SAUDI ARABIA / INDUSTRIAL SUPPLY CHAIN

October 2026 review · Published 24 November 2026

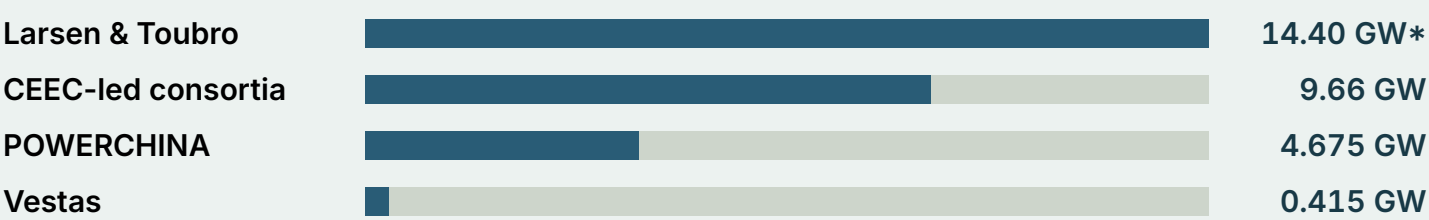
Who builds Saudi renewables: EPC contractors and equipment makers, 2026 league table

The selected contracts identify who buys turbines, trackers, storage systems and site services. The capacity beside a contractor measures the projects it can document, including consortium work.

14.4 GW*

Gross ratings of L&T awards in this sample, including completed plants. Named in public sources only, not a census of Saudi awards.

Generation EPC awards reviewed



*Published GW and GWp ratings are combined as reported. See the contract bridge on page 3.

Larsen & Toubro · Sudair turnkey EPC award · 9 Apr 2021 / Larsen & Toubro · Integrated Annual Report FY2024/25 · FY ended 31 Mar 2025 / L&T · Integrated Annual Report FY2025/26, Infrastructure Projects · FY ended 31 Mar 2026 / CEEC · Haden solar EPC award · 13 Aug 2024 / CEEC · three Saudi generation EPC contracts · 16 Oct 2025 / CEEC · full Al Shuaibah EPC and PCOD · 6 Jul 2026 / POWERCHINA · MAS and AHK2 EPC contract · 22 Jan 2025 / POWERCHINA · Saad II EPC construction · 18 Sept 2024 / ACWA · project portfolio workbook, 30 September 2026 · 5 Nov 2026 / Vestas · Dumat Al Jandal turnkey wind order · 16 Jul 2019

EXECUTIVE SUMMARY

Contract scope determines where a Saudi supplier should sell

9.66 GW
CEEC-led generation EPC awards in sample

3.0 GW
Goldwind's Starah and Shaqra wind farms

6.0 GWh
Gotion integrated storage order

EPC scale points to a purchasing organisation

CEEC identifies the consortium building the Haden PV project and the team that finished piling at Faris in October. A supplier of cable trays, steelwork or plant hire needs the package lead within that consortium. The parent company's headline capacity does not identify the buyer.

Equipment awards give a second route

Nextpower Arabia identifies L&T as its customer for trackers at Bisha. Goldwind names the turbine model for the Riyadh wind farms. These links allow a local manufacturer to approach an equipment maker for a defined component as well as an EPC for site works.

Operating services are a separate market

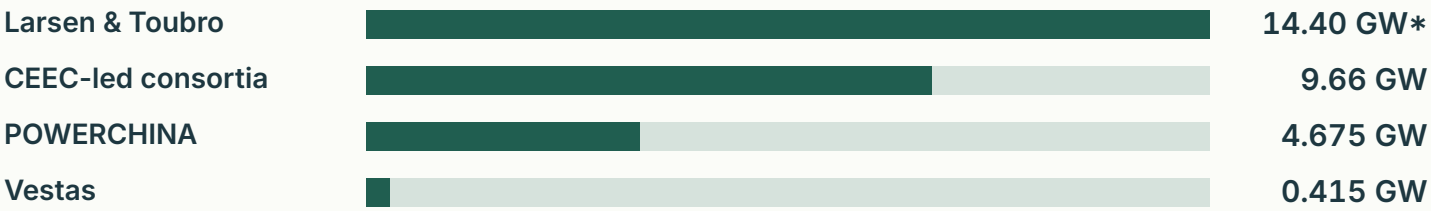
The October Al Masa'a account describes a 1.2 GW commissioning and operating-services package.

CEEC · Haden solar EPC award · 13 Aug 2024 / CEEC · three Saudi generation EPC contracts · 16 Oct 2025 / CEEC · full Al Shuaibah EPC and PCOD · 6 Jul 2026 / CEEC · Faris piling and next construction phase · 6 Oct 2026 / Nextpower Arabia · Bisha tracker order · 27 Jan 2026 / Goldwind · GWH204-10MW for Shaqra and Starah · 23 Jun 2026 / Gotion · Saudi integrated storage order · 11 Sept 2026 / Shanghai Metals Market · MAS commissioning and operating services · 19 Oct 2026

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GENERATION EPC / SELECTED AWARDS

L&T and CEEC lead the sampled generation EPC awards



Contractor / origin	Contracts included in total	Official record
L&T · India	Sudair 1.5, Ar Rass 2 2.0 and Al Kahfah 1.4. New Saudi orders of 3.5 GWp in FY2024/25 and 6 GW in FY2025/26.	L1 · 9 Apr 2021 / LA · FY ended 31 Mar 2025 / L26 · FY ended 31 Mar 2026
CEEC group · China	Haden 2, Al Shuaibah 2.66 (0.60 + 2.06, COD Q4 2025), Shaqra 1, Starah 2 and Khulais 2 GW.	CS · 13 Aug 2024 / C5 · 16 Oct 2025 / WB · 5 Nov 2026
POWERCHINA · China	PV 2.875 GW (MAS 1.25, AHK2 0.50, Saad II 1.125). Wind 1.80 GW (SEPCOIII: Al Ghat 0.60, Waad Al Shamal 0.50, Yanbu 0.70).	PC · 22 Jan 2025 / PS · 18 Sept 2024 / PGA · 9 Oct 2026 / PWA · 3 Jul 2026 / PYA · 22 Sept 2025
Vestas · Denmark	Dumat Al Jandal 415 MW supply-and-install EPC. Historical award included as Saudi delivery experience.	VE · 16 Jul 2019

Named in public sources only, not a census of Saudi awards. Across all groups, we count each documented award since 2019 once per parent, including completed work and gross consortium scope. GWp is DC peak.

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DELIVERY ORGANISATIONS

Guangdong Power Engineering is a route into CEEC's projects

Delivery organisation	Named Saudi work	Where to direct a package enquiry	Source
China Energy Engineering group (CEEC)	Wind and solar EPC awards	Consortium procurement for package allocation.	C5 · 16 Oct 2025
Guangdong Power Engineering, Energy China International and Northwest Electric Power Design Institute	Faris installation phase and Haden PV	Site procurement for installation works. Design institute for approved materials and drawings.	CF · 6 Oct 2026 / CS · 13 Aug 2024
POWERCHINA	MAS and AHK2 PV, plus Al Ghat, Waad Al Shamal and Yanbu wind through SEPCOIII.	Ask the contractor which project company owns any free-issued item.	PC · 22 Jan 2025
Larsen & Toubro	Sudair EPC and tracker purchasing for Bisha	Approach utility-scale solar procurement with a reference drawing.	L1 · 9 Apr 2021 / NX · 27 Jan 2026
alfanar Projects · Saudi Arabia	Construction for HiTHIUM's Tabuk and Hail storage systems	Local construction interfaces, installation labour and site delivery.	HI · 26 Aug 2025 (release dateline 27 Aug)

One group gets one entry

Guangdong Power Engineering is a CEEC delivery unit. Its capacity is included in the parent's awards. Alfanar's reference concerns storage construction. The energy capacity appears in the storage table under the system supplier.

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EQUIPMENT / DELIVERED SCOPE

Goldwind leads the disclosed wind orders. Two tracker makers name Bisha.

Package	Supplier / project	Scale and role	Source
Wind turbines · 1	Goldwind · Shaqra and Starah	3.0 GW combined plant capacity. GWH204-10MW platform.	GW · 23 Jun 2026
Wind turbines · 2	Windey · Yanbu	0.70 GW project capacity. Turbine supply contract.	WW · 22 Jan 2026
Wind turbines · 3	Vestas · Dumat Al Jandal	0.415 GW turbine order. Also appears in the EPC ranking under its turnkey role.	VE · 16 Jul 2019
Solar trackers	Nextpower Arabia · Bisha	2.25 GWp tracker supply to L&T. Saudi-based joint venture of Nextpower and Abunayyan Holding.	NX · 27 Jan 2026
Solar trackers	GameChange Solar · Bisha	1.29 GWp tracker award for the same site. Distinct supplier disclosure.	GCS · 4 Feb 2026

The unit describes what was sold

Bisha carries a 3 GW owner rating. Nextpower Arabia and GameChange report 2.25 and 1.29 GWp of trackers respectively. DC tracker scope and the owner rating use different bases. A turbine order measures machine capacity, independent of the associated grid and civil packages.

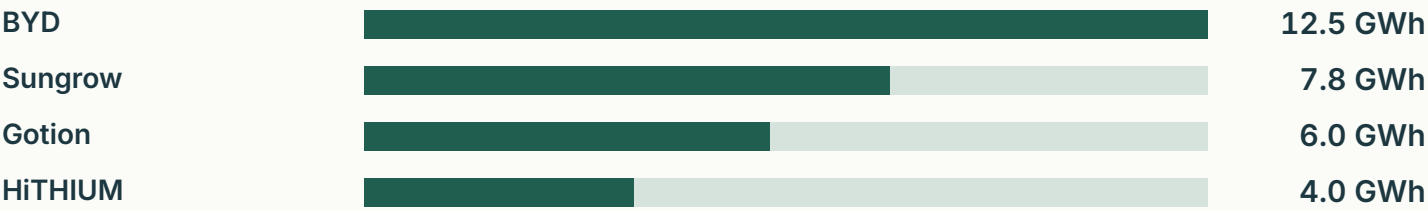
Named in public sources only, not a census of Saudi awards. The wind list covers sites with a verified turbine maker.

ACWA · project portfolio workbook, 30 September 2026 · 5 Nov 2026 / Nextpower Arabia · Bisha tracker order · 27 Jan 2026

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STORAGE OEMS / GWH

Four supplier disclosures identify different routes to battery procurement



Supplier	Scale and disclosure basis	Source
BYD · China	12.5 GWh in Saudi Electricity Company grid-scale contracts.	BY · 17 Feb 2025
Sungrow · China	7.8 GWh covered by the group's Saudi grid-connection report. Operating reference.	SU · FY2025, issued 2026
Gotion · China	6 GWh across three sites in Saudi Arabia's first batch of large build-own-operate battery projects.	GO · 11 Sept 2026
HiTHIUM · China	4 GWh in Tabuk and Hail. HiTHIUM covers system supply and technical services; alfanar leads construction.	HI · 26 Aug 2025 (release dateline 27 Aug)

Named in public sources only, not a census of Saudi awards. Ranking uses each disclosed system's energy capacity. These disclosures cover orders and delivery milestones across programmes. Their sum would not measure national installed capacity.

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CONTRACTOR ORIGIN / SAMPLE COMPOSITION

China supplies two of the five construction groups in the comparison



Group origin	Distinct groups counted	Share of five
• **China**	CEEC • POWERCHINA CS · 13 Aug 2024 / PC · 22 Jan 2025	40%
• **India**	Larsen & Toubro L1 · 9 Apr 2021	20%
• **Europe · Denmark**	Vestas VE · 16 Jul 2019	20%
• **Saudi Arabia**	alfanar Projects HI · 26 Aug 2025 (release dateline 27 Aug)	20%

What the split measures

Named in public sources only, not a census of Saudi awards. Each construction group receives one count, irrespective of contract size. The four generation EPC groups and the Saudi storage construction lead make up the denominator. Parent and subsidiary appear once.

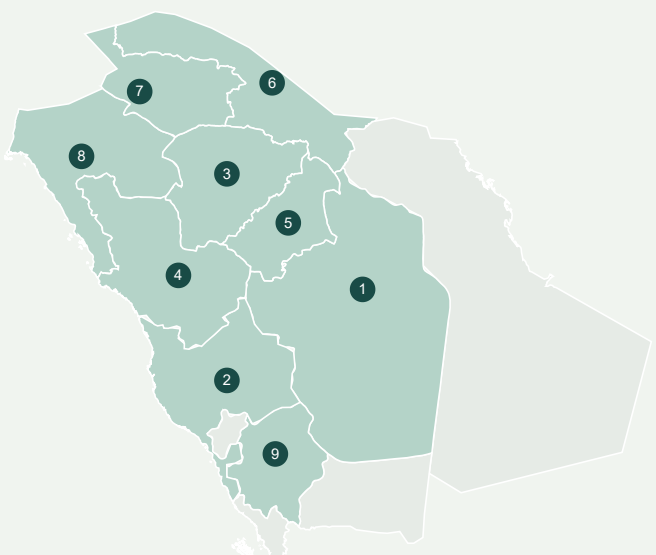
What a purchasing team still needs to know

Headquarters says little about where a tower section, cable or tracker is made. Verify the contracted factory, Saudi fabrication steps and supporting evidence at product level.

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PROJECT MAP / SELECTED DELIVERY TEAMS

Which contractor leads each Saudi site?



1 · Riyadh
CEEC · Shaqra and Starah. L&T · Sudair. POWERCHINA · Saad II and Al Ghat.

2 · Makkah
CEEC · Haden, Al Shuaibah and Khulais (Faris).

3 · Hail
POWERCHINA · MAS. L&T · Al Kahfah. alfanar · Hail BESS.

4 · Madinah
POWERCHINA · AHK2 and Yanbu. Windey · Yanbu turbines.

5 · Qassim
L&T · Ar Rass 2.

6 · Northern Borders
SEPCOIII · Waad Al Shamal.

7 · Al Jouf
Vestas · Dumat Al Jandal wind EPC.

8 · Tabuk
alfanar · Tabuk storage construction.

9 · Asir
Bisha · L&T named as tracker buyer by Nextpower Arabia.

Markers identify provinces. Multiple assets in one province share a marker. Boundaries: geoBoundaries, CC BY 4.0.

Annual orders with no named site are excluded from the map. Bisha identifies the tracker buyer. Project references appear on pages 3–6 and in the source register.

ACWA · financial close for Haden, Muwayh and Al Khushaybi · 29 Sept 2024 / GameChange Solar · Khulis project and EPC consortium · 16 Dec 2025 / geoBoundaries · Saudi Arabia ADM1, community boundary data · accessed 24 Nov 2026

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OCTOBER MILESTONE / CIVIL TO INSTALLATION

Faris completed piling on 6 October. The next workfront is mounting and modules

Event	What the source confirms	What follows commercially
Faris · 6 October	CEEC says all piling finished at its 2 GW project. CF · 6 Oct 2026	Ask for remaining mounting and module installation lots, laydown provision and installation QA.
MAS · 19 October	Industry press describes a 1.2 GW commissioning and operating-services package. SM · 19 Oct 2026	Approach the named operating team for site services, subject to confirmation of subcontracting rights.

Faris is CEEC’s name for the Khulais project

ACWA names the 2 GW site Khulais. GameChange Solar identifies the Khulis plant and its CEEC consortium. The same consortium calls it Furais at award and Faris in its piling update.

ACWA · financial close of the seven-project portfolio · November 2025 / CEEC · three Saudi generation EPC contracts · 16 Oct 2025 / CEEC · Faris piling and next construction phase · 6 Oct 2026 / GameChange Solar · Khulis project and EPC consortium · 16 Dec 2025

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AWARD STATUS / OPERATING SERVICES

The October MAS report describes 1.2 GW of services

Source and basis	Saudi project / capacity	Use in the comparison
EDF · power purchase agreement ED · 5 Dec 2024	Al Masa'a · 1.0 GW	Owner's contract size
POWERCHINA · EPC release PC · 22 Jan 2025	MAS · 1.25 GW installed	Generation EPC table
Times Digital company-attributed account, republished TM · 20 Oct 2026 (republication)	MAS · 1.2 GW	Commissioning and operating technical services
SMM · 19 October press report SM · 19 Oct 2026	MAS · 1.2 GW	Secondary confirmation of reported service scope

What can be credited

The source account names the operating-technology subsidiary of Times Digital. An original issuer-hosted award notice and a signed duration were not located. We retain the service award as reported. The size of ACWA's separate five-plant PV portfolio is 12 GW.

What to request before treating it as an order

Ask for the contracting entity, individual plant, service period, commissioning demarcation and whether the provider can place local subcontracts.

Tadawul · ACWA, financial close for five solar plants · 27 Nov 2025

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SAUDI SUBCONTRACTING

Sell the work package to the firm responsible for its acceptance

Package to offer	Buyer to approach	What a credible offer contains
Foundations and erection	EPC civil lead or nominated balance-of-plant contractor	Soil assumptions, design responsibility, erection tolerances, cranes and delivery sequence.
Tracker and tower components	Tracker or turbine manufacturer	Factory route, welding and coating records, traceability and dimensional inspection.
Cables, terminations and transformers	Electrical package lead	Approved specification, factory slot, test and witness plan, and site service cover.
BESS integration and commissioning	System integrator and Saudi site contractor	Metering boundary, test protocol, field engineering, spares and defect response.

A Saudi reference should prove the part can be accepted

Supply a comparable drawing, a test record, factory capacity and an achievable delivery date. Match the local-content evidence to the tender. An international OEM may also need its own factory approval before it can release the order.

DECISION

Start with an identifiable buyer and an upcoming package release. Use an EPC ranking to choose accounts, then qualify each opportunity against its actual purchase scope.

Nextpower Arabia · Bisha tracker order · 27 Jan 2026 / Goldwind · GWH204-10MW for Shaqra and Starah · 23 Jun 2026 / HiTHIUM · Tabuk and Hail systems with alfanar · 26 Aug 2025 (release dateline 27 Aug) / Ministry of Finance · local-content preference regulation · accessed 24 Nov 2026

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SOURCES AND DEFINITIONS

Source documents and calculation notes

EPC and equipment awards documented since 2019, including completed plants and consortium awards at their gross project rating. One count per parent for each award in its respective role. October review, with ACWA's November portfolio cross-check. Absolute volumes describe the named scope and unit. Press-reported work is identified separately. Origin uses the named construction group's home jurisdiction. The tables are a documented sample, not a census.

L26 L&T · Integrated Annual Report FY2025/26, Infrastructure Projects
FY ended 31 Mar 2026

PS POWERCHINA · Saad II EPC construction
18 Sept 2024

CS CEEC · Haden solar EPC award
13 Aug 2024

CF CEEC · Faris piling and next construction phase
6 Oct 2026

PGA SEPCOIII · Al Ghat wind EPC
9 Oct 2026

PYA POWERCHINA · Yanbu EPC procurement notice
22 Sept 2025

WB ACWA · project portfolio workbook, 30 September 2026
5 Nov 2026

LOC ACWA · financial close of the seven-project portfolio
November 2025

SA CEEC · full Al Shuaibah EPC and PCOD
6 Jul 2026

GCS GameChange Solar · Saudi Bisha tracker order, company release
4 Feb 2026

C5 CEEC · three Saudi generation EPC contracts
16 Oct 2025

KHL GameChange Solar · Khulis project and EPC consortium
16 Dec 2025

PWA POWERCHINA · Waad Al Shamal wind EPC
3 Jul 2026

PV Tadawul · ACWA, financial close for five solar plants
27 Nov 2025

EAR ACWA · financial close for Haden, Muwayh and Al Khushaybi
29 Sept 2024

L1 Larsen & Toubro · Sudair turnkey EPC award
9 Apr 2021

Titles link to the source. The accompanying source register gives the full URLs. Access checked 24 November 2026 unless an earlier archive snapshot is identified.

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SOURCES AND DEFINITIONS

Source documents and calculation notes

Additional project disclosures, equipment awards and geographical references.

LA Larsen & Toubro · Integrated Annual Report FY2024/25
FY ended 31 Mar 2025

ED EDF · Al Masa'a and Al Henakiyah 2 power purchase agreements
5 Dec 2024

VE Vestas · Dumat Al Jandal turnkey wind order
16 Jul 2019

WW Windey · Yanbu financing close (turbine supplier)
22 Jan 2026

GO Gotion · Saudi integrated storage order
11 Sept 2026

SU Sungrow · 2025 Sustainability Report, Saudi commissioning entry
FY2025, issued 2026

TM Times Digital · company-attributed MAS account republished by IN-EN
20 Oct 2026 (republication)

LC Ministry of Finance · local-content preference regulation
accessed 24 Nov 2026

PC POWERCHINA · MAS and AHK2 EPC contract
22 Jan 2025

ED2 EDF · financial close and target commercial-operation dates
6 Nov 2025

GW Goldwind · GWH204-10MW for Shaqra and Starah
23 Jun 2026

NX Nextpower Arabia · Bisha tracker order
27 Jan 2026

BY BYD · Saudi Electricity Company storage contracts
17 Feb 2025

HI HiTHIUM · Tabuk and Hail systems with alfanar
26 Aug 2025 (release dateline 27 Aug)

SM Shanghai Metals Market · MAS commissioning and operating services
19 Oct 2026

GEO geoBoundaries · Saudi Arabia ADM1, community boundary data
accessed 24 Nov 2026

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