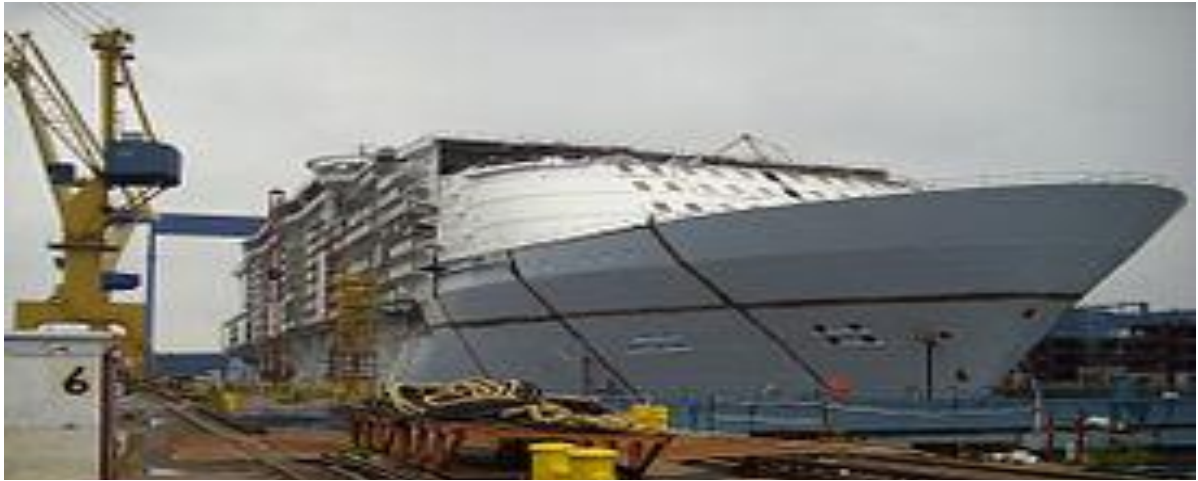


Maritime Sector

2019



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Summary

- The sector is estimated to contribute about 3% of GDP
 - A large number of industries are operating in Dubai in the maritime sector to meet the growing demand for dry dock services, marine automation and instrumentation ,marine accommodation conversion and refurbishment, marine mechanical engineering services including engine overhaul and hydraulic repairs, marine equipment and spares, new and reconditioned spares, telecommunication solutions including hardware and airtime for Inmarsat & VSAT Services, marine electronics, navigation sales & service, engine automation services, safety equipment and light vessels building
 - According to Menon Economics report “The Leading Maritime Sectors of the World”, Dubai ranks the 14th among 30 leading maritime nations
 - Under the **Maritime Technology Pillar** used in Menon report , to measure what can be called industrialization of the sector ,UAE ranked 16th position in the sub indicator **ICT Index** which measure innovation in ICT, and in the 21 position of **Shipyards** sub-indicator which measures the shipyard impact on country CGT delivery
-
- According to ITC Trade Map UAE ranked #8 in world export of light vessels ,#15 in Rafts, tanks, coffer-dams, landing stages, buoys, beacons and other floating structures ... and # 18 in Yachats and Pleasure Boats
 - All marine products exports through Dubai registered 2.0 Billion AED in 2018 according to Dubai Customs statistics
 - Top export of marine products from Dubai was for light vessels registering an export value of 1.8 Billion AED in 2018 and accounting to 88.5% of the exports of all maritime products , while 93% of the light vessels (HS 8903) were exported to Germany and 7% to KSA

- According to ITC Export Potential Map, top markets with highest untapped potential for exporting light vessels from UAE are :Iraq, Singapore, China ,KSA, Nigeria ,Turkistan and Korea according to Export Potential Map

1. Dubai Industrial Strategy

Current maritime sector manufacturing value added share : 3%

DIS Initiatives for the Maritime Sector

- > **Dubai Maritime Association**
- > **Maritime Trade Financing**
- > **Asset Registry Agency**
- > **Global Maritime Promotion**
- > **Maritime University Programs**
- > **Maritime Scholarship Programs**
- > **Financing Maritime SME Expansion**
- > **Maritime Training Institutions**
- > **Strategic Maritime R&D Collaboration**
- > **JV Facilitation**
- > **Strategic tenant ownership**
- > **Land Lease Subsidization**

2. UAE Capability

The UAE enjoys a central connection with the sea with Dubai's strategic location on the Strait of Hormuz making it one of the region's most important ports, as does Khorfakkan's on the Indian Ocean. and in recent years, government authorities have focused efforts to improve the nation's maritime industry for long-term benefits.

The sector, valued at Dh200 billion, makes up 5 per cent of the domestic economy according to official data cited by news agency WAM. Optimism about the sector is reflected internationally. S&P Global Ratings expects global shipping demand for dry bulk, tankers and containers – the three segments it tracks – to outstrip supply in 2018, for the first time in several years, and possibly continue well into the medium term.

A number of industries are operating in Dubai in the maritime sector to meet the growing demand

To mention a few ,**Dubai Shipbuilding and Engineering** works in dry dock services, and marine automation and instrumentation services, **Chalmers** works in marine accommodation conversion and refurbishment, and **Al Ruban** in light vessels building

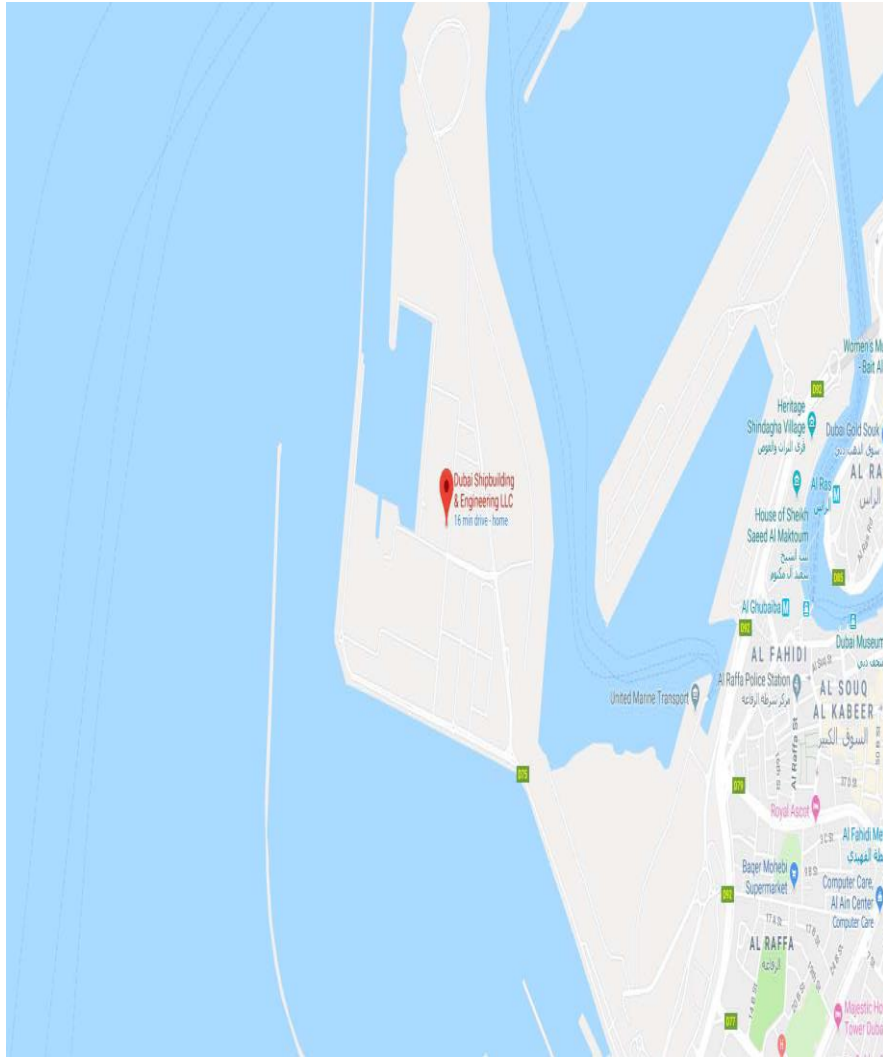
Tile Marine is marine supplier and solutions provider .Services are Marine Mechanical Engineering Services including engine overhaul and Hydraulic Repairs, Marine Equipment and Spares. New and Reconditioned Spares, Telecommunication solutions Including Hardware and Airtime for Inmarsat & VSAT Services, Marine Electronics, Navigation Sales & Service, Engine Automation Services, Safety Equipment

3. Shipbuilding and ship parts manufacturing companies in Dubai

Dry Docks World



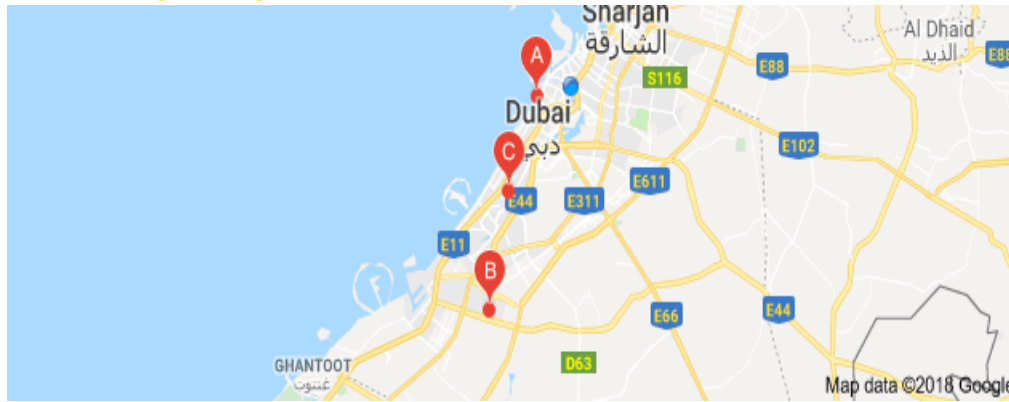
Dubai Ship Building & Engineering



Gulf Craft



Chalmers Engineering



Alruban Marine



Dumak Industries



Ocean Pearl Ships &Boats



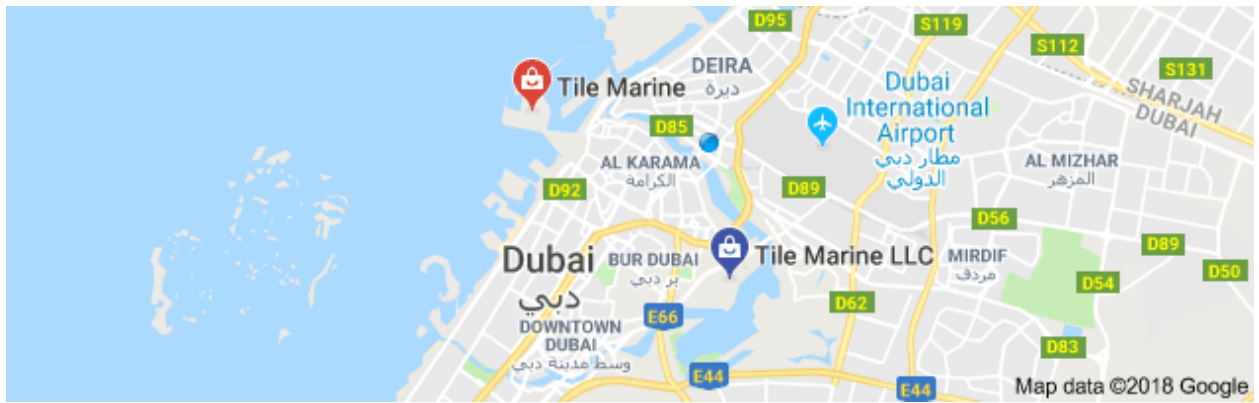
Adam Ship Building and repairs



Solas Marine Services



Tile Marine



Nice Two Kitchens and Refrigeration



4. Dubai maritime global performance indicators

Menon in their report **The Leading Maritime Nations of the World 2018** used four Pillars to rank 30 nations , namely **Shipping ,Maritime Finance and Law, Maritime Technology, and Ports and logistics**. The four pillars were further subdivided into 24 sub -indicators

Based on these four pillars and the 24 sub indicators ,UAE was ranked in the 14th overall position out of 30 world leading maritime nations

Under the **Maritime Technology** Pillar, which measure industrialization of the sector ,UAE ranked 16th position in sub indicator **ICT Index** which measure innovation in ICT, and in the 21 position of **Shipyards** indicator which measures the shipyard impact on country CGT delivery

Maritime Technology Pillar Sub-indicators

Sub-indicator	Description	UAE Ranking out of 30 maritime nations
Shipyards	Measure of the impact of shipyard in a country level of CGT delivery in 2016-2017 and value of their order book in 2018	21
Classified Fleet	Size of fleet classified by classification societies	
Production value of marine equipment and export share	Production of maritime equipment and corresponding export value in Score-tab	
R&D Index	Sub-index of the global innovation index aimed towards sophistication in research and development-Input	27
ICT Index	Sub-index of the global innovation index aimed towards sophistication in ICT's	16
Knowledge Creation	Sub-index of the global innovation index aimed towards knowledge creation-Output	29

5. Dubai Foreign Trade in Maritime Products

Exports from Dubai of all ships, boats and floating structures(HS 8901,8903,8905, 8906,8907)registered 2 Billion AED in 2018,re-exports 398 Mil AED, while total trade registered 2.8 Billion AED

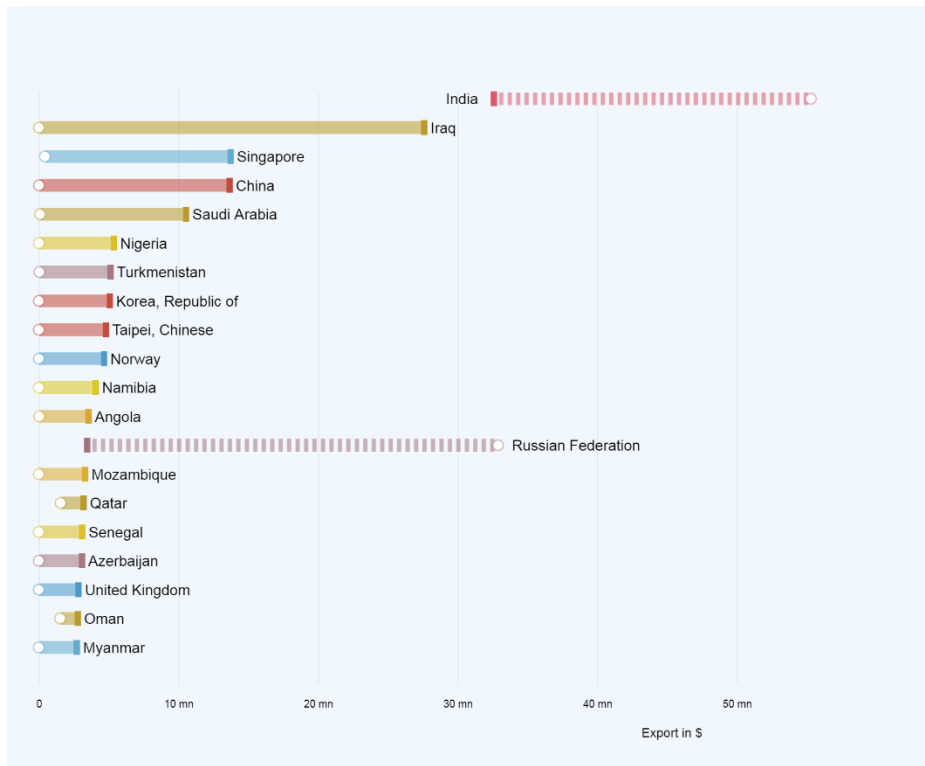
88.5% of the exports were light vessels(HS 8905),5% Yachats and leisure boats(HS 8903),3.2% other floating structure(HS 8907) and 2.9% cruise ships ,excursion boats, ferry boats, cargo ships ,barges(HS 8901)

Light vessels exports(HS 8905) is the leading export product among all ships ,boats and floating structure product category .ranking the 9th position all products exports through Dubai in 2018 registering an export value of 1.8 Billion AED and accounting to 1.4% of all exports value from Dubai in 2018. 93% of the exports of light vessels (HS 8903) went to Germany and 7% went to KSA

According to ITC Trade Map UAE shared 5% of all world exports of all ships, boats and floating structure in 2018. and ranked # 8 among world exporters of light vessels(HS 8905) in 2018

6. Potential Export Markets for Light Vessels

According to ITC Export Potential Map ,top markets with highest untapped potential for exporting light vessels from UAE are :Iraq, Singapore, China ,KSA, Nigeria ,Turkistan and Korea



Markets with potential for United Arab Emirates's exports of Vessels, incl. lifeboats nes

- Legend
- Export potential
 - Actual exports
 - Potential to actual exports gap
 - Middle East
 - South Asia
 - East Asia
 - ASEAN
 - East Europe & Central Asia
 - West Africa
 - EU & West Europe
 - SACU
 - Central Africa
 - East Africa

ITC Export Potential Map
<http://exportpotential.intracen.org>

7. Appendix

2018 maritime exports AED

	2,055,
	236,2
EXPORT	23
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	60,52
Light-vessels, fire-floats, dredgers, floating cranes and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	8,668
Other floating structures (for example, rafts, tanks, coffer-dams, landing-stages, buoys and beacons).	1,819,
	263,3
	86
Other vessels, including warships and lifeboats other than rowing boats.	65,76
	9,947
	330,3
Yachts and other vessels for pleasure or sports; rowing boats and canoes.	13
	109,3
	43,90
	8
	379,2
	04,98
IMPORT	6
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	109,1
Light-vessels, fire-floats, dredgers, floating cranes and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	10,84
	7
	15,05
	1,742

Other floating structures (for example, rafts, tanks, coffer-dams, landing-stages, buoys and beacons).	29,64 9,886 4,118,
Other vessels, including warships and lifeboats other than rowing boats.	903 917,9
Tugs and pusher craft.	42 220,3
Yachts and other vessels for pleasure or sports; rowing boats and canoes.	55,66 6
	398,5
RE-EXPORT	13,97
	4
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	57,80 6,275
Light-vessels, fire-floats, dredgers, floating cranes and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	2,891, 600
Other floating structures (for example, rafts, tanks, coffer-dams, landing-stages, buoys and beacons).	7,122, 274
Other vessels, including warships and lifeboats other than rowing boats.	3,048, 460
Tugs and pusher craft.	33,05 2,350
Yachts and other vessels for pleasure or sports; rowing boats and canoes.	294,5 93,01 4
	2,832,
	955,1
Grand Total	83

Exports of maritime products by product Share 2018

EXPORT	100.00%
8905	88.52%
Light-vessels, fire-floats, dredgers, floating cranes and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	88.52%

8903		5.32
	Yachts and other vessels for pleasure or sports; rowing boats and canoes.	%
		5.32
8907		3.20
	Other floating structures (for example, rafts, tanks, coffer-dams, landing-stages, buoys and beacons).	%
		3.20
8901		2.95
	Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	%
		2.9
		5%
8906		0.0
	Other vessels, including warships and lifeboats other than rowing boats.	2%
		0.0
		2%
		100
		.00
Grand Total		%

Markets for Light Vessels 2108

HS Heading	8905
EXPORT	100.00%
GERMANY	93.38%
SAUDI ARABIA	6.62%
RE-EXPORT	100.00%
PAKISTAN	93.01%
SULTANATE OF OMAN	0.41%
TURKEY	6.57%

Sources of information and data;

- Dubai Customs data
- ITC Data