

FILTRATION

**MAADEN LOCALIZATION
OPPORTUNITY CARD**



FILTRATION CONSUMABLES

OPPORTUNITY SUMMARY

Case Summary

Recurring Demand Patterns

Filter consumables are replaced regularly due to wear and fouling, supporting steady demand that is largely independent of new project cycles

Competitive Dynamics

Purchasing is specification-driven, with limited brand stickiness once suppliers are qualified, which may support repeat orders over time

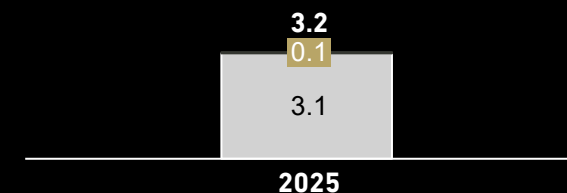
Local Execution Considerations

Proximity, short lead times, and ability to customize filter media and dimensions may provide advantages for local producers

Maaden & Market Demand

MEA demand, Bn SAR (2025)

■ Maaden Demand ■ Rest of GCC Demand



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LOCALIZATION OPPORTUNITY OVERVIEW

1

Recurring Consumables Demand

Filter consumables are replaced on fixed operating cycles driven by wear, fouling, and process conditions, resulting in stable and recurring demand patterns independent of new project cycles

2

Specification-Driven Competition

Products are purchased against media type, dimensions, and performance thresholds, which may reduce switching frequency once a supplier is qualified

3

Local Responsiveness Considerations

Short lead times, rapid customization, and on-site support materially influence purchasing decisions, which may allow local producers to compete on responsiveness and service rather than price alone

4

Fragmented Supply Base

The market is served by a large number of regional and niche suppliers rather than a few dominant players, which may enable new entrants to build scale through breadth rather than volume

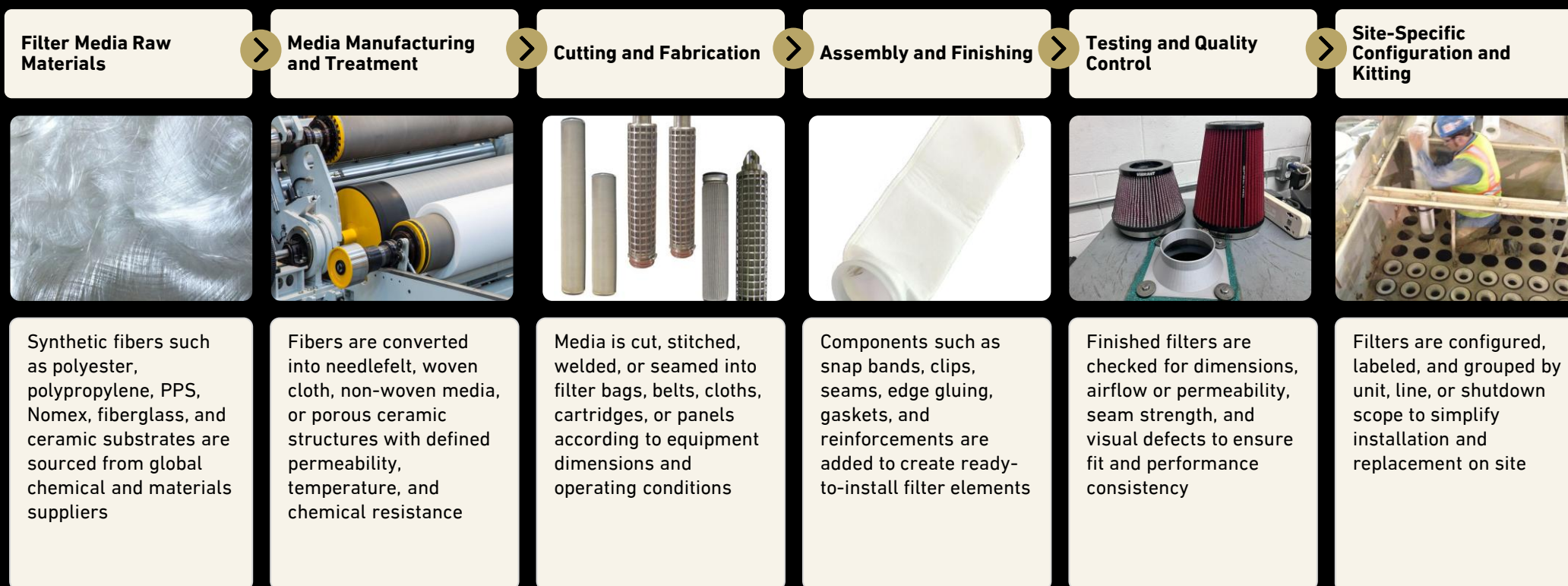
5

Relatively Simple Manufacturing Processes

Production relies on textile handling, cutting, sewing, and assembly, which may support operational viability depending on cost structure with moderate capital intensity

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VALUE CHAIN



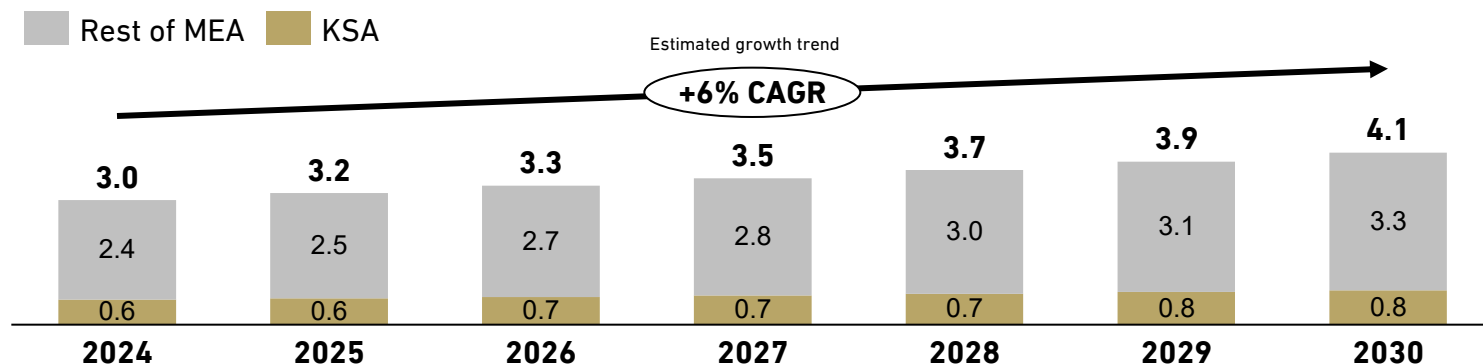
Localization potential



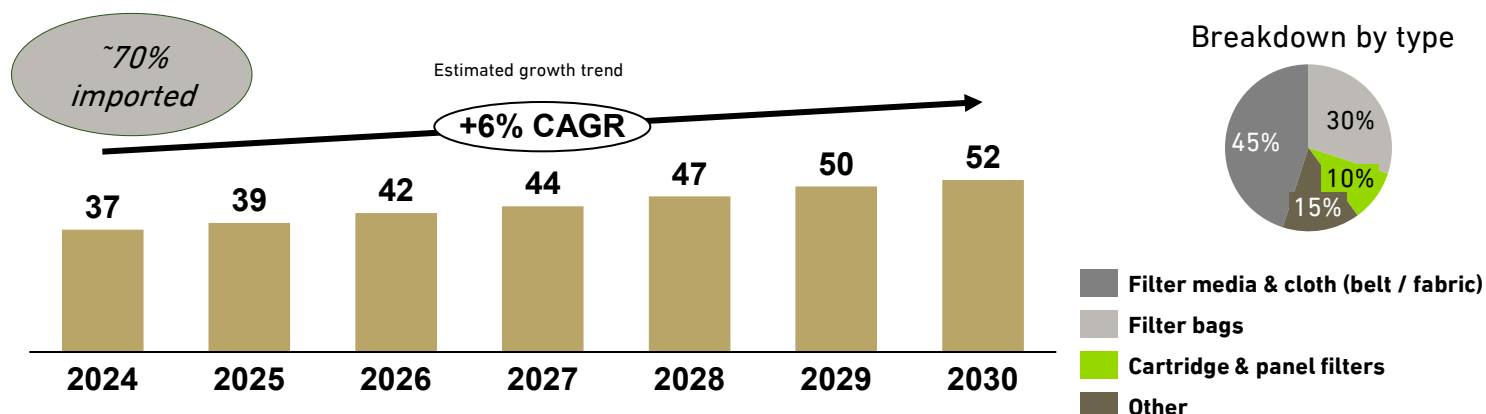
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MARKET DEMAND & SUPPLY

Market Demand, Bn SAR



Maaden Demand, mn SAR



Market Trends & Demand Drivers

- 1 Demand is dominated by routine replacement rather than new installations, with filter bags, cloths, and cartridges replaced every few months to 2–3 years
- 2 While filtration equipment is OEM-led, consumables are supplied by a broad base of specialized media and fabrication players
- 3 Polyester and polypropylene media represent the volume base, while PPS, Nomex, fiberglass, and ceramic filters command higher prices
- 4 In shutdown-driven environments, availability, exact fit, and delivery reliability often outweigh brand preference, especially for standard geometries and repeat items

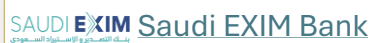
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The KSA ecosystem comprises six main categories, supported by key enablers

1. Infra & Supply Chain



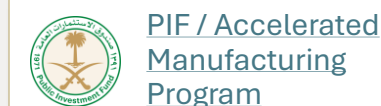
2. Financing



3. Licensing & Taxation



4. Market Access



5. Workforce



6. Technology



7. Enablers

