

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
platform of the decade.

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

AUTHORED BY

نوى
nuwa

65+ years of World Expo experience.
experience.

A FREE BRIEFING FROM NUWA.
THE FULL SERIES BEGINS JUNE 2026.
2026.

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

42 million visits. 197 participating countries. A US\$7.8 billion capital budget 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 reader needs to internalise; show what happened to the Saudi pavilions across the last four World four World Expos and what those four outcomes teach us about Riyadh; explain why the real constraint real constraint at any World Expo is private sector readiness, not demand; and lay out the questions questions you should be asking yourself this quarter, whether you are deploying capital, building a building a brand, or sponsoring at scale.

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

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

42^M

PROJECTED
VISITS

197

PARTICIPATING
COUNTRIES

\$7.8^B

CAPITAL BUDGET
(USD)

1.76^X

DUBAI 2020
SITE SIZE

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.

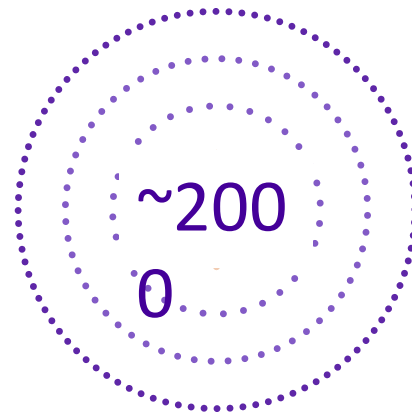
Two hundred clients, not one.

A Saudi giga-project has one client. NEOM has one client. Qiddiya, the Red Sea Project, Diriyah — one client each, and every commercial decision flows through the Public Investment Fund or one of its subsidiaries.

A World Expo does not work that way.



SAUDI GIGA-PROJECT ONE PIF-ROUTED
POINT OF AUTHORITY.



EXPO 2030 RIYADH ~197 COUNTRY
COMMISSIONERS-GENERAL + ERC + RCRC
+ PIF + COMMERCIAL-PARTNER
PROGRAMMES.

LENS · 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 (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 at NEOM does not automatically win a tender inside 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.

LENS · BRAND

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.

Those activations 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.

§ 03 · FOUR PAVILIONS, FOUR OUTCOMES

The pattern that predicts Riyadh.

Each pavilion carries two lessons. Capital — what it teaches about supply-chain, JV timing and procurement. Brand — what it teaches about activation, sponsorship and soft-power return.



SHANGHAI 2010


The Moon Boat

CAPITAL LESSON

Suppliers and contractors who positioned around the pavilion 36 months before opening day captured the highest-margin contracts. The procurement decisions for who built, fitted-out and operated the Moon Boat were made in 2007. Firms that arrived in 2009 found the door already closed.

BRAND LESSON

One of the most-photographed objects of the entire Expo. Saudi corporate sponsors who tied themselves to the pavilion (tourism, hospitality, content programming) earned visibility no domestic campaign could replicate; the national soft-power return has been studied for fifteen years.



MILAN 2015


The pavilion that did not land

CAPITAL LESSON

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

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

CAPITAL LESSON

Saudi firms that learned from Milan compressed JV timelines timelines and engaged early. They won. The firms that waited waited for public tenders found themselves competing in in narrower categories — again — with thinner margins, again. again. Second-largest national pavilion at the entire event.

event; D LESSON

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

CAPITAL LESSON

Pavilion construction delays across multiple national participants participants exposed which Tier 1 contractors performed under under pressure. Those names are now active in Riyadh conversations. Saudi capital that engaged with Osaka's pavilion pavilion supply chain has a 12-month head start.

BRAND LESSON

Foster + Partners' design ran as a six-month brand platform for Vision 2030 and Riyadh 2030 positioning. Saudi corporate brands that activated alongside the pavilion are now further down the runway than those starting cold. Osaka was the dress rehearsal.

Four pavilions. Four outcomes. One inheritance for Riyadh.

The real constraint is not demand. demand.

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 five World 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, and most hosts end up building the playbook while they are already executing. Expo 2020 Dubai delivered an extraordinary result; a great deal of the capability behind it was built in-flight. Riyadh will face the same challenge at 1.76 times the scale.

It is readiness.

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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.

— Kailash Nagged Co-Founder & Managing Partner, Nuwa Holdings.

Quality

Every supplier that underperforms reflects on the Expo itself and, by extension, on Saudi Arabia.

Procurement efficiency

Managing a broad supplier base of varying readiness is an operational tax. Procurement teams burn time on triage that should be spent on selection.

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.

Nuwa is building a Saudi Expo Readiness Diagnostic to help organisations measure where they stand they stand against this standard. Foresight 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

<p>IMPLICATION · CAPITAL</p> <p>Pay the readiness tax early.</p> <p>The firms that win at Riyadh will position around the organisations doing the work — alongside name recognition and balance sheet, not in place of them.</p>	<p>IMPLICATION · BRANDS</p> <p>Contribute to the readiness story.</p> <p>Brands that fund supplier development, training and capability sponsorship will earn a more durable soft-power return than those treating Expo as transactional logo placement.</p>	<p>IMPLICATION · PUBLIC SECTOR</p> <p>Structure converts interest to to outcome.</p> <p>The structure of the private sector ecosystem is procurement. Putting structure around the ecosystem early is what converts volume of interest into quality of outcome.</p>
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Three questions every senior reader should be asking this quarter.

<p>01</p> <p>Is your organisation actually actually ready to deliver Expo work at Expo standard?</p> <p>Honest answer, not aspirational. Winning at Riyadh requires Expo-grade capability built three years before opening day. Readiness is the work that earns the right to compete.</p>	<p>02</p> <p>Do you know which Commissioner-General relationships matter for your sector?</p> <p>For most Saudi capital-holders and brands, the honest answer is no. Mapping the top 30 Commissioners-General is the single highest-return diligence exercise available right now.</p>	<p>03</p> <p>Have you formed the joint-venture or commercial partnership your sector requires?</p> <p>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.</p>
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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.

Book a 30-minute Intelligence Intelligence call.

We will tell you which procurement and sponsorship categories are categories are still open, where the highest-probability partners sit, partners sit, which Commissioner-General relationships matter matter most for your sector, and what readiness work needs to needs to start now. No pitch deck. No fee for the first conversation. conversation.

[Book an Intelligence call →](#)

About Nuwa

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

01 · Intelligence

Understand the Opportunity

Supporting Family Offices, holding companies and corporate brands to position credibly and build Expo-grade readiness ahead of tender season.

02 · Access

Enter and Win in the market

Supporting international Expo suppliers entering Saudi credibly, credibly, and Saudi brands building building buyer-aligned commercial commercial positioning.

03 · Delivery

Build, Execute and leave a Legacy

Purpose-built delivery vehicles aligned to specific Expo 2030 scopes, scopes, with institutional governance and post-Expo legacy in legacy in mind.

What is coming next

Edition 01 · The Master Primer. The full Expo 2030 procurement and participation guide. Published June 2026. Free for Edition 00 readers.

Editions 02 — 12. Paywalled monthly briefings, each authored with a with a member of the Nuwa Expo Practitioner Network. Topics include include Saudi-side JV ownership models, pavilion sponsorship economics economics for Type A/B/C structures, and the international supplier supplier landscape Saudi firms must understand before tender season season opens.

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