

UAE Market Study

Including an overview of the country's construction sector; an assessment of opportunities for US engineered wood products; recommendations; and a database of key construction contacts.

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Background & scope of work

Based upon AF&PA's successful participation in the Dubai Wood Show in April 2006 and the subsequent understanding that the UAE might indeed offer some potential to US wood products, it was felt that a study of the overall scale of the UAE's massive construction sector should be conducted. This study was, therefore, commissioned by AF&PA in order to shed some light on this sector and to look at where certain US softwood and engineered wood products might be of value to it.

The study was also designed to enable production of a database of useful contacts from within the UAE construction sector, which would prove invaluable to future promotional and educational activities.

Although far from conclusive, this brief analysis is designed to give producers and exporters of US softwood and engineered wood products a clearer understanding of the size and scope of the UAE market.

The information within this report is also designed to help enable AF&PA, APA and American Softwoods to plan a promotional strategy within the region.

1. Trade and/or policy issues affecting US wood product imports

1.1 Overview

As export markets go for US wood products, the UAE is a relatively simple and regulation free prospect. There are very few barriers to international trade and no domestic policies relating to forestry or wood products, which could create a barrier to imports.

Tariffs on imports are generally very low (between 0 and 5%) and a phytosanitary certificate is required for the import of plants and plant matter.

Any US company wishing to export wood products to the UAE would be advised to seek a local agent, who would be able to advise on specific import and distribution regulations. Furthermore, it is often far easier to start business through the services of a local agent in an unknown market.

Some issues affecting the import of US wood products have been outlined below, but for more detailed information on these and on import licensing, trademark law and commercial agent issues, please see the WTO UAE Trade Policy Review 2006, which can be found at:

http://www.wto.org/english/tratop_e/tpr_e/tp263_e.htm

1.2 Free Trade Agreements & Customs Unions

1.2.1 GCC, GAFTA & US MEFTA

The United Arab Emirates is a member of the Gulf Cooperation Council (GCC), which also includes Bahrain, Kuwait, Oman, Qatar and Saudi Arabia. Its purpose is to facilitate cooperation among members in the fields of international commerce, education, shipping, and travel. Headquarters are in Saudi Arabia, and it meets twice a year. Its administrative structure includes a supreme council, a council of foreign ministers, an arbitration commission, and a general secretariat.

In 2003, GCC members **eliminated tariffs on trade between member nations** and established **Common External Tariffs** as part of the GCC Customs Union. They have agreed to establish a broader economic union (including a single market and currency) by 2010.

The United States Middle East Free Trade Agreement initiative started in 2003 with the purpose of creating a US Middle East Free Trade Area by 2013.

The US objective with this initiative has been to gradually increase trade and investment in the Middle East, and to assist the Middle East countries in implementing domestic reforms, instituting the rule of law, protecting private property rights (including intellectual property), and creating a foundation for openness, economic growth, and prosperity.

In terms of progress within the framework of the US MEFTA, the UAE, along with Oman, has announced its intention to pursue a Free Trade Agreement with the United States and talks are in progress. Bahrain has already entered such an agreement. The UAE has already entered into a Trade and Investment

Framework Agreement (TIFA) with the US and has been a member of the World Trade Organisation since 1996.

FTA's within the Arab region are also gathering momentum in an attempt to counterbalance economic dominance by the US and EU and due to fears that liberalization through the WTO is proceeding too slowly and unevenly. To that end the Greater Arab Free Trade Area (GAFTA) is a new Arab League initiative that aims to revive previously unsuccessful attempts at regional integration. Starting in 2005, membership of GAFTA has meant zero tariffs trade between members. Of the 22-member Arab league, those not taking part in GAFTA are the Palestinian Authority, the Comoros, Somalia, Djibouti, Mauritania, Sudan and Yemen. GAFTA is managed by the Council of Ministers of member countries and its secretariat is managed under the auspices of the economics department of the Arab League Secretariat.

1.2.2 EU-GCC Negotiations

The GCC's main trading partner is the European Union and, in recognition of this, both parties have entered into negotiations to establish a Free Trade Agreement between the two unions. Once realised, this will mean that most imports from the EU are treated as duty-free.

1.3 Import tariffs & regulations

The UAE, along with all other members of the GCC, with the exception of Bahrain, applies a 5% tariff on the importation of all wood products. This is based upon the Common External Tariff (CET) system, which is applicable at this level on the vast majority of products entering the GCC. Bahrain, with its Free Trade Agreement with the United States no longer uses the CET and it is expected that the UAE and Oman will also abolish this tariff, once their agreements with the US have been put in place.

As far as sanitary and phytosanitary measures are concerned, all SPS regulations in the UAE are federal. Under Federal Law No. 5 of 1979 (Plant Quarantine Law of GCC countries), all imports of plants and plant products are subject to an agricultural quarantine system. In addition, agricultural consignments are not permitted to enter the country unless accompanied by a phytosanitary certificate issued by the competent authority in the exporting country and attested by an Arab country's embassy in the exporting country.

1.4 Free Zones

There are twelve Free Trade Zones (FTZs) in the UAE, which can be an attractive option for foreign investors. To date, these free zones have been successful in attracting a large number of companies and foreign direct investment, as well as expanding net non-oil exports. A significant proportion of wood processing and construction related activity is now taking place in these free zones, especially in Jebel Ali, which can be found between Dubai and Abu Dhabi. The major advantage in setting up in a free zone is that a company is entitled to:

- 100% foreign ownership of the enterprise
- 100% import and export tax exemptions
- 100% repatriation of capital and profits
- No corporate taxes for 15 years, renewable for an additional 15 years
- No personal income taxes
- Assistance with labour recruitment, and extra support services, such as sponsorship and housing.

2. The UAE construction sector

2.1 Overview

The GCC construction sector is witnessing an unprecedented boom, which has been on-going since 2002. The main driving forces have been high oil prices, renewed liquidity and strong investor confidence. With oil prices firmly fixed above US\$60 a barrel and about US\$325 billion worth of building projects planned or underway in the GCC (early 2006 estimate), the stage is set for sustained growth in the sector for at least the next five years, if not many more.

The UAE is at the forefront of construction activity in the Gulf, with a forecasted spend of US\$94 billion over the next three years. Furthermore, this figure only accounts for projects which have been announced and confirmed and not for those in their early planning stages. The UAE's construction activities are largely concentrated in Dubai, but during the coming years unprecedented growth in the sector is expected throughout the federation, especially in the emirate of Abu Dhabi.

The governments of Abu Dhabi, Dubai and Ras Al Khaimah have separately issued laws allowing own freehold property in specified investment areas. However, a federal law authorizing freehold ownership is planned and this is expected to further fuel the construction boom throughout the country.

Major development schemes in Dubai, such as the Burj Dubai, Dubailand, Palm Islands, The World, Dubai Waterfront, Dubai Festival City, Business Bay, Underwater Hotel etc, in addition to keeping the many contractors busy, are intended to transform the nation into a popular tourist and business destination and act as a stable foundation for long-term economic growth.

In Abu Dhabi, the emergence of Aldar Properties has changed the mindset of the local real estate industry. Aldar is planning to carry out projects worth Dhs.100 billion (US\$27 billion) over the next five years. The government is understood to be opting for more private partnerships and is encouraging a flood of new joint venture companies to help develop the emirate. The multi-billion dollar Abu Shuoom Island development scheme has already raised the interests of new players like Sorouh Real Estate and Al-Reem Investments, who are forging ahead with their own plans. Abu Dhabi Tourism Authority has a similar mandate at Saadiyat Island. Seven other start-up property development companies are set to launch in Abu Dhabi over the next six months with a total capital of more than US\$2 billion.

A host of waterfront schemes are being planned or developed in the UAE. These developments will comprise an island or a group of islands that will be dredged off the coast and each transformed into a city on water. Major waterfront developments include:

- Jumeirah Palm Island, Dubai
- Al Reem Island, Abu Dhabi
- Jebel Ali Palm Island, Dubai
- Al Raha Beach Development, Abu Dhabi
- Deira Palm Island, Dubai
- The World, Dubai
- Lulu Island, Abu Dhabi
- Dubai Maritime City
- Saadiyat Island, Abu Dhabi
- Dubai Waterfront
- Mina Zayed Redevelopment, Abu Dhabi
- Deira Corniche Development, Dubai
- Mangrove Residential Complex, Abu Dhabi
- Amber Islands, Ajman
- Stars Island, Sharjah
- Umm Al Quwain Marina

Major investments are planned or under way for the expansion of existing airports, as well as construction of new capacity in the country. Dubai's airport expansion portfolio includes addition of a new terminal at the existing international airport and construction of a new Airport City in Jebel Ali. Abu Dhabi has also embarked on construction of a new terminal to accommodate the planned fleet expansion of Etihad Airways. Expansion is either underway or planned at Sharjah, Ras Al Khaimah and Fujairah airports, while Ajman will focus on the construction of an entirely new facility.

Unlike in the recent past, the northern emirate is also geared up to grab its slice of the construction boom. A raft of new projects is planned in the emirate of Ras al Khaimah. Several projects are already underway, including the Al Hamra Village and The Cove resort being developed by Egypt's Orascom. RAK Properties has also unveiled an array of large scale urban development schemes in the emirate. At the same time, Emaar Middle East's estimated Dhs.12 billion (US\$3.3 billion) Umm Al Quwain Marina project and the estimated Dhs.30 billion (US\$8.3 billion) Al Salam City - a Tameer Real Estate initiative - are expected to transform Umm Al Quwain's property and construction market.

Despite the very positive outlook for construction in the UAE, there exist areas of difficulty faced by many sub-sectors within the industry. Rapid hikes in the cost of key construction materials, - predominantly steel reinforcement bar (rebar) and cement - but also wood products, over the past two years have left many contractors struggling to carry the extra costs. Materials shortages have been hard-felt by contractors and this was particularly severe in 2004. In an attempt to confront the situation, an increasing number of contractors are entering into long-term agreements with key suppliers to ensure continuity of supply. The industry, in the coming years, will see construction clients also adopt a similar approach by entering into long-term agreements with preferred contractors, thereby avoiding the lengthy tendering procedure for every single new project.

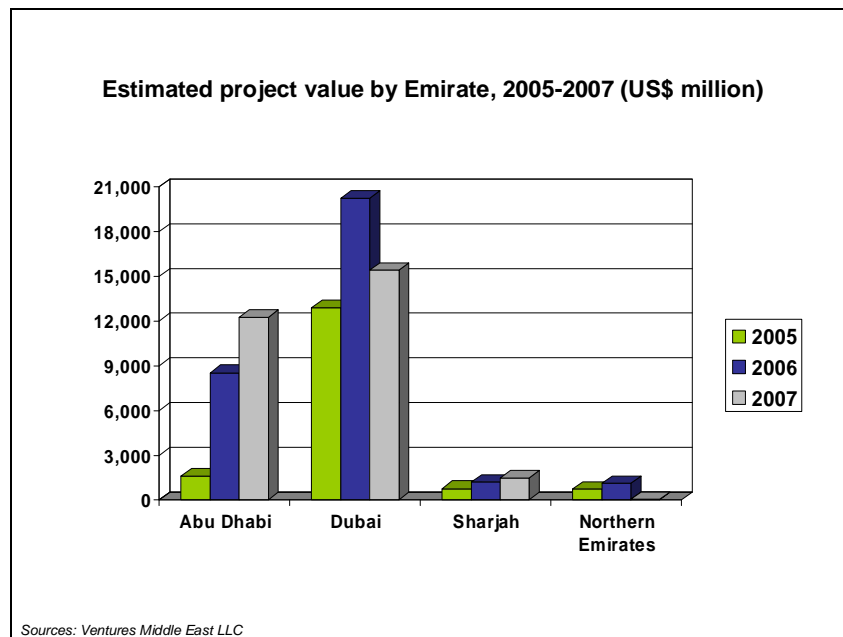
Though there is still room for more specialized contractors in the region, the growing number of indigenous companies in the general construction sector is having a significant impact on firms already established in the region. These newcomers are poaching staff from existing players, driving up salaries and aggravating fears of a shortage in experienced staff in project management and engineering capacities. Many of the new players are submitting very aggressive, even loss-making bids for contracts in order to fill the order books. Others, particularly those from emerging markets such as China and India, are able to submit low prices because of their low cost base. Existing contractors are thus forced to squeeze their margins to unsustainable levels just in order to win contracts.

2.2 Construction project values in 2005, 2006 & 2007

The estimated value of construction contracts awarded during 2005 was Dhs.58.8 billion (US\$16.0 billion). By the end of 2006, this figure is expected to have reached Dhs.114.1 billion (US\$31.1 billion) and by the end of 2007, the value is forecast to reach Dhs.120.2 billion (US\$32.8 billion).

By emirate of the UAE, estimated project value is distributed as follows:

Emirate	Value (US\$ million)		
	2005	2006	2007
Abu Dhabi	1,600	8,548	12,239
Dubai	12,893	20,223	15,378
Sharjah	790	1,223	1,485
Northern Emirates	743	1,104	3,657
Total	16,026	31,098	32,759



What is immediately obvious from these figures, is that the vast majority of construction projects are centred in the Emirate of Dubai. However, the table and chart also show that, while projects in Dubai are expected to tail off in 2007, they are expected to grow considerably in Abu Dhabi and Sharjah.

2.3 Will the construction bubble burst?

The economies of both Dubai and Abu Dhabi are extremely buoyant and this has led to the rapid development of the construction sector as a whole. There has been a flood of foreign architects, designers, contractors, project managers and building material suppliers to both markets, as well as a significant increase in their local counterparts. Additionally, the UAE has become a major destination for all construction materials, with imports – including those of wood products - rising almost exponentially. However, there do exist questions over the longevity of this upward development with anecdotal evidence suggesting certain doubts as to whether the current situation will last forever. Following this, the next obvious question is: if it isn't going to last forever, when will it end?

This is impossible to answer. However, a look at the bases for each of these two economies shows distinct differences and may suggest that, while the economy of Dubai is very healthy at present, it may not endure over the longer-term. Over the past ten years or so, Dubai has pushed forward, aiming to become a haven for business, tourism and luxury living in the Persian Gulf. The Crown Prince of Dubai, HH Sheikh Mohammed, has been behind much of this drive and has proposed many of the more ambitious projects and developments. However, he has not invested any of his own money in Dubai and this raises significant doubts over his own confidence in the Emirate's future. Furthermore, unlike Abu Dhabi, Dubai has virtually no oil and gas reserves and is totally dependent on the inflow of money from investment, tourism and trading. Some have suggested that, like its skyscrapers, Dubai is founded on sand and that this is no basis for a secure future.

Abu Dhabi, on the other hand, has vast reserves of oil and gas and, over the past ten or so years, has succeeded in strong economic growth, while maintaining a rather more conservative pace and style of overall development. This is partly due to the conservative style of its rulers and some of its real estate laws, but also because it has focused more on attracting foreign investment through banking and business and not through the, perhaps more fickle, route of tourism and luxury living. Anecdotal evidence does suggest that the strong and developing economy of Abu Dhabi may well endure long into the future, while that of Dubai may be less secure and this is clearly reflected in the construction project forecast shown above.

2.4 UAE building codes

In the absence of a formal building code, over the years and as the construction sector has ballooned, the municipality of the Emirates has accepted the practice of British, American and Australian standards. However, during the last three years or so, the Dubai municipality has led the way with the development of a United Arab Emirates building code.

The implementation of the code is due to be carried out in a phased manner and, at the time of writing, remains unimplemented. According to the UAE Contractor's Association (UCA), the UAE building code is likely to be accepted by the end of 2006 and will promote standardisation in line with international best practices. At present, the UAE construction sector's activities are regulated by municipal authorities throughout the country. Each municipality has its own individual building code.

Since American codes are widely accepted, there is little reason why there should be any problems specifying and using US engineered wood products in construction in the UAE. Furthermore, the new unified building code, once adopted, is likely to be based very closely on the existing British, American and Australian standards.

For more information on this and for an update on the introduction of the unified UAE building code, please contact:

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3. Opportunities for US wood products by end-user sector

3.1 Overview

While it is apparent that the UAE does not present a vast and untapped market for American softwoods and engineered wood products, and the construction sector is not a major end-user of softwood, it does appear that there may be niche opportunities developing. As a result of the massive amounts of construction activity taking place in the UAE, new and innovative building technologies and techniques are appearing in the market. Following on from this, UAE consultants and contractors are becoming more open to exploring the capabilities of a wider range of construction materials, including wood products.

3.2 Interiors, furniture & flooring

The UAE is a very fashion-conscious market and looks to the US and Europe for inspiration in design. With knot-free, clear surfaced hardwoods being at the pinnacle of interior design trends, American softwoods will find it hard to compete in most areas of the interior joinery and furniture sectors. However, while the vast majority of wood used for interior joinery and furniture is hardwood, some softwoods are used for furniture carcasses, mouldings and lippings. This, however, does not present a hugely attractive market prospect for the American softwood industry, as the products they can supply are unlikely to compete with those from Scandinavia and New Zealand. Where American softwoods could break into the UAE interiors market is with hemlock and Douglas fir, in wall coverings, doors, trim and mouldings. With the right marketing and promotion, these species could be presented to the UAE design community as an attractive alternative to hardwoods.

3.3 External joinery & structural applications

The numerous hotel, sports and leisure and residential developments have given rise to a large number of external wooden structures, such as pavilions, verandas, decks, bridges and sun shades. In many cases, teak, iroko or other naturally-durable tropical hardwoods are used for these structures, but in some cases, softwoods have been used.

Examples exist in both Dubai and Abu Dhabi, where Southern pine and Douglas fir have been used to create such structures and it would seem that this sector of construction is developing fairly rapidly. A recent visit to the UAE yielded information on previously unknown wooden structures, such as restaurant in Abu Dhabi, which overhangs water and an entire hotel/villa complex on Jumeirah Beach in Dubai. Although New Zealand radiata pine was used in both of these cases, they do underline the fact that wood as a structural material is not a complete anathema to the UAE building sector.

Furthermore, under construction in both Dubai and Abu Dhabi are numerous island, coastal and inland waterside developments, which will incorporate wooden structures in marinas, jetties, pilings, bridges and causeways. These projects, which will be on-going for up to the next five years or so, are likely to present huge opportunities for wood in structural applications and to allow for new technologies and materials to enter into the market.

4. Opportunities for US wood products by product type

4.1 Overview

Aside from the competition to US softwood and engineered wood products from other wood and non-wood products in the UAE construction sector, there are other factors influencing their use in the market. The main issue is that the vast majority of wood products offered by the United States (with the exception of hardwoods) are simply not known or not known well enough.

4.2 Plywood & OSB

As one might expect, the UAE construction sector consumes vast quantities of plywood, whether it is for sidings, concrete-form or even temporary housing. Since the basis for construction of most new buildings in the UAE is concrete, plywood for concrete-form is a major end-use and UAE builder's merchants are very active in importing plywood from many overseas suppliers. China is the main supplier of plywood to the market and this is down to the simple fact that it is often the cheapest option available. Furthermore, since the unified UAE Building Code has not yet been implemented and since standards in the construction industry are far from exacting, Chinese plywood (of almost any quality) is acceptable in many end-uses.

With this in mind, US suppliers of plywood will find it extremely hard to break into the UAE plywood market, unless they can home in on niche sub-sectors, where Chinese and other imported plywood do not meet the standards required.

As for OSB, this product is relatively unknown in the UAE building sector and, in most cases, plywood is used in its place. One area where OSB might become a material of choice is in temporary housing for construction workers and site buildings, which is a surprisingly large end-user sector for wood products. At present, plywood (mainly from China), in combination with a softwood frame (mainly Russian whitewood), is used in the construction of such portable cabins or temporary houses. There is a substantial and growing need for such buildings in the market, which is in line with the growing construction sector. Furthermore, few of these buildings are reused once the construction project is complete and so the turnover of such structures is impressive.

In addition to the market for housing for construction workers, there is an increasing need for temporary luxury villas, which use similar construction techniques. As the population of the UAE becomes wealthier everyday, many people are having impressive residential villas built for themselves and their families. In certain cases, these people will require a temporary villa in which to live while their new home is being completed.

In conjunction with the possible take-up of OSB in this sector is the possible move towards using wood-based panels, which incorporate a radiant barrier. The climate of the UAE is so extreme that such products could offer enhanced cooling solutions and reduce the need for constant air-conditioning.

4.3 Glulam

Glulam is generally little known in the UAE construction sector. However, certain contracting companies have experience of using it and, in line with the seemingly wider take-up of wooden structures in the market, it is becoming better known everyday. It would, therefore, seem that of all the engineered wood products offered by the United States, glulam could present the best opportunity in the immediate future.

As previously mentioned, the enormous number of waterside projects currently underway and the growing need for shade structures and light, flexible and natural structural solutions could present an ideal opportunity for these products.

4.4 LVL, I-joist & rim board

As far as can be made out from the limited amount of research conducted in this field, none of these products are known or have ever been used in the UAE market. While LVL might present an interesting concept to be used in conjunction with glulam in certain wooden structures, it would seem unlikely that I-joist and rim board technology will gain any market share, as they are very much geared towards the wood frame construction housing sector.

4.5 Southern pine

Southern pine or Southern yellow pine is somewhat known and has been used in the past to a small degree in the UAE in external structures and in boardwalks and decking. It would seem that if there was ever a time for Southern pine to re-enter the UAE market it would be right now, as its properties would be well-suited to some of waterside applications in many of the current construction projects.

5. Main barriers to increased use of US wood products

5.1 External competition

While there most certainly exist niche opportunities for US softwood and engineered wood products in the UAE construction sector, there are also many alternative products which are well-established in the market. In particular, the UAE is a major importer and user of plywood and other wood-based panels from China and other Southeast Asian producer countries. However, the UAE is also importing increasing amounts of softwood from Russia, Romania, the Baltic States, Chile and New Zealand. While this does not mean that US wood products cannot gain any foothold in the market, it does mean that their availability, suitability, delivery time and, above all, cost will be pitched against many competitive alternatives. Furthermore, the development of the wood processing sector in China is likely to yield an ever-widening range of products in the near future and these are almost certainly going to be made available to Middle Eastern end users, bringing in even more competitive products.

5.2 Price-sensitivity

One of the greatest potential barriers to the increased penetration of US wood products into the UAE is the, sometimes overbearing, price-sensitivity of the market. One would assume that, in a market where multi-billion dollar construction projects are almost common-place, the cost of construction materials would not be such an issue. However, it appears that cash flow within projects is often a problem and that initial designs and concepts are often compromised in the latter stages of development due to the mismanagement of funds. Contractors are often forced to use less expensive materials in order to complete projects within budget and, since standards and regulations are not very high, nor are they necessarily enforced, project managers will turn a blind eye.

Price-sensitivity is also an issue within the general trading and distribution network of the UAE, with large numbers of building materials suppliers vying for contracts with major projects. Offering lower priced building materials is often the only way for builder's merchants to secure long-term business.

5.3 Lack of knowledge & lack of material on the ground

External competition and price-sensitivity notwithstanding, perhaps the most significant barrier to increased take-up of US wood products in the UAE (or any other Gulf market) is that they are not widely known or widely available. It is, of course, a catch-22 scenario, where it is difficult for end users to be aware of products unless they are readily available and it is difficult to make these products readily available unless end users demand them.

6. Recommendations

6.1 Further research

While this report attempts to shed some light on the scope of the UAE construction sector and the opportunities for US softwoods and engineered wood products within it, it is by no means conclusive nor all-encompassing. Furthermore, it does not include research into other Gulf markets, where the construction sector is also extremely buoyant at the moment, such as Oman, Qatar, Kuwait and, Bahrain.

While it is not recommended that more time be spent conducting in-depth research into specific niche markets for specific products, as this information will become apparent through increased contact with the market during trade shows and other promotional/educational activities, it is recommended that the scope of research be widened to include the other Gulf markets.

6.2 Trade shows

Although trade shows are by no means the only way to break into a market with new products and ideas, they can be very useful in a completely new market, where contact has been very limited. The UAE, in particular, has at least two highly suitable trade shows for US softwood and engineered wood products and these are the Dubai Wood Show (www.dubaiwoodshow.com), which takes place every spring and the Big 5 (www.thebig5exhibition.com), which usually takes place in October/November, depending on where the month-long fasting period of Ramadan falls. Both shows are well-organised, well-attended and attract visitors from all over the Persian Gulf and beyond.

6.3 Seminars/workshops

Using the attached database of contacts on the UAE, it would seem an ideal opportunity to conduct a series of seminars and/or workshops in the market. These are very easy to organise in Dubai or Abu Dhabi, where good facilities are available and not too expensive. Direct marketing of the events would also be fairly simple to organise, but advertisements could also be placed in the relevant trade media (see below).

6.4 PR/Advertising

There are few trade magazines in the UAE or general Gulf area which might be suitable for a series of advertisements and PR coverage. The two main titles are as follows:

Gulf Construction – monthly, produced in Bahrain and covers the entire Gulf region

Construction Week – weekly newspaper style, produced in Dubai and covers the GCC region

There is also *Contractors' News*, which is the monthly magazine of the UAE Contractors' Association (UCA). The UCA also produces an annual *Contractors & Suppliers Directory*, which offers advertising opportunities.

6.5 Distribution of publications/technical information

Although trade shows and seminars are an ideal place to distribute the many technical publications offered by American Softwoods and APA, direct mailing could also be carried out fairly easily. Additionally, promotion of the relevant websites would also help to encourage contacts to order publications directly.

6.6 Newsletter

In addition to the brochures and technical publications available, it may also be worth considering distribution of a simple and market-specific, dual language newsletter on a regular basis. This would contain, amongst other things, information on specific products and how they have been used in projects around the world. It could also be used as a conduit for publicising seminars/workshops and participation in trade shows etc.

Appendix

Description

Electronic database (Access 2003): **UAE Construction Contacts**.

The database contains 186 contacts, comprising the most active architects, developers and contractors currently operating in the United Arab Emirates. The database is split as follows:

Developers: 66
Architects: 71
Contractors: 49

Of the 71 architects, 52 have permanent offices in the UAE, while the remaining 17 are overseas based companies, which are active in the UAE. In this case, the full contact details have not been provided.

Database key

The following key has been used to show the type of contacts:

DEV = developer
ARC = architect
CON = contractor
ASS = association

For future additions to the database, it would be helpful to continue to use this key and to assign the following codes to other types of contacts, as follows:

IMP = importer
AGT = agent
MFR = manufacturer
GOV = government body
PRE = press/media
INT = interior designer

Notes

This database is far from complete, but is designed to serve as a basis from which to work in the future. It will also need to be checked and updated on a regular basis, in order to remain as current as possible.

The original source for these contacts was Ventures Middle East LLC. However, the list has been significantly edited and made available in electronic format by Forest Industries Intelligence Limited.