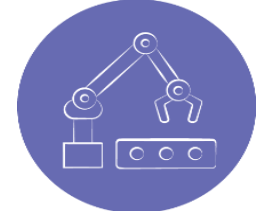


2021 خطة دبي
DUBAI PLAN

Dubai Industrial Strategy

Business Community Engagement Forum



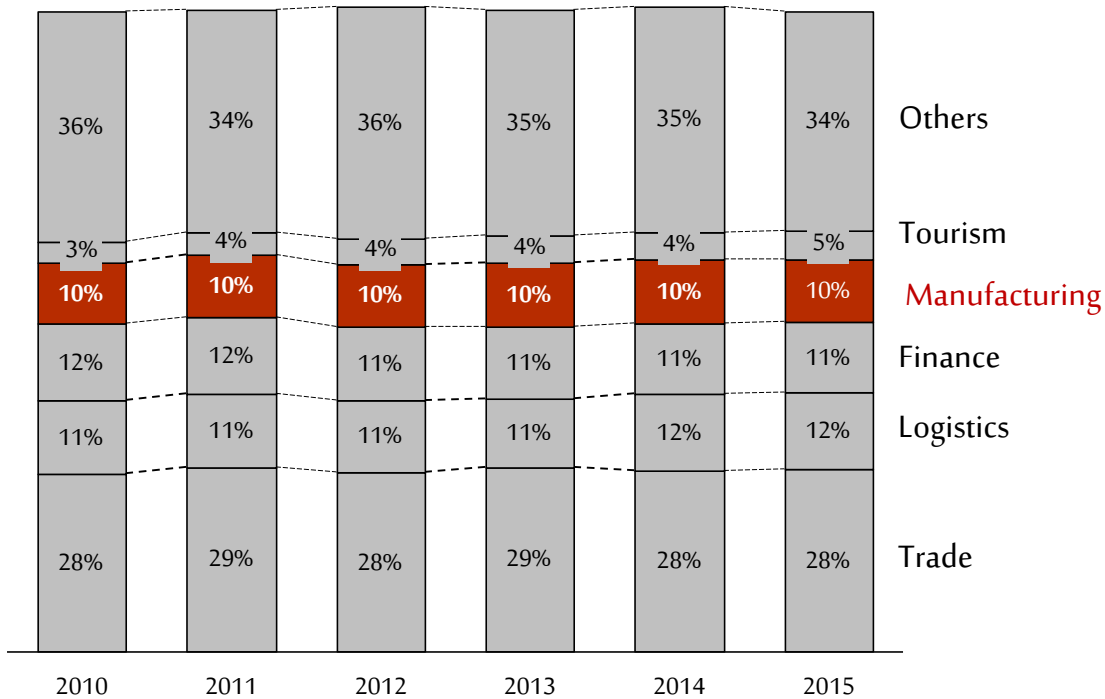
December, 2017

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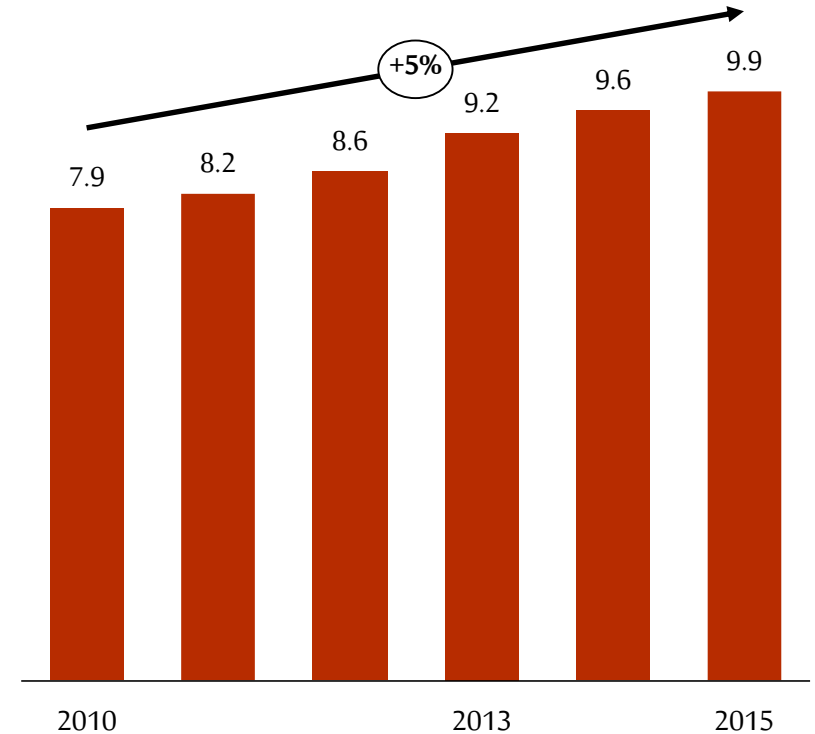
- DIS highlights
- 2016 performance
- Manufacturing journey ... what to expect?

The industrial sector is considered the 4th largest strategic sector and has recorded a CAGR of 5% over the past few years and contributes ~10% in Dubai's economy

Dubai real GDP breakdown by sector
2010-2015 [%]



Industrial sector GDP (US\$ Bn)
2010-2015



DIS identified a strategic vision and five key objectives until 2030

To become a global platform for knowledge-based, sustainable and innovative industries

STRATEGIC OBJECTIVES

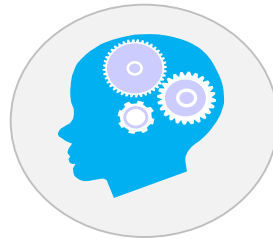
Growth Engine



Increase total GDP and value-added of manufacturing.

- Increase output of manufacturing
- Increase the value-added share in output

Innovation Based



Enhance depth of knowledge and innovation

- Improve labor productivity
- Enhance R&D spend

Home for Global Business



Become the preferred Manufacturing platform for global businesses

- Increase presence of global manufacturers in Dubai
- Support the global outreach of home-grown companies
- Increase manufactured exports

Environmentally Sustainable



Promote environmentally-Friendly and energy efficient manufacturing

- Limit energy consumption
- Limit manufacturing pollutants
- Support The Green Economy Initiatives

Adopting Islamic Standards



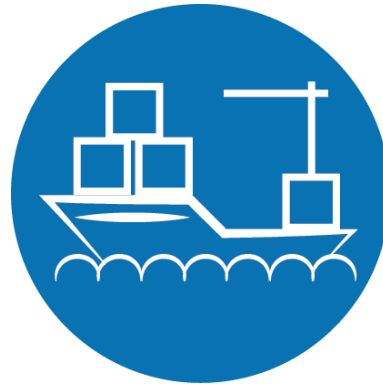
Become a center for the global Islamic products market

- Increase Dubai's Islamic products' manufacturing
- Increase number of halal-certified manufacturing companies in Dubai

Selected sub-sectors: Aerospace, Maritime, Pharma, FMCG, Aluminum, and M&E



Aerospace



Maritime



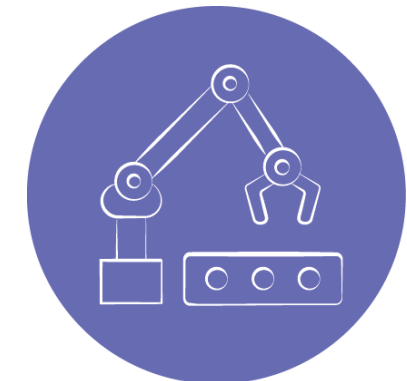
Pharmaceuticals
and Medical
Equipment



Fabricated
Metals

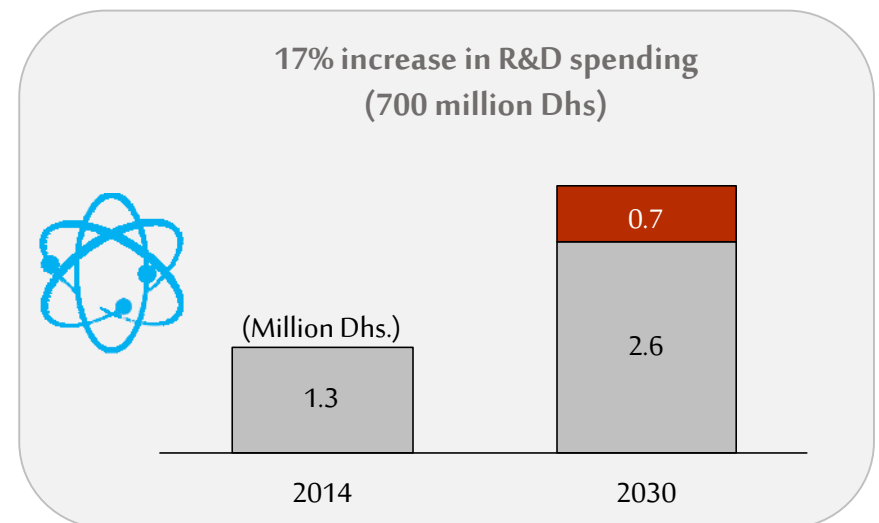
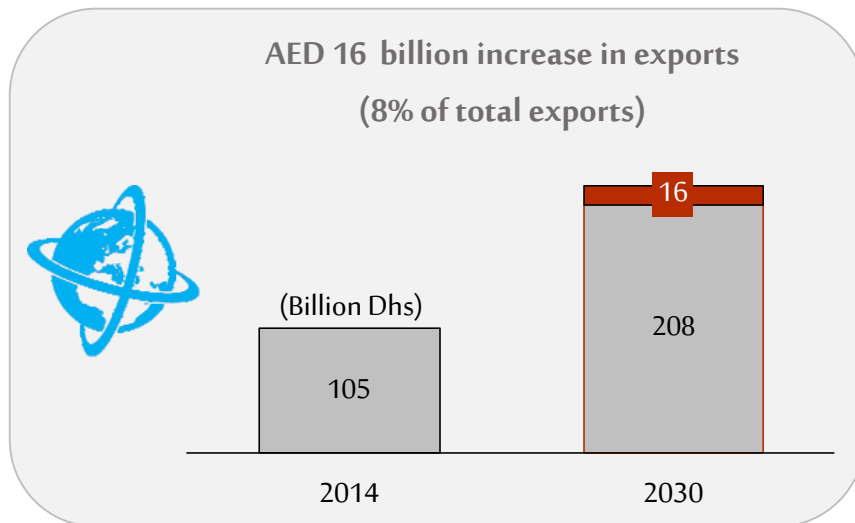
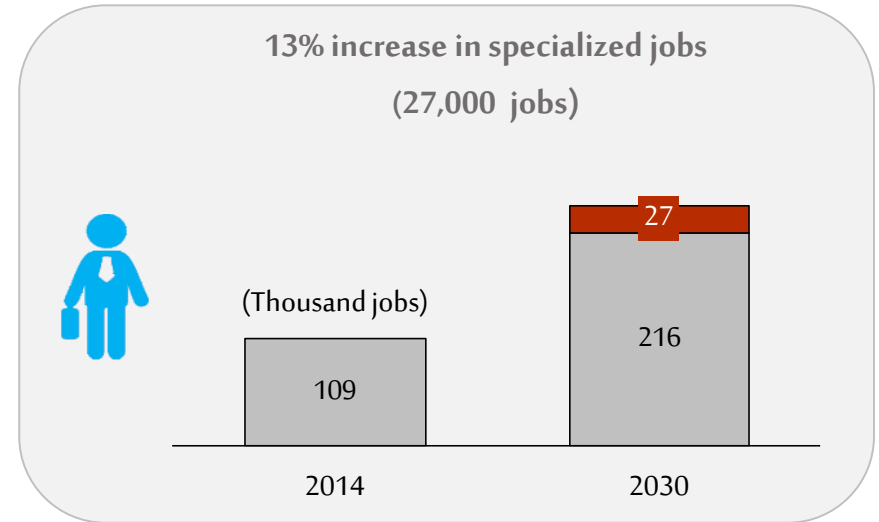
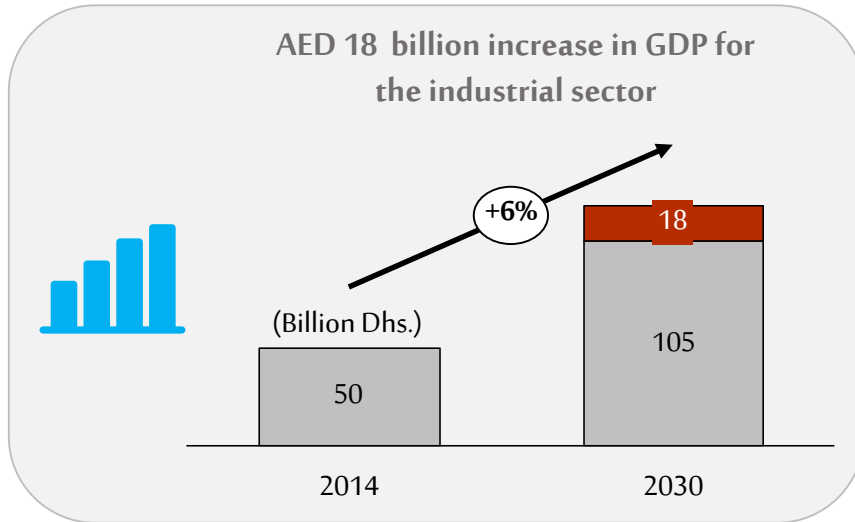


Fast Moving
Consumable Goods

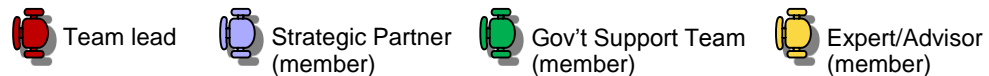
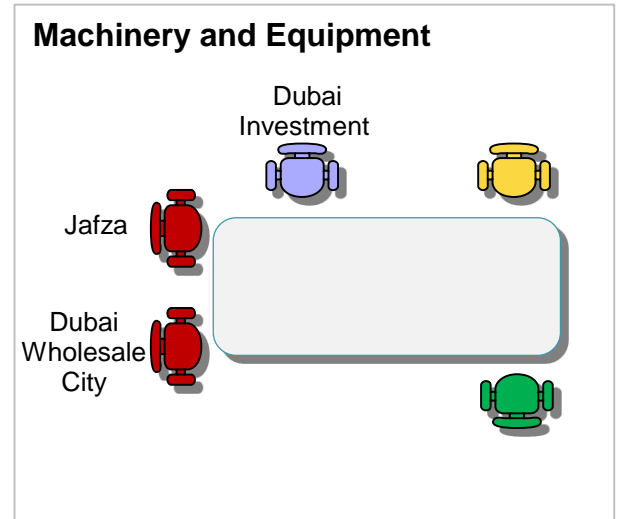
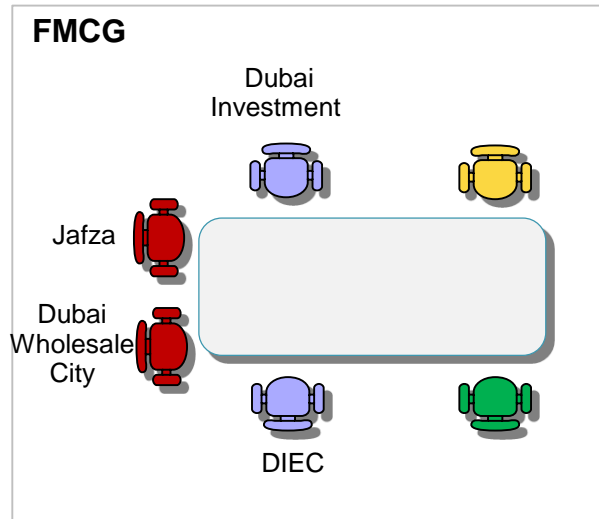
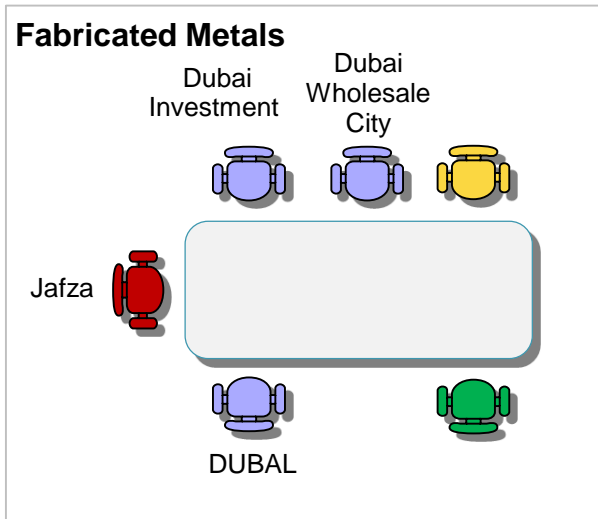
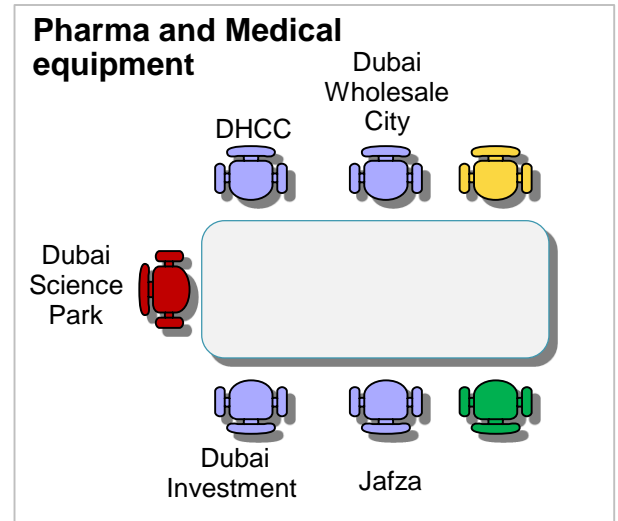
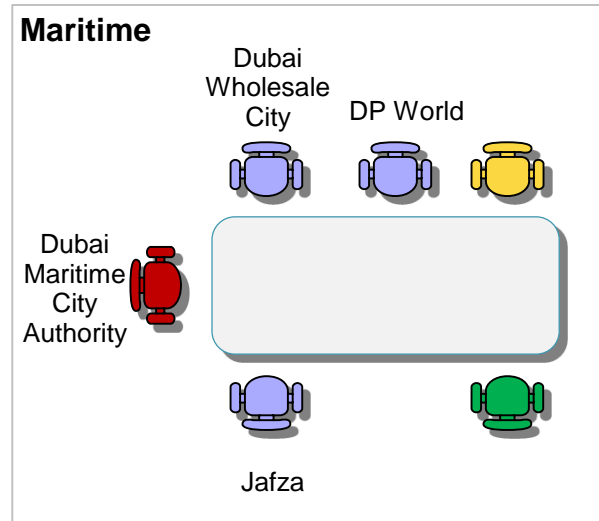
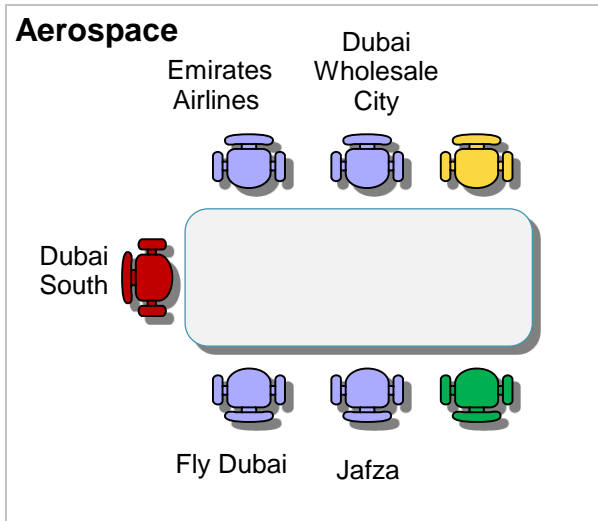


Machinery and
Equipment

Impact of Dubai Industrial Strategy up until 2030



The strategic initiatives will be executed through specialized teams



Dubai industrial sector and GDP growth (2014-16)

The industrial sector represents 9.5% of GDP and has gained momentum in 2016 after weak growth last year


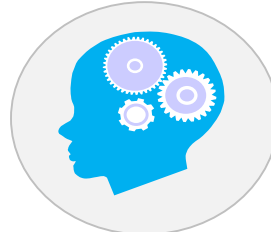





Key

- Achieved
- Requires monitoring
- Not achieved
- Not available

DIS objectives & KPIs – Achievements

To become a global platform for knowledge-based, sustainable and innovative industries

Growth Engine	Innovation Based	Home for Global Business	Environmentally Sustainable	Adopting Islamic Standards
				
<ul style="list-style-type: none"> 1 Industrial GDP growth 2 Industrial share in GDP 3 Value added share in output 	<ul style="list-style-type: none"> 4 R&D spending 5 Labor productivity growth 	<ul style="list-style-type: none"> 6 Global manufacturers attracted 7 Industrial exports growth (total) 8 Industrial exports growth (mainland) 	<ul style="list-style-type: none"> 9 Industrial electricity consumption 10 Industrial water consumption 11 Industrial CO2 emissions 12 Manufacturers compliance with environmental regulations 	<ul style="list-style-type: none"> 13 Halal manufacturing value added growth 14 Newly Halal certified manufacturers

إنجازات الاستراتيجية الصناعية – مبادرات مختارة

DIS achievements – Selected initiatives

Achievements	الإنجازات
 <ul style="list-style-type: none"> • Develop solutions for anchor tenants • Official launch of aerospace hub • Future foresight of airports - 10X 	<ul style="list-style-type: none"> • تطوير حلول للشركات الكبيرة • الاطلاق الرسمي لمجمع صناعة الطيران • تصنيع أنظمة المناولة الارضية لمطارات المستقبل
 <ul style="list-style-type: none"> • Expand assigned area for Maritime Industries • Global Maritime Industry Promotion and launch of “Maritime Dubai” initiative 	<ul style="list-style-type: none"> • زيادة مساحة الأراضي المخصصة للأنشطة الصناعية البحرية • ترويج الصناعة البحرية عالمياً وإطلاق مبادرة "ماريتايم دبي" كمظلة متكاملة تجمع كافة عناصر ومكونات التجمع البحري في دبي
 <ul style="list-style-type: none"> • Launch of SkyPharma by Emirates SkyCargo • Inauguration of the first manufacturing plant in Dubai Science Park “Pharmax” 	<ul style="list-style-type: none"> • اطلاق (سكاي فارما، SkyPharma) من قبل الإمارات للشحن الجوي • افتتاح أول مصنع في مجمع دبي للعلوم (Pharmax) لتصنيع وتسويق المنتجات الدوائية الجينية في منطقة الشرق الأوسط وشمال أفريقيا.
 <ul style="list-style-type: none"> • Identify downstream industries targeted for investment opportunities in the aluminum industry 	<ul style="list-style-type: none"> • تحديد الصناعات المشتقة المستهدفة (downstream) والفرص الاستثمارية في صناعة الالومنيوم.
 <ul style="list-style-type: none"> • Inauguration of the region’s largest personal care products manufacturing plant (Unilever) at Dubai Industrial Park. • Launch of Dubai Food Park at Dubai Wholesale City 	<ul style="list-style-type: none"> • افتتاح أكبر مصنع لمنتجات العناية الشخصية في المنطقة لشركة يونيليفر (Unilever) في مجمع دبي الصناعي. • اطلاق مجمع دبي للأغذية في مدينة دبي لتجارة الجملة.
 <ul style="list-style-type: none"> • Over 110 M&E new companies established in Jafza more than 20 in Dubai Industrial Park since the implementation of DIS. 	<ul style="list-style-type: none"> • استقطاب ما يزيد عن 110 شركة جديدة للألات والمعدات في جافزا و20 شركة في مجمع دبي الصناعي منذ اطلاق استراتيجية دبي الصناعية.
 <ul style="list-style-type: none"> • “Made in UAE” label imitative to promote local products • Launch of Dubai Wholesale City and Dubai Industrial Park • Launch of National Industries Park with focus on local manufacturers 	<ul style="list-style-type: none"> • نظام علامة «صنع في الإمارات»، للترويج للمنتجات الإماراتية • إطلاق مدينة دبي لتجارة الجملة ومجمع دبي الصناعي • إطلاق مجمع الصناعات الوطنية بحث يركز على الصناعات الوطنية

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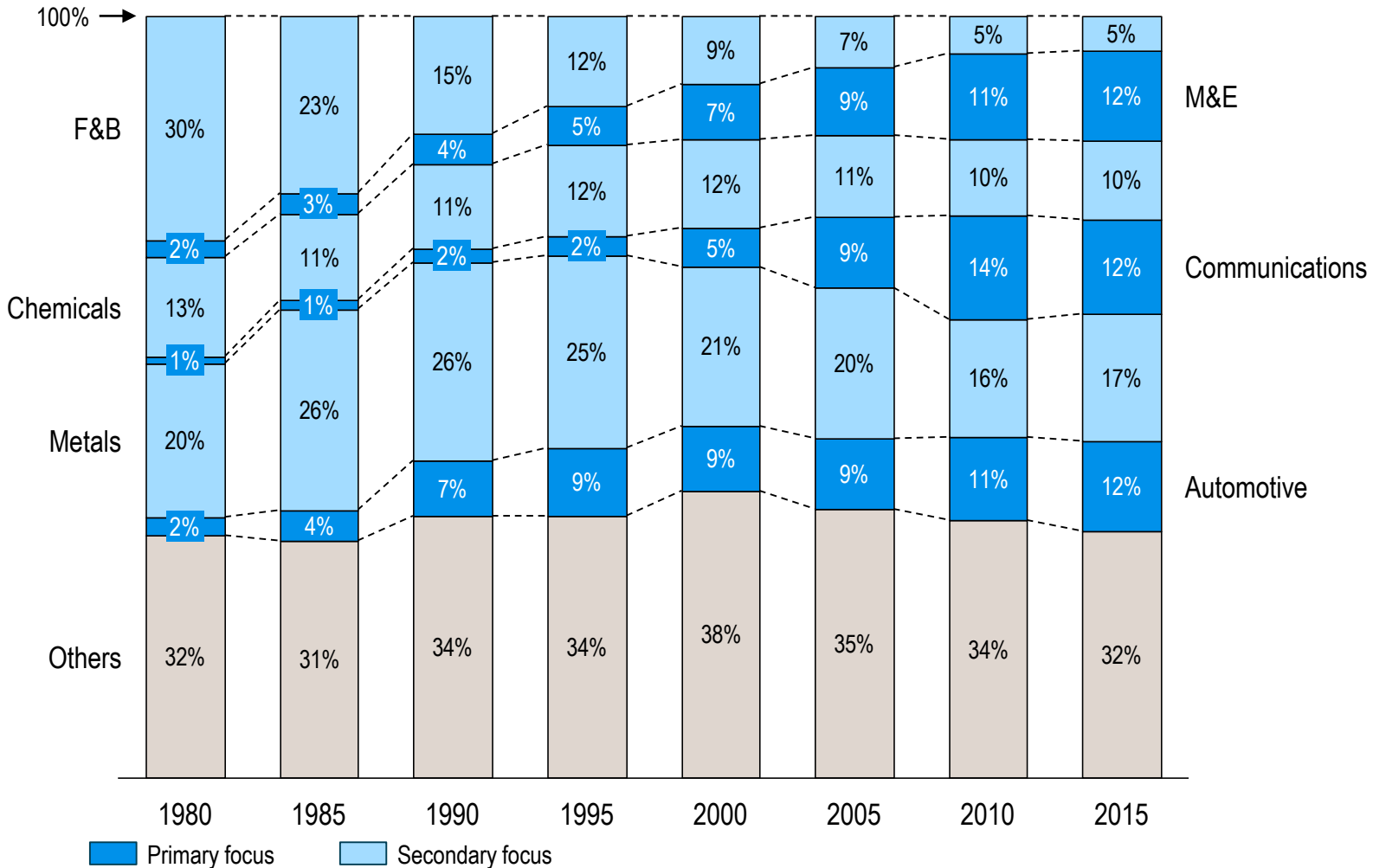
➤ DIS highlights

➤ 2016 performance

➤ Manufacturing journey ... what to expect?

Since its move away from resource intensive manufacturing post 1980s, Korea has been consistent in its focus sub-sectors

MVA breakdown of Korea 1980-2015 [%]

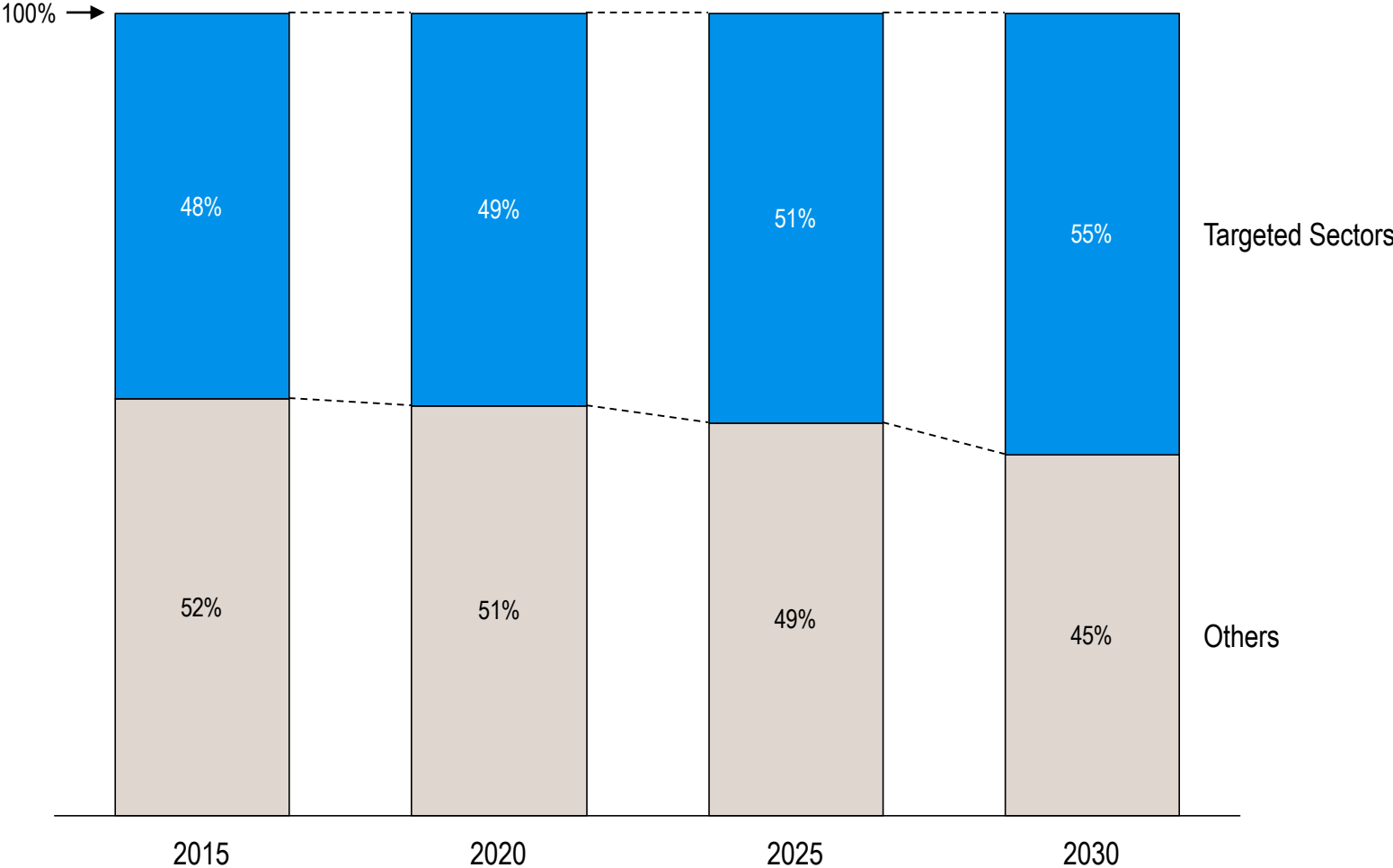


Comments

- > Korea focused on Light & resource based industries such as F&B until the 1980s
- > From 1980 until 1995 focus was on heavy industries such as machinery, chemicals and metals industries
- > Until from 1990-2015, Korea focused on advanced machinery, automotive and communications at the expense of heavier industries such as chemicals and metals

Targeted sectors are expected to increase their share in the manufacturing sector in Dubai

MVA breakdown of Dubai 2015-2030 [%]



Comments

- > Targeted sectors:
 - Aerospace
 - Maritime
 - Pharma
 - Metals
 - FMCG
 - M&E

خطة دبي DUBAI PLAN 2021

حكومة دبي
المجلس التنفيذي
GOVERNMENT OF DUBAI THE EXECUTIVE COUNCIL

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