SAUDI TRADE · 2023–2025 / INDEPENDENT RESEARCH

24 November 2026

Supplying Saudi utilities and energy majors: the qualification path for electrical equipment

Choose a buyer and product family before funding the tests.

Large transformers and switchgear account for most of the value in this Saudi import basket. A local manufacturer needs a named buyer, a confirmed approval route and enough margin to recover the cost of qualifying.

$1.89bn

Saudi gross imports across four electrical-equipment headings in 2025.



The selected import basket more than tripled over two years

Saudi imports from the world · USD million



Source · UN Comtrade Plus · four equipment headings listed on page 2

EXHIBIT 02 / IMPORT SCREEN

Large transformers account for the biggest line in the basket

Saudi imports from the world · USD million · final column is share of the four-code 2025 basket.

Equipment / HS	2023	2024	2025	Share
Large liquid-dielectric transformers · 850423	223.6	630.3	910.1	48.0%
Boards and panels >1 kV · 853720	225.0	369.9	640.1	33.8%
Conductors >1 kV · 854460	133.6	351.9	296.5	15.6%
Other electrical insulators · 854690	47.4	35.7	47.9	2.5%
Basket	629.5	1,387.8	1,894.5	100.0%

Start below the customs heading

Split the largest category by voltage, rating, design, factory, owner and named tender. Then remove products the proposed plant cannot build or the buyer will not yet qualify. That gives the commercial team a defensible first shortlist.

Find the buyer for the first order

Ask who awards the equipment lot and who can approve a new factory. An EPC may place the order while the utility retains technical approval. Identify both parties before budgeting for qualification.

REGIONAL DEMAND SCREEN / HS 853720

Saudi Arabia and Oman recorded rising switchgear imports

Gross imports from the world · USD million · HS 853720

Reporting market	2023	2024	2025
Saudi Arabia	225.0	369.9	640.1
Oman	24.7	68.1	93.0
Qatar	91.9	104.2	not available
Kuwait	29.4	39.9	25.5
Bahrain	15.3	10.0	not available
UAE	196.4	not available	not available

“not available” means the annual primary-reporter query returned no observation for that market and code at retrieval. No mirror values or zeros have been substituted.

Which tenders fit the factory?

The heading covers equipped boards and panels above 1 kV across voltage classes. Compare each utility’s upcoming tenders with the voltage range and panel designs the factory can supply.

What to investigate next

For a target tender, confirm whether the utility buys directly or through an EPC. Ask who approves the assembly site and when a new supplier must qualify to bid.

BUYERS, SUPPLIERS AND QUALIFICATION

Use each buyer's own route to qualify the factory and product

Route	What the buyer compares	Evidence to request or prepare
Saudi Energy / SEC	Commercial and financial registration first. The manufacturer then applies for technical qualification for the material group.	Approved supplier number, current technical questionnaire, factory and product file, applicable tests. Confirm requirements in the selected questionnaire.
Aramco direct	The registration route depends on where and how the supplier operates. Product qualification and local-value expectations follow the sourcing event.	Supplier classification and documents, material category and current qualification instructions. Ask which iktva submission applies.
EPC or equipment OEM	The EPC or OEM may issue the order while the owner retains approval of the source or design.	Contract approval matrix, buyer's drawing, test-report acceptance and written agreement on who submits the file.

LOCAL MANUFACTURING INCENTIVE

BENA means Build and Employ National Abilities. SEC describes contractual incentives, including long-term purchase guarantees, to support local manufacture of electrical equipment and components. Obtain the applicable agreement and purchasing terms before counting volume.

Sources · Saudi Energy supplier registration · Saudi Energy manufacturer qualification · Aramco supplier registration · Aramco iktva · SEC Annual Report 2024, pp. 156–157

COMMERCIAL SENSITIVITY / ILLUSTRATIVE CASE

A first order of SAR 700,000 would recover the example qualification spend

Entirely hypothetical planning scenario. All durations and costs are analyst assumptions. They represent no official fee, service time, tender cadence or promise of award.

Stage · assumed sequential	Elapsed time	Internal / external cost
Prepare commercial registration file	2 weeks	SAR 10,000
Prepare samples and conduct type tests	6 weeks	SAR 90,000
Prepare factory and support assumed audit	3 weeks	SAR 25,000
Bid and reach assumed first award	5 weeks	SAR 15,000
Total to first award in this scenario	16 weeks	SAR 140,000

BREAK-EVEN REVENUE

At an assumed 20% contribution margin, break-even first-order revenue = SAR 140,000 ÷ 0.20 = SAR 700,000.

Decide what can be spent before a tender

If the buyer accepts current tests, remove the avoided test cost and revise the schedule. If a factory audit slips or the tender falls outside the plan, the first revenue date moves even if the technical file is complete.

A universal registration-to-order fee, timeline and qualifying score are not published in the cited buyer routes.

DECISION AND DILIGENCE / FIRST ORDER

Obtain written agreement on the approval scope before commissioning tests

01 Engineering | pin down the material group

Select one buyer, product, design and manufacturing site. Obtain its current questionnaire and document the tests already accepted. Ask the buyer to clarify gaps and whether changes of site or process trigger a new submission.

02 Procurement | register on the correct route

For Saudi Energy, obtain the supplier number before technical application. For Aramco, choose the registration route for the supplier type and location. Where an EPC holds the order, ask it to confirm the owner approval required.

03 Commercial | release spend against a live buying event

Identify a tender, annual demand range, contribution margin and capacity slot. Sequence testing, any factory visit and the bid around that event. Keep local-content documents current in parallel when the tender requests them.

WHAT WOULD CHANGE THE CONCLUSION

Bring tests forward only when the buyer requires them and confirms the proposed scope. Defer expansion when there is no suitable tender, an incumbent agreement covers the lot, or the margin cannot recover qualification cost.

OPERATING IMPLICATIONS / LOCAL CONTENT AND CONFORMITY

Prepare separate files for local value, product conformity and customer approval

File	What it establishes	Action before tender
LCGPA certificate	An establishment's measured local-content percentage.	Engage a qualified audit firm, supply supporting records and submit the measurement report via the authority's service. Confirm what the tender requests.
Aramco iktva	Local value under Aramco's programme.	Check the applicable submission, reporting basis and supporting purchase, payroll and supplier-development records with the buyer.
SASO / Saber	The conformity and shipment documents applicable to the commercial import.	Identify the exact product and technical regulation. Complete product registration and the required product certificate or self-declaration before requesting the shipment certificate.

Separate the programme from the purchase commitment

Model a BENA volume only when the signed terms identify products, period, volume conditions and obligations. Keep an uncontracted localisation opportunity outside the base order forecast.

Track ownership of the first order

For a utility-specified item bought through an EPC, clarify who approves the factory, who signs the purchase order and who accepts delivery. The three decisions can sit with different parties.

Sources · LCGPA local content certificate · Aramco iktva · SASO shipment conformity through Saber · SEC Annual Report 2024, pp. 156–157

OPERATING IMPLICATIONS / RESEARCH NOTES

Commit test spend when a buyer can qualify the product in time

DECISION

Fund qualification for a named product and buyer when the first credible tender can support the test cost, factory readiness and delivery commitment.

Method

We summed four mutually distinct six-digit import headings for Saudi Arabia and calculated shares on unrounded USD values. We checked the route against each buyer's registration pages, the government certificate service and the issuer's annual report.

Scope of the evidence

The basket measures imported goods. It does not establish local production, technically substitutable demand, eligibility for a guarantee or accessible tender value. Actual test costs, queue lengths, approval scope and commercial terms require the buyer's or laboratory's written confirmation.

Source documents

Sources are linked below. Open Source-list.txt in the PDF attachments for the full queries and retrieval dates.

Sources · UN Comtrade Plus · Saudi Energy supplier registration · Saudi Energy manufacturer qualification · SEC Annual Report 2024, pp. 156–157 · Aramco supplier registration · Aramco iktva · LCGPA local content certificate · SASO shipment conformity through Saber · UN Comtrade HS 2022 headings