

A free briefing from Nuwa Intelligence.
The full series begins June 2026.

Why Expo 2030 will behave differently from anything you have built before.

A briefing for capital, brand and sponsorship leaders evaluating Saudi Arabia's largest international platform of the decade.

This briefing is for you if your organisation is evaluating Expo 2030 Riyadh as a capital allocation, a brand platform, a sponsorship investment, or as a private sector capability question for Saudi Arabia.

Saudi Arabia is about to host the largest World Expo in history.

42 million visits. 197 participating countries. \$15 billion expected direct spend and an economic footprint measured in tens of billions across 25 years.

Most of the senior people we speak with already know these numbers. Very few of them know that World Expos behave nothing like a Saudi giga-project, nothing like a sports tournament, and nothing like a domestic sponsorship calendar. The rules are different. The clients are different. The commercial logic is different. The window to position is shorter than most assume.

That is what this briefing is about.

In seven pages we set out the single structural fact about Expos that every serious Saudi reader needs to internalise; show what happened to the Saudi pavilions across the last four World Expos (Shanghai 2010, Milan 2015, Dubai 2020 and Osaka 2025) and what those four outcomes teach us about Riyadh; explain why the real constraint at any World Expo is private sector readiness, not demand; and lay out the questions you should be asking yourself this quarter, whether you are deploying capital, building a brand, or sponsoring at scale.

If you take one thing from this briefing, take this: the organisations that won at previous Expos started 48 months before opening day. Riyadh opens in 53 months. The window to build capability and position credibly is now.

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At Expo, the work that wins is decided three to four years before the gates open. The work that loses is decided in the last twelve months.

— Manal AlBayat, Expo 2020 Dubai.
Quoted in conversation with Nuwa, 2025.

Expo 2030 Riyadh: A World of Opportunity

40+M

Projected
Visits

197

Participating
Countries

US\$15B

Expected
Direct Spend

1.76x

Dubai 2020
Site Size

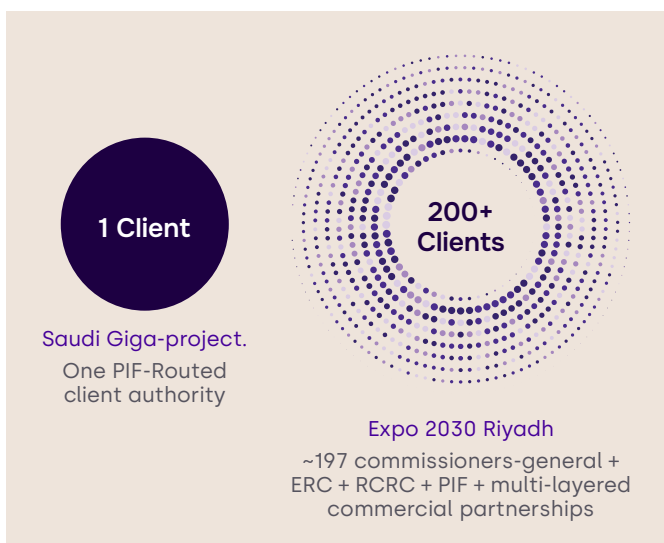
Two hundred clients, not one.

A Saudi giga-project has one client. NEOM has one client. Qiddiya has one client. The Red Sea Project has one client. Diriyah has one client. In every case, the client is the Public Investment Fund or one of its subsidiaries, and every commercial decision flows through that single point of authority.

A World Expo does not work that way.

Expo 2030 Riyadh will host approximately 197 participating countries plus dozens of international organisations. Each of those participants is governed by a Commissioner-General appointed by their own government. Each Commissioner-General has sovereign authority over the design, procurement, sponsorship, and content of their national pavilion. Each one runs a different procurement timeline, a different commercial logic, a different set of partner expectations.

That is the structural fact. There are roughly 200 clients in the room, not one.



For Capital

There is no single tender.

There are hundreds of them, running in parallel across approximately 200 sovereign authorities, the Expo 2030 Riyadh Company, and the wider Saudi public-sector layer (Royal Commission for Riyadh City (RCRC), the Ministry of Tourism, PIF subsidiaries with delivery mandates). Procurement, joint-venture formation, timelines and risk all reframe. A capability that wins a tender in NEOM does not automatically win a tender in the French pavilion. A relationship at PIF does not automatically open a door at the Korean Commissioner-General. The map most Saudi capital-holders carry from giga-project work breaks at Expo.

For Brands

There is no single sponsorship desk.

Brand visibility at Expo is procured across approximately 200 doors plus the ERC sponsorship layer plus the international participants' commercial partner programmes. The headline sponsorship slots will be ERC-managed; the high-visibility, high-margin activations sit inside individual country pavilions and are decided by Commissioners-General whose names most Saudi corporate marketing teams could not list today. The brands that win at Riyadh will be the ones that mapped the doors before tender season opened.

The pattern that predicts Riyadh.

The clearest way to understand how an Expo rewards or punishes a participant is to look at four Saudi pavilions across the last four World Expos. The pattern across Shanghai, Milan, Dubai and Osaka is the most reliable predictor of what will work at Riyadh.



Shanghai 2010 | The Moon Boat

The Saudi pavilion at Expo 2010 Shanghai (designed in the form of an elevated dhow above a date-palm garden, immediately nicknamed the Moon Boat) drew queues that wrapped around the pavilion zone for the full six months of the Expo. Reported visit numbers placed it among the top three pavilions at the entire Shanghai event.

The Capital Lesson.

The Saudi suppliers and contractors who positioned around the pavilion 36 months before opening day captured the highest-margin contracts. The procurement decisions that determined who built, fitted-out, and operated the Moon Boat were made in 2007, three years before the doors opened. The firms that arrived in 2009 found the door already closed.

The Brand Lesson.

The Moon Boat became one of the most-photographed objects of the entire Shanghai Expo. The Saudi corporate sponsors who tied themselves to the pavilion (in tourism, hospitality, and content programming) earned visibility no domestic campaign could replicate. The Saudi national brand earned a soft-power return that has been studied for fifteen years.



Milan 2015 | The Pavilion That Did Not Land

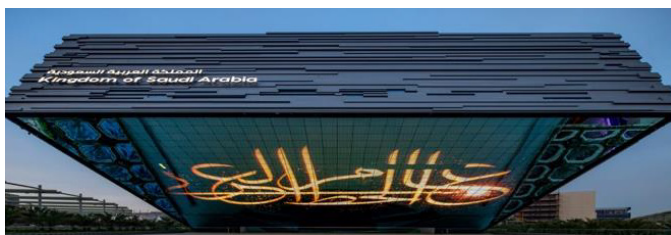
Saudi Arabia participated in Expo 2015 Milan with a pavilion themed around food, hospitality and date cultivation. The participation was credible. The headlines, sponsorships, and international press coverage were modest by comparison with Shanghai.

The Capital Lesson.

Late joint-venture formation and weak Commissioner-General relationships closed doors that never reopened. The Saudi suppliers who arrived later in the cycle competed in narrower categories, with thinner margins, against entrenched Italian and European incumbents.

The Brand Lesson.

Saudi corporate sponsors who treated Expo as transactional logo placement saw little measurable brand lift. The few who built a multi-month activation programme around the pavilion got something out of it; the others got a logo on a wall.



Dubai 2020 | The Lesson Applied

The Saudi pavilion at Expo 2020 Dubai was the second-largest national pavilion at the event, after the UAE's own. It won design awards. It captured significant visitor numbers. It functioned as a multi-month activation platform for Saudi tourism, culture, and Vision 2030 messaging.

The Capital Lesson.

The Saudi firms that learned from Milan compressed their joint-venture timelines and engaged early. They won. The firms that waited for public tenders to be released found themselves competing in narrower categories, again, with thinner margins, again.

The Brand Lesson.

The corporate sponsors who designed activations across the full 182-day event outperformed the ones that paid for visibility and waited for foot traffic. Brand presence at Expo behaves more like a season of media than a single event; the rhythm of activation is its own discipline.



Osaka 2025 | The Handover

The Saudi pavilion at Expo 2025 Osaka, designed by Foster + Partners and themed around the Kingdom's cultural transformation, was one of the standout participations of the event. Live cultural programming ran across the full six months. The pavilion was widely covered as a precursor to Saudi Arabia's role as the next World Expo host.

The Capital Lesson.

Osaka's most public pre-event story was pavilion construction delays across multiple national participants. International Tier 1 contractors who arrived early built credibility under pressure; the firms that arrived late inherited squeezed timelines and reputational risk. The same names that delivered for Saudi Arabia at Osaka are already active in conversations for Riyadh. Saudi capital that engaged with Osaka's pavilion supply chain has a 12-month head start over capital that did not.

The Brand Lesson.

The Saudi pavilion at Osaka was used as a six-month brand platform for Vision 2030, Riyadh 2030, and the Kingdom's broader cultural positioning. The Saudi corporate brands that activated alongside the pavilion (cultural programming, hospitality moments, country-week activations) earned a level of international visibility that will be difficult to replicate from cold for Riyadh. Osaka was the dress rehearsal. The brands that took it as such are now further down the runway.

Four pavilions. Four outcomes. One inheritance for Riyadh.

The Real Constraint Is Not Demand. It Is Readiness.

Most analysis of Expo 2030 begins with the demand side. The budget. The visit numbers. The number of pavilions. From the practitioner experience accumulated across six World and Specialized Expos, that is the wrong starting point.

Demand is never the constraint at a World Expo. The constraint is whether the private sector, local and international, is ready to participate and deliver at the standard the event requires.

A World Expo is a different kind of mega-event. The Olympics has a fixed playbook. The FIFA World Cup has a fixed playbook. The Bureau International des Expositions sets only a high-level framework. The host country defines almost everything else: site masterplan, theme, number and type and scale of pavilions, commercial model, delivery structures, and the model for how the private sector engages. In practice, most host countries end up building the playbook while they are already executing.

Expo 2020 Dubai delivered an extraordinary result. A great deal of the capability behind that result was built in-flight: aligning international suppliers with local companies, raising delivery standards at scale, structuring the supplier ecosystem under live time pressure. Some of that strain was visible from outside. Most of it was absorbed inside the system. Riyadh will face the same challenge at 1.76 times the scale.

There are already very large numbers of companies, Saudi and international, looking at Expo 2030. The honest reality from previous Expos is that only a relatively small share of those companies are ready, today, to win work or deliver at the required standard.

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Expo-scale demand is never the issue. The real constraint is how effectively the private sector is able to participate and deliver. We see ourselves operating in the layer underneath the strategy firms, where strategy translates into execution and where most of the friction sits.

— Manal AlBayat, Expo 2020 Dubai.
Quoted in conversation with Nuwa, 2025.

That gap creates two compounding problems.

Quality	Procurement Efficiency
<p>Quality and consistency of delivery. Every supplier that underperforms reflects on the Expo itself and, by extension, on Saudi Arabia.</p>	<p>Managing a broad supplier base with varying levels of readiness is an operational tax. The host's procurement and oversight teams burn time on triage that should be spent on selection.</p>

These are the problems that Expo 2030 has the chance to fix early.

The opportunity is bigger than the event. Expo 2030 is a platform for building long-term private sector capability in the Kingdom, with returns measured well beyond March 2031. The capability built around Expo will be the capability available to Saudi Arabia for the next decade of giga-projects, mega-events, and international hosting. That capability does not build itself. It is built deliberately, three years before opening day, by the organisations that take readiness seriously.

Nuwa is building a Saudi Expo Readiness Diagnostic to help organisations measure where they stand against this standard. Intelligence clients will be the first to use it.

This is the gap Nuwa was built to close.

The lessons amplify. The window narrows.

Riyadh 2030 will be 1.76 times the size of Dubai 2020 by site area. It will host roughly twice the visit count. The capital budget is comparable. The legacy footprint will be larger by every measure.

Every lesson from Shanghai, Milan, Dubai and Osaka will be amplified at Riyadh. The doors that close, will close earlier. The relationships that matter, will matter more. The mistakes that hurt, will hurt longer. The advantage already built by those who engaged at Osaka is real; the gap will widen.

The implications are different for each reader of this briefing.

Implication — Capital

Pay the readiness tax early.

For Saudi capital, the firms that win at Riyadh will be the ones that paid the readiness tax early. Position around the organisations doing the work, not just the name recognition and the balance sheet.

Implication — Brands

Contribute to the readiness story.

For Saudi brands, those that contribute to the readiness story (through supplier development, training, capability sponsorship) will earn a more durable soft-power return than those that approach Expo as a transactional logo placement.

Implication — Public Sector

Structure converts interest to outcome.

For the public sector, structuring the private sector ecosystem early is what converts volume of interest into quality of outcome.

Three questions every senior reader should be asking this quarter.

01.

Is your organisation actually ready to deliver Expo work at Expo standard?

Honest answer, not aspirational answer. The organisations that win at Riyadh will be the ones that started building Expo-grade capability three years before opening day; readiness is the work that earns the right to compete.

02.

Do you know which Commissioner-General relationships matter for your sector, and have you started building them?

For most Saudi capital-holders and brands, the honest answer is no. The Commissioner-General mapping for the largest participating countries is the single highest-return diligence exercise available right now.

03.

Have you formed (or begun forming) the joint-venture structure or commercial partnership your sector requires?

Late JV formation is the single most common reason international firms have failed to win mega-event contracts in previous Expos. The same will be true at Riyadh.

If the answer to any of these three is no, the gap between your current position and where you need to be is widening with every month. The Saudi cultural tendency to engage close to the event will not work for Expo 2030. The procurement and sponsorship structures will close before that window opens, and the capability behind them takes years to build.

This brief is designed to guide the right questions. The answers are discussed privately.

Book a 30-minute Intelligence call



Nuwa Intelligence is the advisory layer of Nuwa platform. It works with Saudi Family Offices, holding companies, Saudi corporate brands, and the wider public-sector ecosystem to professionalise private sector participation in Expo 2030.

If you are evaluating Expo 2030 for your portfolio, your brand, or your sponsorship spend, book a 30-minute Foresight call. We will tell you which procurement and sponsorship categories are still open, where the highest-probability partners sit, which Commissioner-General relationships matter most for your sector, and what readiness work needs to start now.

About Nuwa.

Nuwa is a Saudi-based advisory built specifically to professionalise private sector participation in Expo 2030 Riyadh and the wider international Expo lifecycle. We sit in the layer underneath the strategy firms, where strategy translates into execution and where most of the friction sits. Nuwa works across three integrated areas:

01 · Intelligence	02 · Access	03 · Delivery
<p>Understand the opportunity.</p> <hr/> <p>Capability building for Saudi companies. Through Intelligence, supporting Family Offices, holding companies and Saudi corporate brands to position credibly and build Expo-grade readiness ahead of tender season.</p>	<p>Enter and win in the market.</p> <hr/> <p>Structured market access for international players. Through Access, supporting international Expo suppliers to enter Saudi credibly, and Saudi brands to build buyer-aligned commercial positioning.</p>	<p>Build, execute and leave a legacy.</p> <hr/> <p>Execution through delivery and partnerships. Through Delivery, building purpose-built execution vehicles aligned to specific Expo 2030 scopes, with institutional governance and post-Expo legacy in mind.</p>

The Nuwa practitioner network draws on more than 65 years of collective Expo delivery experience across six World and Specialized Expos including Shanghai 2010, Milan 2015, Astana 2017, Dubai 2020, Osaka 2025 and Belgrade 2027. Members are confirmed and signed; the full advisory board will be named publicly later in 2026.

What is coming next

Edition 01: The Master Primer. The full Expo 2030 procurement and participation guide, published in June 2026. Free download for Edition 00 readers.

Editions 02 to 12 are subscriber-only monthly briefings, each authored with a member of the Nuwa Expo Practitioner Network. Topics include the four Saudi-side joint-venture ownership models that have worked (and the one that consistently fails), the pavilion sponsorship economics for Type A, B and C structures, and the international supplier landscape Saudi firms must understand before tender season opens.

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