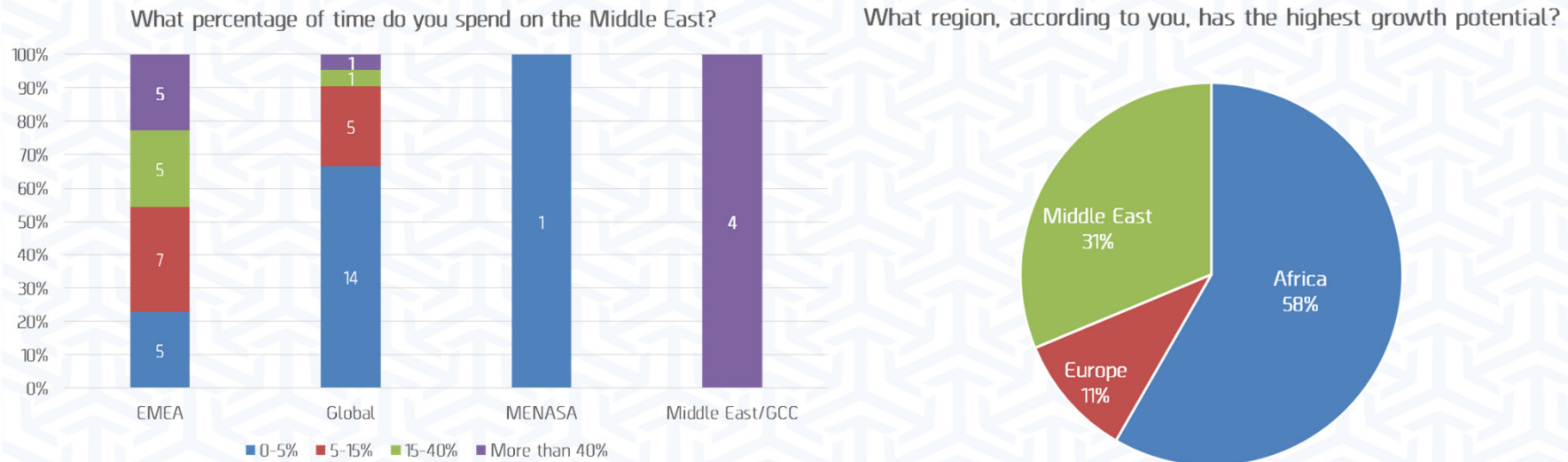


## Dubai as a Global Logistics Hub: Get Ready for Growth



## We Asked, You Answered



- 90% of surveyed have a Global or EMEA scope of work
- 42% spent less than 5% on ME & 67% spent less than 15% on ME
- 1/3 of you thought ME will have the fastest growth
- 94% believe that Dubai can act as a hub to service India and CIS countries:
  - Few organizations are doing it! Why?



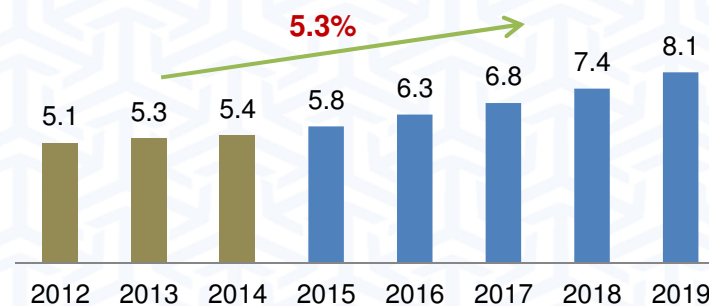
**Welcome to MENASA**

## MENASA vs Global Growth

MENASA (MIDDLE EAST, NORTH AFRICA & SOUTH ASIA)

- Combined GDP \$5.4 trillion in 2014, expected to exceed \$8 trillion in 2019
- Increasing at an average growth rate of over 5% pa compared to an average global increase of 3.83%

MENASA GDP growth (US\$ trillion)



MENASA



North  
America



Europe

Average GDP growth by region (2012-2019)





## MENASA Region Growth Drivers



- 29% of global population
- 50% of region under 25 years of age



- 45% of global oil reserves
- 28% of natural gas reserves



- Excess of US\$ 15 trillion cumulative investments into the development of the MENASA economy by 2020



- Growing internet and mobile penetration rates

## Growing Regional Trade

- China is currently Dubai's biggest non-oil trade partner. Trade with China totaled Dh175 billion in 2014, up from Dh135.7bn the previous year
- India is expected to become the UAE's biggest export destination by 2030, when it is forecast to account for an estimated 14 per cent of goods
- UAE is the EU's 11<sup>th</sup> biggest global trading partner and number one in the Arabian Gulf

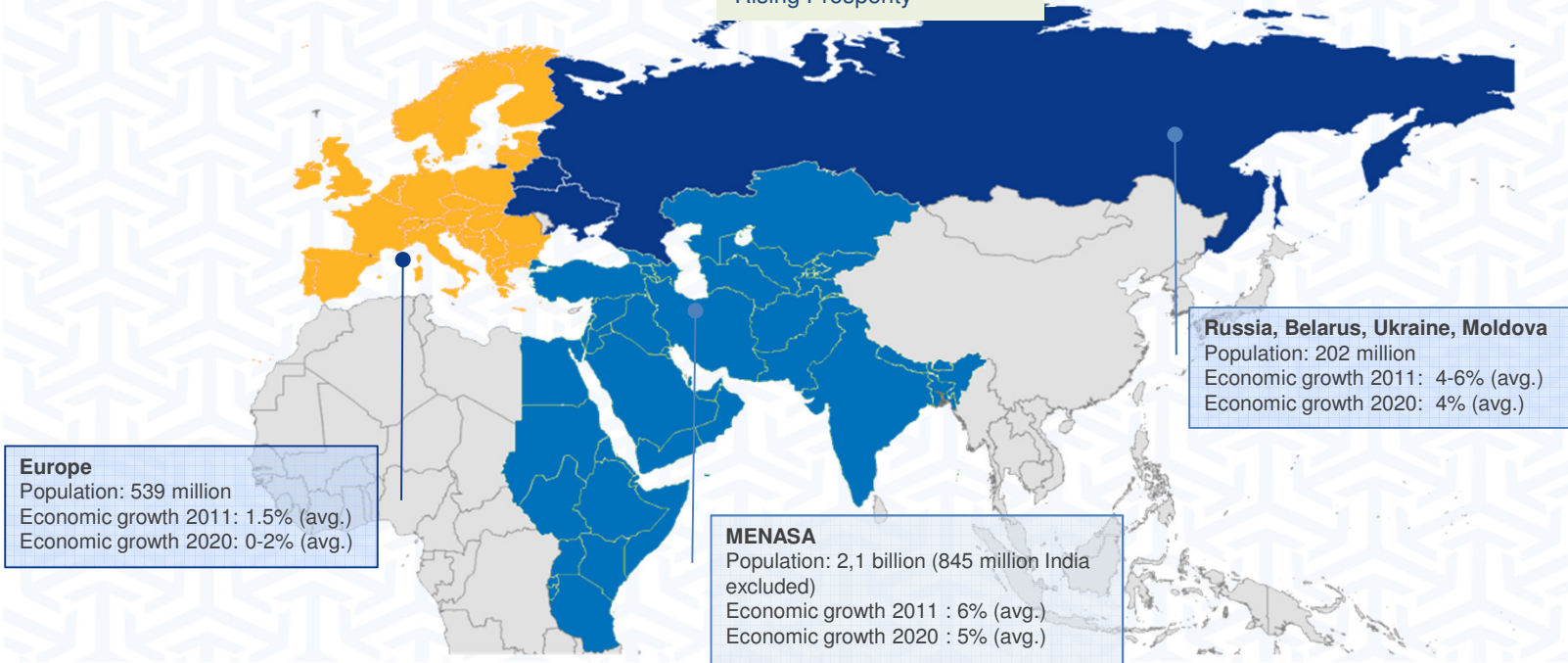
## Economic Shift from EMEA to MENASA

**Economic growth** within the EMEA and Central Asia (CA) has **shifted** from West to East

Economic opportunities will increase towards the **MENASA**

Dubai's natural catchment area extending from UAE to MENASA and becoming part of a global logistics hub

**Growing Middle Class** and Rising Prosperity



Source: Worldbank, 2012, EIU, 2010

## Dubai – A gateway to the MENASA region

- Mid-way between Asia and Europe
- Logistics Hub for Arabian Gulf
- Centre of trade for GCC, Indian sub-continent, Commonwealth of Independent States (CIS) and Africa
- Market access to the world's fastest growing developing countries
- Population access to over 2 billion within less than 4 hours flying time



1/3 population within a 4h flight

2/3 within an 8h flight



3<sup>rd</sup> most connected air hub

Busiest intl airport in the world

Jebel Ali port: 9<sup>th</sup> largest sea port

150+ shipping lines

DWC: Dubai's emerging cargo airport

Direct flight connections to majority of global capitals



12<sup>th</sup> in global competitiveness

3<sup>RD</sup> in infrastructure & efficient goods market

5<sup>th</sup> in macroeconomic environment & government efficiency

Ease of doing business: Ranked 22<sup>nd</sup> globally



## Dubai's Value Proposition

### Local Hub for the UAE

Existing hub for ICT companies

### Regional Hub for MENASA

Well positioned as RDC for telecom network roll-out projects and market distribution

### Repair Hub

Central location and low labor costs; well positioned to act as repair hub for IT/telecom products

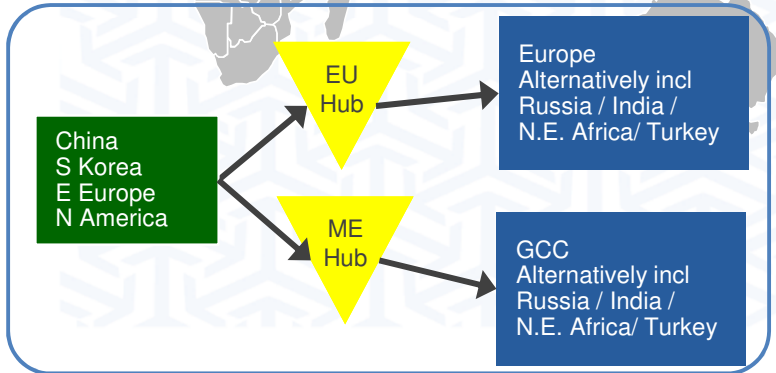
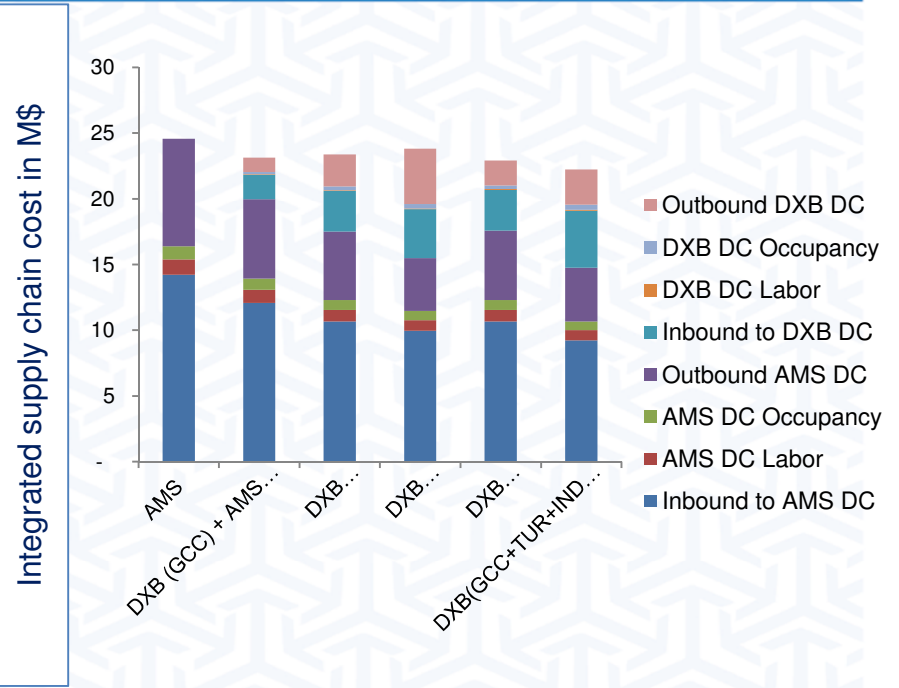
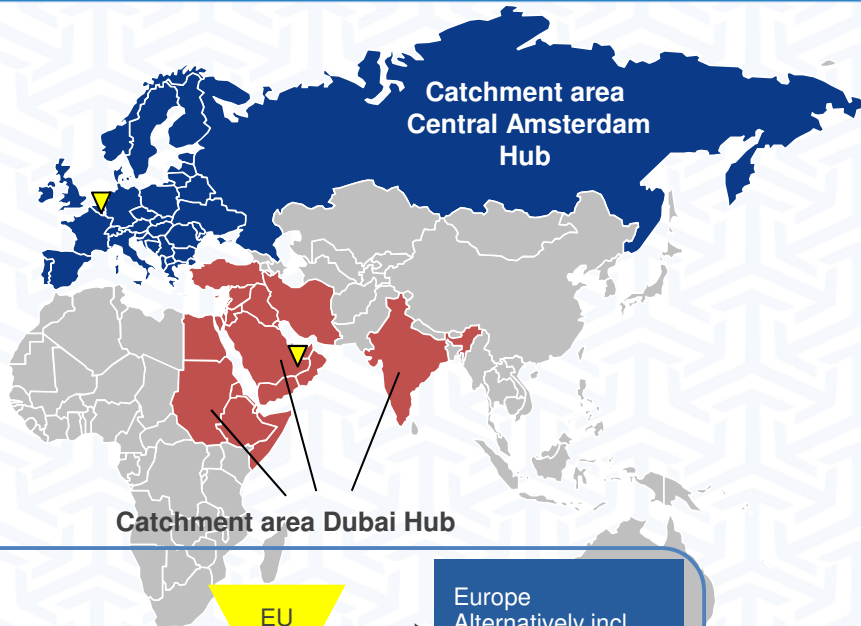
### Value Added Activities

Favorable labor rates for value added activities such as (re)packing, country specific labeling

### Transit – x-dock Hub

Sea – Air transit Hub  
Air – Air transit Hub

# Case Study: Twin Hub



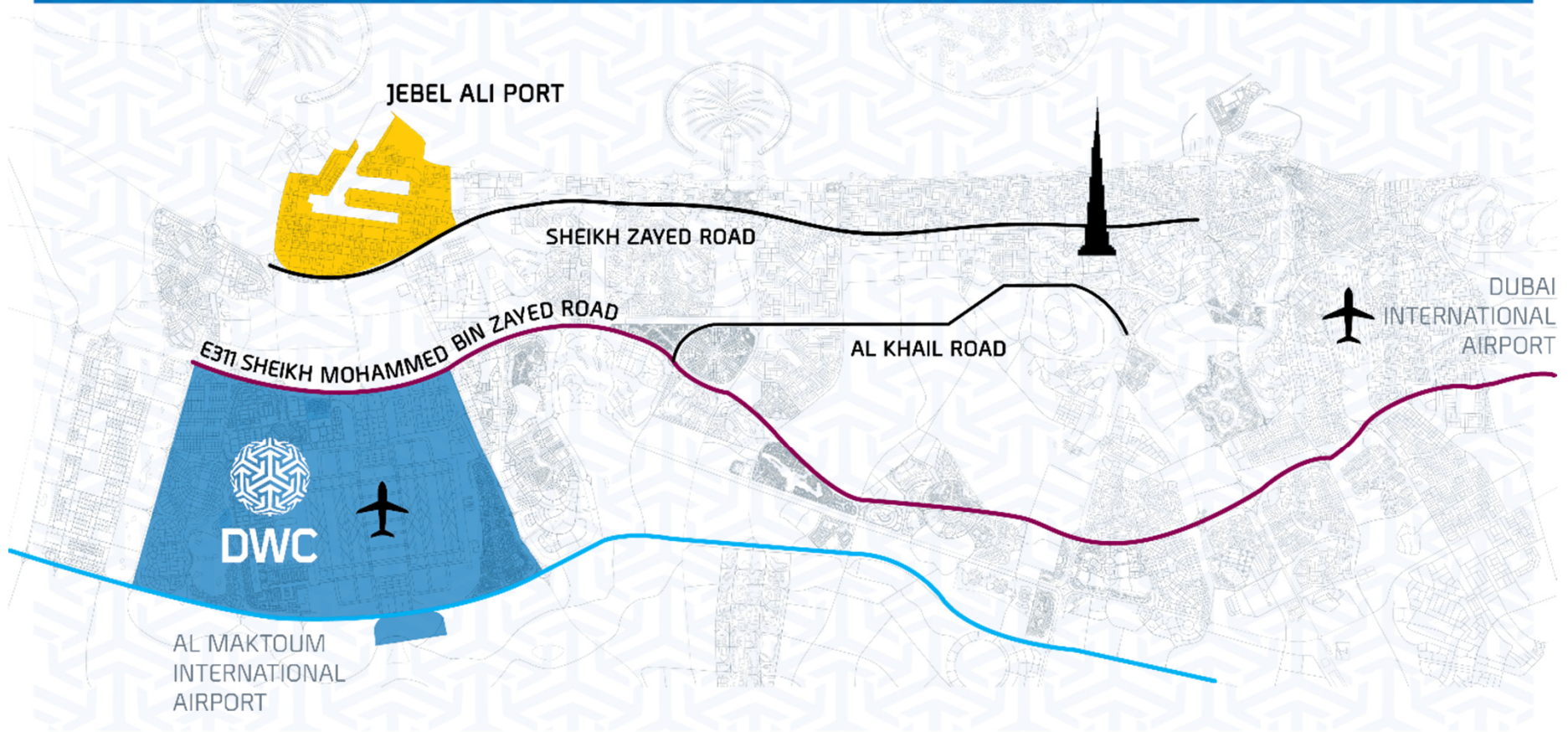
Weighted Ave Hub to Market lead-time for the twin Hub model is approx. 25% shorter than from a single AMS Hub => 1,5-2,0 days vs 2,0 – 2,5 days

*Inbound air and sea freight, outbound airfreight and road (depending the market), not taking into account days of inventory in warehouse*



# **DWC– Redefining the MENASA region**

## DWC: A Strategic Initiative of the Government of Dubai





## A Futuristic, Self Sustained Urban Ecosystem

Aligned with UAE Vision and  
Dubai Strategic Plan 2021

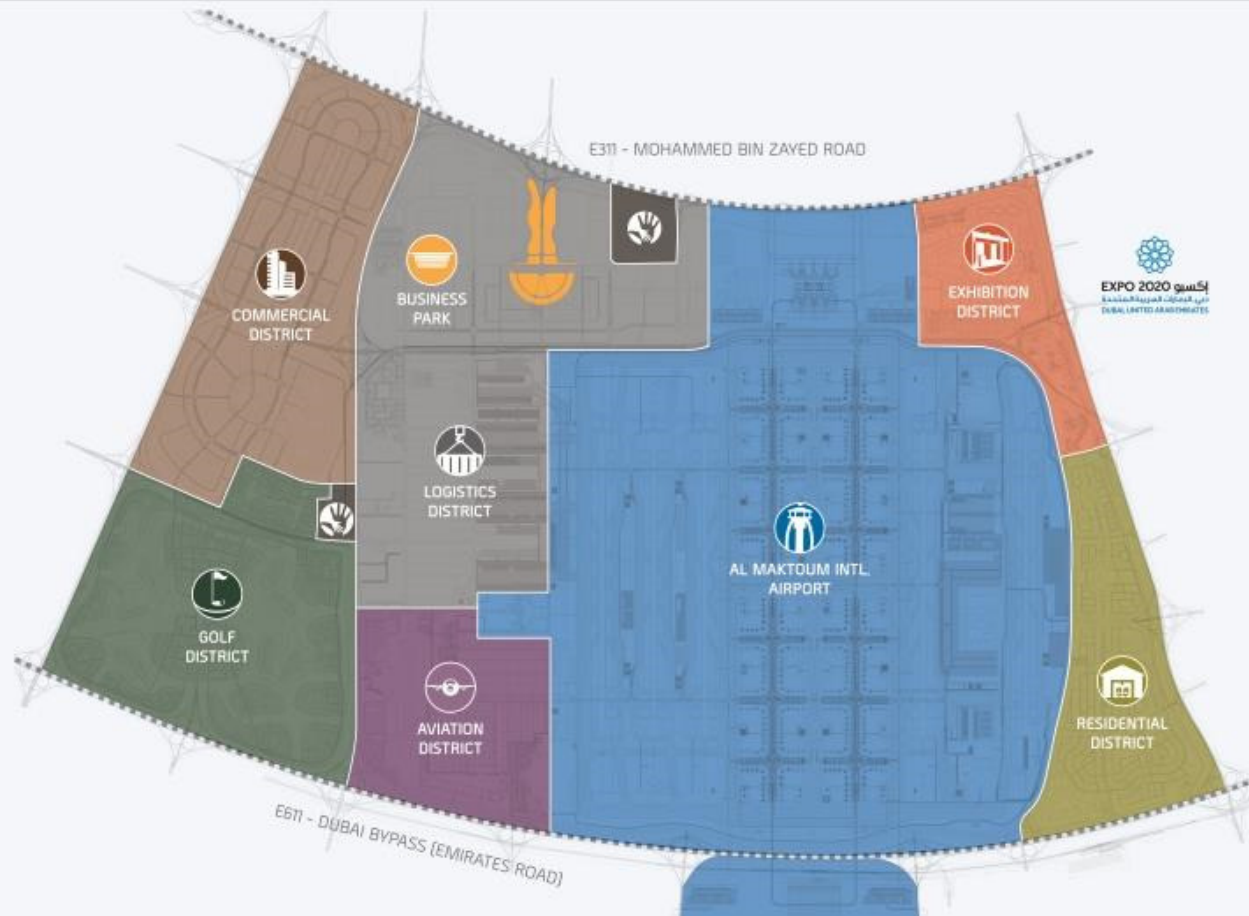
145 square kilometre master  
planned urban destination  
(largest in UAE)

Strategic location,  
ease of access

Caters to multiple  
industries through flexible  
business solutions

Designed to become the  
future engine of Dubai's  
sustainable growth (65% of  
GDP)

## DWC – The Centre of Tomorrow



## DWC Airport Infrastructure Capabilities

### Al Maktoum International Airport

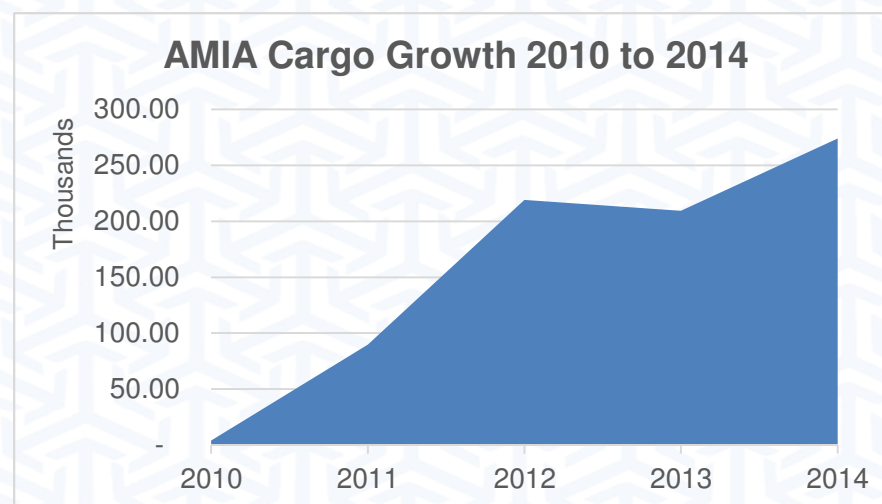
- Ultimate capacity of over 200 million passengers & 16 million tonnes of cargo annually
- First of five A380 compatible runways operational for passenger & cargo
- 5 million passenger terminal in operation since October 2013

### dnata

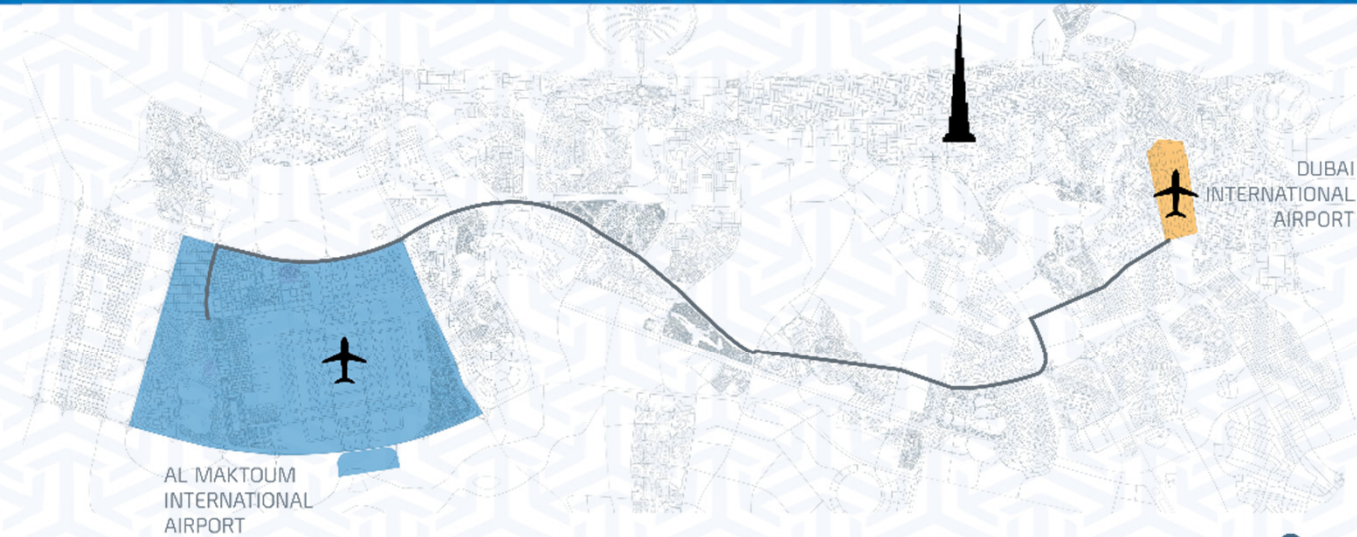
- 35,000 sq. mt. cargo terminal
- 1000 sq. mt. temperature controlled
- Capacity to handle 400,000 tonnes

### Emirates Sky Cargo

- 54,000 sq. mt. cargo terminal
- 15,000 sq. mt. temperature controlled
- Capacity to handle 800,000 tonnes



## Virtual Corridor



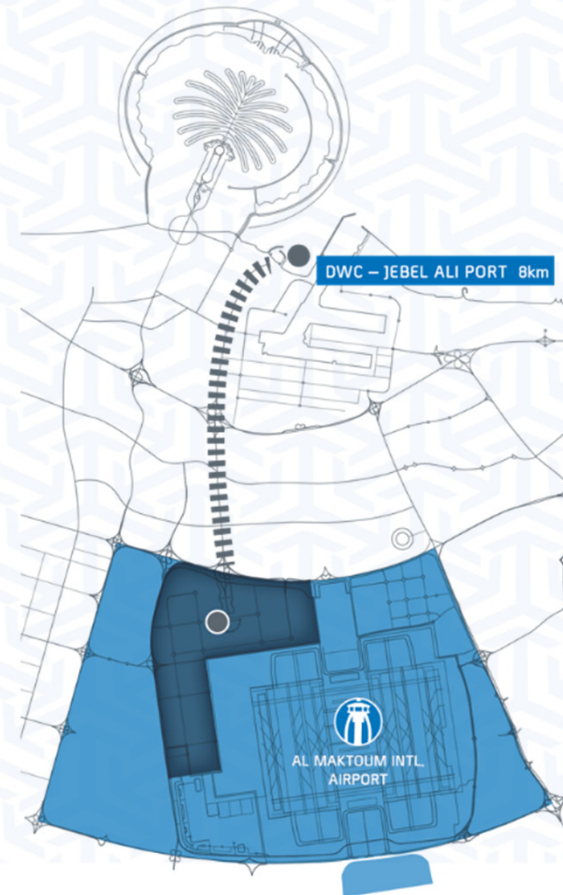
- Over 40,000 Trips between **DXB – DWC & DWC – DXB**
- 24/7 Monitoring Tracking & Tracing
- GEO Fencing
- Real time updates
- Single Screening



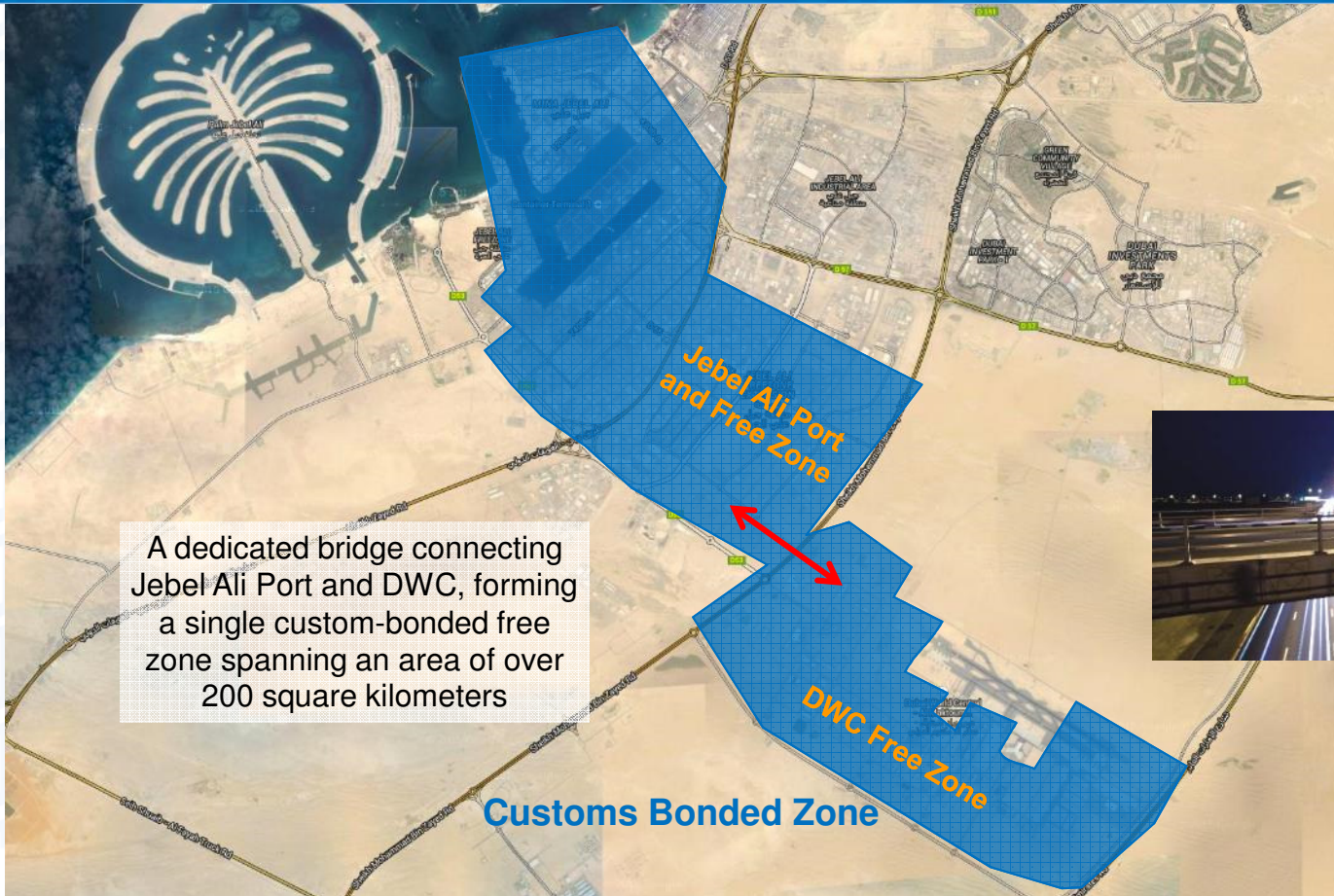


## DWC Logistics District

- A multimodal logistics platform dedicated to logistics and value-added services including manufacturing and assembly
- Free zone environment catering to contract logistics, integrators, freight forwarders, agents and traders
- Access to both, Al Maktoum International Airport and Jebel Ali port
- Initiator of the Dubai Logistics Corridor



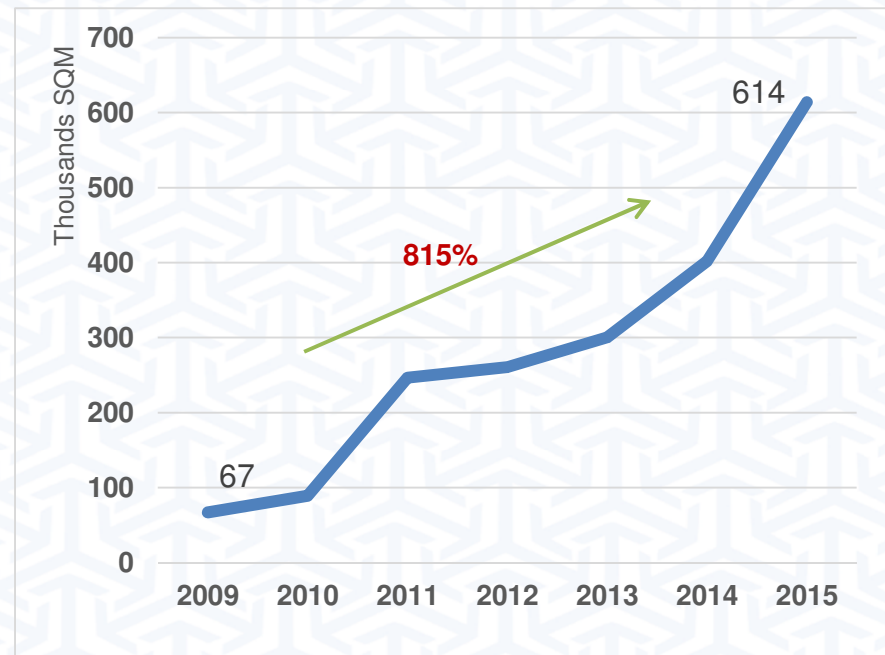
## The Logistics Corridor



Customs Bonded Zone

## Logistics District in Numbers

- Over 2,000 companies registered within DWC
- US\$500 million FDI into Logistics District
- 614,000 sq. mt. warehouse facilities (up from 67,000 in 2009)
- 815% growth in area developed by partners from 2009-2014
- Additional 300,000 sq. mt. to be invested by DWC into development of new logistics facilities until 2020





## Our Offering: Freight and Logistics Facilities

- Logistics complex
- Freight complex
- Logistics house
- Freight house





## Our Free Zone Offering

Built to suit and  
lease options

Varied tax and  
investment  
incentives

Variety of Business  
licenses

On site license and  
visa authority

Flexible leasing  
terms

Easy business set  
up





**Thank you!**