



# Market Opportunities and Export Promotion in Gulf States

*5 October 2022, 2:00 – 4:00 PM, Bishkek, Kyrgyz Republic*

**Sandra Abramovic**, *INova Global Solutions, Expert in Innovation, Technology Transfer & Sustainability*  
**Masa Bubanj**, *INova Global Solutions, Expert in International Business*



***1. Presentation of market opportunities & export promotion in UAE & Gulf States***

# UAE as link to Major Trade Regions

*The UAE's chain of ports provides a window of access to major maritime trade routes supplying both mature and emerging global markets.*

## MENA

This region is home to **population of 578 million** in **21 countries** and economies **\$3.3 trillion GDP**.

## SOUTH ASIA

This region is home to **1.94 billion** people and **\$14.83 trillion** in 2022. This region includes **8 countries** and economies.

## EAST ASIA & PACIFIC

This region is home to **60 per cent** of the world's **population** – some **4.3 billion people** – and includes the world's most populous countries, China and India. **GDP \$30,880.83B** in 2021 This region includes **24 countries** and economies.



## EUROPE & CENTRAL ASIA

The region of Europe and Central Asia embraces **29 countries** and is highly diverse in terms of size, location, population and social development. This region is home to **923 million people**, **GDP 25.05 trillion 2021**.

## SUB-SAHARAN AFRICA

Sub-Saharan Africa includes all countries south of the Sahara Desert. In 2021, the total population of Sub-Saharan Africa amounted to approximately **1.17 billion inhabitants**. **\$1,917.90B**. This region includes **47 countries** and economies and houses the **COMESA**.

# UAE as Trade and Investment HUB

*“The UAE is a dynamic HUB for global commerce, with unmatched infrastructure that provides seamless connectivity for businesses worldwide.”*

- I. **Strategic Location:** The UAE’s distinct location in the south - western part of the Arabian Gulf enables it to play an active trading role in linking the maritime lines on one hand and facilitating transportation of goods between the East and the West on the other hand.
- II. **Balanced Economic Policy:** The UAE pursues a free and balanced economic policy which encouraged national and foreign capitals to enter into successful investment ventures in different commercial, industrial and services fields.



### III. World class infrastructure:

In support of its economic policy, the UAE has set up complete and efficient infrastructural projects along with other services and utilities which has an immediate and positive impact on growth rates in the :

- **Economic sectors**
- **Social development**
- **Living standards of individuals**



***2. Market Overview –  
Do you want to export to the UAE & GCC?***

# Doing Business in UAE & GCC

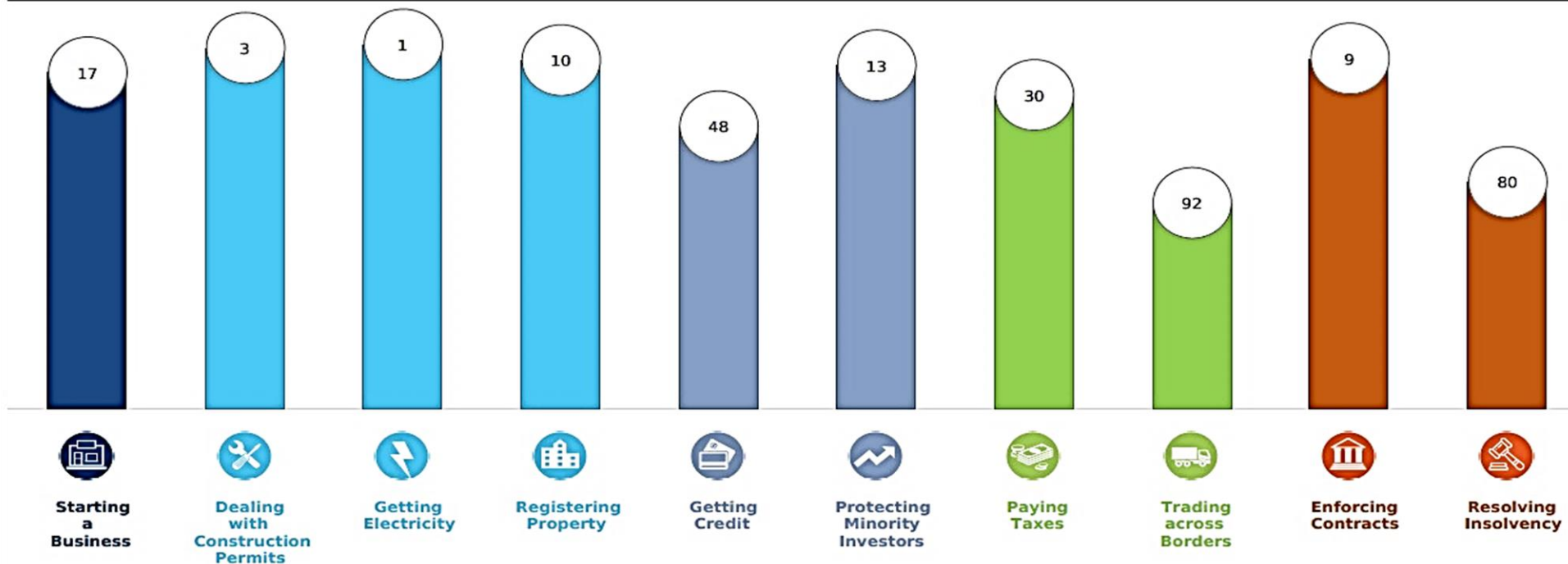
- The [Doing Business](#) study from the World Bank analyses economic regulations in **190 countries** around the world. According to the report from 2020, the UAE had an overall ranking of 17 in the world and **was the economy number 1 in the Gulf region**.
- The leading commercial hub serving the **Middle East, Africa, and South Asia, the UAE (especially Dubai)** continues to play a central role as a regional trade, logistics, and tourism hub.
- The UAE continues to be a strategic hub, with business-friendly free zones and a quickly growing economy.
- The UAE's economy grew by an estimated **8.2% in Q1 2022**. Real GDP is expected to **grow 5.4% this year** and **4.2% next year**. The official estimate for United Arab Emirate's GDP was **\$640 billion** at the end of 2021 in [purchasing power parity](#) terms (World Economics).

# Doing Business in UAE & GCC

- ✓ Dubai has changed dramatically over the last three decades, becoming **a major business center** with a more dynamic and diversified economy.
- ✓ Dubai enjoys **strategic location** and serves as **the biggest re-exporting center in the Middle East**.
- ✓ Its **low logistical and operational cost and excellent infrastructure**, international outlook and liberal government policies are **attracting investors** in a big way. Activities such as trade, transport, tourism industry and finance have shown steady growth and helped the economy to achieve a **high degree of expansion and diversification**.
- ✓ The UAE has an open trade regime with **low tariffs and few non-tariff barriers**, according to the World Trade Organization.

# Rankings on Doing Business topics - United Arab Emirates

## Rankings on Doing Business topics - United Arab Emirates



## Topic Scores





# Doing business in UAE & GCC

- Dubai is home to one-third of all **Middle East and North Africa (MENA) investors** and **19 venture capitalists**, the highest in the region.
- The advantages of doing business in Dubai are numerous. Among the benefits of the ease of doing business in Dubai are the wealth of options for corporate structure and the rewards that come with them.

**Companies in Dubai benefit** from the following, regardless of the format:

- 1) A zero-tax regime, meaning no personal or corporate income taxes (next year announcements, introduction of tax)
- 2) Safe and robust governance
- 3) A world-class financial hub
- 4) An educated supply of human capital with diverse professional experience hailing from all corners of the globe
- 5) No capital repatriation restrictions
- 6) No share capital requirements
- 7) No physical office requirements
- 8) Lower set-up costs compared to other onshore jurisdictions



*3. Presentation of distribution channels supply for drinking water*

# Distribution & Sales Channels

*„Distribution network from how products enter to final destination, including reliability of distribution systems, distribution centres, ports“*

- Challenges and Tips
- Using an Agent or Distributor
- Establishing an Office
- Free Trade Zones
- Franchising or finding the partner

- Trade Shows and conferences
- Direct Marketing and Online marketing
- Joint Ventures and Licensing
- Express Delivery
- Due Diligence

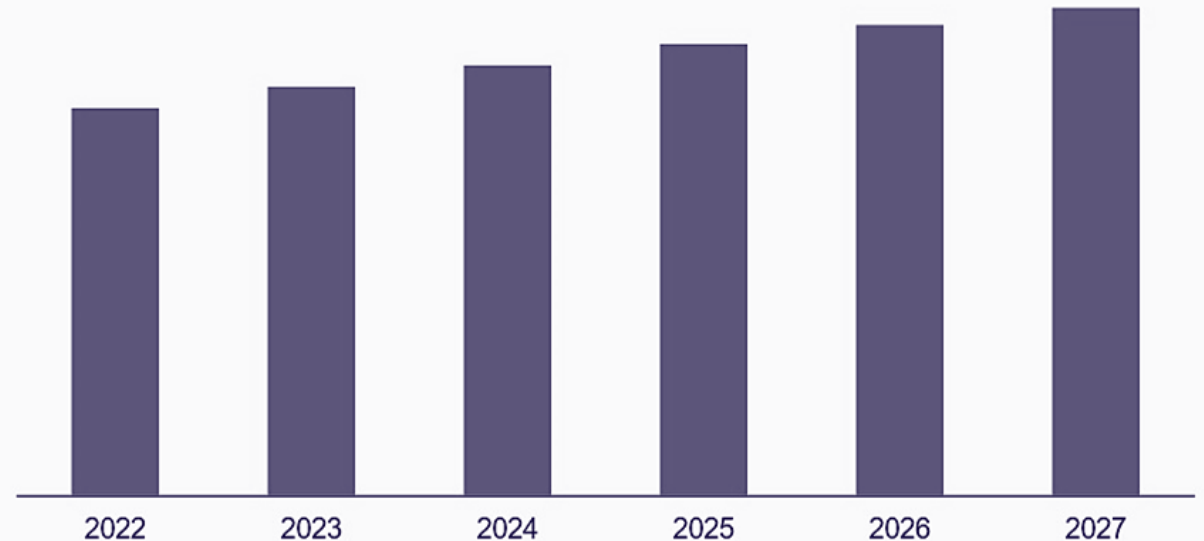


## ***4. GCC Bottled Water Market - Industry Trends, Share, Size, Growth, Opportunity & Forecast 2022-2027***

# Gulf Cooperation Council (GCC) Bottled Water – Market Outlook 2022-2027

- The GCC bottled water market reached a value of **US\$ 20.23 Billion in 2021**. Looking forward, expects the market to reach **US\$ 33.1 Billion by 2027**, exhibiting at a CAGR of **10.5% during 2022-2027**
- *(CAGR - The performance metric is the Compound Annual Growth Rate of the Share price, measured over a period of two calendar years and three months of the Company)*
- Keeping in mind the uncertainties of **COVID-19**, need continuously tracking and evaluating the direct as well as the indirect influence of the pandemic.

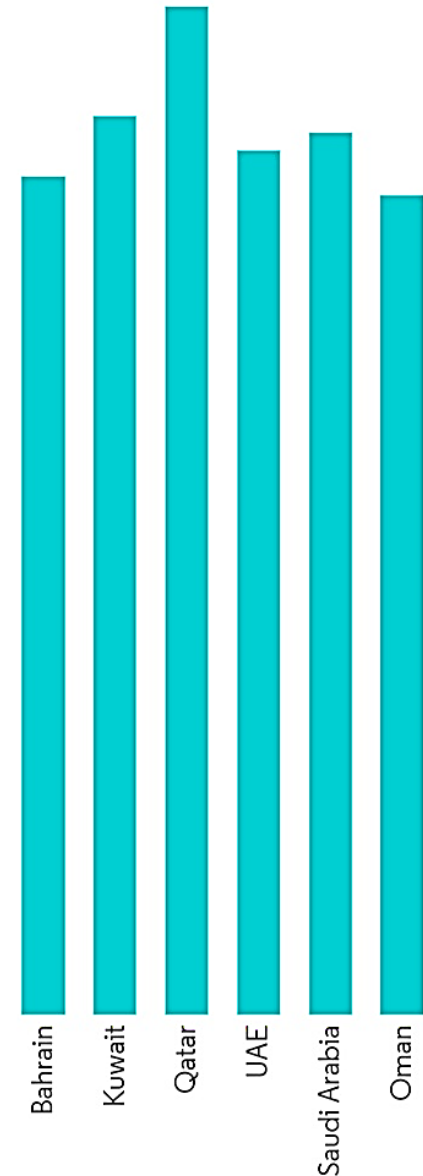
GCC Bottled Water Market Size, 2022-2027 (in Billion Litres)



# Key Market Trends

## Scarce Water Resources Leading to Increasing Dependency on Packaged Drinking Water

- The most water-scarce region in the world is the Middle-East & North Africa region (MENA), including GCC, where more than 60% of the population has little or no access to drinkable water.
- Over 70% of the region's gross domestic product (GDP) is exposed to high or very high-water stress, which is extreme compared to the global average of 22%. According to the World Bank, the MENA region also has the greatest expected economic losses from climate-related water scarcity, estimated to account for 6–14% of GDP by 2050.
- This scarcity poses a significant threat to the region's long-term socio-economic development.
- The deep scarcity of drinkable water has been an issue due to water scarcity and unavailability of treated water, which is leading to the high dependency on bottled water and packed forms of drinking water across the GCC region.



# GCC Bottled Water Market Trends

- The rising consciousness among individuals about the impact of increasing water pollution levels on **human health** represents one of the key factors positively influencing the **demand for bottled water in the GCC region**.
- the growing occurrence of **gastrointestinal and digestive tract ailments** caused due to the consumption of contaminated water is **demand for purified bottled water**.
- Significant rise in the **number of tourists and pilgrims**, with the increasing expatriate community in the region, is **increasing the sales of bottled water in the region**.



- **Consumer demand for carbonated bottled water** alternatives to sugar-sweetened beverages are offering lucrative growth opportunities to manufacturers.
- **Expansion of hotels, restaurants, cafes, resorts and bars** is catalyzing the **demand for bottled mineral water**.
- Leading manufacturers are focusing on developing new and **innovative flavored water** variants, which offer improved taste along with nutritional benefits, including vitamins and reduced calorie content.
- The **expansion of hypermarkets, supermarkets, stores, and convenience stores** is **propelling the market growth**.

# GCC Bottled Water Market Share, By Product Type (in Billion Litres)

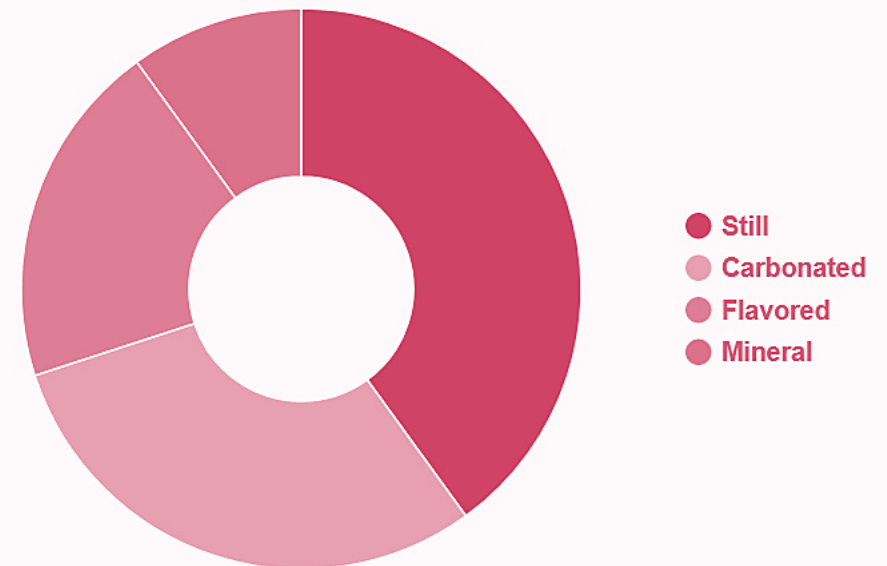
At present, bottled water is available in different varieties, including still, carbonated, flavored, mineral, and artesian, across the GCC region.

## Break up by Product Type:

- Still – 40 %
- Carbonated – 30%
- Flavored – 20%
- Mineral – 10%

**Still water** presently represents the largest market segment as the majority of the **GCC population prefers** consuming bottled water over tap water.

GCC Bottled Water Market Share, By Product Type (in Billion Litres)





# GCC Bottled Water Market Outlook 2022-2027

## Breakup by Distribution Channel:

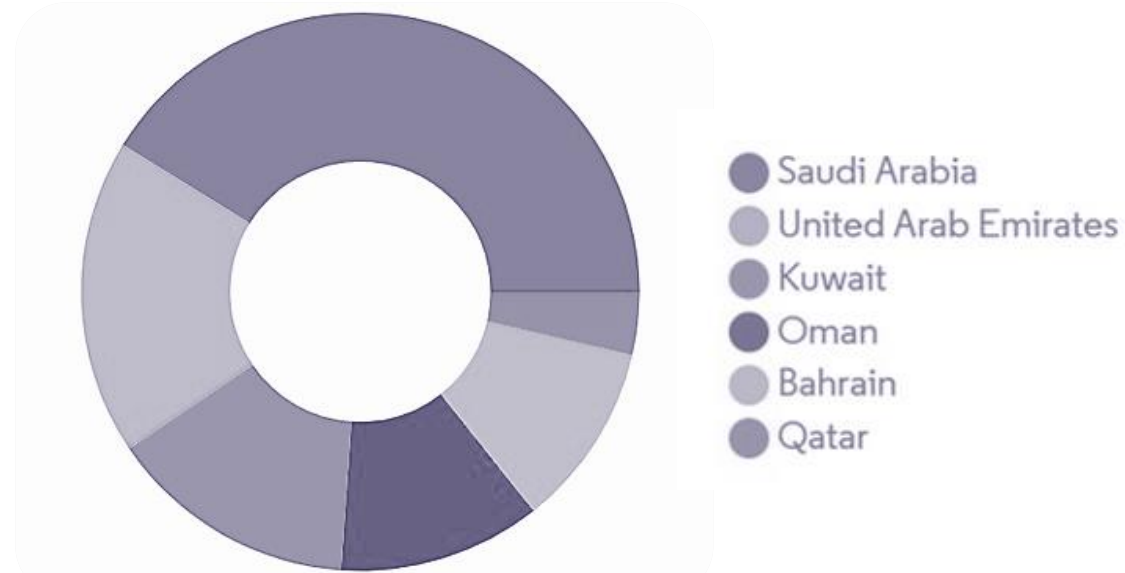
- ✓ Supermarkets/Hypermarkets
- ✓ Retailers
- ✓ Stores/Convenience/Grocery Stores
- ✓ On-Trade Channels
- ✓ Home and Office Delivery
- ✓ Other Distribution Channels

## Regional Insights:

- ✓ Saudi Arabia
- ✓ United Arab Emirates
- ✓ Oman
- ✓ Qatar
- ✓ Kuwait
- ✓ Bahrain

## Competitive Landscape:

- ✓ The competitive landscape of the market is characterized by the presence of numerous small and large manufacturers who compete in terms of prices and quality.



## Leading players operating on the market:

- ✓ National Plant for Healthy Water (HANA)
- ✓ Bin Zomah Group Trading & Mfg.
- ✓ Health Water Bottling Co. Ltd.
- ✓ Al Ain Mineral Water Co.
- ✓ Al Jomaih Bottling Plants (Al Jomaih Holding Co.)
- ✓ Al Manhal Water Factory Co. Ltd.

## Recent Developments:

- ✓ In 2021, Masafi Co LLC introduced a sustainable bottled drinking water brand in the UAE called SOURCE
- ✓ In 2021, Red Sea Development Co. inaugurated the first 100% renewable bottled water plant in Saudi Arabia - the country's first mineral water extraction plant that uses solar and wind energy in line with efforts to preserve the environment by limiting carbon emissions.
- ✓ In March 2020, Agthia Group launched the Al Ain Plant bottle, the region's first plant-based water bottle. The packaging of the new Al Ain Plant Bottle is environmentally-friendly and made of 100% plant-based sources, including the cap.

# Key Questions & Answers

---

1. What was the size of the GCC bottled water market in 2021?

*The GCC bottled water market was valued at US\$ 20.23 Billion in 2021.*

2. What is the expected growth rate of the GCC bottled water market during 2022-2027?

*We expect the GCC bottled water market to exhibit a CAGR of 10.5% during 2022-2027.*

3. What are the key factors driving the GCC bottled water market?

*The growing consumer awareness towards the need for safe drinking water, along with rapid increase in the number of tourists and pilgrims in the region, is currently driving the GCC bottled water market.*

4. What has been the impact of COVID-19 on the GCC bottled water market?

*The sudden outbreak of the COVID-19 pandemic had led to the implementation of stringent lockdown regulations across the region resulting in temporary shutdown of numerous manufacturing units for bottled water.*

# Key Questions & Answers

---

- 
5. What is the breakup of the GCC bottled water market based on the product type?  
*Based on the product type, the GCC bottled water market has been segmented into still, carbonated, flavored, and mineral. Currently, still water holds the majority of the total market share.*
  6. What is the breakup of the GCC bottled water market based on the distribution channel?  
*Based on the distribution channel, the GCC bottled water market can be divided into supermarkets/hypermarkets, retailers, stores, on-trade, and others. Among these, supermarkets/hypermarkets currently account for the largest market share.*
  7. What are the key regions in the GCC bottled water market?  
*On a regional level, the market has been classified into Saudi Arabia, United Arab Emirates, Oman, Qatar, Kuwait, and Bahrain, where Saudi Arabia currently dominates the GCC market.*
  8. Who are the key players/companies in the GCC bottled water market?  
*Some of the major players in the GCC bottled water market include National Plant for Healthy Water (HANA), Bin Zomah Group Trading & Mfg., Health Water Bottling Co. Ltd., Al Ain Mineral Water Co., Al Jodmah Bottling Plants (Al Jomaih Holding Co.), Al Manhal Water Factory Co. Ltd., etc.*



*Could you be creative for entering in GCC market?*



## 5. INova Company Presentation



# Our Mission

*To create bridges, enable business expansion, new market entry and internationalisation for the businesses worldwide with the Middle East.*

- **INova** represents different companies, with their projects, products and services, from all over the world.
- **INova** works on the market expansion and act as trade agent including planning, strategy development and networking with new business partners.
- **Our team** of professionals with 20 + years of experience delivers expert services and solutions to facilitate business development, growth, and international expansion throughout a wide range of industry sectors.
- **Main industries** - we operate in are IIOT, IT Digital Innovation and Technology, Energy saving and monitoring, Food and Industry products, Agroindustry, Consultancy, Health/Wellbeing, Fashion, Design, Interior Design, Professional services and Education.



# About Us

# Comprehensive Services

IMPACTFUL AND INNOVATIVE SOLUTIONS FOR YOUR GLOBAL SUCCESS

## 1 STRATEGIZE

### International roadmap

- ✓ Strategic review
- ✓ Market research
- ✓ Project & Operational Management
- ✓ Financing solutions

## 2 EXPAND

### Market strategy

- ✓ Comparative analysis
- ✓ Sales channels
- ✓ New partners, clients, distributors, suppliers
- ✓ Improving business performance

## 3 SET UP

### Operation

- ✓ Company setup
- ✓ Launching campaigns
- ✓ Local representation

## 4 INVEST

### External growth

- ✓ Identification of targets
- ✓ Negotiation support
- ✓ Investment

YOUR CHALLENGE



# Yours Advantages

## INova Strengths

**INova is a reliable partner for You.**

*Our experienced team of at INova can provide a range of benefits and offer different consulting services:*

- Tailor-made solutions to grow your business
- Develop international business cooperation, business networking
- Provide consultations and implementation of trade of goods and services
- Provide project management consultancy, investment consultancy
- Development of strategic business relations
- Promotion for our clients to access new markets
- Mobilise investment aiming at business expansion & internationalisation





# Thank You

Inova Global Solutions  
United Arab Emirates

[office@inovaglobal.net](mailto:office@inovaglobal.net)

[www.inovaglobal.net](http://www.inovaglobal.net)

**INNOVA**  
GLOBAL SOLUTIONS