

## **“Women and Youth Entrepreneurs Leading Change – OBADER”**

### **UAE Market Pointer**

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**Export Development and Market Intelligence Department –**

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**13.10.2021**

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**Contents**

Introduction.....	4
Economic Overview .....	4
<b>KEY POINTS</b> .....	5
Economic Structure and Major Industries .....	6
Foreign Trade .....	7
Palestine's Trade with the UAE .....	8
United Emirates' International Trade.....	9
Consumers Trends and Behavior .....	10
Income and Expenditure .....	10
Consumers Behavior and COVID19 .....	10
Life priorities.....	11
Home Life .....	11
Ethical Life .....	12
Shopping.....	13
UAE Handicraft Market Size .....	14
Handicraft Market – Life Cycle .....	16
UAE Market – Handicraft Products Shares.....	17
Distribution Channels.....	18
Impact of COVID19 on the UAE .....	19
Rising Disposable Income .....	20
Growing E-Commerce .....	21
Government Initiatives – Handicraft Sector Focused .....	22
Products Demand in Target Market .....	23
Glass .....	23
Applied Tariffs on Palestine .....	24
Quantities Imported.....	24
Ceramics.....	26
Applied Tariffs on Palestine .....	27
Quantities Imported.....	27

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Wooden Statues .....	28
Applied Tariffs on Palestine .....	30
Quantities Imported.....	30
Rosaries.....	31
Applied Tariffs on Palestine .....	32
Quantities Imported.....	32
Embroideries .....	34
Applied Tariffs on Palestine .....	35
UAE Handicraft Market Opportuntiy Assessment .....	35
By Product.....	35
By Distribution Channels.....	35
By End User .....	36
Companies Profiles.....	37
Fakih Group of Companies.....	37
Al Saqee Handicraft LLC.....	37
Lucky's Furniture & Handicraft .....	38
Amal Star Antiques LLC .....	38
Tribe Dubai.....	39
Craft India Overseas.....	39
Ramniwas Hastkala Niryat Pvt. Ltd .....	40
D Décor Home Fabrics Pvt. Ltd. ....	40

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### Introduction

**CARE International (West Bank/ Gaza)** is implementing OBADER project “Women and Youth Entrepreneurs Leading Change” in cooperation with the Ministry of National Economy and in partnership with the Government of Canada. The Ultimate Outcome of OBADER is “Enhanced economic empowerment and increased prosperity for low-income women and/or female and male youth in central (including Nablus) and south of West Bank and Gaza”. CARE has contracted PalTrade to assist in achieving their goal by providing market intelligence information on three different regions to identify and find niche markets for the Palestinian handicraft products in international markets.

This market pointer will focus on the UAE market. The following products will be the main focus of investigation:

- Glass (hand-made)
- Ceramics
- Olive Wood monuments, sculptures and rosaries
- Embroidery

### Economic Overview

The standard of living in the United Arab Emirates is one of the highest in the world. A liberal, business friendly and market-oriented growth strategy has reshaped the economy. The non-oil sector steadily expanded as diversification of the economy proceeded. However, greater diversification meant that the UAE was hit more severely by the global financial crisis than its neighbours. The economy continued to struggle in later years as low oil prices persisted and the fiscal deficit widened (despite significant reforms). Real GDP grew by 1.7% in 2018 and by the same figure in 2019, as oil prices recovered somewhat, but were limited by the OPEC+ production cap. However, continuously low oil prices, together with the measures introduced to contain COVID-19, represented a drag on the UAE's economy in 2020, with real GDP estimated to have fallen by 6.4% in that year.

Abu Dhabi and Dubai together account for about 80% of the UAE's income. Abu Dhabi's diversification programme has made impressive progress. Its non-oil industries now account for close to 50% of GDP. Dubai's diversification efforts were slowed by problems in the financial industry and the real estate market. However, both sectors now appear to be on the way to recovery.

The UAE is the second largest FDI recipient among Arab countries after Saudi Arabia. As the UAE's economy has developed into a major services hub in the Middle East, its dependency on oil exports has declined.

The economy will experience moderate growth in 2021. Oil prices are not expected to recover this year, and it is anticipated that the OPEC+ oil production cap will remain in place. Dubai Expo, which will run from October 2021 to April 2022, is expected to attract 25 million visitors, 70% from outside the UAE. The UAE's economy should continue its recovery; recording real GDP growth of 2.2% in 2022 and the rate will grow to around 2.6% per year thereafter.

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#### KEY POINTS

- In 2021, the economy is expected to recover somewhat. Real GDP is expected to grow by 1.2% in 2021, after a decrease of 6.4% in 2020.
- Private final consumption (in real terms) is estimated to have fallen by 5.7% in 2020 and real terms growth of 1.6% is expected in 2021.
- Unemployment should fall to 2.8% in 2021 – down from an estimated 3.5% in 2020. According to the national statistics agency, foreign workers represent more than 80% of the workforce.
- The UAE's economy should continue its recovery; recording real GDP growth of 2.2% in 2022 and the rate will grow to around 2.6% per year thereafter, although it could still be restricted by low oil prices and the continuation of the OPEC+ production cap.

United Arab Emirates – Country Facts	
Area	83,600 square kilometres
Currency	UAE dirham (AED= 100 fils)
Capital	Abu Dhabi
Ruling Party	<p>There are no legal political parties in the United Arab Emirates.</p> <p>The country is managed by:</p> <ol style="list-style-type: none"> <li>1. Head of State: Sheikh Khalifa bin Zayed Al Nahyan (2004)</li> <li>2. Sheikh Mohammed bin Rashid Al Maktoum (2006)</li> </ol>
Political Structure	<p>The UAE is a federation of seven emirates – Abu Dhabi, Dubai, Sharjah, Ajman, Fujairah, Ras al-Khaimah and Umm al-Qaiwain. Political power is concentrated in Abu Dhabi, which controls the vast majority of the UAE's economic and resource wealth. The two largest emirates – Abu Dhabi and Dubai – provide over 80% of the UAE's income. In 1996, the UAE's Federal National Council approved a permanent constitution. The establishment of Abu Dhabi as the UAE's permanent capital was one of the new framework's main provisions. There is a Federal Supreme Council, composed of the seven emirate rulers. The Federal National Council, which consists of 20 members appointed by the emirate rulers and 20</p>

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	members elected by indirect vote through local councils, has no legislative powers. The president is elected by the Federal Supreme Council.
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### Economic Structure and Major Industries

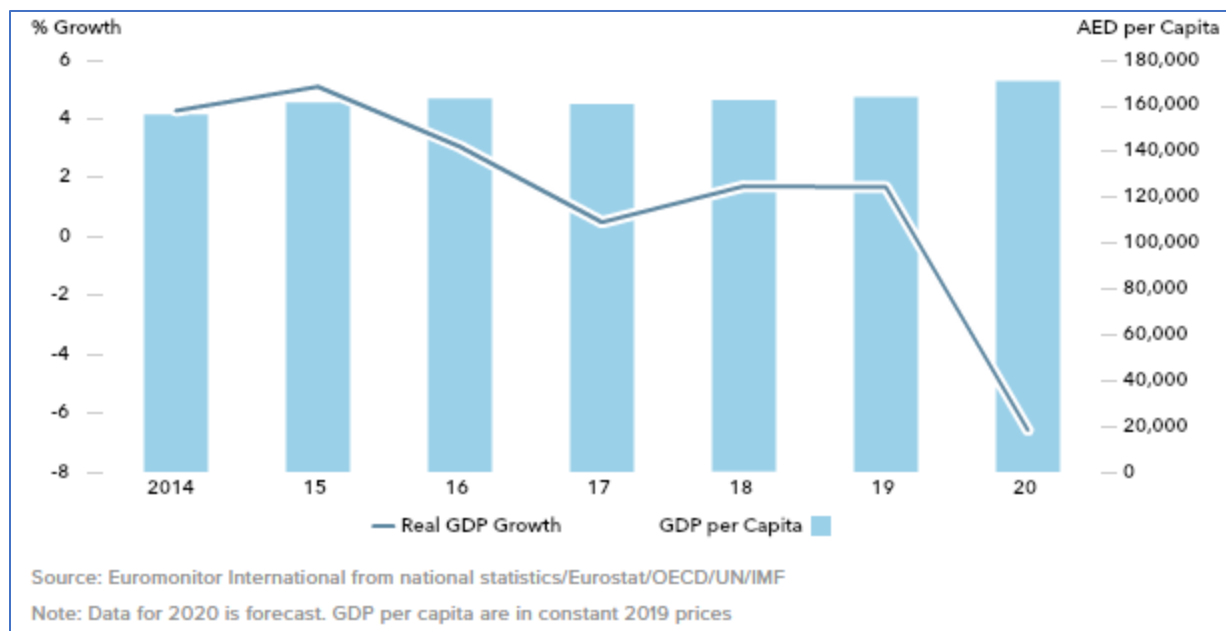
Manufacturing employs 8.8% of the workforce and accounts for 9.2% of GDP but the government aims to raise this share to 25% by 2025. The industries singled out to drive this expansion are petrochemicals, automobile parts, shipbuilding, aviation and energy-based activities. Presently, several large aluminium projects are nearing completion. The biggest is a US\$5.6 billion aluminium smelter. Other large aluminium smelters are being merged. Abu Dhabi intends to encourage manufacturing through projects such as the Khalifa Industrial Zone which allows 100% foreign ownership. Abu Dhabi is also pursuing a diversification strategy that emphasises financial services, petrochemicals and renewable energy.

Abu Dhabi National Oil Co (Adnoc) is currently engaged in a five-year US\$40 billion investment plan aimed at boosting oil and natural gas output. Gas developments will account for US\$25 billion of the planned investment.

The real value of inbound tourist and business receipts fell by 67.8% in 2020 as the performance was hampered by travel restrictions, although real growth of 136% is expected in 2021. To attract more visitors, a movie-based theme park known as IMG Worlds of Adventure has been built, which has the capacity for 10,000 visitors daily. Dubai also plans to invest US\$32 billion to develop one of the world's largest aviation mega-hubs. Expo 2020 has been postponed to 2021-2022 and is expected to create 900,000 new jobs and bring in 25 million visitors. The new Expo 2020 will take place on the 1<sup>st</sup> of Oct 2021 to 31<sup>st</sup> of Mar 2022. The theme of the Expo is in innovation and technology in a number of fields including food and livelihood, culture and arts, sports and fitness, and architectures among others. In the financial field, credit growth to the private sector has slowed as banks increase provisioning against potential loan losses. Although banks remain well capitalised, most are increasingly unwilling to lend to SMEs.

### Chart1: Real GDP Growth and GDP per Capita 2014-2020

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### Foreign Trade

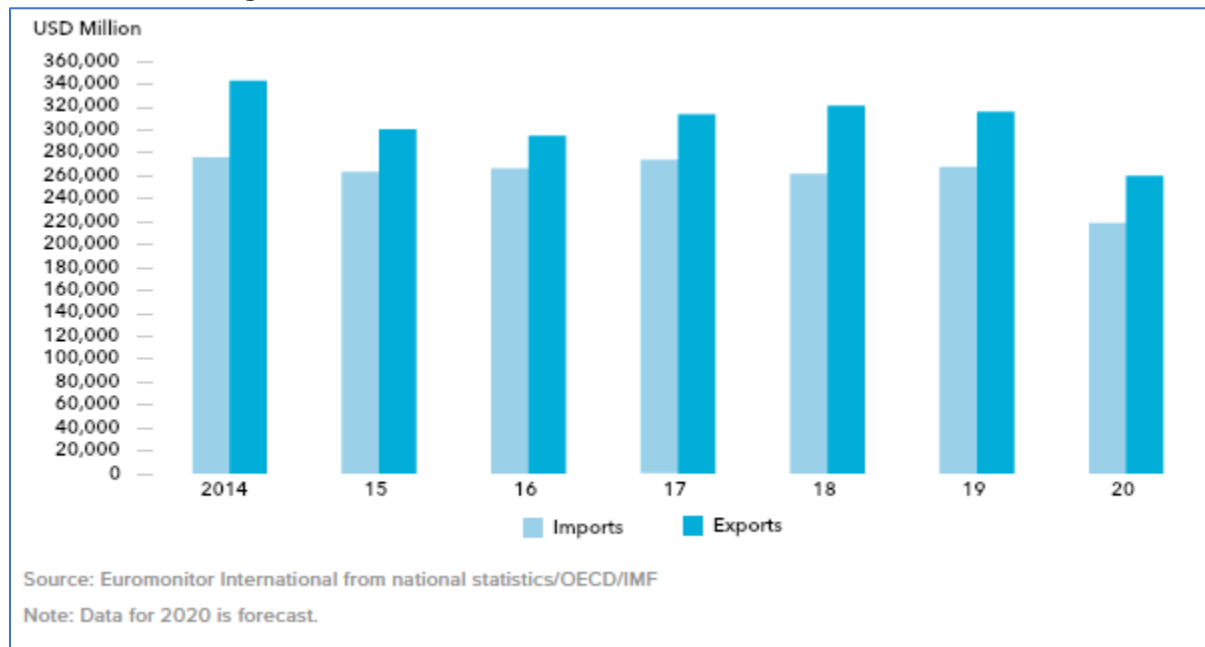
The UAE is especially dependent on exports. In 2019, exports amounted to 75.0% of GDP. Such a high export-to-GDP ratio is due to the fact that the UAE acts as a re-export hub for other countries in the region. Exports are estimated to have fallen by 17.8% in real terms in 2020 as export performance was stifled by the collapse in oil prices and the global slowdown created by the pandemic. Exports should return to growth in 2021.

Asia (primarily Japan and India) is the most important export market for the UAE, taking 44.1% in 2019. Mineral fuels represented 35.0% of all exports in 2019. Iran is an important destination for non-oil exports. These are largely re-exported goods.

The current account surplus was 8.4% of GDP in 2019, but it is estimated to have fallen to 3.2% of GDP in 2020. A gradual increase would occur if oil prices were to improve.

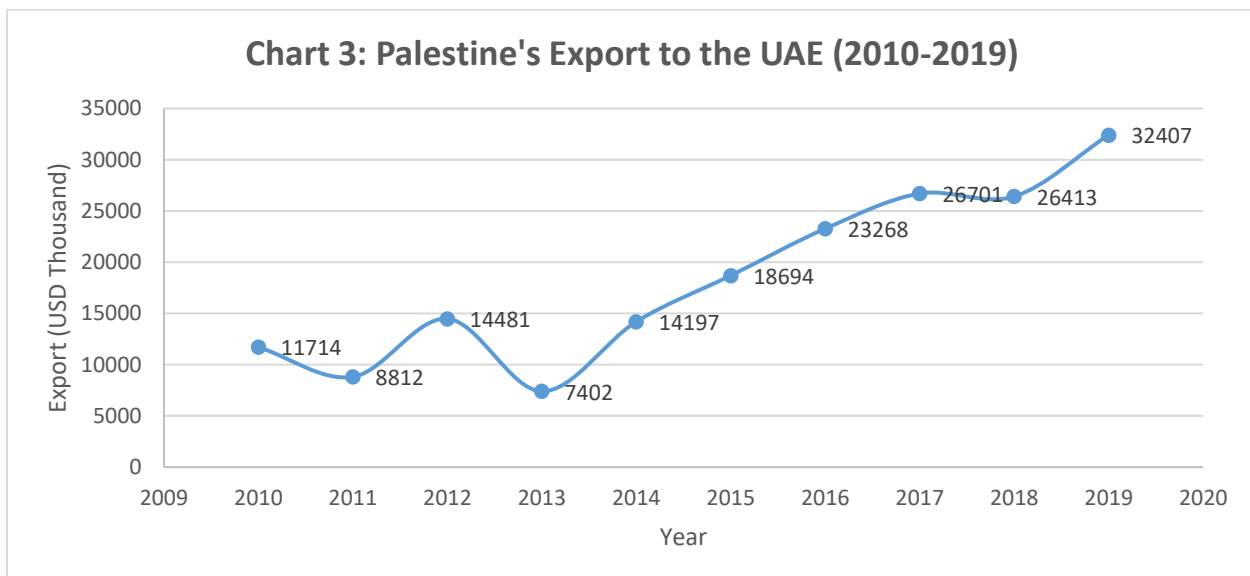
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**Chart 2 Total Foreign Trade: 2014-2020**



#### Palestine's Trade with the UAE

Palestine's export to the UAE have witnessed a constant increase since 2010 where Palestine exported USD 11.7 million to the UAE. Exports continued to increase to reach USD 18.6 million in 2015 and finally reached USD 32.4 million in 2019. See figure below.

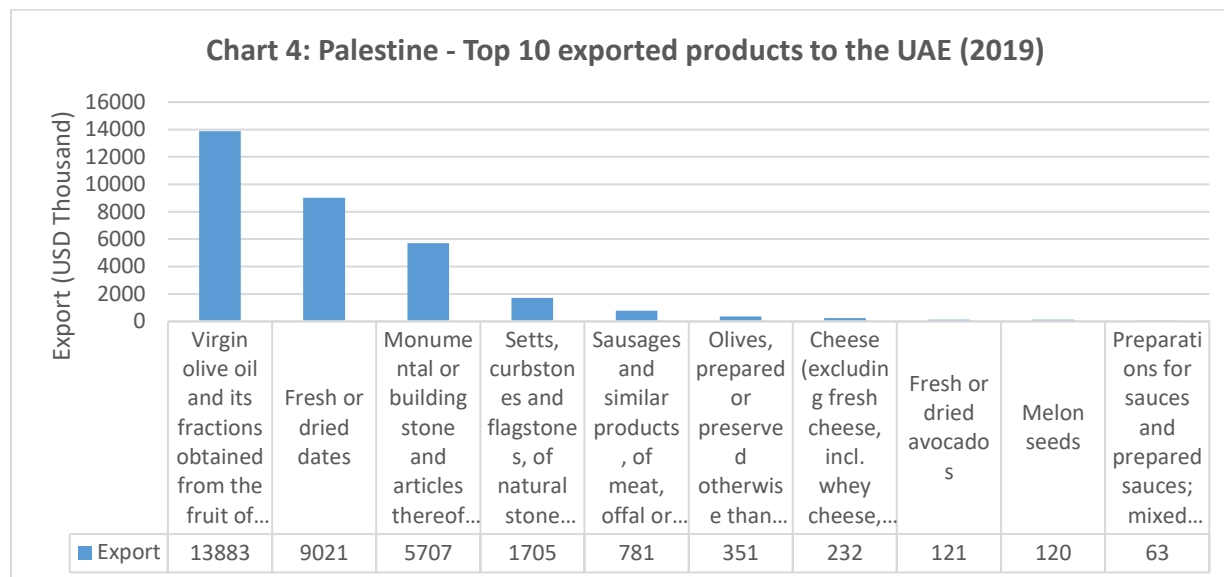


Source: Trademap.org.

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In terms of our top exported products to the UAE, Olive Oil and Dates are our most significant and consistent exports to the market. In which, in 2019 Palestine exported USD 13.8 million worth of Olive Oil and USD 9 million worth of Dates. Other exported products include Stone and marble with USD 5.7 million. See figure below.



Source: Trademap.org.

#### United Emirates' International Trade

Major export destinations	2020 Share (%)	Major import sources	2020 Share (%)
Exports (FOB) to Asia Pacific	44.1	Imports (CIF) from Asia Pacific	37.4
Exports (FOB) to Africa and the Middle East	20.7	Imports (CIF) from Europe	21.0
Exports (FOB) to Other Countries	18.4	Imports (CIF) from Africa and the Middle East	16.0
Exports (FOB) to Europe	13.8	Imports (CIF) from Other Countries	14.1
Exports (FOB) to North America	1.5	Imports (CIF) from North America	7.2
Exports (FOB) to Australasia	1.1	Imports (CIF) from Latin America	2.8

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## Consumers Trends and Behavior Income and Expenditure

The UAE's savings ratio has typically been somewhat higher than the regional average. In 2019, savings were 15.9% of disposable income and the ratio will remain the same in 2020. An ageing population ensures that demand for Islamic savings products is strong.

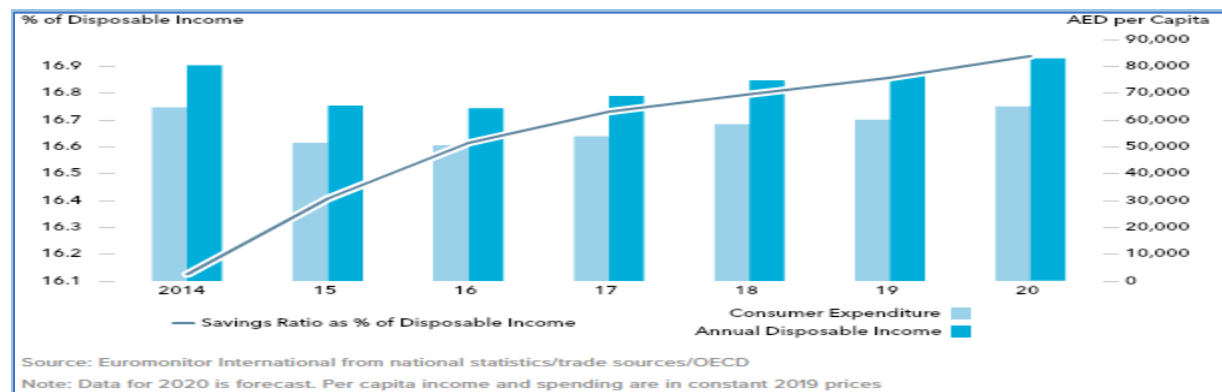
Consumer expenditure per capita totalled AED60,098 (US\$16,364) in 2019. It is expected to grow by 8.7% in 2020 in real terms. In 2020-2030, hotels and catering will be the fastest-growing consumer category. Miscellaneous goods and services will be the next largest category of growth.

In the period 2020-2030, total consumer expenditure will grow at an average annual rate of 2.6%. It will increase by a cumulative value of 29.2% during that period. Total consumer expenditure will be 38.3% of GDP in 2020.

Disposable income per capita amounted to AED75,857 (US\$20,655) in 2019. The indicator will grow by 8.3% (in real terms) in 2020.

During the period 2020-2030, total disposable income will increase by a cumulative value of 30.4% in real terms – growing at an average annual rate of 2.7%.

**Chart 5: Per Capita Annual Disposable Income, Spending and Savings Ratio: 2014-2020**



## Consumers Behavior and COVID19

Within the COVID19 pandemic there is a growing interest of consumers seeking more convenient online platforms for shopping and connecting with others, as well as growth in holistic approaches to healthy living and demanding flexibility and more options to balance work and home life. We will look at four different segments in UAEs consumer behaviors as follows<sup>1</sup>:

1. Life priorities;

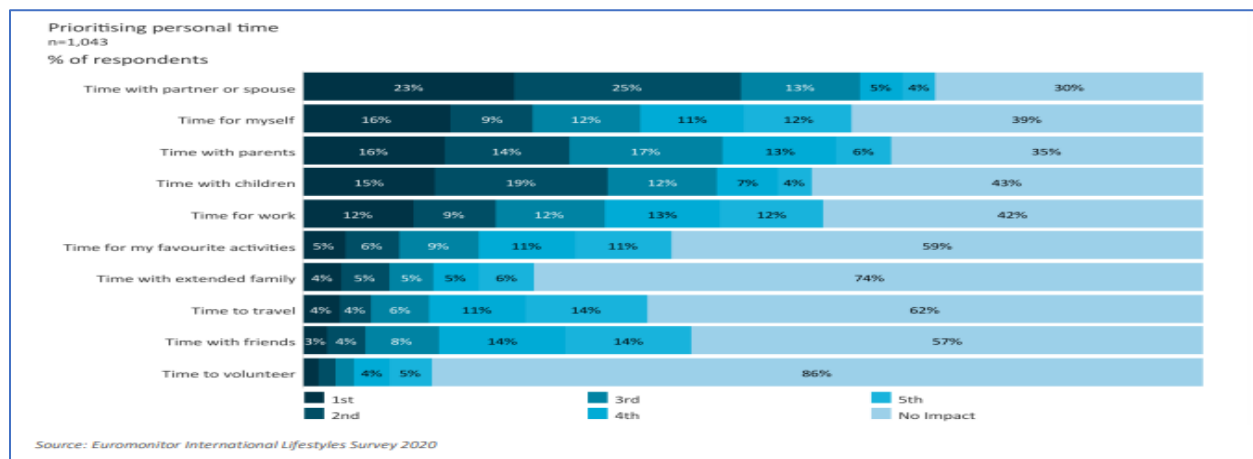
<sup>1</sup> Based on "Life Styles Survey" results in 2020

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2. Home life;
3. Ethical Living;
4. Shopping.

### Life priorities

- Lifestyles in the United Arab Emirates are far from uniform, with the vast majority of the population consisting of expatriates from a variety of backgrounds. An estimated 87% of the population are foreign citizens in 2020. Moreover, while the UAE as a whole has one of the highest standards of living in the world, there is a vast wealth gap between the highly skilled expats and native Emiratis, many of whom live in luxury, and the 4.5 million or so low-income migrant workers, mainly from India, Pakistan, Bangladesh and the Philippines.
- Strictly enforced lockdowns at the onset of the COVID-19 outbreak and other precautionary measures have kept infections and death rates low. The UAE government was also quick to respond by supplying food, hygiene products and electronic equipment to those in need. Respondents in the survey were found to have a strong sense of community. 74% agreed/strongly agreed with the statement, “I give back to those in need” (91% of baby boomers).
- The country’s residents are very family-orientated; the survey found that 62% prioritise finding time to spend with their spouse/partner and 46% with their children. Spending time with parents was also ranked highly by 47% of respondents (versus 33% globally). Families living apart have been relying on connecting virtually using their smartphones during the pandemic. The government lifted its ban on two VoIP platforms: Microsoft’s Skype for Business and Google Hangouts and made video calling platform Zoom available.

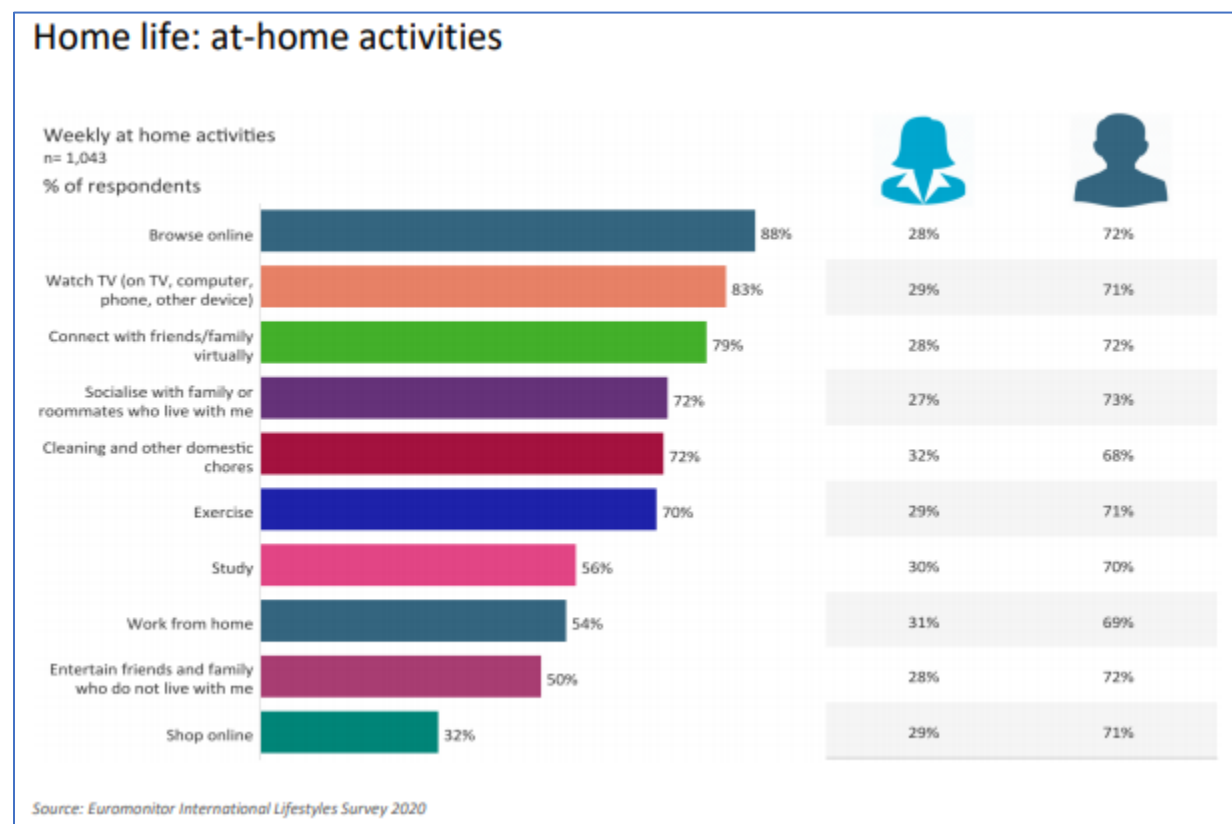


### Home Life

- Due to the large number of expatriates and the growing number of single-person households, rented dwellings are common in the United Arab Emirates and due to busy lifestyles, households seek convenience and time-saving solutions. The survey found that 54% (versus 41% globally) would pay a premium for smart appliances and products with 48% currently owning a smart kitchen appliance (versus 33% globally).

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- Entertaining at home is common in the UAE as it allows people to get together in a more relaxed environment and also to avoid going outside into the extreme heat. The survey found that 50% (versus 33% globally) entertain friends and family who do not live with them at least weekly. While sharing food is an important part of entertaining at home, only 66% of respondents said they regularly cooked or baked at home (63% of 60+ respondents). With food delivery options widely available, 51% of respondents (78% of 60+ year-olds) reported ordering food for home delivery at least weekly - much higher than the global average of 26%.
- Over 80% of 30+ year-olds surveyed watched television shows or movies (on TV, computer, smartphone, or other devices) at least weekly prior to the pandemic. During the lockdown, according to the Telecommunications Regulatory Authority, streaming service Netflix reported a 26% increase in viewership. Streaming service STARZPLAY also reported that content consumption in April 2020 increased by 340% over the same period in 2019.



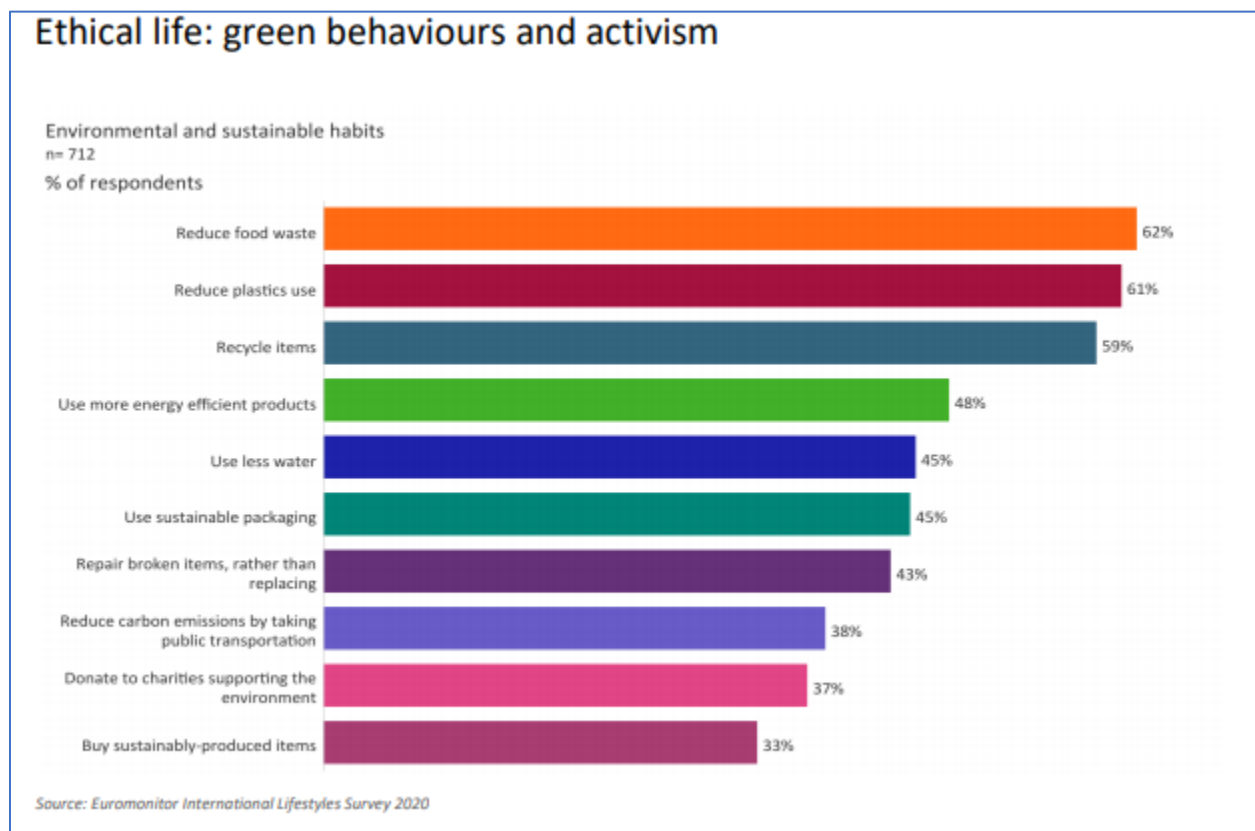
### Ethical Life

- With water scarcity and climate change considered to be the greatest environmental issues facing the country, residents are aware of the need to conserve water, with 45% of respondents prioritising using less water. However, the COVID-19 outbreak has led to greater demand for water, as additional handwashing alone is expected to increase the use of water by 9-12 litres per person per day amid the pandemic, excluding laundry, cleaning and food washing, according to a recent study by the United Nations. The country recently launched

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its Water Security Strategy 2036 to ensure sustainable access to water during both normal and emergency conditions.

- Nearly three quarters of respondents agreed/strongly agreed that giving back to those in need is important to them. There has been a huge response to government initiatives to support those made vulnerable by the COVID-19 outbreak. For example, in Dubai, a drive to provide “10 million meals” exceeded its target within a week of its launch.
- Food waste is a huge concern among many consumers in the UAE. 62% of respondents want to cut down food waste. The Ministry of Climate Change and Environment reported that the average person in the UAE wastes about 197kg of food each year. The pandemic has created a demand for more fresh foods that can be cooked at home, and households are becoming more adept at planning their meals.



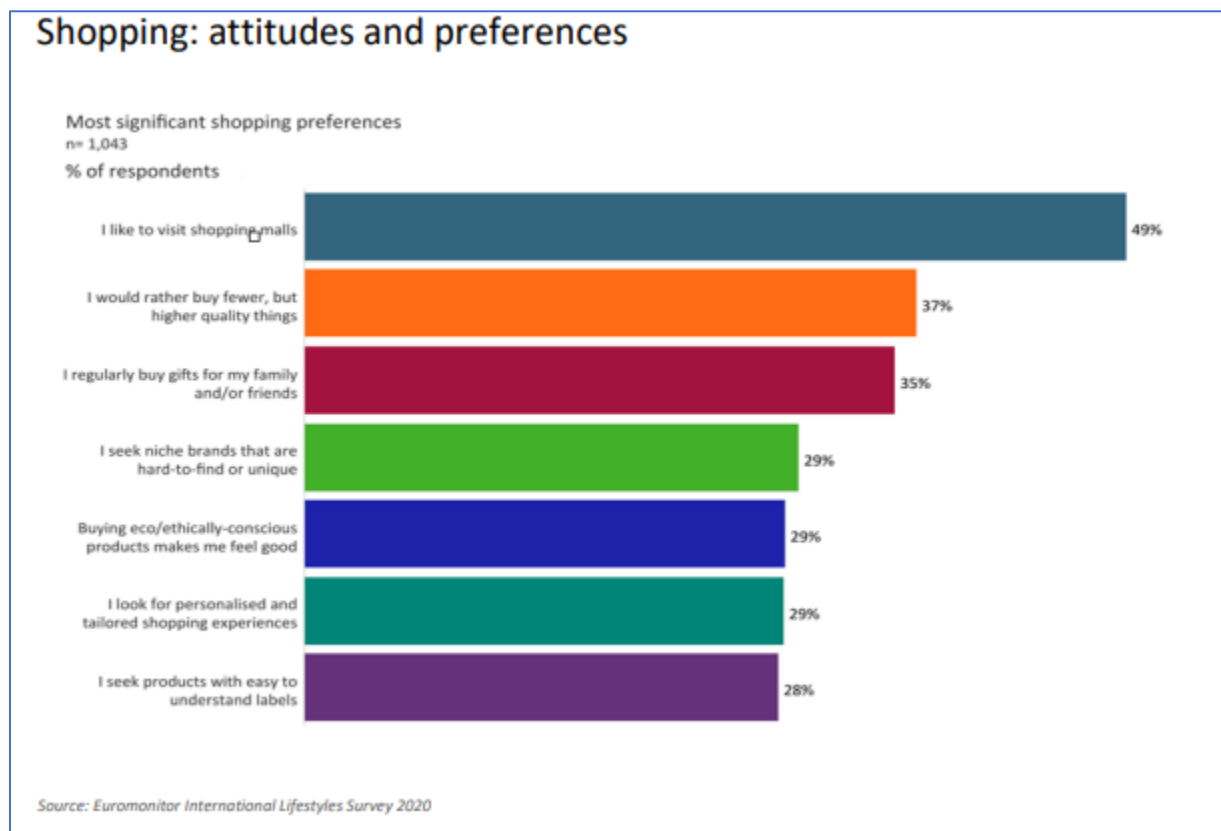
### Shopping

- Residents in the United Arab Emirates were already enthusiastic online shoppers prior to the COVID-19 outbreak - survey identified that 40% bought an item or service on their mobile phone every week. There is high demand for e-commerce retailers to provide an engaging and interactive experience to their online customers as they hesitate to return to shopping malls while restrictions remain in place. In line with demand for more tailored and shopping experiences (29% of respondents), Bazzarna recently launched its virtual fitting room,

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enabling customers to use their virtual smart-sizing solution to see if a garment is a suitable fit before they purchase it. Emaar, a Dubai-based mall reacted quickly to the outbreak by setting up virtually on noon.com, so that customers can access their retail outlets online.

- Consumers are highly influenced by marketing and advertising strategies when they are choosing products and services. Although the most influential are typically friends' and family recommendations (79% of respondents) and independent consumer reviews (71%), consumers are also heavily influenced by loyalty reward programmes (68%) and social media posts from a brand or company (61%). Residents spend a significant amount of time online and are highly engaged with companies and brands on social media. 54% (versus 38% globally) said they like to be actively engaged with brands and 46% share their data in order to receive personalised and targeted offers/deals.

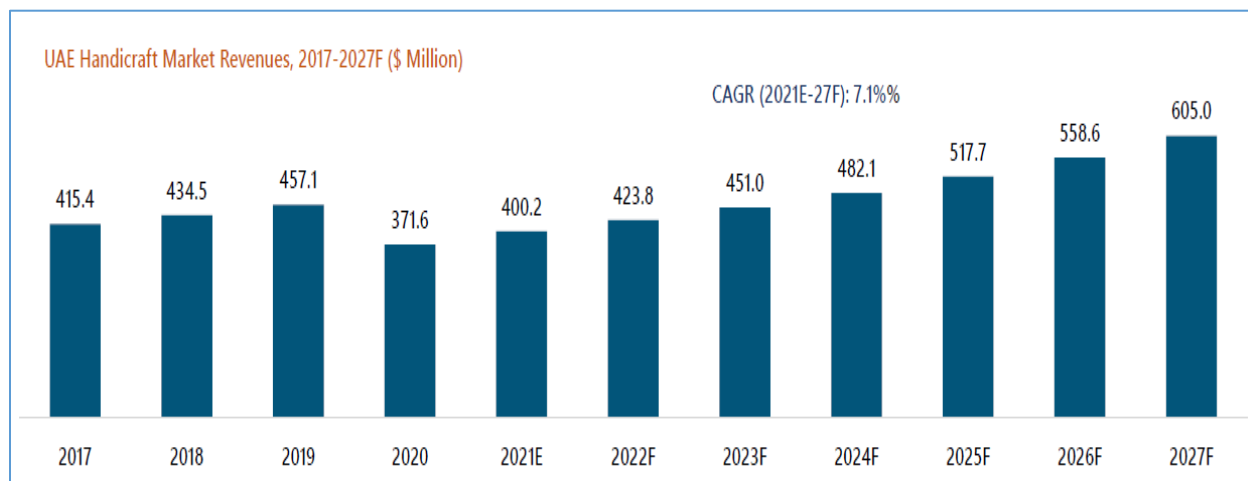


#### UAE Handicraft Market Size

The UAE market for handicrafts has been affected by the COVID19 pandemic as market revenues declined from USD 457.1 million in 2019 to USD 371.6 million in 2020. However the market is expected to rebound in 2021 with an estimated revenue of USD 400.2 million. And with the return of tourism as regulations are

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relaxed in line with increase in number of vaccinated people, as well as the EXPO 2020<sup>2</sup> which will take place in the UAE then it is expected that tourism and country visitation will increase again. It is forecasted that the market revenue will increase to USD 451 million in 2023 and ultimately reach USD 605 million in 2027. (See figure below)



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

As a result of the return of the housing and hospitality and travel and tourism sectors, the demand on handicrafts is recovering after the dip in 2019. The decline is due mainly to the COVID19 pandemic and the closures of malls and retail stores leading to a decline in sales and revenues figures for the Handicraft market in the UAE. In terms of numbers, the handicraft market revenue is projected to grow at a Compound Annual Growth Rate (CAGR) of 7.1% during 2021-2027 given the successful government interventions in combating the spread of COVID19 through a successful vaccination program and the uplifting of travel restrictions, the demand from tourism and hospitality sector is expected to increase growth in the handicraft market. In addition the recovery is also due to the rising disposable income and growing living standards in the UAE which is already above regional average.

As well as, other government policies and efforts toward the promotion of art and culture through platforms like Abu Dhabi Register of Artisans, as Irthi Contemporary Crafts Council, Taskeel and The Abu Dhabi Crafts Platform and The House of Artisans. Design and craft program to promote art and culture among the audience in the upcoming Dubai Expo 2020 is further expected boost the market for Handicraft in the country.

By distribution channel, mass retailer segment acquired largest market revenue share in 2020 in the UAE Handicraft market owing to their vast distribution network coupled with competitive pricing and wide variety of product portfolio. By product type, metal ware Handicraft led the market revenue share in 2020 on account of high demand form housing and hospitality sector which is further expected to drive the market for Handicraft in the country during the forecast period.

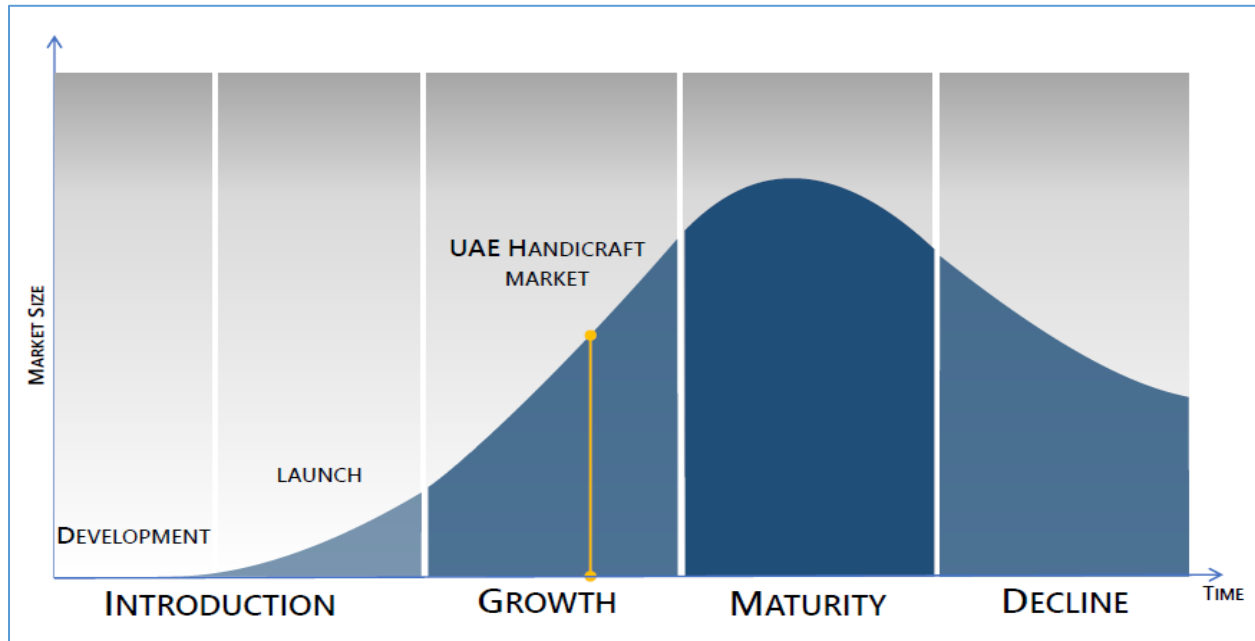
<sup>2</sup> EXPO 2020 which was delayed due to COVID19 and currently is scheduled to run from 1<sup>st</sup> of Oct 2020 to 31<sup>st</sup> of Mar 2022.

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### Handicraft Market – Life Cycle

UAE Handicraft Market is currently in its growth stage in the life cycle of the market. This mainly due to rising disposable income and increase in tourism visitation to the country, coupled with government initiatives to promote culture and tradition. Also given the rise in digital marketing and e-commerce payments the demand on handicraft products is further expected to increase. (please see figure below)



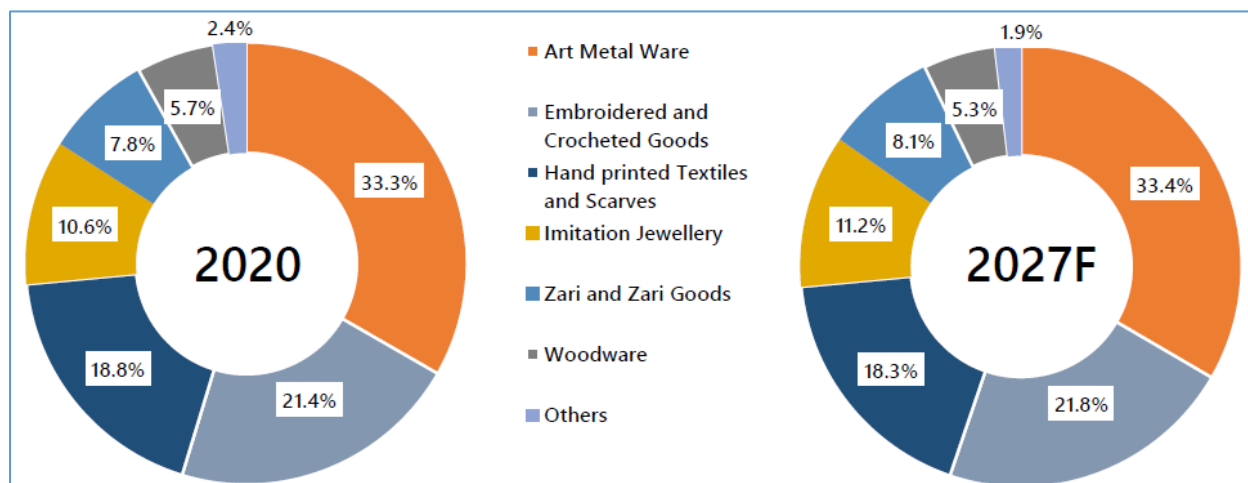
Source: 6Wresearch – UAE Handicraft Report (2021-2027)

In 2020, with increased demand from residential and hospitality sector in UAE the metal ware along with premium clothing with embroidered and crocheted goods, and hand printed textiles and scarves segments of handicraft sectors saw increased revenue shares. Recently, after relaxation of COVID19 regulations tourism is back as one of the main drivers of the handicraft market in the UAE making it one of the fastest growing activities in the UAE – please see figure below for 2020 handicraft products market share and forecasted shares in the year 2027.

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**Figure: UAE Handicraft Market Revenue Share, By Product Type, 2020& 2027F**



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

#### UAE Market – Handicraft Products Shares

UAE Handicraft Market Revenues, By Product Type, 2017-2027F (\$ Million)													
Product Type	2017	2018	2019	2020	CAGR (2017-2020)	2021E	2022F	2023F	2024F	2025F	2026F	2027F	CAGR (2021E-2027F)
Art Metal Ware	136.7	143.5	151.6	123.7	(3.3%)	133.4	141.3	150.4	160.9	172.8	186.5	202.1	7.2%
Embroidered and Crocheted Goods	86.0	91.0	96.7	79.5	(2.6%)	85.8	91.1	97.2	104.2	112.3	121.5	132.0	7.5%
Hand printed Textiles and Scarves	81.8	84.3	87.3	69.9	(5.1%)	75.2	79.3	84.0	89.4	95.6	102.7	110.7	6.7%
Imitation Jewellery	42.0	44.6	47.7	39.4	(2.1%)	42.5	45.4	48.8	52.6	57.0	62.0	67.8	8.1%
Zari and Zari Goods	31.7	33.4	35.4	29.0	(2.9%)	31.3	33.3	35.7	38.4	41.5	45.0	49.0	7.8%
Woodware	25.8	26.2	26.8	21.2	(6.3%)	22.7	23.8	25.0	26.4	28.1	30.0	32.1	5.9%
Others	11.5	11.5	11.5	8.9	(8.1%)	9.4	9.6	9.9	10.2	10.5	10.9	11.4	3.3%

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<b>Total</b>	<b>415.</b> <b>4</b>	<b>434.</b> <b>5</b>	<b>457.</b> <b>1</b>	<b>371.</b> <b>6</b>	<b>(3.6</b> <b>%)</b>	<b>400.</b> <b>2</b>	<b>423.</b> <b>8</b>	<b>451.</b> <b>0</b>	<b>482.</b> <b>1</b>	<b>517.</b> <b>7</b>	<b>558.</b> <b>6</b>	<b>605.</b> <b>0</b>	<b>7.1%</b>
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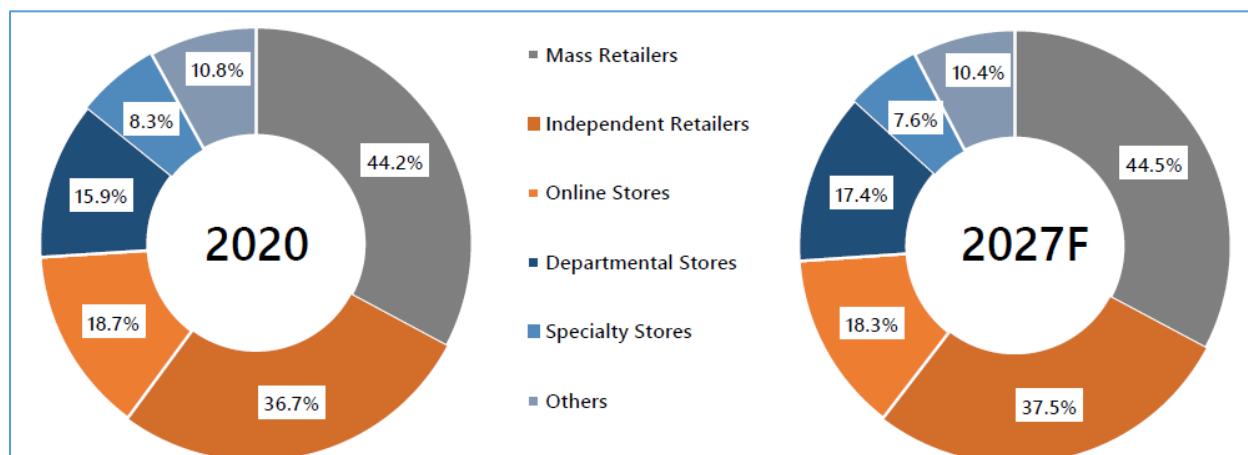
Source: 6Wresearch – UAE Handicraft Report (2021-2027)

#### Distribution Channels

Looking at the distribution channels of handicraft products in the UAE in year 2020, we see that mass retailers hold the majority of the market share with 44.2% in 2020, followed by independent retailers at 36.7%, while online stores accounted for 18.7% which according to 6WResearch have witnessed a major growth in 2020 due to malls and retail stores being closed during COVID19 lockdown – see figure below.

In 2027, the handicraft market distribution channels is expected to remain mostly the same with mass retailers and independent retailers capturing the majority of the market share followed by online stores, although the percentage for online sales in 2027 is expected to slightly decline to 18.3%.

**Figure: UAE Handicraft Market Revenue Share, By Distribution Channel, 2020& 2027F**

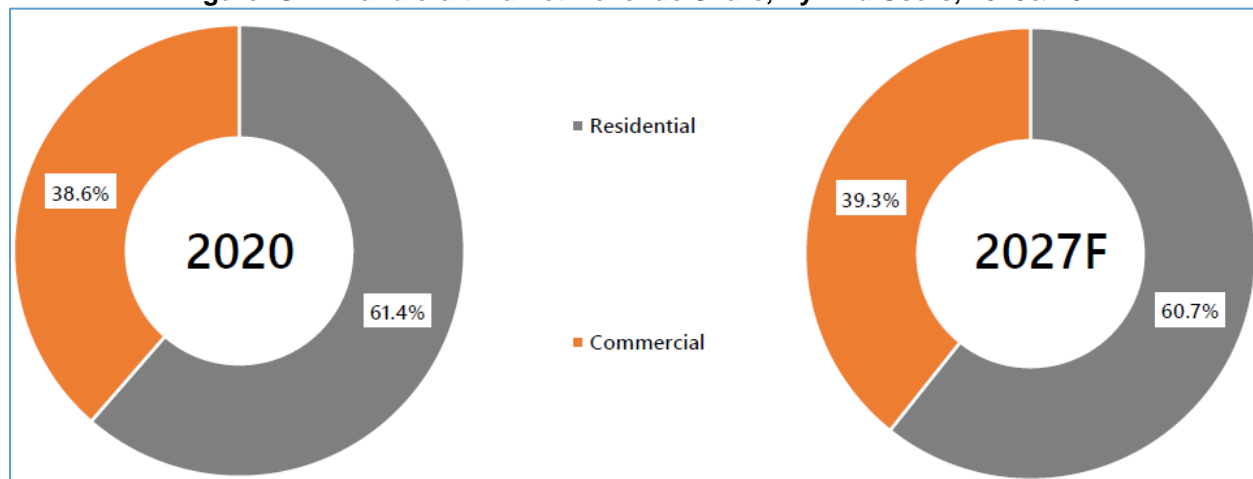


Source: 6Wresearch – UAE Handicraft Report (2021-2027)

Most of the handicraft products in the UAE market in 2020 are being purchased by the residential sector due to the high disposable income level of consumers along with falling residential prices and government's immigration reforms. Moreover, giving the massive construction boom and expanding manufacturing base and thriving services sector its expected that commercial shares of handicraft products is forecasted to increase. As in 2020, the residential sector accounted for 61.4% of the handicraft market revenue while the commercial sector accounting for 38.6%. In 2027, it is forecasted that the commercial sector share will increase to 39.3% - see figure below.

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Figure: UAE Handicraft Market Revenue Share, By End Users, 2020& 2027F



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

UAE Handicraft Market Revenues, By Distribution Channel, 2017-2027F (\$ Million)													
Product Type	2017	2018	2019	2020	CAGR (2017-2020)	2021E	2022F	2023F	2024F	2025F	2026F	2027F	CAGR (2021E-2027F)
Mass Retailers	181.9	190.9	201.4	164.2	(3.4%)	177.0	187.6	199.9	213.9	229.9	248.3	269.2	7.2%
Specialty Stores	149.1	157.1	166.5	136.4	(2.9%)	147.0	156.3	166.8	178.9	192.8	208.8	226.9	7.5%
Independent Retailers	79.3	82.4	86.1	69.5	(4.3%)	74.6	78.8	83.5	89.0	95.3	102.5	110.7	6.8%
Online Stores	57.3	63.0	69.5	59.1	1.0%	63.9	68.7	74.2	80.4	87.6	95.9	105.3	8.7%
Departmental Stores	37.8	38.4	39.2	30.8	(6.6%)	33.1	34.6	36.3	38.3	40.5	43.1	46.0	5.6%
Others	46.5	48.1	5.0	40.1	(4.8%)	43.0	45.3	48.0	51.0	54.4	58.4	62.9	6.5%
<b>Total</b>	<b>415.4</b>	<b>434.5</b>	<b>457.1</b>	<b>371.6</b>	<b>(3.6%)</b>	<b>400.2</b>	<b>423.8</b>	<b>451.0</b>	<b>482.1</b>	<b>517.7</b>	<b>558.6</b>	<b>605.0</b>	<b>7.1%</b>

Source: 6Wresearch – UAE Handicraft Report (2021-2027)

#### Impact of COVID19 on the UAE

The COVID19 pandemic had an adverse effect on the global economy as a whole including the UAE economy. The effect was derived from falling oil prices and reduced number of tourism and travel visitation to the country. This resulted in a decline in the UAE economy of 5.8% in 2020 and this also reflected heavily on the demand for handicraft products during the same year as consumers shifted their spending preferences.

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The COVID19 closures in the UAE resulted in 30% decline in retail revenues in Feb 2020, as malls which account for the majority of retail revenues in the UAE remained closed for a period of 4 weeks and later resumed operations at only 30% capacity which impacted heavily on handicraft products sales in the market. Thankfully, the decline in traditional retailing saw a rise of e-commerce and digital payments, as online sales of handicraft products increased during 2020.

In March 2020, the UAE government adopted measures to help businesses cope with COVID19 effects. As the central bank pumped AED 100 billion in economic support scheme for businesses. The government continued its serious effort to combat and reduce the impact of COVID19 as it announced in 2021, 50 new projects to attract investment up to USD 150 billion mostly focused on the the industrial sector and technology education. Coupled with a new visa scheme to attract new residents and skilled workers. For the handicraft market in the UAE these are welcomed interventions that will help facilitate new economic growth, increased tourism levels, government support and interest in the success of the sector, and renewed optimism in the market that encourages investment and promote increased demand should see the handicraft market in the UAE recover quickly.

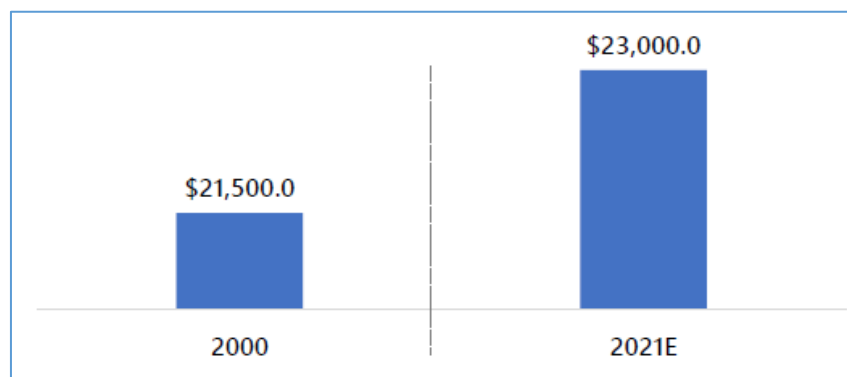
In the below section we will explore in more depth the market drivers that should help the UAE handicraft market to grow.

## Market Drivers

### Rising Disposable Income

Due to COVID19 average disposable income declined in 2020 by 19.6%, however it expected that it will rebound in 2021 by 12.4%. However, with government policies aimed at improving economic situation and incourage investment and spending, it is expected that consumer spending will increase by 4.1% in 2021. Also due to 4% pay increase planned by UAE enterprises for 2022 in addition to the 3% pay increase offered in 2021. Finally, upcoming events in the UAE such as the EXPO 2020 and Dubai Export World Fair which will run from Oct 2021 to Mar 2022, and the World Cup 2022 should also help boost tourism and spending levels in the UAE and have a positive impact on the demand for handicraft products.

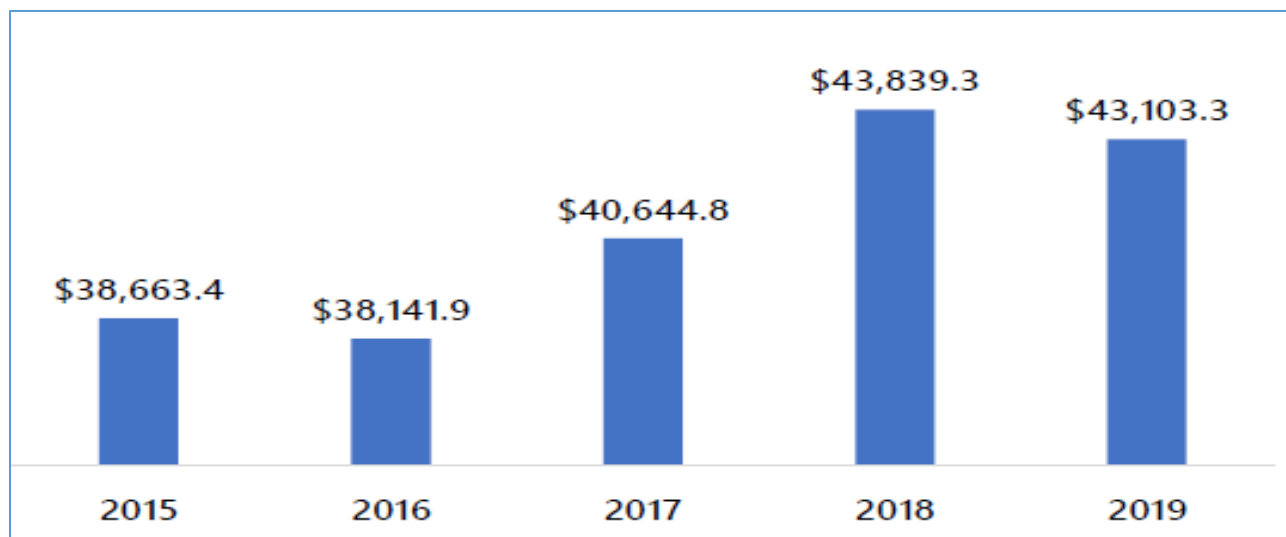
**Figure: UAE Per Capita Income, 2000 & 2021E**



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

**Figure: UAE GDP Per Capita, 2015-2019**

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Source: 6Wresearch – UAE Handicraft Report (2021-2027)

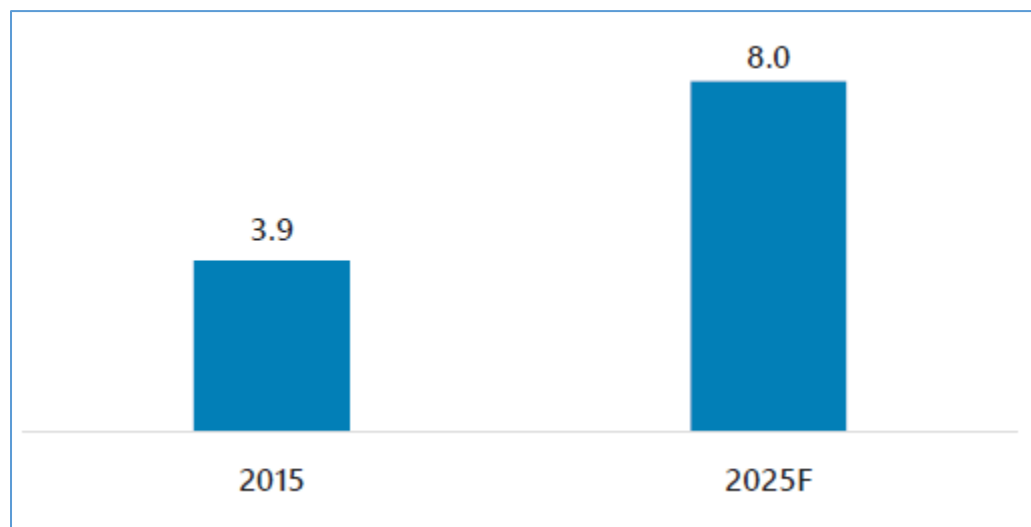
#### Growing E-Commerce

The e-commerce retail sector in the UAE has witnessed an increase of 53% in 2020 due to change in consumer spending medium due to COVID19 closures and as such it registered USD 3.9 billion in 2020. With the trend expected to continue with the market size reaching USD 8 billion in 2025 with growth rate of 18.9% CAGR. The UAE government is also contributing for this growth as it introduce further support to cashless payments and digital commerce, the UAE central bank is implementing the National Payments Systems Strategy and Dubai Paperless Strategy in order to secure and develop the online payment system in the country.

As such several handicraft companies are opening their own online stores such as, Ashaak Company so it can sell its home made products including handicraft products. Also Al Ban which is a marketplace launched in 2021 offering its users the ability to purchase a number of products including handicraft ones from suppliers in the UAE, Bahrain, Egypt, Lebanon and other countries.

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**Figure: UAE E-Commerce Market Size, 2015 & 2025F (\$ Billion)**



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

#### Government Initiatives – Handicraft Sector Focused

In Abu Dhabi the government planned a number of programs and initiatives to support the handicraft sector in the country, including:

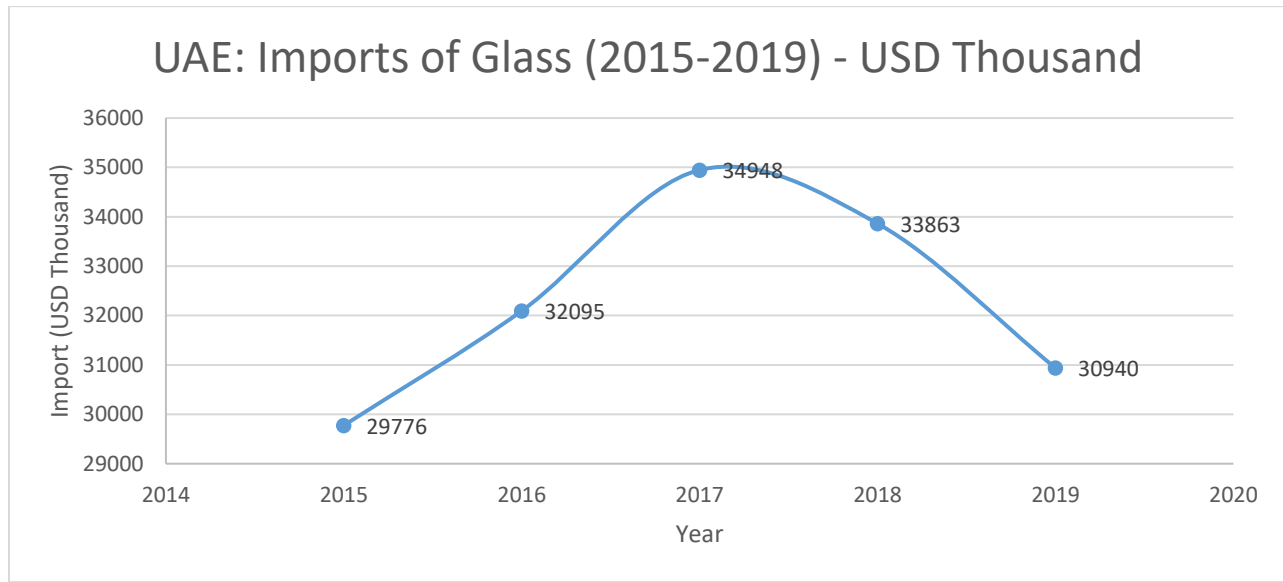
1. **Sougha Programme:** This aims to preserve the cultural heritage by encouraging entrepreneurship in handicrafts. It targets all artisans and women within the UAE
2. **The Abu Dhabi Crafts Platform:** would help the artisans display their products at events, as well as sell and market their products at international stores and participate in skill development programs. For the customers the platform would offer user friendly portal and ensure authenticity of the available products.
3. **Abu Dhabi register of Artisans:** is an online database that would allow craftsman and women who practice one or more of the 17 traditional crafts to apply for certification and memberships of the register. Several benefits would be made available to the artisans such as training and development, participation in fairs and workshops and other government sponsored activities.
4. **The house of Artisans:** Located in Al Hosn recently resumed their operations offering exhibition of traditional craft for its visitors who can experience the culture and technique required to produce artwork by the Emirati artists and designers. Government efforts to promote traditional art and culture is expected to drive the market for Handicraft in the coming years.

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## Products Demand in Target Market

### Glass

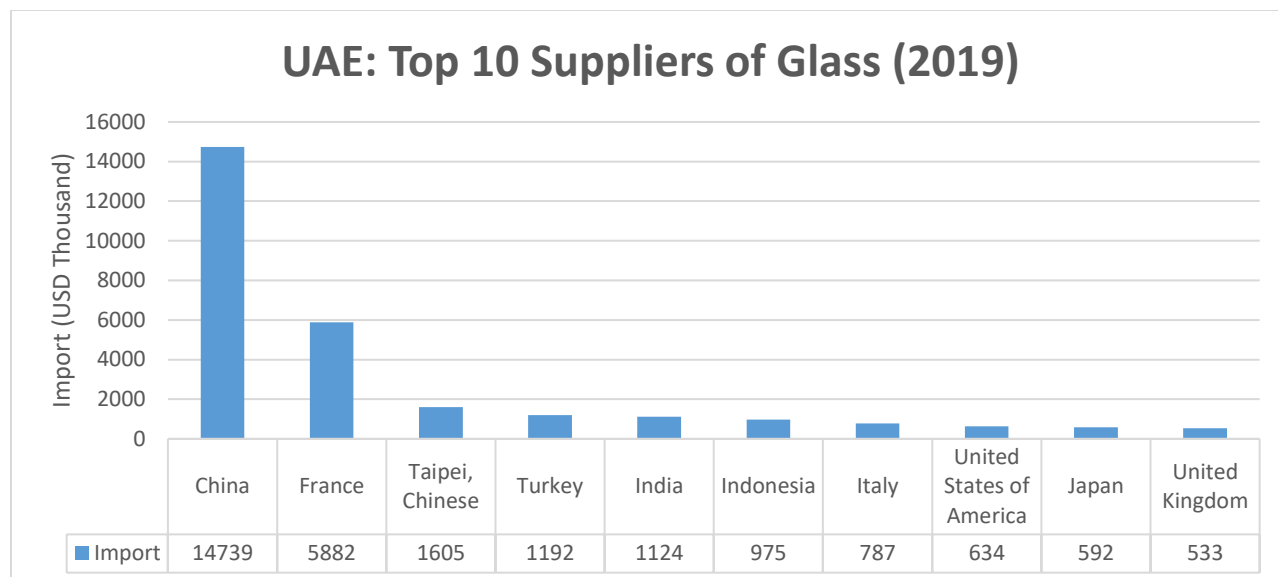
The UAE market Imports increased slightly overall between the years 2015 to 2019, as imports increased from US 29.7 million to US 30.9 million. However, overall demand in the market seems to be cyclical in nature with ups and downs on a yearly basis and it remains huge in value. See figure below.



Source: Trademap.org

In terms of competitors, China is the lead supplier of glass to the UAE market in 2019 where it exported US\$ 14.7 million or 47% of the UAE's total imports of glass. France comes second with US\$ 5.8 million. While Taipei China and Turkey ranks in 3<sup>rd</sup> and 4<sup>th</sup> place with US\$ 1.6 million and US\$ 1.1 million respectively. Palestine on the other hand did not export glass to the UAE in 2020 or earlier.

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Source: Trademap.org

#### Applied Tariffs on Palestine

Glass – HS 701349		
Tariff Regime	Applied Tariff	AVE <sup>3</sup>
MFN duties (Applied) <sup>4</sup>	5%	5%
<b>Preferential tariff for Palestine</b>	<b>0%</b>	<b>0%</b>

Source: Market Access Map

#### Quantities Imported

Looking at the specific HS code for glass HS 701349 in terms of quantity we notice UAE's imports are significant in 2019 with a total of 18.7 thousand tons, with China exporting 11.5 thousand tons in 2019 which is about 62% of the UAE market share and are subject to a 5% tariff rate. All of the top marketshare holders in the UAE market are subject to 5% tariff rate while Palestine enjoys preferential treatment with zero tariffs faced.

Glass – HS 701349		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>18762</b>	

<sup>3</sup> AVE stands for Ad Valorem Equivalent. It is an estimation in the form of a percentage of a non-ad valorem tariff.

<sup>4</sup> MFN tariffs are the tariffs applied by WTO members to goods imported from any other WTO member countries in respect of the Most Favoured Nation principle.

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China	11594	5
France	2414	5
Indonesia	1287	5
India	811	5
Turkey	770	5
Spain	367	5
Iran, Islamic Republic of	317	5
Taipei, Chinese	193	5
Italy	150	5
Poland	143	5

Source: Trademap.org

Unfortunately it is difficult to tell the exact HS code that will be used by Palestinian exporters of glass given the very limited available previous exporting experience and information. As such we have also decided to take a look at UAE's imports of the entire family of glass products at the 4 digits level (HS 7013) in terms of quantity. In 2019, the country imported 57 thousand tons of glass worldwide, with China as the market lead shareholder with 35 thousand tons, followed by France with 4.5 thousand tons.

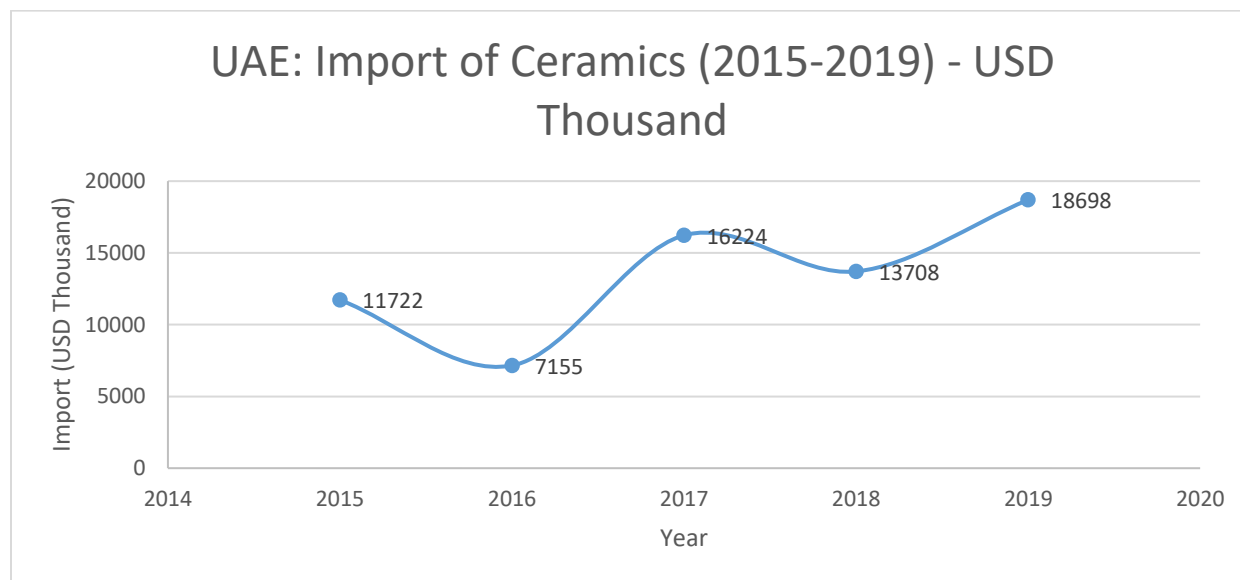
Glass – HS 7013		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>57485</b>	
China	35402	5
France	4551	5
India	3829	5
Indonesia	2205	5
Turkey	1854	5
Spain	970	5
Czech Republic	943	5
Italy	789	5
Poland	768	5
Bulgaria	692	5

Source: Trademap.org

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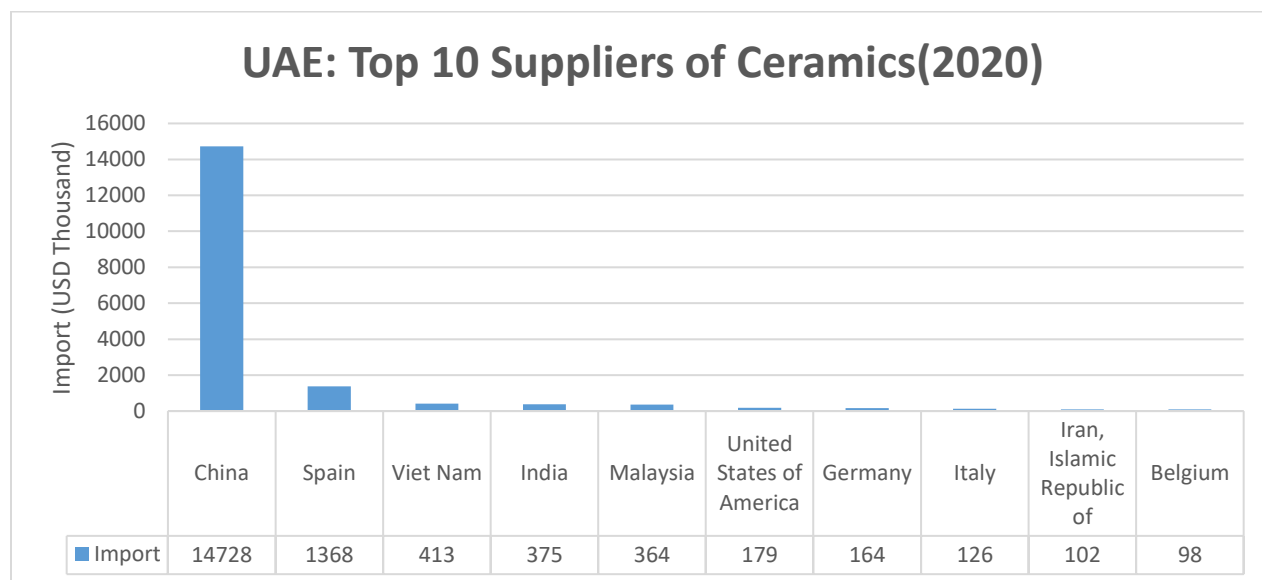
### Ceramics

The UAE market Imports increased overall between the years 2015 to 2019, as imports increased from US\$ 11.7 million to US\$ 18.6 million. See figure below.



Source: Trademap.org

In terms of competitors, China is the lead supplier of ceramics to the UAE market in 2020 where it exported US\$ 14.7 million or 79% of the UAE's total imports of ceramics. Spain comes second with US\$ 1.3 million. While Vietnam and India ranks in 3<sup>rd</sup> and 4<sup>th</sup> place with US\$ 413 thousand and US\$ 375 thousand respectively. Palestine only exported US\$ 2,000 in 2017.



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Source: Trademap.org

#### Applied Tariffs on Palestine

Ceramics – HS 691490		
Tariff Regime	Applied Tariff	AVE
MFN duties (Applied)	5%	5%
<b>Preferential tariff for Palestine</b>	<b>0%</b>	<b>0%</b>

Source: Market Access Map

#### Quantities Imported

Looking at the specific HS code for ceramics HS 691490, the UAE's imports of ceramic are significant and registered 9.5 thousand tons in 2019 worldwide. China is the largest exporter to the market with 7.1 thousand tons, followed by Vietnam with 528 tons and Malaysia with 515 tons. It is important to note that almost all top competitors are subject to a 5% tariff in the UAE market while Palestine enjoys zero tariffs advantage.

Ceramics – HS 691490		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>9572</b>	
China	7124	5
Viet Nam	528	5
Malaysia	515	5
Spain	368	5
India	318	5
Iran, Islamic Republic of	182	5
Portugal	119	5
Thailand	75	5
Morocco	75	0
Pakistan	70	5

Source: Trademap.org

Unfortunately it is difficult to tell the exact HS code that will be used by Palestinian exporters of ceramics given the very limited available previous exporting experience and information. As such we have also decided to take a look at UAE's imports of the entire family of ceramics products at the 4 digits level (HS 6914) in terms of

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quantity. In 2019, China holds the lead marketshare in the country with 7,875 tons of ceramics imported, followed by Vietnam with 555 tons.

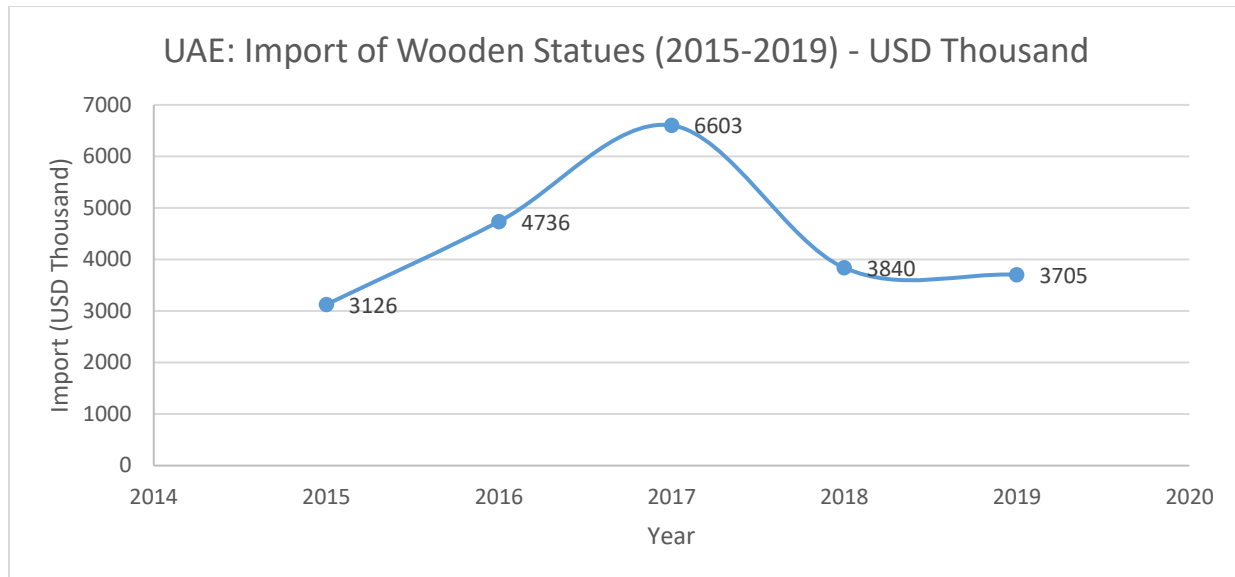
Ceramics – HS 6914		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>10688</b>	
China	7875	5
Viet Nam	555	5
Malaysia	516	5
Spain	447	5
India	339	5
Iran, Islamic Republic of	183	5
Portugal	139	5
Italy	108	5
Thailand	75	5
Morocco	75	0

Source: Trademap.org

#### Wooden Statues

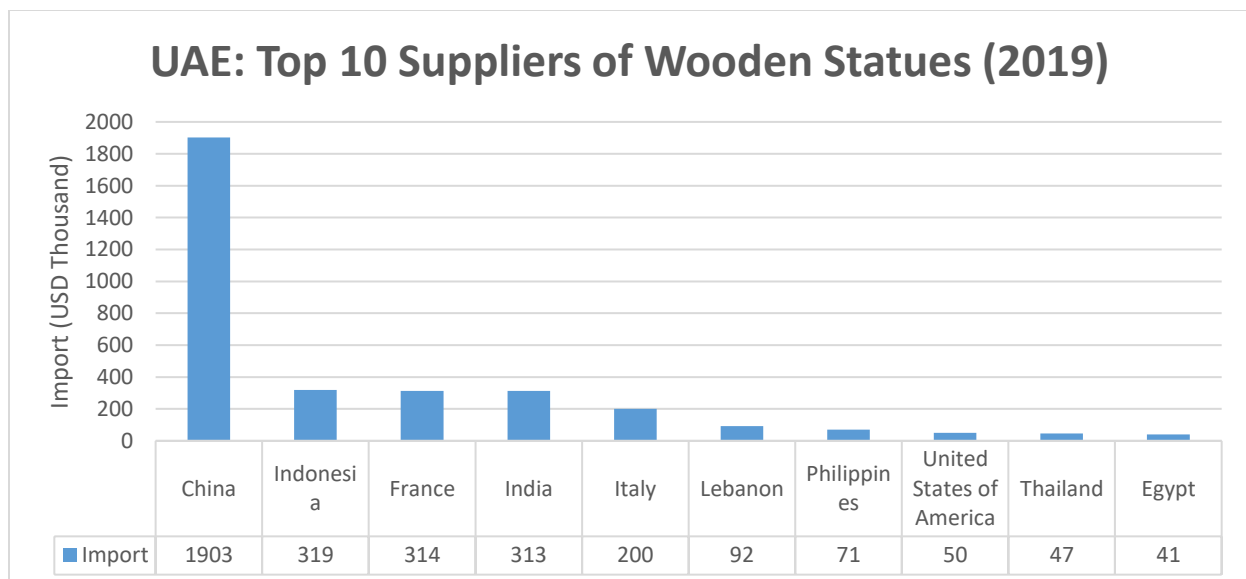
The UAE market Imports increased steadily between the years 2015-2017, as it moved from US\$ 3.1 million in 2015 to US\$ 6.6 million in 2017 which also represents peak import year for wooden statues in the UAE market. Following 2017, imports declined sharply back to US\$ 3.8 million and finally reached US\$ 3.7 million in 2019. See figure below.

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Source: Trademap.org

In terms of competitors, China is the lead supplier of wooden statues to the UAE market in 2019 where it exported US\$ 1.9 million or 51% of UAE's total imports of wooden statues. Indonesia comes second with US\$ 319 thousand. While the France and India ranks in 3<sup>rd</sup> and 4<sup>th</sup> place with US\$ 314 thousand and US\$ 313 thousand respectively. Palestine on the other hand last exported wooden statues to UAE in 2016 with US\$ 19 thousand to UAE.



Source: Trademap.org

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#### Applied Tariffs on Palestine

Wooden Statues – HS 442010		
Tariff Regime	Applied Tariff	AVE
MFN duties (Applied)	5%	5%
<b>Preferential tariff for Palestine</b>	<b>0%</b>	<b>0%</b>

Source: Market Access Map

#### Quantities Imported

Looking at the specific HS code for wooden statues HS 442010 in terms of quantity we notice UAE's imports in 2019 reached a total of 907 tons, with China exporting 594 tons in 2019 which is about 65% of the UAE market share. Most of the top competitors are subject to 5% tariff as opposed to Palestine's preferential treatment with 0% tariffs.

Wooden Statues – HS 442010		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>907</b>	
China	594	5
India	63	5
Indonesia	60	5
Kenya	57	5
Egypt	30	0
Philippines	21	5
Senegal	18	5
United Kingdom	10	5
Lebanon	10	0
Thailand	8	5

Source: Trademap.org

Unfortunately it is difficult to tell the exact HS code that will be used by Palestinian exporters of wooden statues given the very limited available previous exporting experience and information. As such we have also decided to take a look at UAE's imports of the entire family of wooden products at the 4 digits level (HS 4420) in terms of quantity. In 2019, the country imported from China 2160 tons, followed by Germany with 455 tons, while in 3<sup>rd</sup> rank India exported 354 tons of wooden products to the UAE market.

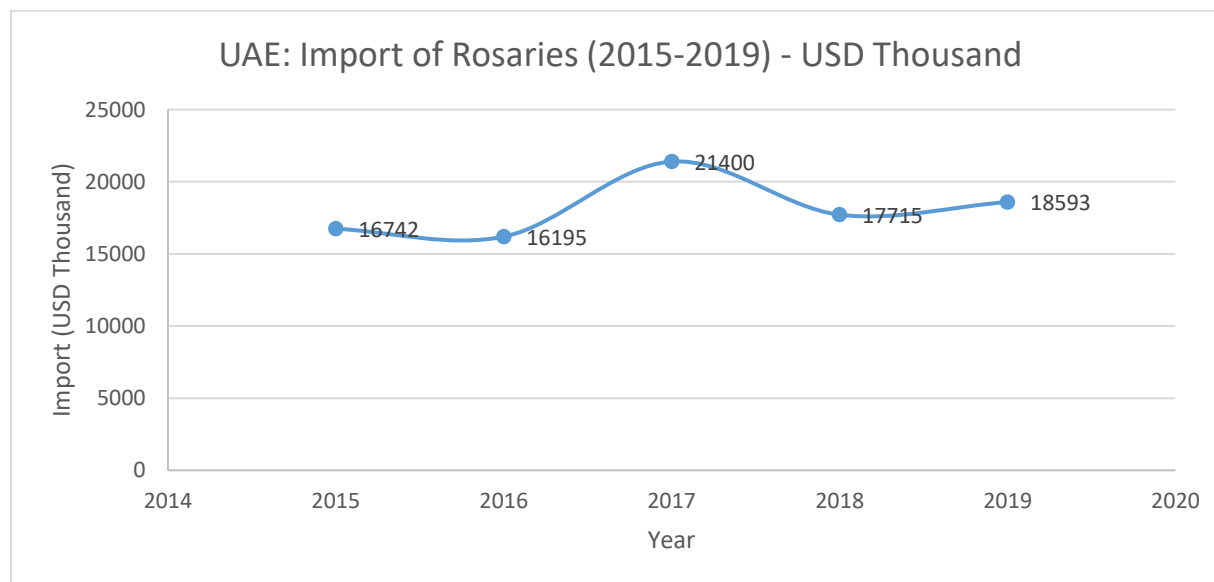
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Wooden Products – HS 4420		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
World	4401	
China	2160	5
Germany	455	5
India	354	5
Malaysia	247	5
Bangladesh	192	5
Thailand	129	5
Indonesia	113	5
Poland	73	5
France	73	5
Viet Nam	68	5

Source: Trademap.org

#### Rosaries

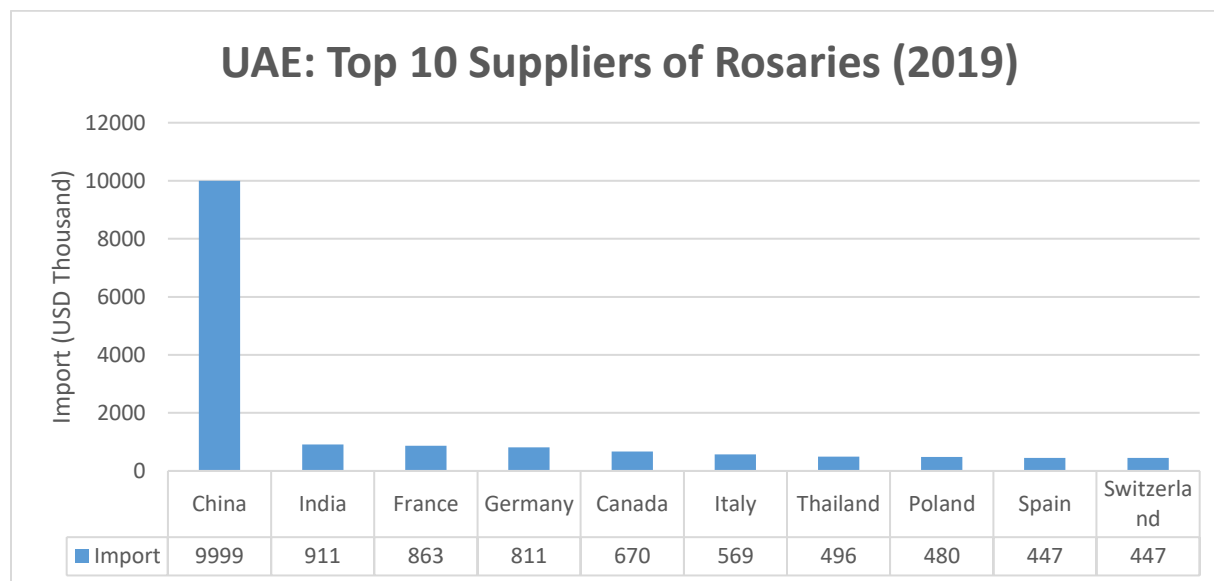
The UAE market Imports increased overall between the years 2015 to 2019, as imports increased from US\$ 16.7 million to US\$ 18.5 million. See figure below.



Source: Trademap.org

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In terms of competitors, China is the lead supplier of rosaries to the UAE market in 2020 where it exported US\$ 9.9 million or 54% of UAE's total imports of rosaries. India comes second with US\$ 911 thousand. While France and Germany ranks in 3<sup>rd</sup> and 4<sup>th</sup> place with US\$ 863 thousand and US\$ 811 thousand respectively. Palestine on the other hand last exported rosaries to UAE in 2017 and 2018 with US\$ 10 thousand and US\$ 11 thousand respectively.



Source: Trademap.org

#### Applied Tariffs on Palestine

Rosaries – HS 442090		
Tariff Regime	Applied Tariff	AVE
MFN duties (Applied)	5%	5%
<b>Preferential tariff for Palestine</b>	<b>0%</b>	<b>0%</b>

Source: Market Access Map

#### Quantities Imported

Looking at the specific HS code for rosaries HS 442090 in terms of quantity we notice UAE's imports reached a total of 3494 tons in 2019, with China exporting 1566 tons, followed by Germany with 453 tons. India ranks 3<sup>rd</sup> and exported 291 tons in 2019. All of the top exporters of rosaries to the UAE market are subject to 5% tariffs while Palestine enjoys preferential treatment for this product with zero tariffs applied.

Rosaries – HS 442090		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>3494</b>	

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China	1566	5
Germany	453	5
India	291	5
Malaysia	246	5
Bangladesh	192	5
Thailand	121	5
Poland	72	5
France	68	5
Viet Nam	65	5
Canada	57	5

Source: Trademap.org

Unfortunately it is difficult to tell the exact HS code that will be used by Palestinian exporters of wooden statues given the very limited available previous exporting experience and information. As such we have also decided to take a look at UAE's imports of the entire family of wooden products at the 4 digits level (HS 4420) in terms of quantity. In 2019, the country imported from China 2160 tons, followed by Germany with 455 tons, while in 3<sup>rd</sup> rank India exported 354 tons of wooden products to the UAE market.

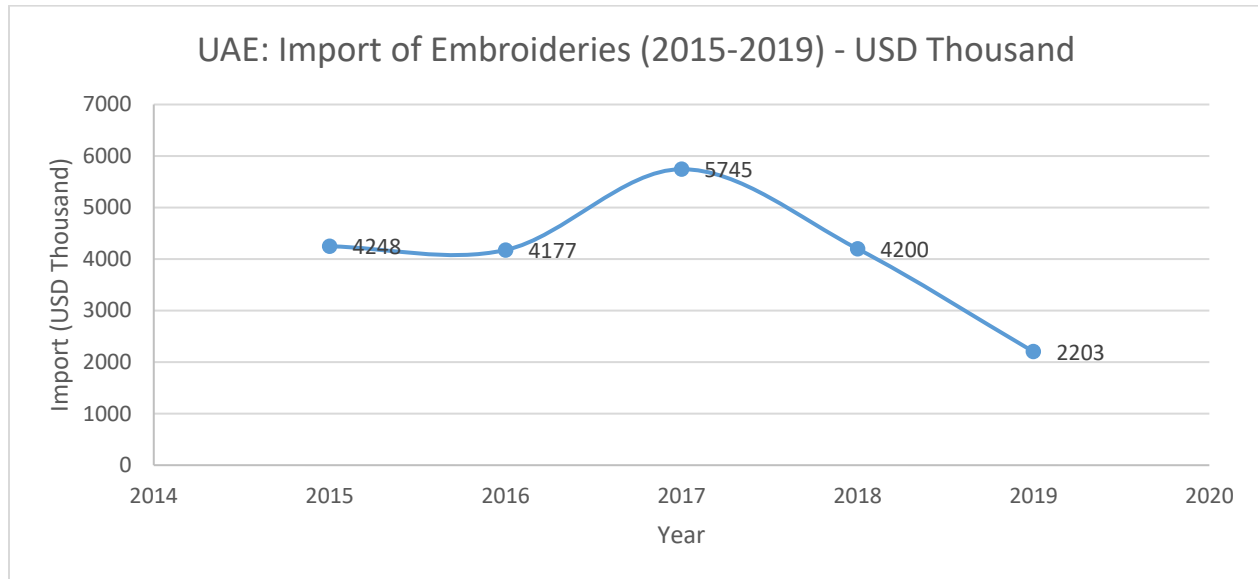
Wooden Products – HS 4420		
Exporter	Quantity imported in 2019	Average tariff (estimated) applied by UAE (%)
<b>World</b>	<b>4401</b>	
China	2160	5
Germany	455	5
India	354	5
Malaysia	247	5
Bangladesh	192	5
Thailand	129	5
Indonesia	113	5
Poland	73	5
France	73	5
Viet Nam	68	5

Source: Trademap.org

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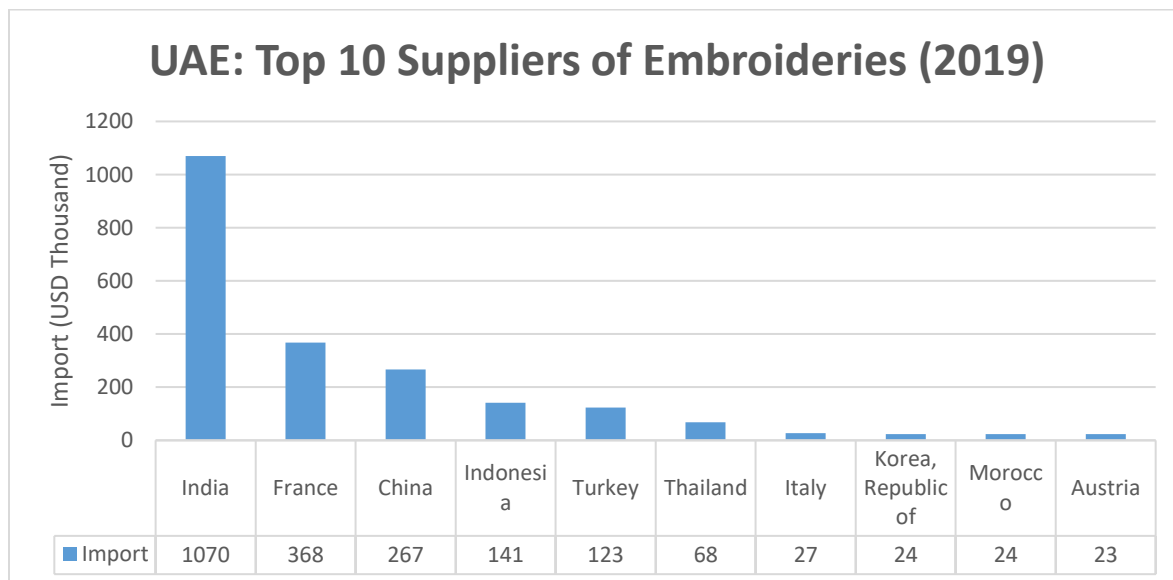
### Embroideries

The UAE market Imports decreased overall between the years 2015 to 2019, as imports decreased from US\$ 4.2 million to US\$ 2.2 million. See figure below.



Source: Trademap.org

In terms of competitors, India is the lead supplier of embroideries to the UAE market in 2019 where it exported US\$ 1 million or 48.5% of UAE's total imports of embroideries. France comes second with US\$ 368 thousand. While China and Indonesia ranks in 3<sup>rd</sup> and 4<sup>th</sup> place with US\$ 267 thousand and US\$ 141 thousand respectively. Palestine on the other hand did not export embroideries to UAE in 2019 or earlier.



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Source: Trademap.org

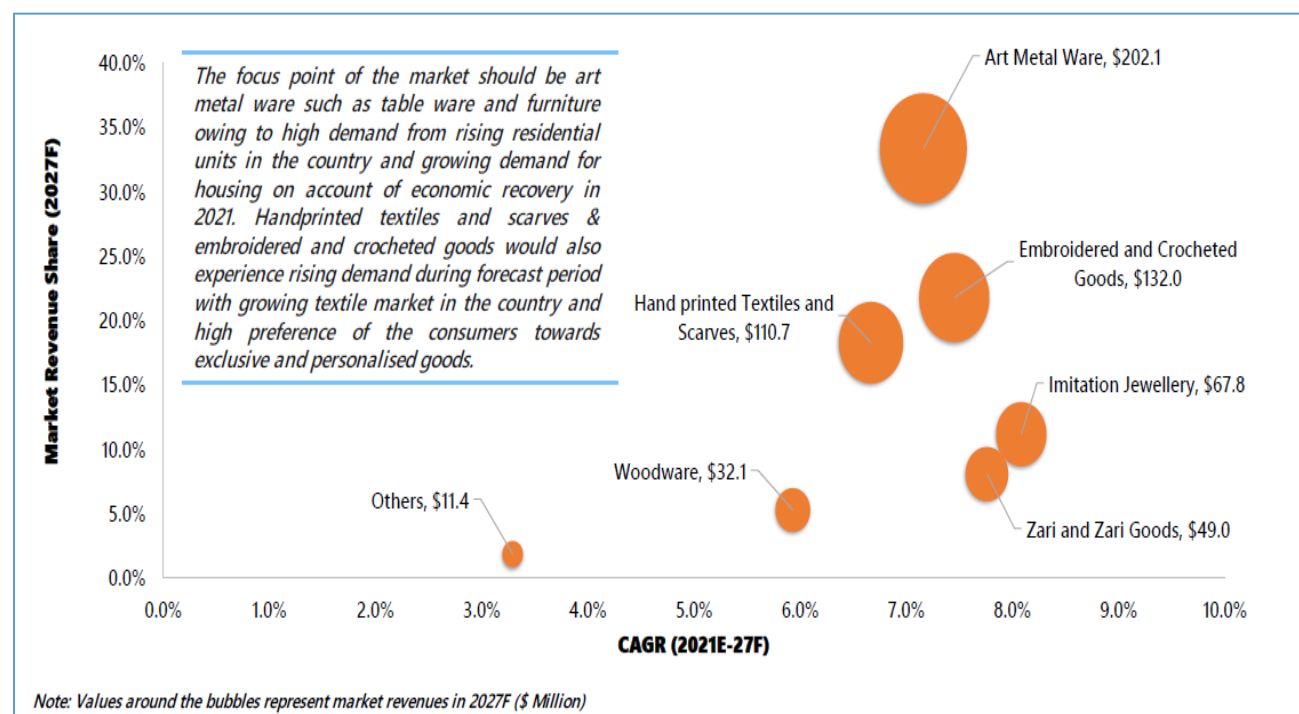
#### Applied Tariffs on Palestine

Embroideries – HS 581099		
Tariff Regime	Applied Tariff	AVE
MFN duties (Applied)	5%	5%
<b>Preferential tariff for Palestine</b>	<b>0%</b>	<b>0%</b>

Source: Market Access Map

#### UAE Handicraft Market Opportunity Assessment By Product

**Figure: UAE Handicraft Market Opportunity Assessment, By Product Type, 2027F**



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

#### By Distribution Channels

**Figure: UAE Handicraft Market Opportunity Assessment, By Distribution, Channel , 2027F**

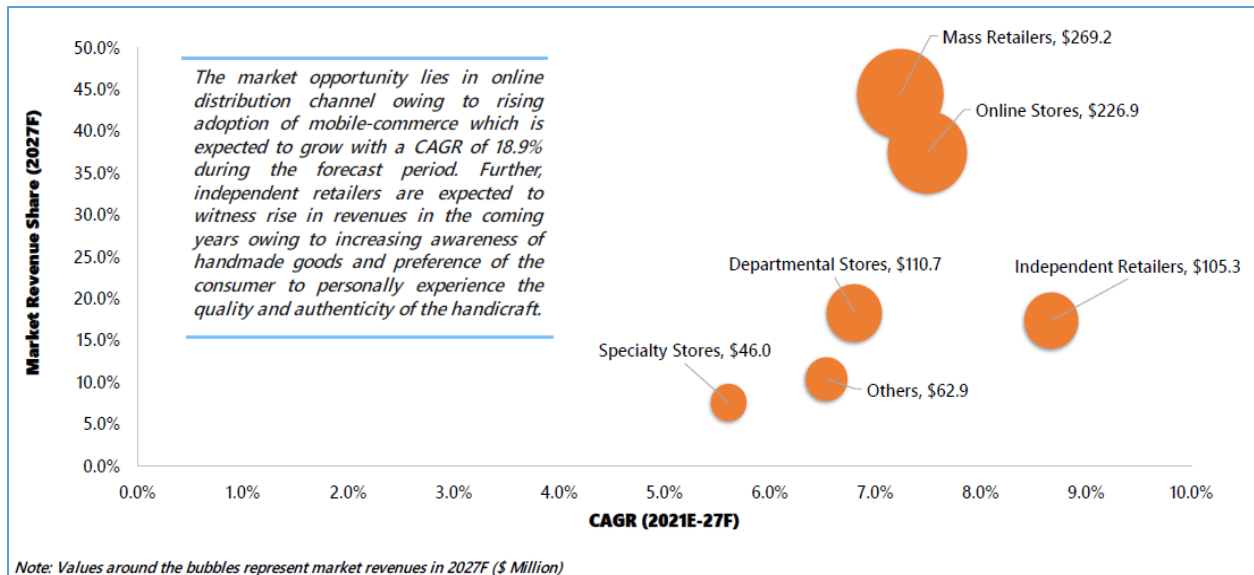
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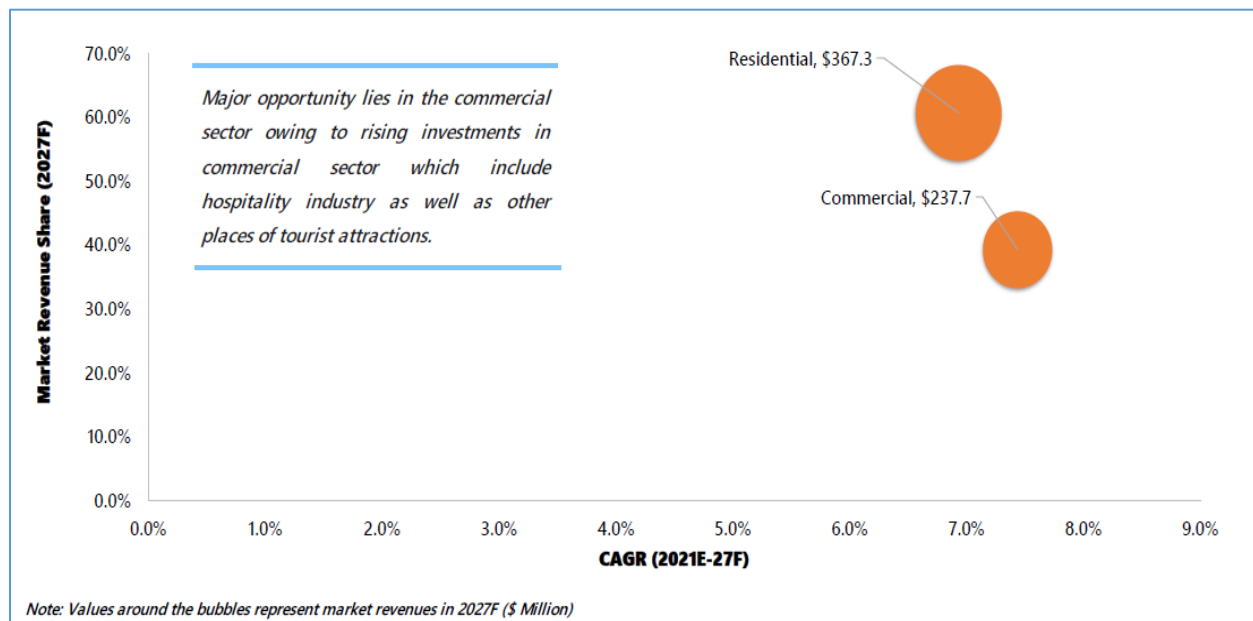
**Ministry of National Economy**



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

#### By End User

**Figure: UAE Handicraft Market Opportunity Assessment, By End Users, 2027F**



Source: 6Wresearch – UAE Handicraft Report (2021-2027)

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### Companies Profiles

#### Fakih Group of Companies

Fakih Group of Companies, headquartered at Dubai, UAE which deals with manufacturing, trading and exporting of a variety of souvenirs, traditional gifts, Handicraft, lamps, decorative items, oil perfumes, frames and clothing items.

**Year of Establishment:** 1994

**Executive Management:** Managing Director- Mr. Fakih Purayil

#### Key Brands:

- Antique Museum
- Fakih Collections
- Pick & Pay
- Savaan Coffee

#### Geographical Presence:

- |         |            |             |
|---------|------------|-------------|
| - UAE   | - Thailand | - Indonesia |
| - India | - Nepal    | - China     |

#### Contact Details:

- Address: St 19 12B, Al QouzArt & Cultural Zone, Al QouzInd Area 1, Dubai, United Arab Emirates
- Contact number: +971 43 479935
- Email: info@fakihcollections.com
- Website: www.fakihonline.com

#### Al Saqee Handicraft LLC

Al SaqeeHandicraft LLC, based in Dubai, UAE is a wholesaler of wide variety of Indian Handicraft. The customers of the company mainly comprise of Handicraft traders, art galleries and stores in different Arab and Persian Gulf countries.

**Executive Management:** Director-Mr. Manoj Gupta

#### Product Portfolio:

- |                     |                           |
|---------------------|---------------------------|
| - Brass Handicraft  | - Wooden Handicraft       |
| - Copper Handicraft | - Iron & glass Handicraft |
| - Metal Handicraft  | - Leather Handicraft      |

**Geographical Presence:** UAE - Dubai

#### Contact Details:

- Address: Shop No. 3, Souk Al Arsa, IraniMarket, Al Ras, Deira, P. O. Box No.-41080, Dubai, UAE
- Contact number: + 00971-6-5341937
- Email: alsaqee@live.com
- Website: www.handsncraft.com

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#### **Lucky's Furniture & Handicraft**

Lucky's Furniture & Handicraft situated in Sharjah, deals in Indian antique furniture, solid-wood furniture, bedroom sets, livings sets, handicrafts, gift articles, iron furniture and decorative items. The company operates through its 10 warehouses and furniture store in Sharjah.

**Year of Establishment:** 1985

**Executive Management:** Owner-Mohammed Parvez and Mohammed Firoz

#### **Product Portfolio:**

- |                  |                   |
|------------------|-------------------|
| - Bookshelf      | - Chairs & tables |
| - Boxes & trunks | - Bed side & beds |
| - Cabinet        | - Duri & Rugs     |

**Geographical Presence:** Sharjah, UAE

#### **Contact Details:**

- Address: Industrial Area 11, Sharjah, UAE
- Contact number: 00971-6-5341937
- Email: luckyfurnitures@yahoo.com
- Website: www.luckyfurnitureae.com

#### **Amal Star Antiques LLC**

Amal Star Antiques LLC, situated in Dubai, UAE which deals in artistic work, Objects/Islamic Art, European Art, Silver product, Glass product, Furniture, Jeweler, Textile, Decorative Arms, Metal product, Ceramic.

**Year of Establishment:** 1980

#### **Product Portfolio:**

- |             |             |
|-------------|-------------|
| - Metalwork | - Stone     |
| - Painting  | - Jewellery |
| - Textile   | - Arms      |

**Geographical Presence:** Dubai, UAE

#### **Contact Details:**

- Address: P.O.Box 42577, Deira, Dubai, United Arab Emirates
- Contact number: +971504561410
- Email: info@astarantiques.com
- Website: www.astarantiques.com

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#### Tribe Dubai

Tribe Dubai, headquartered at Dubai deals in homeware, furniture, designer rugs, lighting, among others with a dedicated online store. The company sources its supplies from countries such as India, Ghana, Argentina, Australia, Tanzania, among others

**Year of Establishment:** 2015

**Executive Management:** Owner-Jo England

**Product Portfolio:**

- Furniture
- Rugs
- Toys
- Lighting
- Home Decor

**Geographical Presence:**

- UAE
- India
- Thailand
- Nepal
- Indonesia
- China

**Contact Details:**

- Address: 4B Street, The Courtyard, Opposite Bounce, Dubai, UAE
- Contact number: +971 0 50 142 8248
- Email: shop@tribedubai.com.
- Website: www.tribedubai.com

#### Craft India Overseas

Craft India Overseas, headquartered in India is a manufacturer and exporter of brass artware, aluminium artware, tableware, decorative items. The company exports its products in several countries such as UAE, Kuwait, Malaysia and Israel.

**Year of Establishment:** 2013

**Number of Employees:** about 40

**Executive Management:** Owner-Ashhad Hasan

**Products Portfolio:**

- Artware
- Metalware
- Nautical items
- Glassware
- Tableware

**Geographical Presence:** India

**Contact Details:**

- Address: NaiSarakChaurahaNear TamannahShah Masjid, Moradabad-244001, U.P. India
- Contact number: +91 9997826691

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- Email: [craftindiaovs@gmail.com](mailto:craftindiaovs@gmail.com)
- Website: [www.craftindiaoverseas.com](http://www.craftindiaoverseas.com)

**Ramniwas Hastkala Niryat Pvt. Ltd**

Ramniwas Hastkala Niryat Pvt. Ltd, headquartered in Delhi, India is a manufacturer and exporter of metalware, woodware and glass Handicraft. The company is a major exporter of Handicraft to UAE.

**Year of Establishment:** 2016

**Executive Management:** Director-Ashok Gupta

**Products Portfolio:**

- |                     |                           |
|---------------------|---------------------------|
| - Brass Handicraft  | - Wooden Handicraft       |
| - Copper Handicraft | - Iron & glass Handicraft |
| - Metal Handicraft  | - Leather Handicraft      |

**Geographical Presence:** India

**Contact Details:**

- Address: E-43/2, Okhla Industrial Area, Ph-2, New Delhi, Delhi, 110020, India
- Contact number: +91 11 40 15 81 55
- Email: [rnhn2017@gmail.com](mailto:rnhn2017@gmail.com)
- Website: [www.handsncraft.com](http://www.handsncraft.com)

**D Décor Home Fabrics Pvt. Ltd.**

D Décor Home Fabrics Pvt. Ltd., situated in India, is a manufacturer and exporter of furnishing fabrics. The company operates in UAE through its network of dealers.

**Year of Establishment:** 1999

**Executive Management:**

- Chairman-V.K Arora
- Managing Director-Sanjay Arora

**Products Portfolio:**

- |              |                     |
|--------------|---------------------|
| - Bed & bath | - Gifting items     |
| - Rugs       | - Décor Accessories |
| - Curtains   |                     |

**Contact Details:**

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**Ministry of National Economy**

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- Contact number: 1800 267 9008
- Email: styleexpert@DDecor.com
- Website: www.ddecor.com

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