



U.S.-U.A.E. Business Council
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Global Movements and Trade: Dubai as a Worldwide Logistics Conduit

*The Dubai Advantage—Dubai Delegation Goes
Virtual: Navigating the U.S.-Dubai Network in
Health Care and Logistics*

July 22, 2020



Welcome Remarks



U.S.-U.A.E. Business Council
usuaebusiness.org



Danny Sebright
President
U.S.-U.A.E. Business Council

Presenting Organizations



U.S.-U.A.E. Business Council
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Agenda

1. **Welcome Remarks** – Danny Sebright, President, U.S.-U.A.E. Business Council
2. **Seyfarth Shaw LLP** – Sai Pidatala, Senior Counsel
3. **Remarks by H.E. Eng. Saeed Almheiri**, Consul General of the UAE in Houston
4. **Dubai FDI** – H.E. Fahad Al Gergawi, CEO
5. **Dubai Exports** – H.E. Eng. Saed Al Awadi, CEO
6. **Dubai South** – Mohsen Ahmad, CEO, Logistics District
7. **Jebel Ali Free Zone (JAFZA)** – Faisal Jassem, Senior Manager, Sales
8. **Dubai Airport Freezone (DAFZA)** – Jamal Bin Marghoob, Senior Director, Sales
9. **The Dubai Advantage** – Al Hinton, Advisor, Dubai FDI
10. **Emirates SkyCargo** – Jens Engelbrechtsen, Freighter Commercial Manager - Americas
11. **Q&A**
12. **Closing Remarks**

Seyfarth Shaw LLP



Sai Pidatala
Senior Counsel
Seyfarth Shaw LLP

Remarks



**His Excellency Eng. Saeed
Almheiri**
Consul General of the UAE in
Houston

Dubai Investment Development Agency (Dubai FDI)



His Excellency Fahad Al Gergawi
CEO
Dubai FDI

Dubai Exports



His Excellency Eng. Saed Al Awadi
CEO
Dubai Exports

Dubai South



Mohsen Ahmad
CEO, Logistics District
Dubai South

EZDUBAI
E - C O M M E R C E Z O N E



Mohsen Ahmad - CEO - Logistics District

THE LOGISTICS INDUSTRY IN UAE



Value of sector is worth **AED 220**, to contribute **8%** of UAE economy by 2021



UAE logistics market is estimated to witness **increase of 5.8%** during the period of 2020-2025 in CAGR



UAE's strategic **geographical location & infrastructure** makes it an ideal supply and re-distribution gateway



Sector benefits from massive **infrastructure investment & Free Zones**



Digital players are increasing due to **technological integration**

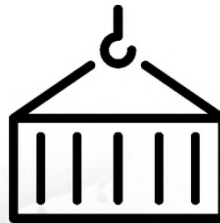
USA – UAE TRADE



The UAE has been the **largest export market** for the US in the **Middle East and North Africa** for the past **11 years**.

UAE trade and investment supports **116,000**

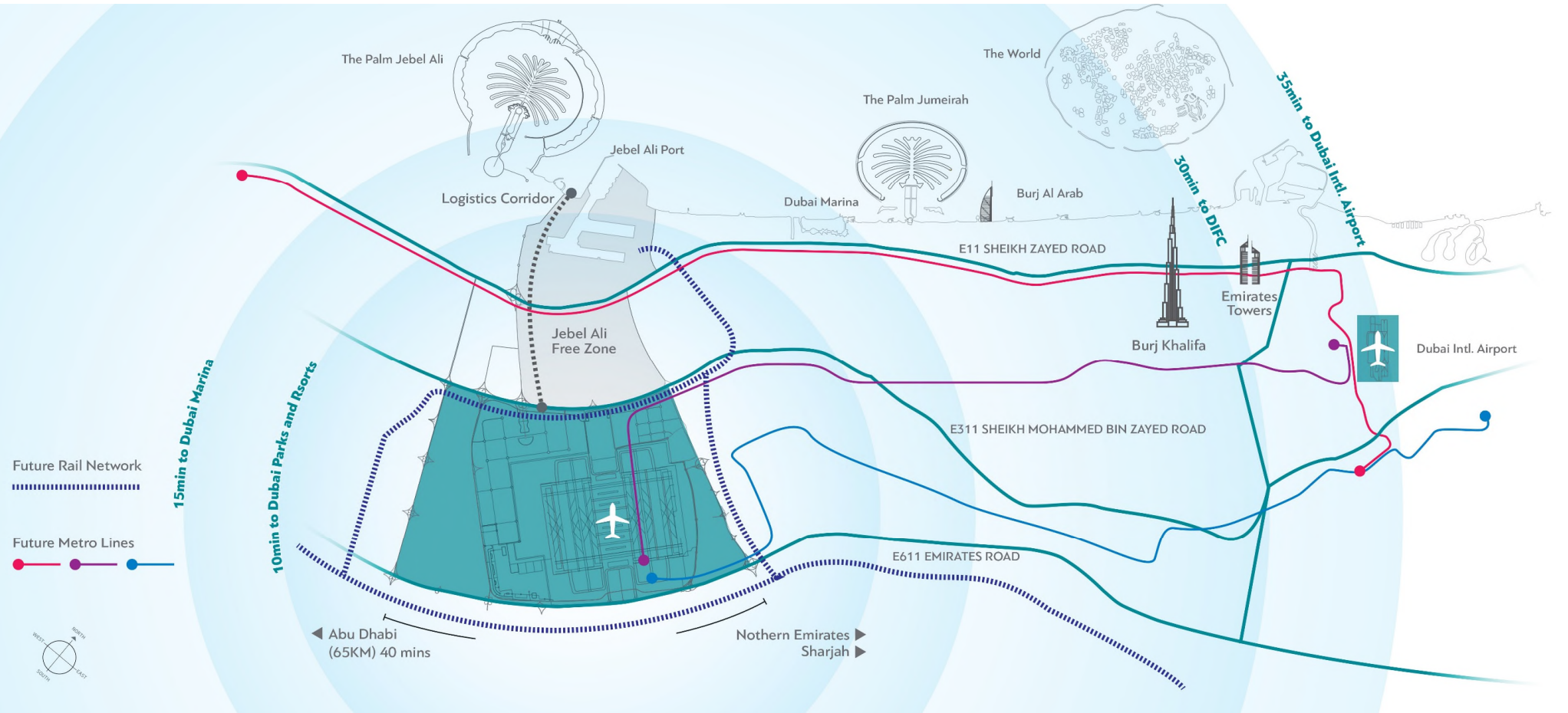
American jobs and it represents the United States largest export market in the MENA



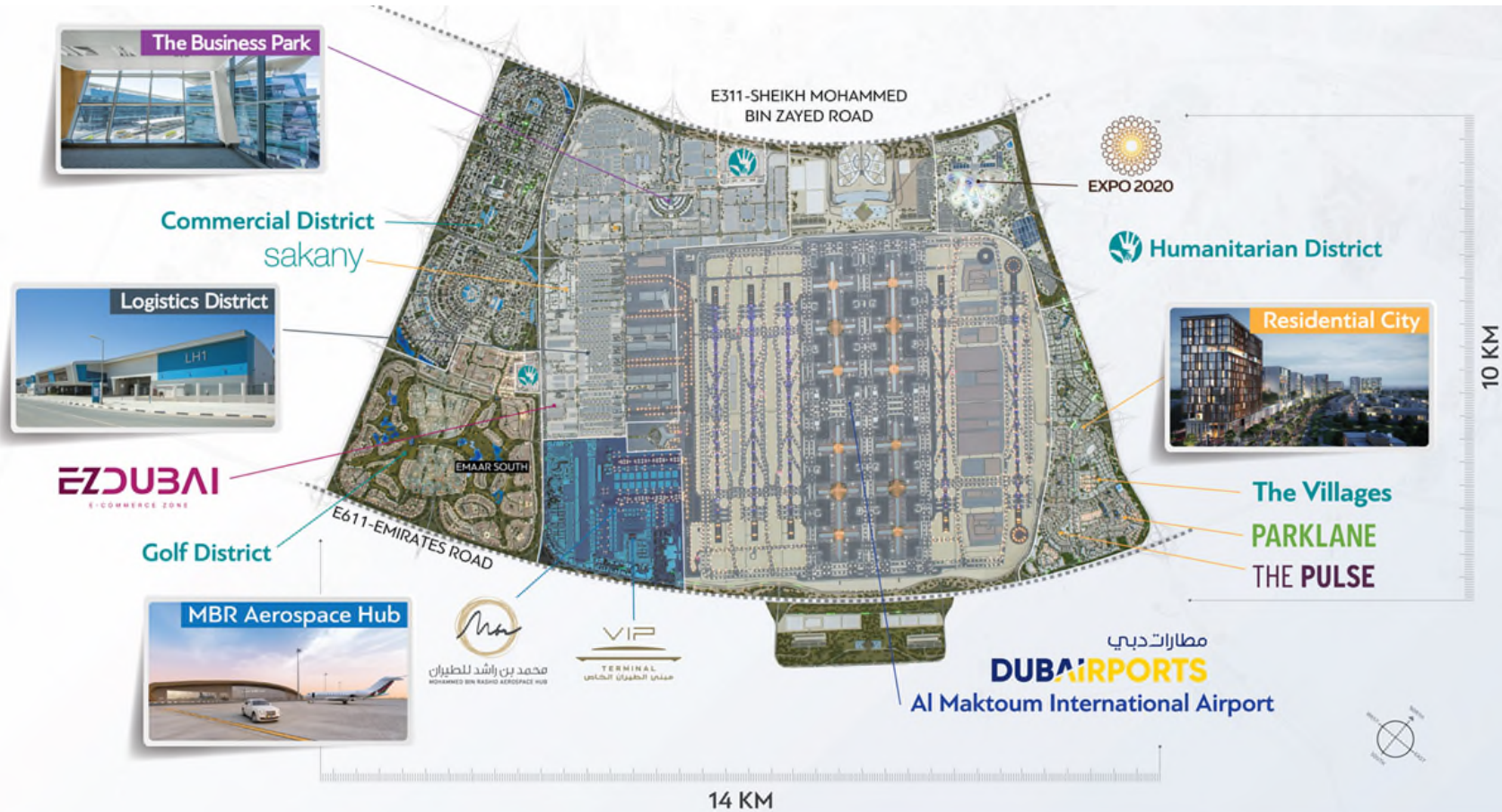
\$15.6 billion

US trade surplus with UAE in **2019**

STRATEGICALLY LOCATED WITHIN DUBAI



DUBAI SOUTH – MASTERPLAN



BUILDING A GLOBAL LOGISTICS HUB



Fashion



Life Sciences



Perishables



IT & Telecom



E-Commerce



Spare Parts

Core Sectors and Key Products:

- Designed for fast moving, high value logistics that require specialised solutions & authority interface
- Enable sea freight and airfreight by processing, packaging & distribution targeting 3 billion consumers





SEAMLESS CONNECTIVITY



**Moving cargo
in 4 hours**

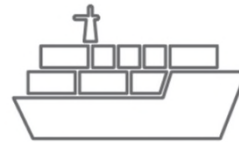


**Customs bonded dedicated
Logistics Corridor**



**Covering an area
of 200 km²**

WHY DUBAI SOUTH?



Land

Direct access to UAE's trans-emirates highways

Sea

Direct connection to Jebel Ali Port, one of the top ten largest container ports in the world
A dedicated bonded logistics corridor allowing 4 hours sea to air

Air

DWC Airport (AMIA) will allow 16 million tons of cargo pa

- Fenced designated Zone
- Scale & allows flexibility for growth
- 100% Foreign ownership and tax exemption
- Dual Solutions for E-Commerce

- Commercial, Industrial & airside plots to Lease
- Flexible Licensing

EZDUBAI

E - C O M M E R C E Z O N E

A development by

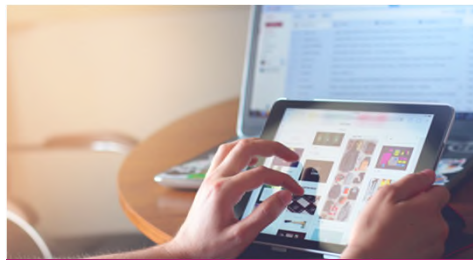


INTERNET PENETRATION IN THE UAE



 Internet penetration

9.73m
(98.98%)



 Time spent Online daily

7h 03m
Internet
2h 57m
Social Media



 Smartphone penetration

9.04m
(91.96%)



 Social media penetration

9.73m
(98.9%)

E-COMMERCE INSIGHTS DURING PANDEMIC

E-commerce Growth

50%
UAE

106%
Middle East

Increase in E-commerce transaction

63%
UAE

200%
Middle East



65% Business moved from Brick & Mortar to **Online**

43% increase of payment mode from **cash to credit**

* Reference Network Global, June 2020

UAE TOP E-COMMERCE SECTORS DURING PANDEMIC



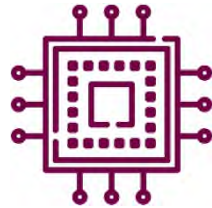
Supermarkets



Food & Beverages



Pharmacies



Electronics



Computer
& Software Services

POSITIONING DUBAI AS A KEY HUB FOR E-COMMERCE



PURPOSE BUILT
E-COMMERCE
CLUSTER

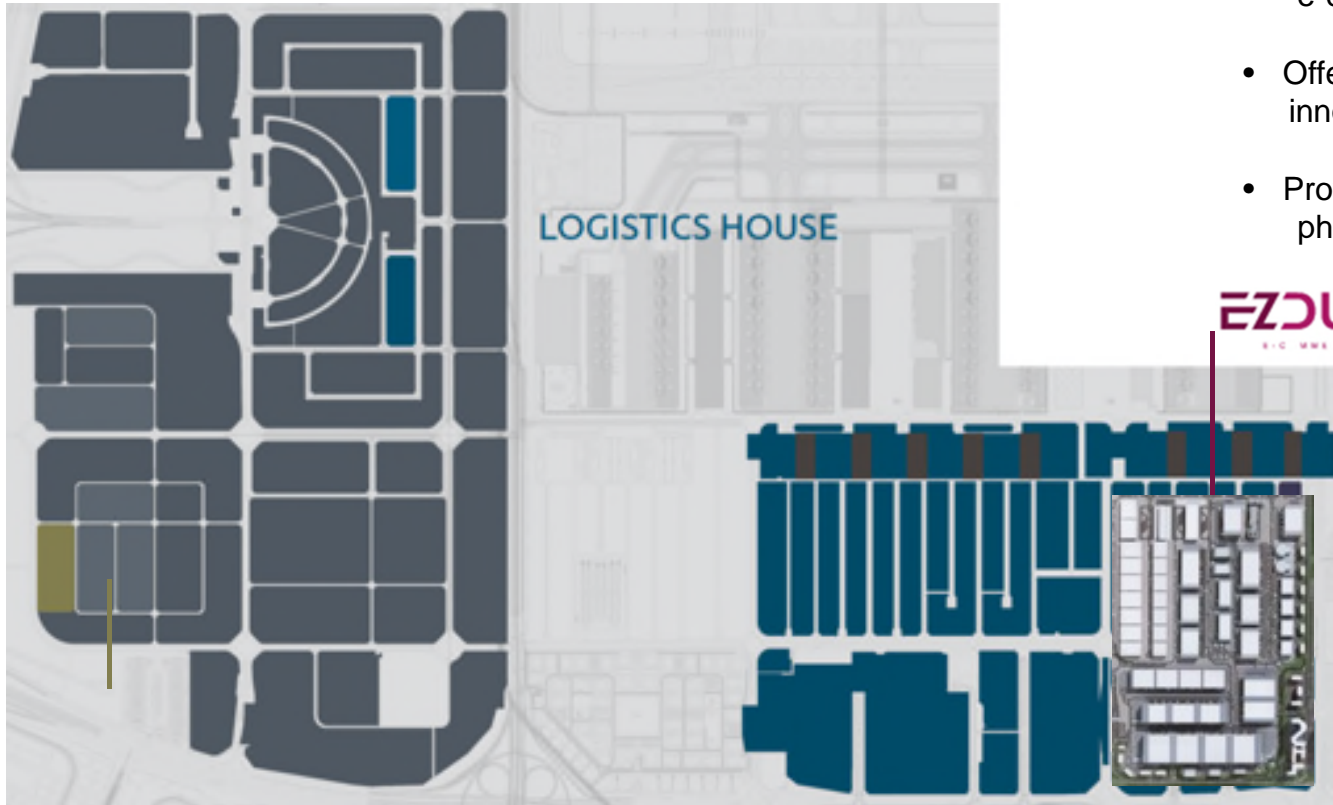
MULTIMODAL
LOGISTICS

COST
EFFICIENCY

SUSTAINABILITY

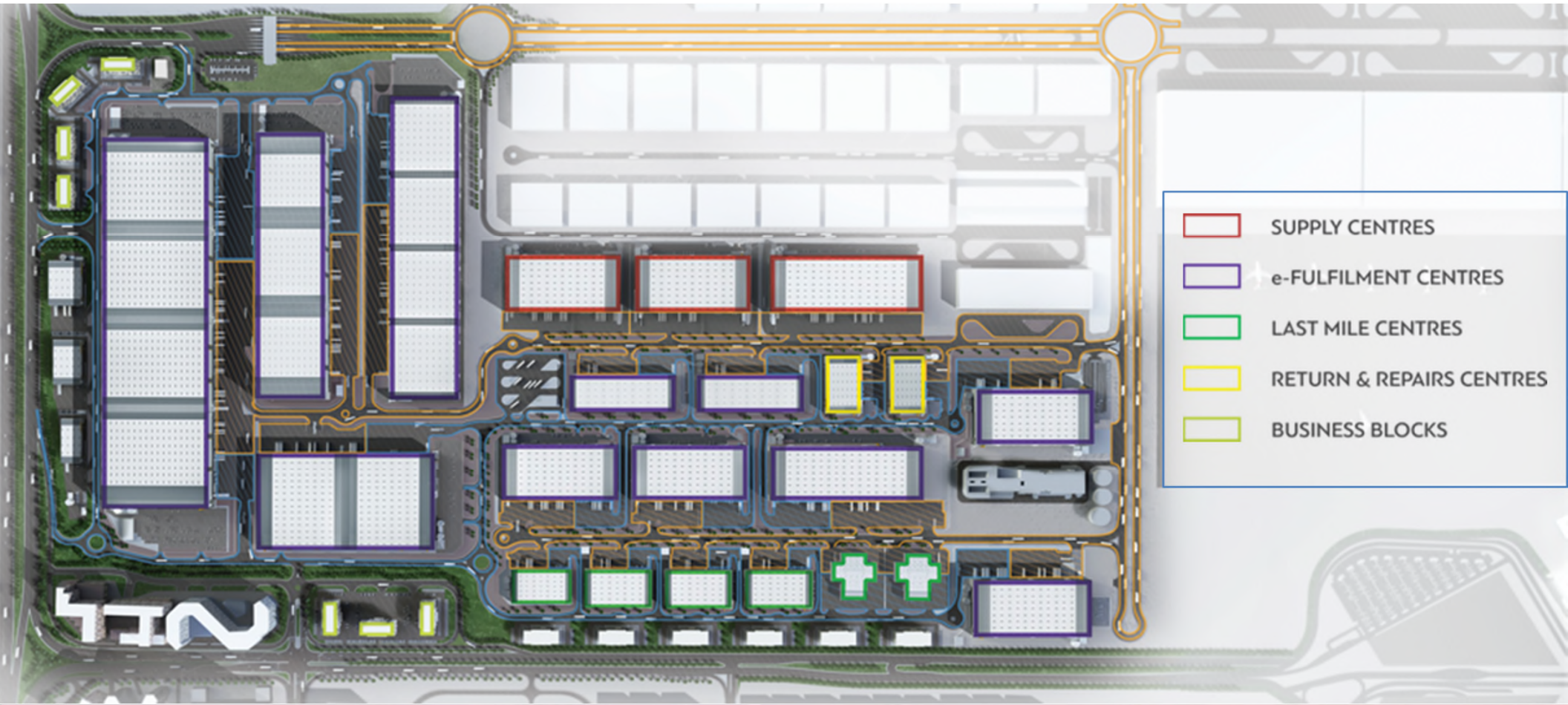
STREAMLINED
CUSTOMS &
LICENSING
PROCESSES

LOCATION

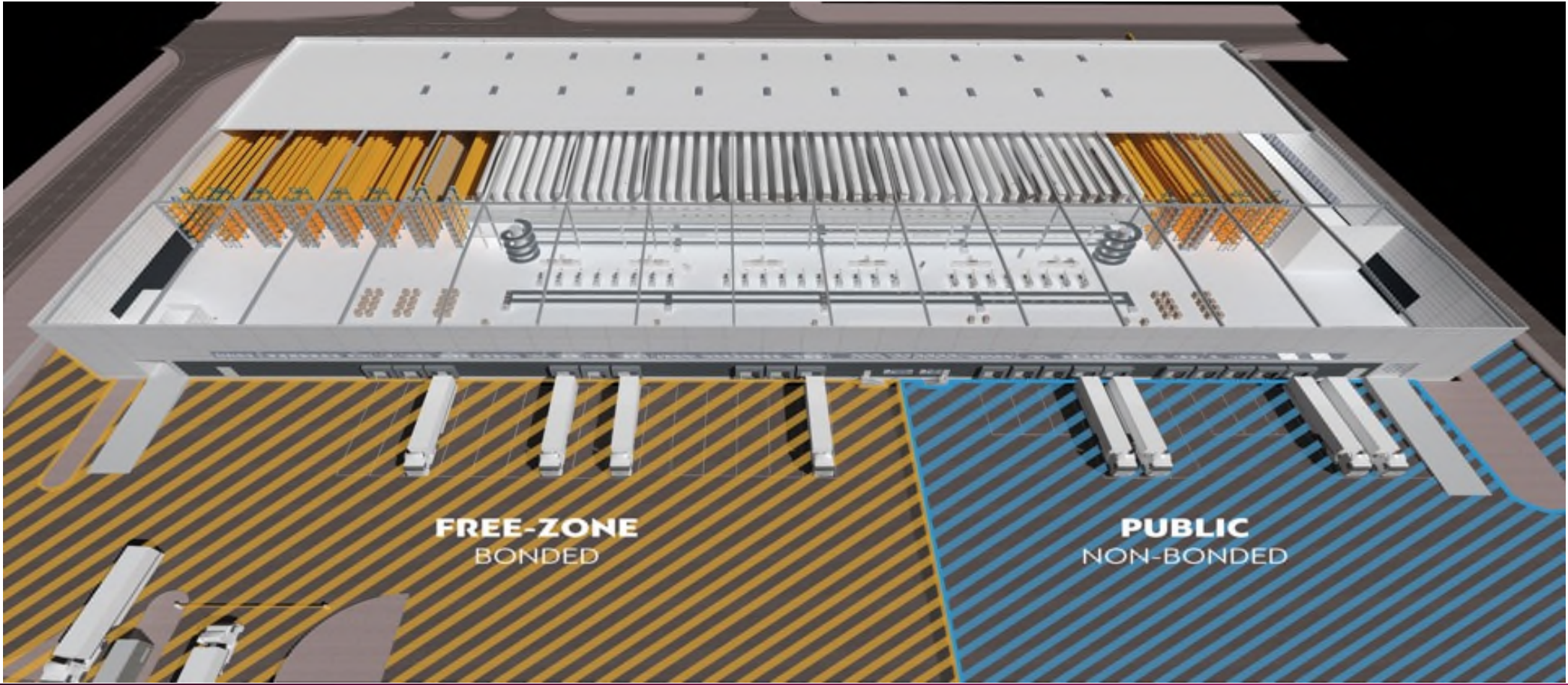


- EZDubai a purpose built e-Commerce zone for the e-commerce industry within the free zone.
- Offering designated solutions for startups, SME's, innovators and enablers.
- Providing products for anything starting from photo studios to complex data centres.

KEY COMPONENTS



TYPICAL INTERNAL LAYOUT



OUR TENANTS



Jebel Ali Free Zone (JAFZA)



Faisal Jassem
Senior Manager, Sales
JAFZA

موانئ دبي العالمية
DP WORLD

Jafza
المنطقة الحرة لجبل علي
Jebel Ali Free Zone

JAFZA - DP World UAE Region

Creating the Future, **Now.**

DP World - Overview



Our Global Footprint



- AUSTRALIA & AMERICAS**
Argentina, Australia, Brazil, Canada, Dominican Republic, Ecuador, Peru, Suriname, United States

- ASIA PACIFIC & INDIA**
China, India, Indonesia, Pakistan, Philippines, Vietnam, Thailand, South Korea

- MIDDLE EAST, EUROPE & AFRICA**
Algeria, Belgium, Cyprus, Djibouti, Egypt, France, Germany, Kurdistan, Kazakhstan, Mali, Mozambique, Netherlands, Romania, Rwanda, Saudi Arabia, Senegal, Somaliland, Spain, Turkey, United Arab Emirates, United Kingdom

78 Marine Terminals
In **40** countries

Handled **71.4** Mn TEU
(2018)

Employing **45,000** people
globally

UAE Region

Ports & Terminals	<ul style="list-style-type: none"> •Jebel Ali Port •Mina Rashid •Mina Al Hamriya
Parks & Zones	<ul style="list-style-type: none"> •Jebel Ali Free Zone (JAFZA) •Dubai Auto Zone (DAZ) •National Industrial Park (NIP)
Trade Enablement	<ul style="list-style-type: none"> •Dubai Trade •Smart Solution Logistics
Security	<ul style="list-style-type: none"> •World Security

Contributes 33.4% to Dubai's GDP

Infrastructure

Poly-functional capabilities
Multi-modal infrastructure
Bonded connection to Dubai Logistics Corridor/airport

Connectivity:

140 direct ports of call, 90 weekly services
Proximity to DWC
Extensive highway and road network

One-stop solution:

In house - port, terminal, harbour, marine services; integrated network of services for all government services and utility and development approvals

Geographical Coverage

Access to GCC, India Sub Con,
Africa and South Asia Markets

Gateway to the UAE: Largest
domestic market in the region

Potential Market Size
Over 3Bn People



HUB to the GCC and the Wider
region

Dubai is World's 3rd Largest Re-
Export market

Over
16,800 Km
of road
network

The region's
extensive highway
network enables goods
to flow smoothly to
regional markets
and beyond

Reaching all
GCC within
1 Day

DP World : Integrated Product Offering

One-stop platform for all transport, industrial and logistics solutions

Ports & Terminals

- Polyfunctional Port: Container, General Cargo, RORO, Liquid Bulk
- 22.1 Mn TEU capacity; Over 77 berths spread across 23 kms of quay
- Connected with multimodal transport

Handling sea trade with direct connection to over 180 global ports

Parks & Zones

- 4 Specialized industrial & logistics zones – JAFZA, NIP, Ducamz & Textile City
- 78 Mn sqm footprint employing hosting over 9,000 companies, employing over 155,000 people
- 100% foreign ownership, 0% personal & corporate taxes, no recruitment, currency & capital/profit repatriation restrictions.
- 101 Billion USD Trade (2019)

Plots, Warehouses, Offices, Business Parks, Customized solutions, On-Site Residences

Logistics

- Port-centric logistics facilities
- Dry and temperature controlled cargo handling & storage
- Full suite of CFS and warehousing facilities and services

Container Freight Station, Cool & Cold Stores, Trucking, Freight Forwarding, Customs Brokerage

JAFZA: Multimodal Connectivity

- JAFZA is ideally located alongside region's **largest deep sea port of Jebel Ali.**
- 40 Kms / 40 Mins from **Dubai International Airport** and 24 Kms / 30 Mins from **Al Maktoum International Airport.**
- **Etihad Rail** is planned to have a depot in the Jebel Ali which will provide **rail link** to GCC.
- Accessible from all major domestic and national **highways** (e.g. E11, E311, E611 etc.), seamlessly connecting JAFZA to other Emirates and neighbors.
- Connected to local transport network of **buses** and **Dubai Metro Red Line.**
- Adjacent to **Dubai Expo 2020 site.**



Sea Connectivity:
80+ Weekly services
140+ Direct ports of call
180+ Shipping lines



A dedicated sea-air
customs bonded
corridor, connecting a
sea-air box within 45
minutes of discharge



Connected to the main
UAE/GCC road network
– 2 to 3 days road
transit to anywhere in
the GCC.



Etihad Rail will have a
depot within Jebel Ali
facility, connecting UAE
to GCC



Jebel Ali Free Zone : A One-Stop Shop



Set up Options

- **Ease of set up – same day company set up**
- **100% Ownership**
- **International Re-Domicile provisions**
- **Registration of various legal types** (eg. Single shareholder/ Multi Shareholder/ LLC/ PLC)
- **Dual licensing provisions (Mainland / Free Zone)**

Integrated Service Offerings

Unprecedented partner and service level integration; covering all stages of the investor life cycle



Ease of Doing Business (Trade/Operations)



- Warehouses, LIUs, Showrooms, Offices, serviced offices, workstations, staff accommodation
- **Built-to-suit provisions**
- **Ability to finance property (mortgage)**
- **Tax-free business environment**
- **Visibility and transparency**
- **Modern logistics infrastructure**
- **Flexible leasing provisions (eg. sublease)**

- **Dubai Customs – Virtual Stock Guarantees**
- **Integrated Logistics corridor linking DWC/ Free Zone/ Jebel Ali Port**
- **Access to goods**
- **Network of buyers/sellers/decision makers**
- **Established and reputable regulatory/legal presence**
- **Double taxation / free trade agreements**



Logistics Capabilities

Industry Profile : Logistics

Trade

Jafza Presence

2019 TRADE

Volume
(Million MT)

2.6



Jafza

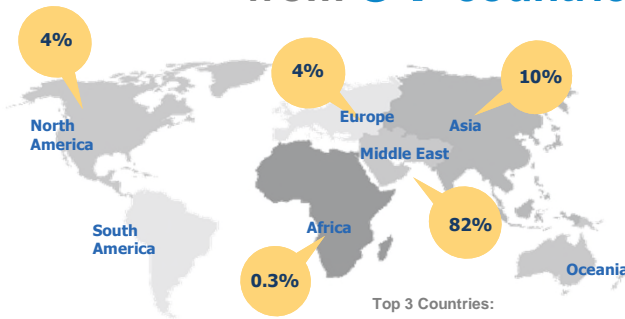
Value



(AED Billion)

67.6

390 FZ companies
from 31 countries



Top 3 Countries:
UAE (78%), India (5%), USA (3%)

EMPLOYMENT



16,000 Zone Employees

PRODUCTS



3.88 Million sqm
Combined Facilities

Plots
3.8 million sqm

Office/ Workstation
2,000 sqm

LIU/ Warehouse
75,500 sqm

KEY CUSTOMERS

13 out of the Top 20 Logistics Providers are in Jafza



Ports & Terminal: Highlights



Polyfunctional Terminals Can berth largest sailing ships or on order

Can handle any/all kinds of cargo - DG & Non-DG cargo, priority handling of perishables

Hub Solutions: Hubbing between terminals

Terminal Concessions: Dedicated facilities

Modal Conversion of cargo from container to general cargo and vice versa

Warehousing and storage within terminal areas

Connectivity to 150+ global destinations

Jebel Ali Port : Connectivity



Network of 80 weekly shipping services connecting to 150+ global ports
60 weekly connections to Middle East and ISC
About 11,000 vessel calls/annum

14.1 Mn TEU (2019)



World's busiest passenger airport; 3rd largest freight hub, connecting to over 260 global destinations
Total capacity nearly 2.8 MMT.
Al Maktoum International Airport linked to Jebel Ali Port with a dedicated customs bonded corridor

2.6 MMT air cargo handled (2018)



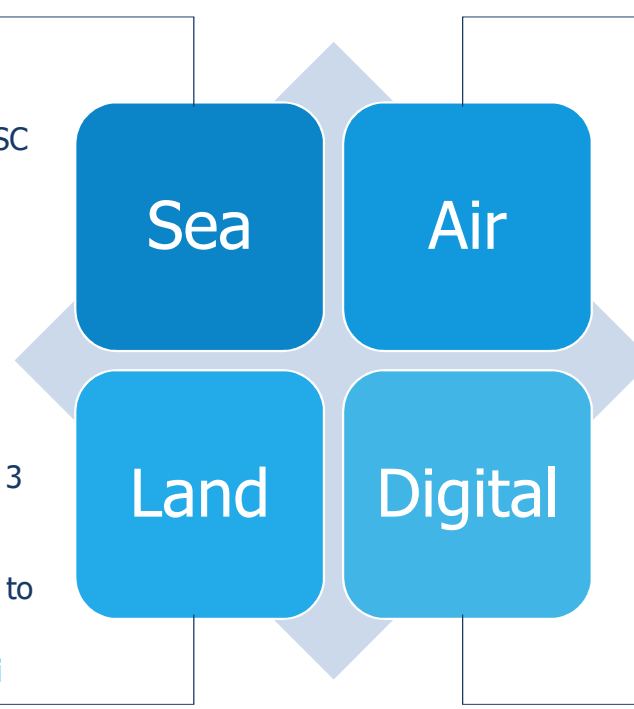
Connected to UAE/GCC Road network – 2 to 3 days road transit to anywhere in the GCC.
Over 16,000 km of roadway across the GCC.
Etihad Rail, under construction, will link UAE to the rest of the GCC.

15 MMT (2018) traded by land in Dubai



Dubai trade - digital single window eplatform connecting all supply chain enablers and customers

>950 services; 98.5% adoption rate
21.5 Mn transactions recorded annually



Smart Solution Logistics

Trade Enablement



Container Freight Station

Area	134,000 sqm
Covered Storage area	11,900 sqm
Racked Area	4,981 ISO pallets
Open Storage area	122,000 sqm; 1200 TEU



Cool Store

Total floor area	3,900 sqm
Capacity	3,336 pallets / 3.336 tons
Chambers	3
Temperature	+10°C to +20°C



Cold Store

Total floor area	5,764 sqm
Capacity	5,778 pallets / 7000 tons
Chambers	9 + 1
Temperature	-29°C to +13°C

Digital Smart Trade at Jebel Ali

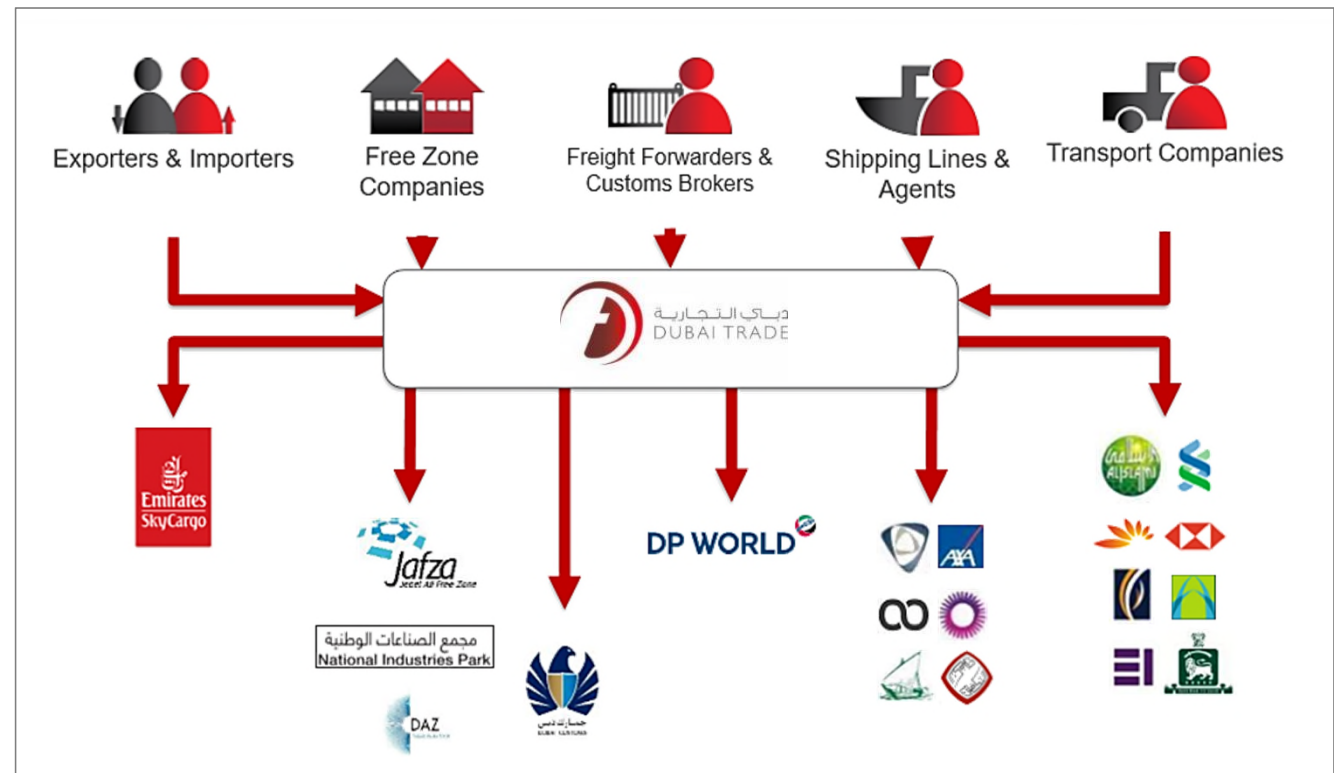


Efficient digital communication between all players in and around the port and our customer's supply chain

950+ services
180K+ registered companies
240K+ users
21.5 Mn annual transactions

Enabled **\$40 Bn savings to trade** over the years since inception in 2012. Efficiencies have increased since then.

Enable **50% reduction in time** to import/export (ease of doing business)





Jebel Ali Port / Jafza - USA

July 2020

Creating the Future, **Now.**

JA Port / Dubai / UAE – USA Trade



Port Volumes & Key Commodities

Port Volumes Handled

	FY 2017	FY 2018	FY 2019
Export (TEU)	44,611	45,318	44,283
Import (TEU)	182,581	187,961	211,620



Port Customers Supported (2019)



Top Import Origin



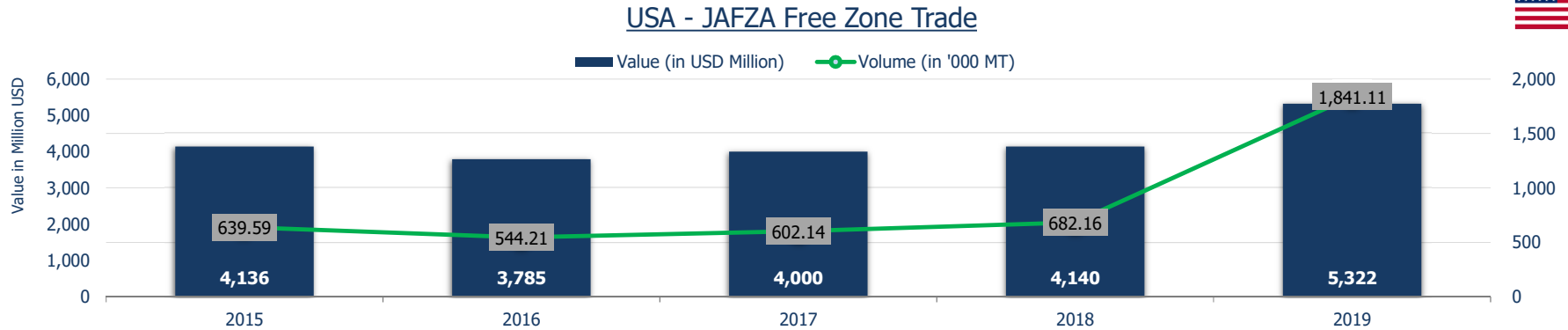
Top Export Destination

Dubai Trade 2019	MT	Value (\$ M)
Import	2,999,087	16,325
Export	540,532	4,825
Total	3,539,620	21,150

UAE Trade 2019	Value (\$ M)
Import	19,909
Export	6,386
Total	26,295

Top Traded Commodities	
Imports	Exports
1 Vehicles & Parts	1 Aluminium
2 Animal Feed	2 Construction material
3 Foodstuff	3 Glass
4 Vegetables, Fruits & Nuts	4 Vehicles & Parts
5 Polymers & plastics	5 Electrical & Machinery

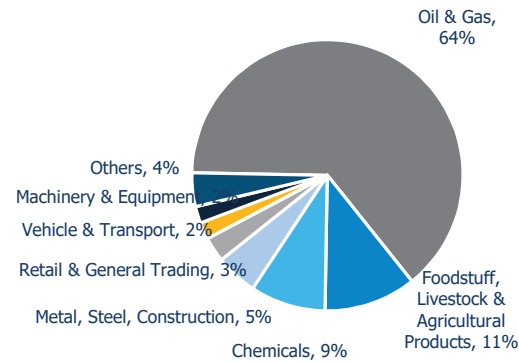
USA – JAFZA FZ Trade Snapshot



USA- JAFZA Highlights

386	No. of American Companies in JAFZA
13,970	No. of Employees
5th	Rank - Free Zone Trade Value at JAFZA
8th	Rank - Free Zone Trade Volume at JAFZA

Key Segments of JAFZA Trade



Key Commodities of JAFZA Trade

<i>Petroleum oils</i>
<i>Denatured ethyl alcohol</i>
<i>E-A-O copolymers</i>
<i>Tubes, pipes, hollow profile of iron / steel</i>
<i>Fuel for engines (excluding plane engines)</i>

DP World Trade Bridges

Integrated service offering from DP World UAE and partner countries to enhance trade flows, enable profitable investments, and optimize global supply chains.



Nurture bilateral trade

Drive cross-border investments

Facilitate access to larger markets, wider consumer base

Contribute to greater economic cooperation

Reduce barriers to trade

موانئ دبي العالمية
DP WORLD

Jafza
المنطقة الحرة لجبل علي
Jebel Ali Free Zone

Thank you

Creating the Future, **Now.**

Dubai Airport Freezone (DAFZA)



Jamal Bin Marghoob
Senior Director, Sales
DAFZA

DUBAI
IRPC Dubai
FREI Airport
Freezone
Free to grow



One-Stop Shop





INDUSTRIES IN DAFZA ACROSS VARIOUS SECTORS

More than 1600 regional and global companies

28%
ICT and
electronics

10%
Consumer
products

8%
Freight, logistics,
aerospace, and
related services

9%
Investment, business
development,
engineering, and
building materials

7%
Food and
beverage sector

5%
Medical
equipment and
pharmaceutical

DAFZA IS HOME TO

Aerospace & Aviation



IT & Telecommunication



Food & Beverages



Oil & Gas



Automobiles



Pharmaceuticals and Medical



Engineering & Building Materials



Engines & Machines



Cosmetics, Perfumes & Luxury Items



TYPES OF LICENSES



Trading License

Allows the holder to import, export, distribute, and store items specified in the license

1

Service License

Allows the holder to carry out services specified in the license

2

E-Commerce

Allow the holder to carry out trading of goods and services over electronic network using electronic means

3

Industrial License

Entitles the holder to carry manufacturing, light industrial activities, packaging, and assembling

4

General Trading License

Entitles the holder to import, export, re-export, store, distribute, and trade in general

5

Packages

Customized office solutions

- Minimum space of 25 sqm
- Offices equipped with carpeting, wall paper, false ceiling and window shades
- 2 visas



Office Packages

- Premium Package
- Premium Plus Package



Business Desk Office Package

- Fully equipped and furnished desk space with all amenities
- Free zone license
- Dubai registered P.O. Box



Lights Industrial Units

- Spacious warehouse spaces that are thermally insulated
- Offices on ground and mezzanine floors
- Minimum leased area is 340 sqm
- 20 visas





The Freezone companies are our partners, and we work to ensure their business continuity through economic incentive packages.

HH Sheikh Ahmed bin Saeed Al Maktoum

DAFZA launched a set of economic incentive packages to help companies based in the free zone to overcome the challenges caused by the spread of COVID-19, with the aim to provide them business continuity and the flexibility to mitigate the impact of the current economic situation across various sectors.



Exempting retailers from lease payments up to three months



Postponing lease payments for up to three months



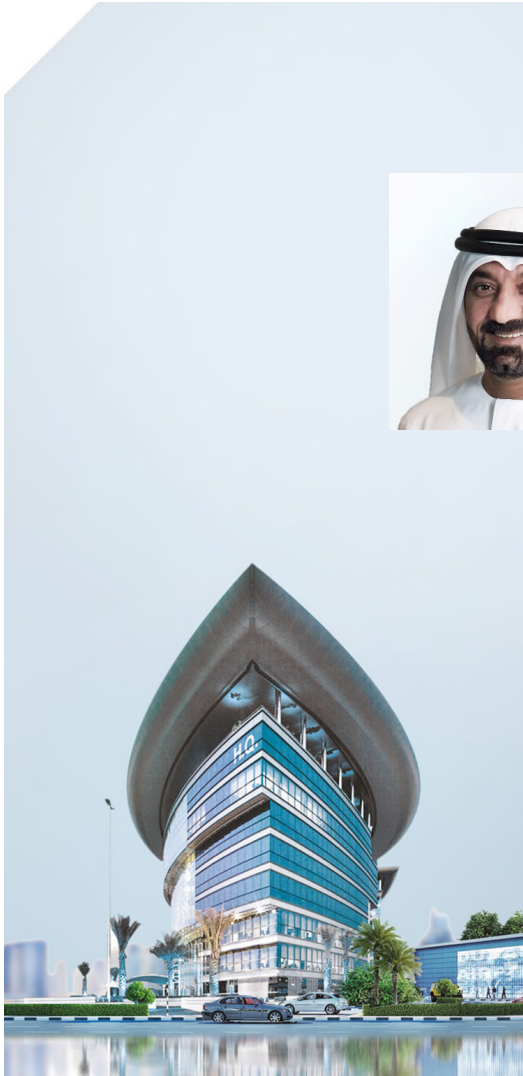
Facilitating the financial payments into easier monthly instalments



Cancelling companies' fines



Refunding security deposits on leased spaces and refunding labour guarantees to companies





REGISTER NOW & SAVE MORE

LOWEST PRICES EVER

50%
OFF

Smart desk

30%
OFF

Light
Industrial Unit

20%
OFF

Office space
& packages

Flexible
payment
options

THANK
YOU

The Dubai Advantage



Al Hinton
Advisor
Dubai FDI

DUBAI ADVANTAGE

Where Global Investors &
Entrepreneurs
Shape The Future

BROUGHT TO YOU BY

مؤسسة دبي
لتنمية الاستثمار
DUBAI FDI



Last Updated: June 16, 2020



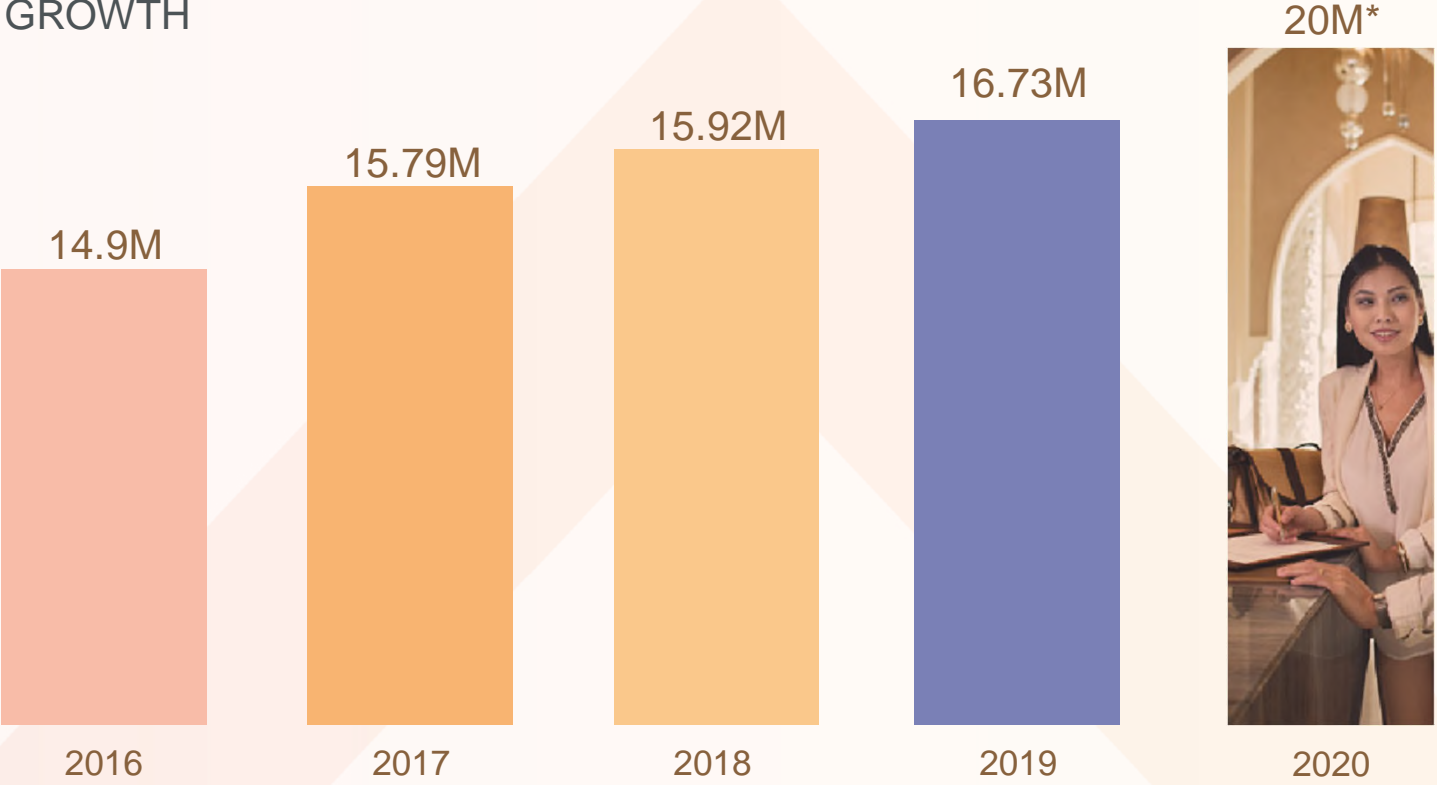
DUBAITHECITY

ECONOMIC DIVERSITY



OPPORTUNITIES | TOURISM AND HOSPITALITY

DUBAI VISITOR GROWTH



* Target growth



DUBAI THE GATEWAY

DUBAI OCCUPIES A UNIQUE LOCATION IN THE WORLD

2.4

**BILLION CONSUMERS
DIRECT MARKET IN
MIDDLE EAST, INDIAN SUB
CONTINENT, AND EAST
AFRICA**



OPPORTUNITIES | AVIATION AND CONNECTIVITY



3.4M

TONNES AIRFREIGHT
MOVED THROUGH
DXB AND DWC
IN 2019



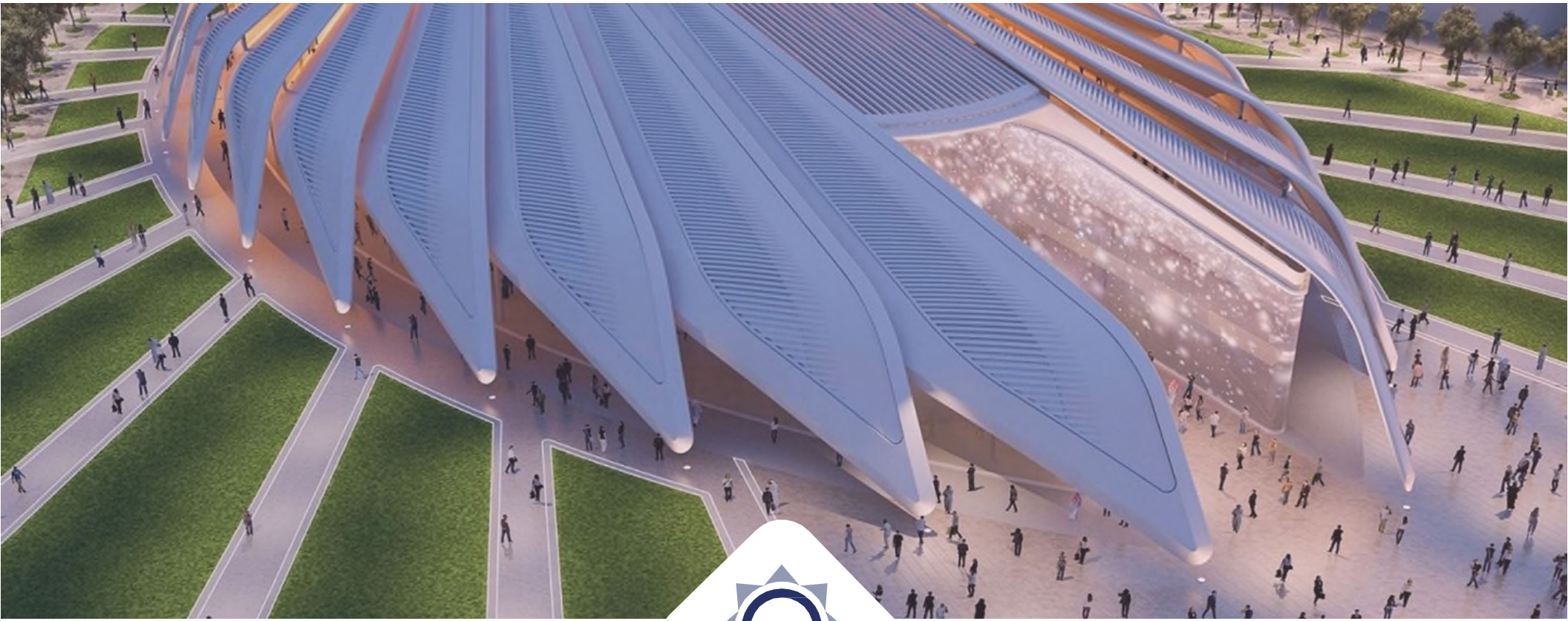
140

AIRLINES DIRECTLY
CONNECTING DUBAI
TO 260 DESTINATIONS



+8,000

WEEKLY FLIGHTS
THROUGH
DUBAI AIRPORT



DUBAITHEHUB

EXPO 2020 DUBAI



EXPO 2020 DUBAI

01 OCTOBER 2021
THROUGH 31 MARCH 2022

1

FIRST TIME

WORLD EXPO TO BE
HOSTED IN MEASA
REGION



25M

VISITS EXPECTED TO THE
EVENT, 70% TO BE
INTERNATIONAL



THEME

‘CONNECTING MINDS
CREATING THE
FUTURE’



SUB-THEMES

MOBILITY SUSTAINABILITY
OPPORTUNITY

INFRASTRUCTURE



INFRASTRUCTURE

DUBAI'S INFRASTRUCTURE IS NEW,
MODERN, AND GROWING ALL THE TIME



Dh 100B

DUBAI HAS INVESTED DHS 100B
ON ROADS AND TRANSPORT
INFRASTRUCTURE



594M

PUBLIC TRANSPORT
PASSENGERS IN 2019



74.6 KM

LONGEST DRIVERLESS
METRO IN THE WORLD,
WITH 421KM PLANNED FOR
2030



3RD

ATTRACTIVE INVESTMENT
DESTINATION FOR
INFRASTRUCTURE
INVESTORS

INFRASTRUCTURE



PUBLIC TRANSPORT SERVICES IN DUBAI

594M

RIDERS USED PUBLIC, SHARED
TRANSPORT, AND TAXIS IN 2019,
COMPARED TO 589M RIDERS IN 2018



47.8M

METRO & TRAM
PASSENGERS
IN Q1 2020



179.8M

PASSENGERS
(DUBAI TAXI, HALA
TAXI, AND
FRANCHISE TAXI IN
2019



34.8M

PUBLIC BUS
PASSENGERS
IN Q1 2020

EDUCATED, HEALTHY, INNOVATIVE, AND HAPPY INDIVIDUALS



A SECURE,
CULTURAL, AND
ENTERTAINING
PLACE TO LIVE



PROACTIVE,
TRANSPARENT,
RELIABLE, AND
INNOVATIVE
GOVERNMENT



A SMART,
SUSTAINABLE, AND
HEALTHY LIVING
ENVIRONMENT



PRO-BUSINESS
PREFERRED
INVESTMENT
DESTINATION

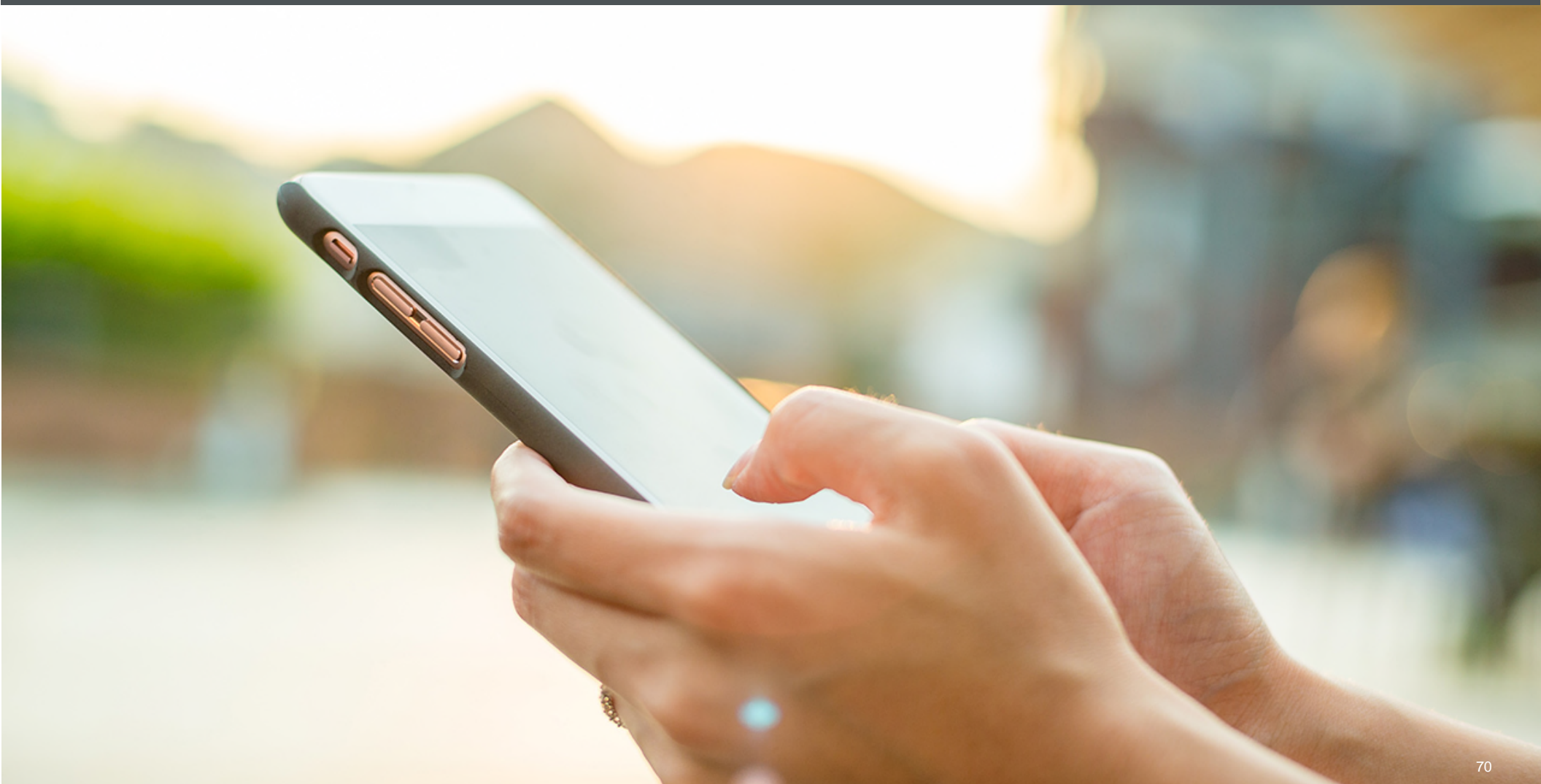


A VIBRANT, TOLERANT
AND INCLUSIVE
MULTICULTURAL
SOCIETY



OFFERING
SUSTAINABLE
ECONOMIC GROWTH

SMART CITY



TO MAKE DUBAI
THE HAPPIEST CITY ON
EARTH



100

INITIATIVES
LAUNCHED
IN 2014



100%

OF GOVERNMENT
TRANSACTIONS WILL
BE PAPER-FREE BY
2021

DUBAI
BLOCKCHAIN
STRATEGY

ELIMINATES
100 MILLION ANNUAL
PAPER TRANSACTIONS
SAVING \$1.5 BILLION
ANNUALLY IN DOCUMENT
PROCESSING ALONE

THE WORLD'S FIRST-EVER
GOVERNMENT TO EXECUTE
ALL APPLICABLE
TRANSACTIONS USING
BLOCKCHAIN TECHNOLOGY
IN 2020

STRATEGY GOAL
DUBAI WILL BE THE FIRST
BLOCKCHAIN POWERED
GOVERNMENT
DRIVING THE FUTURE
ECONOMY

OPPORTUNITIES | INFORMATION TECHNOLOGY



2.3M

FIXED LINES IN ICT INFRASTRUCTURE IN FEBRUARY 2020



18.2M

ACTIVE MOBILE SUBSCRIPTIONS IN FEBRUARY 2020



\$4.8B

IN TECHNOLOGY IOT (INTERNET OF THINGS) CONTRIBUTE TO DUBAI'S ECONOMY IN 2020

OPEN DATA LAW

ENACTED IN 2015 TO IMPROVE ACCESSIBILITY OF DATA AND ENCOURAGE INNOVATION AND ENTREPRENEURSHIP IN SMART SERVICES

FORWARD | ARTIFICIAL INTELLIGENCE

AI TO ADD \$182B
TO UAE ECONOMY BY 2035

\$37B

FINANCIAL SERVICE
SECTOR

\$22B

HEALTHCARE
SECTOR

\$19B

TRANSPORT STORAGE
SEGMENTS

ARTIFICIAL INTELLIGENCE
WILL IMPACT 15 SECTORS
IN THE UAE

\$8B

CONSTRUCTION
SECTOR

\$6B

EDUCATION
SECTOR

FEDERAL SCIENCE, TECHNOLOGY, AND INNOVATION POLICY

TARGETING 40% INCREASE
IN KNOWLEDGE WORKERS BY 2021

\$5.5B
SPACE SECTOR
INVESTMENT

\$1.6B
INNOVATION
INCUBATORS

\$1.6B
ACADEMIC RESEARCH
CENTERS

\$11B
AVIATION R&D AND
MANUFACTURING



\$8.5B
R&D IN PRIORITY
SECTOR

\$34B
CLEAN ENERGY
PROJECTS

\$20B
RENEWABLE
ENERGY

RETAIL



OPPORTUNITIES | RETAIL

DUBAI FIRST FOR INTERNATIONAL RETAILER PRESENCE



SQM 7.17M

LEASABLE AREA AS
CURRENT SUPPLY
OF RETAIL SPACE
BY 2018



NO.1

DUBAI IS RANKED THE
MOST IMPORTANT
INTERNATIONAL
SHOPPING DESTINATION
GLOBALLY

BY CBRE 2018



59

NEW GLOBAL
BRANDS
ATTRACTED TO
DUBAI

IN 2017

MANUFACTURING



OPPORTUNITIES | MANUFACTURING

\$19.04B

BANK CREDIT TO
UAE'S INDUSTRIAL
SECTOR, 190%
GROWTH
OVER 10 YEARS

TARGETS TO BECOME
A GLOBAL PLATFORM
FOR KNOWLEDGE-
BASED, SUSTAINABLE,
AND INNOVATIVE
INDUSTRIES

OPPORTUNITIES | MANUFACTURING

SIX INDUSTRIAL SECTORS
ARE TARGETED FOR DUBAI



AEROSPACE



MARITIME



PHARMACEUTICALS
& MEDICAL EQUIPMENT



ALUMINIUM & FABRICATED METALS



FAST MOVING CONSUMABLE GOODS



MACHINERY AND EQUIPMENT

OPPORTUNITIES | MANUFACTURING

DUBAI INDUSTRIAL STRATEGY 2030

GROWTH ENGINE

AIMS TO INCREASE
TOTAL GDP AND
VALUE-ADDED OF THE
MANUFACTURING
SECTOR

HOME FOR GLOBAL BUSINESS

MAKE DUBAI A
PREFERRED
MANUFACTURING
PLATFORM FOR GLOBAL
BUSINESSES

ENVIRONMENTALLY SUSTAINABLE

TO PROMOTE
ENVIRONMENTALLY-
FRIENDLY AND
ENERGY EFFICIENT
MANUFACTURING

OPPORTUNITIES | MANUFACTURING

GDP GENERATED AT
CONSTANT
PRICES BY MANUFACTURING



HEALTHCARE



OPPORTUNITIES | HEALTHCARE

DUBAI HAS MANDATED EXTENSIVE
HEALTHCARE INSURANCE
FOR ALL RESIDENTS

\$19.48B

THE UAE'S
HEALTHCARE
MARKET IS
EXPECTED TO
REACH IN 2020

ALPEN CAPITAL CONSULTING
SERVICES

SECTOR VALUE
OF UAE MARKET
IS EXPECTED
TO BE \$28
BILLION
BY 2021

**HIGH PRIORITY
INVESTMENT
OPPORTUNITIES**

IN INNOVATIONS IN
PRIMARY CARE,
AMBULATORY CARE,
URGENT CARE CLINICS,
MENTAL HEALTH,
REHABILITATION,
AND LONG-TERM CARE

OPPORTUNITIES | HEALTHCARE

NUMBERS OF MEDICAL TOURISTS (INTERNATIONAL)

135,000

2014

326,649

2016

337,011

2018

500,000

2020

DUBAI MEDICAL TOURISM STRATEGY
2017-2021

VISION

TO POSITION DUBAI AS A
GLOBALLY RECOGNIZED
DESTINATION FOR
ELECTIVE HEALTH AND
WELLNESS TREATMENTS

Dh 2.6BN

TARGET REVENUE
FROM MEDICAL TOURISM
IN 2020

MISSION

TO DEVELOP AND SUPPORT
EXCELLENCE IN HEALTHCARE IN
DUBAI BY DEVELOPING AND
IMPLEMENTING PLANS, POLICIES,
AND LEGISLATIONS THAT
ENCOURAGE INVESTMENT AND
IMPROVE QUALITY IN THE
HEALTHCARE SECTOR TO
PROMOTE MEDICAL TOURISM IN
IDENTIFIED REGIONS THROUGH
COLLABORATIVE EFFORTS
WITH STAKEHOLDERS



Thank You

Emirates SkyCargo



Jens Engelbrechtsen
Freighter Commercial Manager -
Americas
Emirates SkyCargo

Emirates SkyCargo – Air Bridge to the World



Jens Engelbrechtsen
Freighter Commercial Manager - Americas
22nd July 2020

FLY BETTER

Our early days...



Our history in brief...

- Launched first flight on 25 October 1985
- Started with two wet-leased aircraft - an Airbus A300 and a Boeing 737-300
- Connected the UAE to India and Pakistan
- Bought first fully-owned aircraft, a Boeing 727, within the year

Today...

- One of the world's fastest growing airlines
- Fleet of 269 Airbus A380 and Boeing 777 aircraft fly to 157 destinations
- Largest by international Revenue Passenger Kilometres (RPK)
- Part of the Emirates Group – includes dnata and joint ventures

We move cargo faster with our ultra-modern wide-bodied fleet

115 AIRBUS 380-800



133 BOEING 777-300ER



11 BOEING 777F



10 BOEING 777-200LR



Our HUB and geographical importance

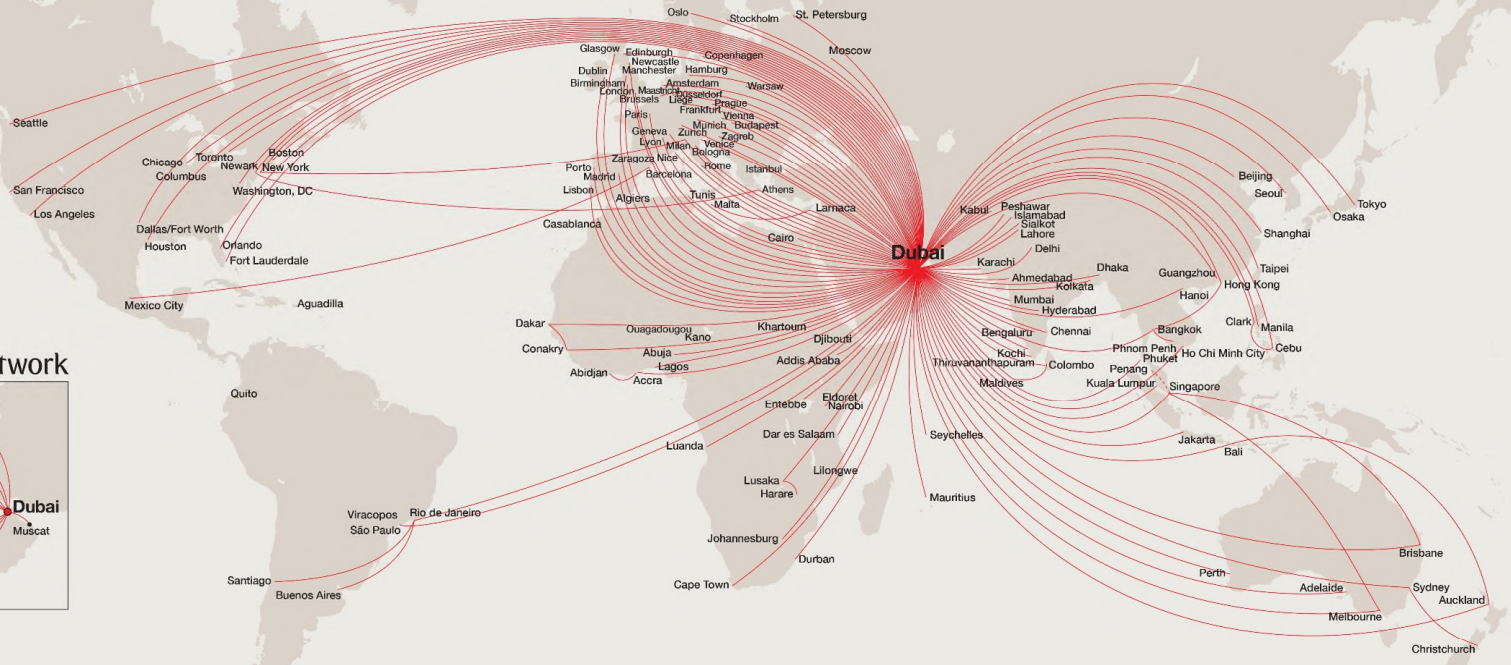


It's not all about geography... Dubai has a lot more to offer

- Political and economic stability
- Open Skies
- Extensive foreign trade network
- State-of-the-art telecommunications
- Business friendly environment
- World-class tourist and business destination
- Close co-ordination amongst government and commercial stakeholders

Emirates network FY 2019-20 (pre-COVID-19)

157 destinations in 83 countries



Middle East Network



Route Map

March 2020

- Passenger Routes
- Freighter Routes
- Passenger & Freighter Routes
- Upcoming Passenger Route

Our HUB strengths

- Global network, high-frequency services
- Hub structure, connecting over 9,000 logical city pairs
- Safety at the core of our organisation
- Network diversity
- All wide-body + FRTR fleet (Enabling Belly-hold + PAX cabin & MD capacity)
- Maximum asset utilisation
- Innovative 'value for money' product
- 24/7 active HUB operations

Our Dubai Hub



 **REAL TIME TRACKING**

 **GEO FENCED**

 **POLICE SECURE MONITORING**

 **QUICK RAMP TRANSFER & WAREHOUSE TRANSFERS**

 **CENTRALISED SCREENING AND INTEGRATED POLICE FACILITY**

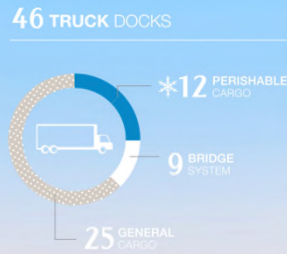
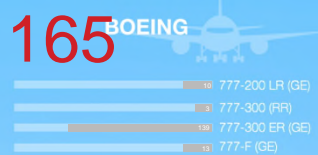
 **24/7 OPERATION**

 **600 STAFF**

 **40 AIRSIDE GATES**

Emirates SkyCentral (DXB) – Facts and Figures

Dubai International Airport, Dubai
FACTS AND FIGURES



GENERAL CARGO FACILITY



2 MILLION TONNES*

* ANNUAL CARGO HANDLING CAPACITY AREA

TEMPERATURE CONTROLLED ZONES



175k TONNES ANNUAL THROUGHPUT

UNIT LOADING DEVICES
2488



SPECIAL CARGO STORAGE

6 ULD EXIT AIRSIDE GATES
52 LOWER DECK COOL DOLLIES
51 MAIN DECK

CUSTOMS AND POLICE
REAL-TIME MONITORING

CENTRALISED SCREENING AND INTEGRATED POLICE FACILITY
ONE OF THE WORLD'S 1st

100% E-AIRWAY BILL DUBAI ENABLED

PHARMA DEDICATED HUB
24/7 OPERATION

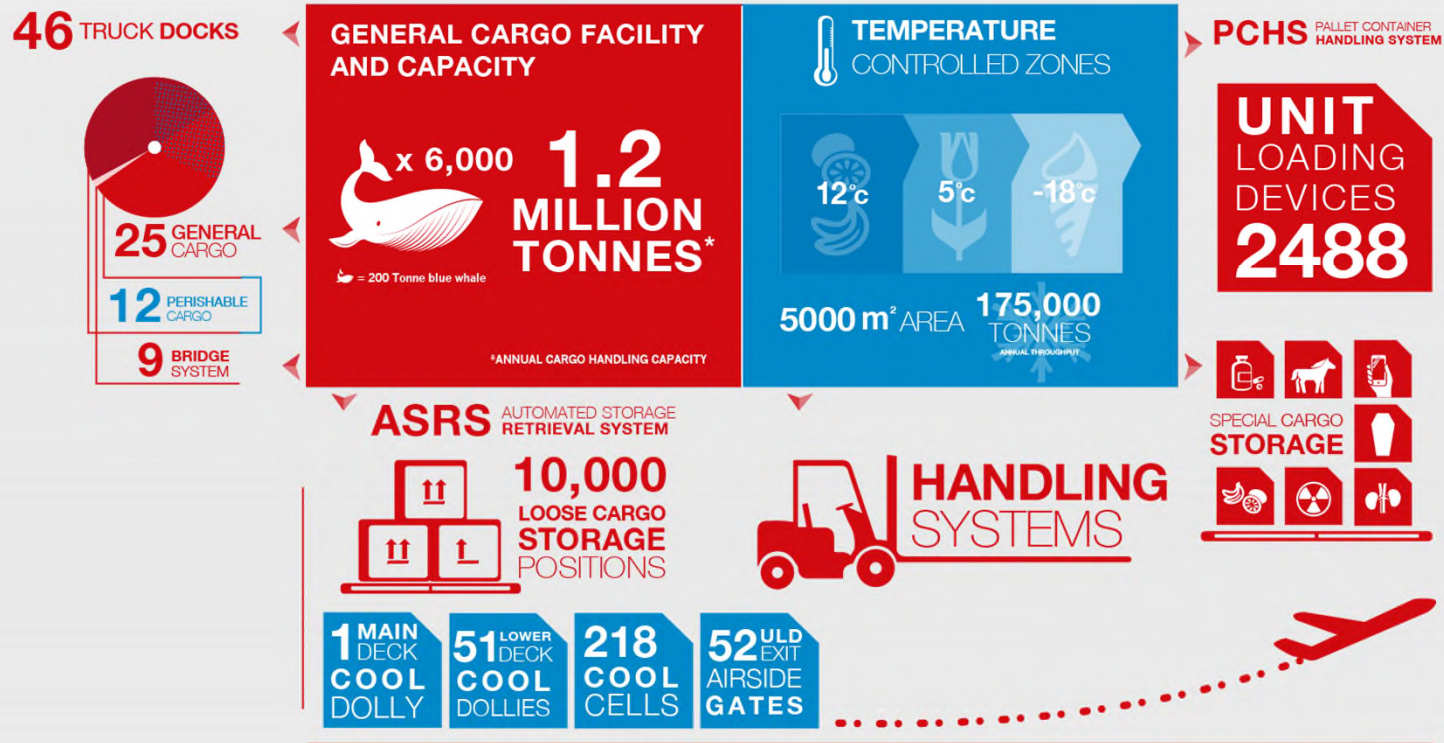
10,000 LOGSKO CARGO STORAGE POSITIONS

PCHS 218 COOL CELLS
PALLET CONTAINER HANDLING SYSTEM

ASRS
AUTOMATED STORAGE RETRIEVAL SYSTEM



Emirates SkyCentral (DWC) – Facts and Figures



SkyPharma Facility

Emirates SkyCentral

CARGO TRANSIT FACILITIES



Emirates Pharma

DEDICATED PHARMACEUTICAL TRANSIT FACILITIES

GOOD DISTRIBUTION PRACTICE

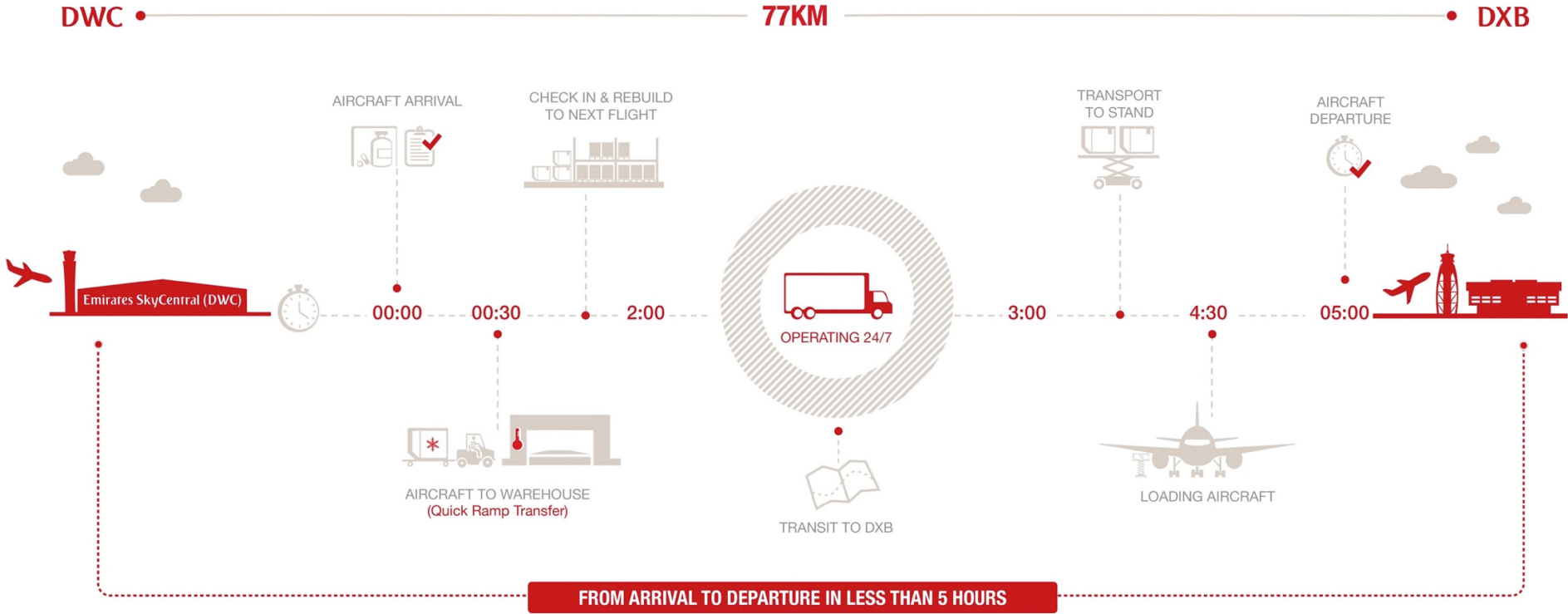
BUREAU VERITAS
Certification



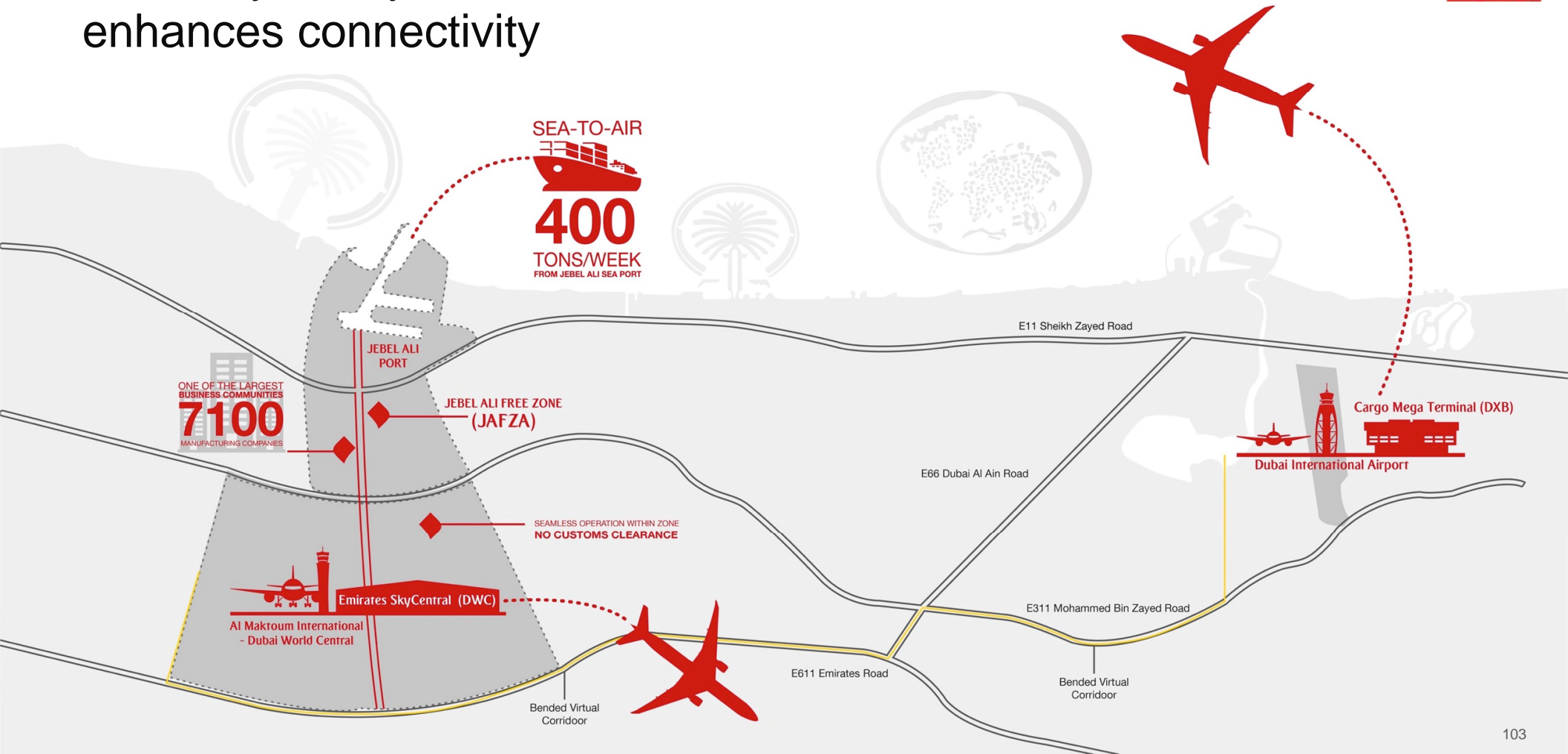
GDP certification* by Bureau Veritas



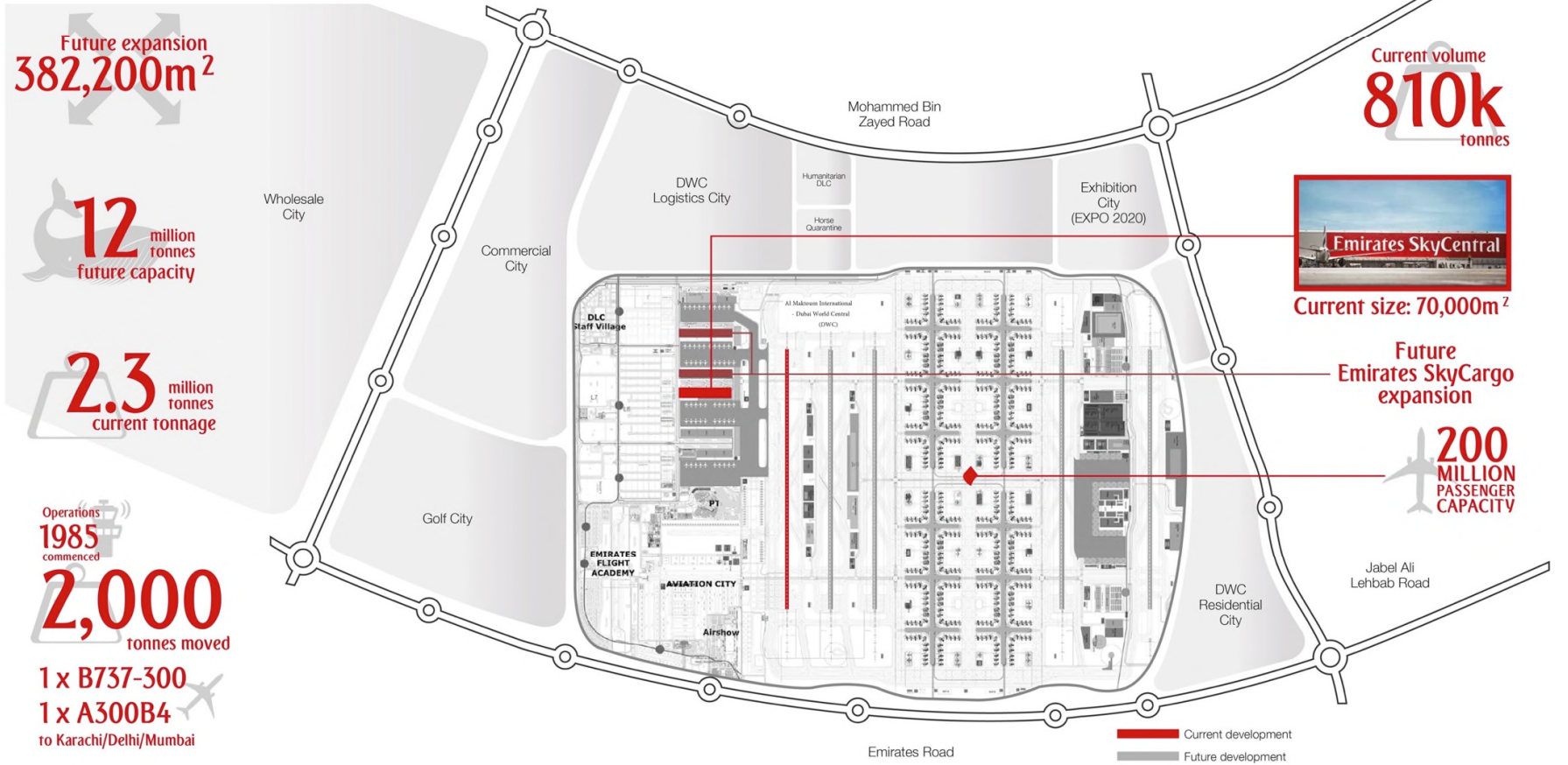
Connecting through our two hubs



Proximity to key infrastructure enhances connectivity



Master Plan



A nighttime photograph of the Sydney Opera House and the Sydney Harbour Bridge, with city lights visible in the background and reflected in the water.

Emirates – Connecting the World

Financial Figures 2019-20

Emirates Airline Revenue	Emirates SkyCargo Revenue	Emirates SkyCargo Tonnage
USD 36.4bn	USD 3.8bn	2.4M tonnes

- USA Revenue: USD 177.4M
- UAE Revenue: USD 271.3M
- USA Tonnage: 60,323 tonnes
- UAE Tonnage: 114,949 tonnes

Australasia route network

Dubai

Penang

Singapore

Jakarta

Bali

Brisbane

Perth

Adelaide

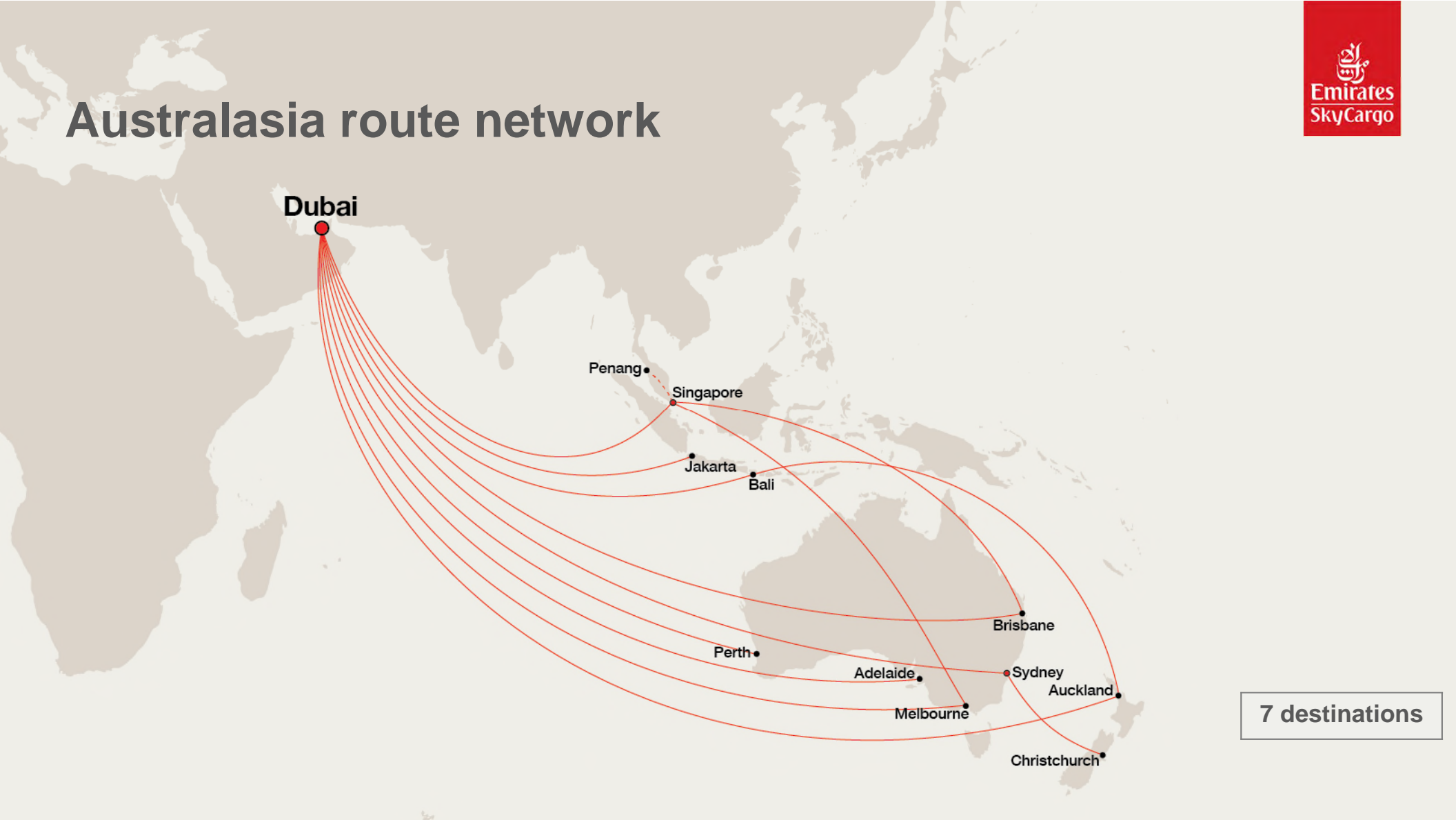
Sydney

Auckland

Melbourne

Christchurch

7 destinations





Regional Map North America

March 2020

- Passenger Routes
- Freighter Routes
- Passenger & Freighter Routes

18 destinations

Dubai

Mexico City

Quito

Viracopos
São Paulo

Rio de Janeiro

Santiago

Buenos Aires

Regional Map South America

March 2020

- Passenger Routes
- Freighter Routes
- Passenger & Freighter Routes

7 destinations



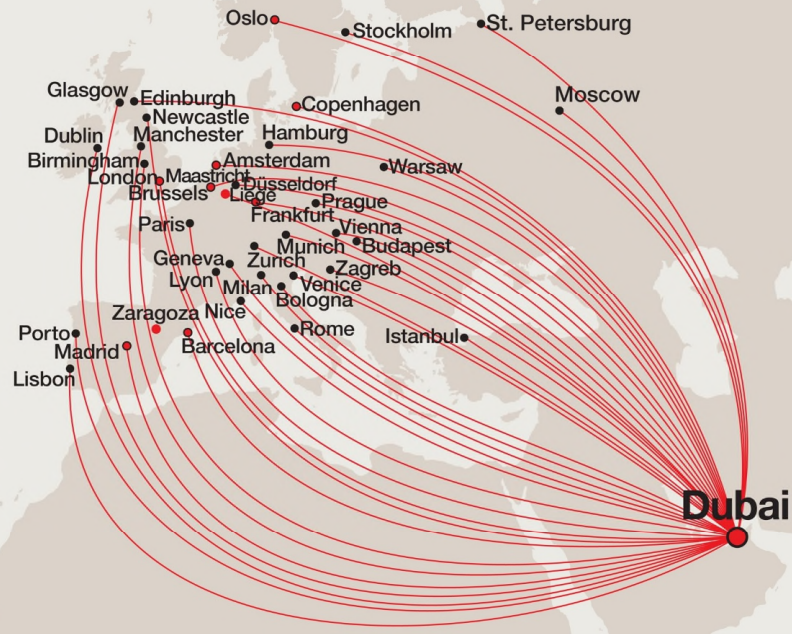


Regional Map Middle East

March 2020

- Passenger Routes
- Freighter Routes
- Passenger & Freighter Routes

13 destinations



Regional Map Europe

March 2020

- Passenger Routes
- Freighter Routes
- Passenger & Freighter Routes

39 destinations



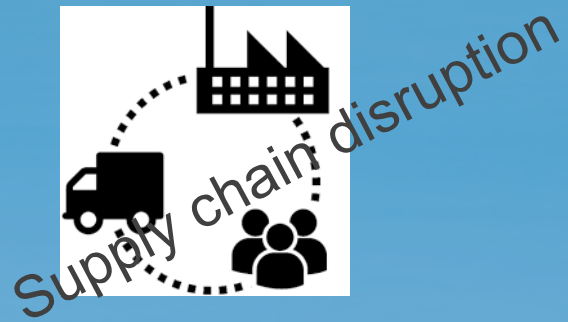
Regional Map Asia

March 2020

- Passenger Routes
- Freighter Routes
- Passenger & Freighter Routes

47 destinations

Business during COVID times



Our Passenger Freighter Network



Current Freighter Frequencies ex the USA

Destination/Origin	Flights per week (X/7)
Chicago	6/7 op (2 x DXB-AMS- ORD -AMS-DXB) (2 x DXB-AMS- ORD -IAH-MST-DXB) (1 x DXB-AMS- ORD -AMS-DXB) (1 x DXB-AMS- ORD -AMS-OSL-DXB)
Houston	2/7 op (2 x DXB-AMS-ORD-IAH-MST-DXB)
Los Angeles	1/7 op (1 x DXB-FRA-MEX-LAX-MST-DXB)

21 July 2020

PASSENGER FREIGHTER AND MINI FREIGHTER

AMERICAS

Sector	Frequencies/ week	Flight #	Day of Operation							Schedule / All times in Local			
			M/1	T/2	W/3	T/4	F/5	S/6	S/7	Dept Arp	Dept Time	Arvl Arp	Arvl Time
BOS	4	EK 237**	✓		✓		✓		✓	DXB	08 15	BOS	14 05
		EK 238**	✓		✓		✓		✓	BOS	23 00	DXB	19 25
FLL	1	EK 2695					✓			DXB	06 00	FLL	13 50
		EK 2564						✓		FLL	18 00	DXB	16 25
GRU	4	EK 2651			✓				✓	DXB	06 10	GRU	14 05
		EK 2652	✓			✓				GRU	14 05	DXB	11 55
		EK 261 ^o			✓				✓	DXB	09 05	GRU	17 00
		EK 262 ^o		✓			✓			GRU	01 25	DXB	22 55
GRU/SCL	1	EK 2651 ^o		✓						DXB	08 05	GRU	16 00
		EK 2651 ^o		✓						GRU	18 00	SCL	21 05
		EK 2652 ^o		✓						SCL	23 05	GRU	04 05 +1
		EK 2652 ^o			✓					GRU	06 05	DXB	03 55 +1
IAD*	3	EK 2557			✓					DXB	07 00	IAD	13 20
		EK 2558				✓				IAD	14 00	DXB	11 10
		EK 231	✓			✓				DXB	08 30	IAD	14 50
		EK 232		✓			✓			IAD	22 00	DXB	19 10
JFK	7	EK 201	✓	✓	✓	✓	✓	✓	✓	DXB	08 30	JFK	14 25
		EK 202	✓	✓	✓	✓	✓	✓	✓	JFK	23 00	DXB	19 45
LAX	5	EK 2559		✓						DXB	15 10	LAX	20 30
		EK 2560			✓					LAX	22 00	DXB	00 50 +1
		EK 215	✓		✓		✓		✓	DXB	08 55	LAX	14 15
		EK 216	✓	✓		✓		✓		LAX	16 40	DXB	19 30
ORD	3	EK 235	✓		✓			✓		DXB	09 55	ORD	15 45
		EK 236		✓		✓			✓	ORD	20 45	DXB	19 10 +1

AMERICAS (CONT.)

Sector	Frequencies/ week	Flight #	Day of Operation							Schedule / All times in Local			
			M/1	T/2	W/3	T/4	F/5	S/6	S/7	Dept Arp	Dept Time	Arvl Arp	Arvl Time
YYZ	5	EK 241	✓		✓		✓	✓	✓	DXB	09 10	YYZ	15 05
		EK 242	✓		✓		✓	✓	✓	YYZ	22 30	DXB	19 15

*Check the detailed schedule on skycargo.com

**Effective 17 August 2020

^oEffective 2 August 2020

^oMini Freighter

skycargo.

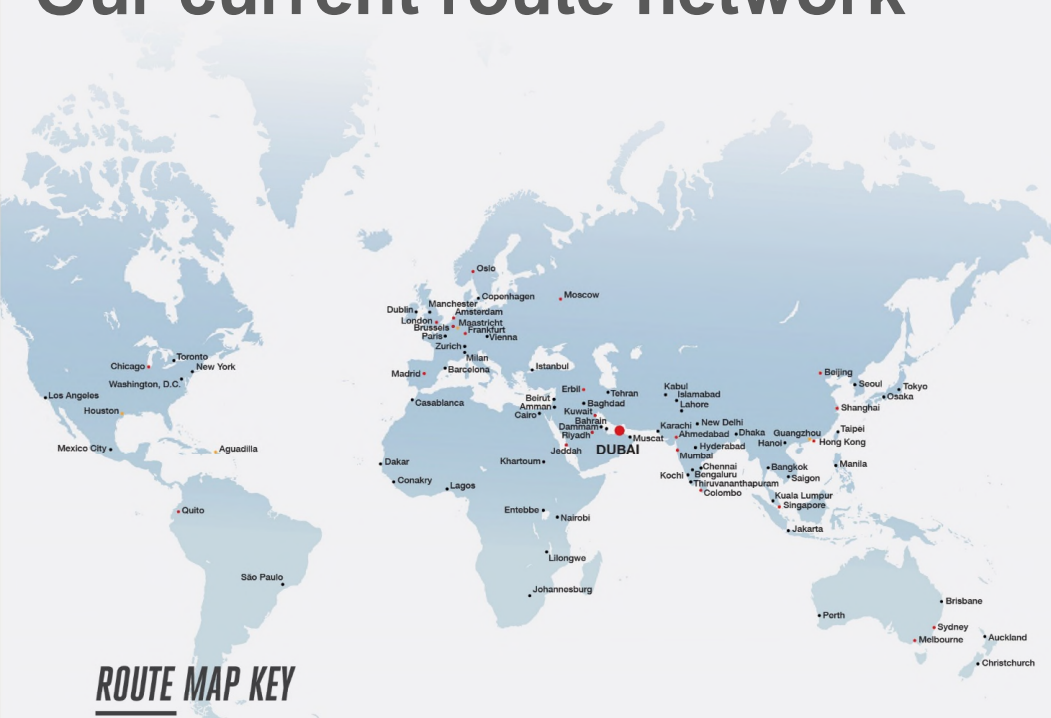
Pre-COVID-19 route network



ROUTE MAP KEY

- 2020
- Passenger routes
- Freighter routes
- Passenger & freighter routes

Our current route network



ROUTE MAP KEY

- 2020
- Passenger Freighter (PF)
- Main Deck Full Freighter (FF)
- Both PF and FF

Emirates

our global journey continues



Questions?



Thank You