

## Middle East in the Global Economy

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THL Industry Leader



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**MENA Economic Performance**

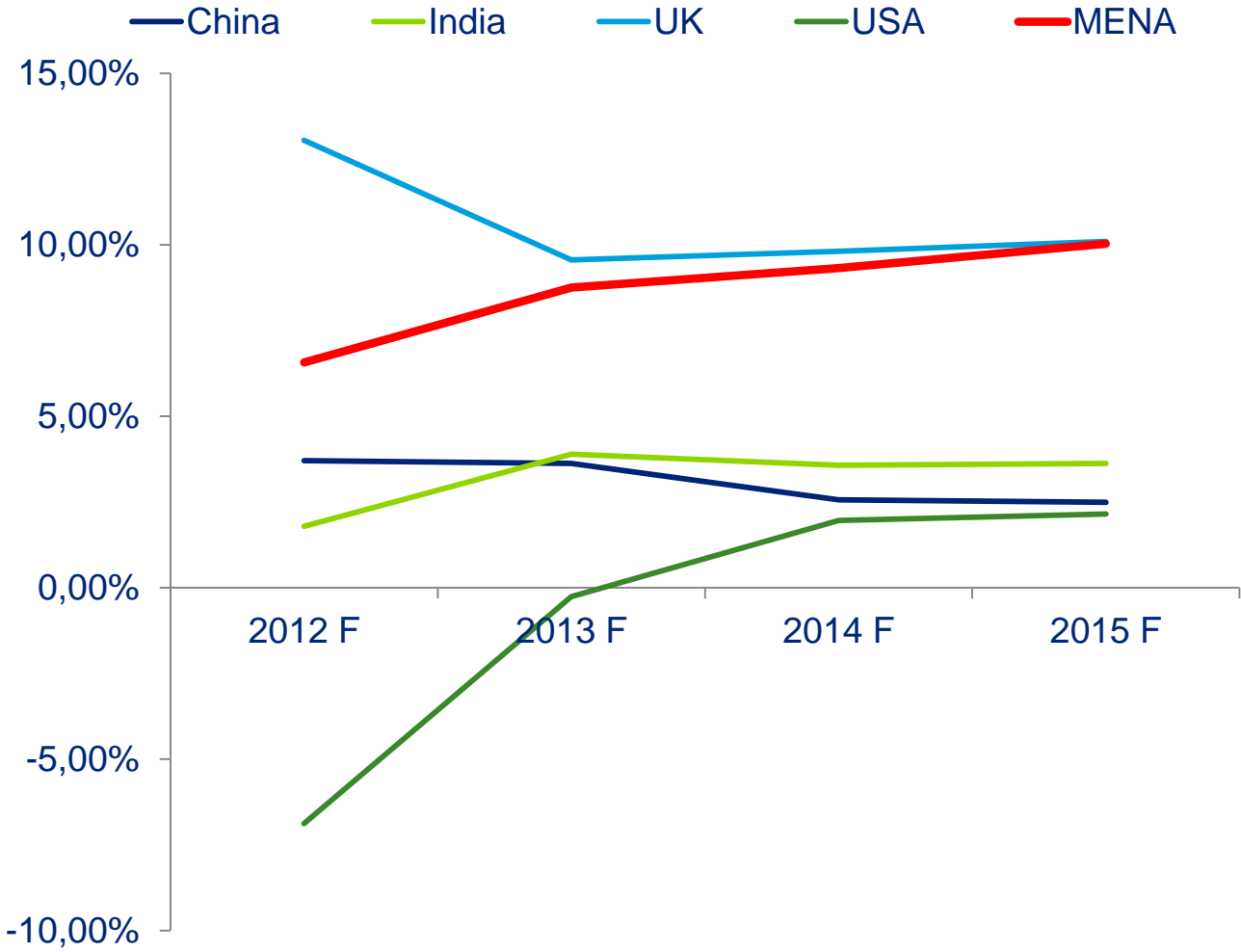
**Middle East Travel & Tourism**

**Middle East Retail**

**Duty Free Shopping**

# MENA Economic Performance | *GDP and Growth*

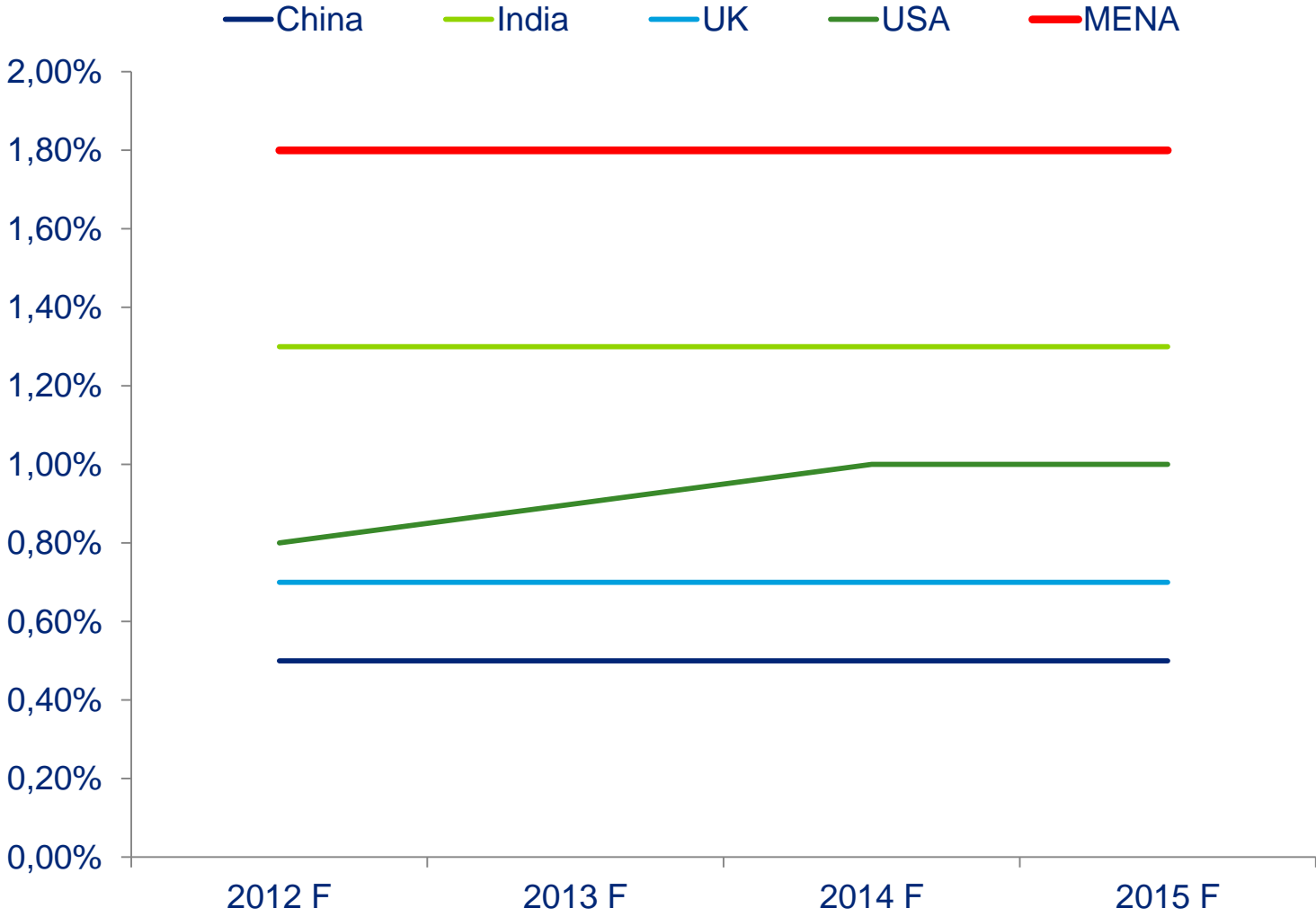
## GDP Current – Growth (%) 2011-2015



Source: IMF; Deloitte

# MENA Economic Performance I *GDP and Growth*

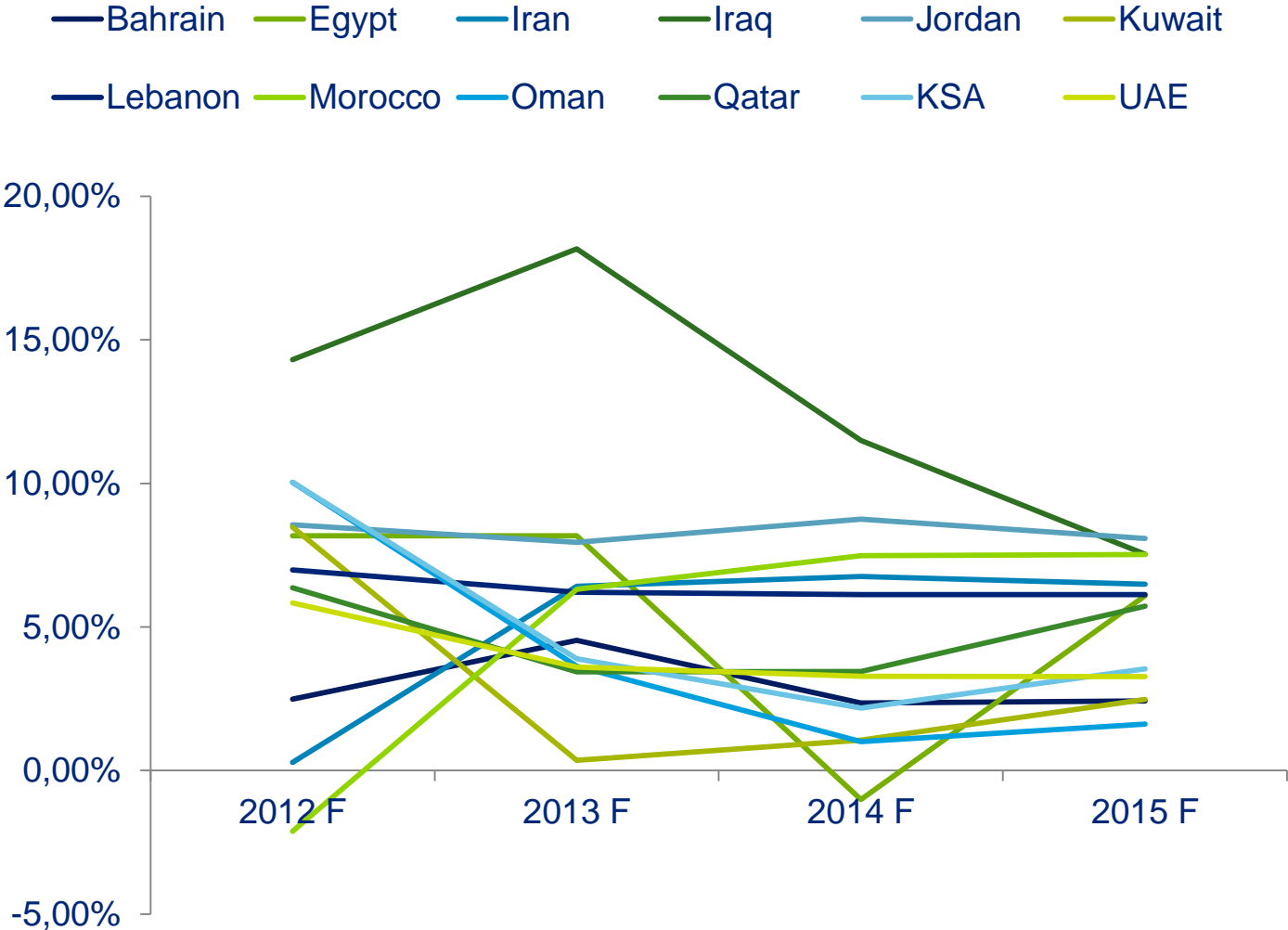
## Population Growth (%) 2011-2015



Source: IMF; Deloitte

# MENA Economic Performance | *GDP and Population*

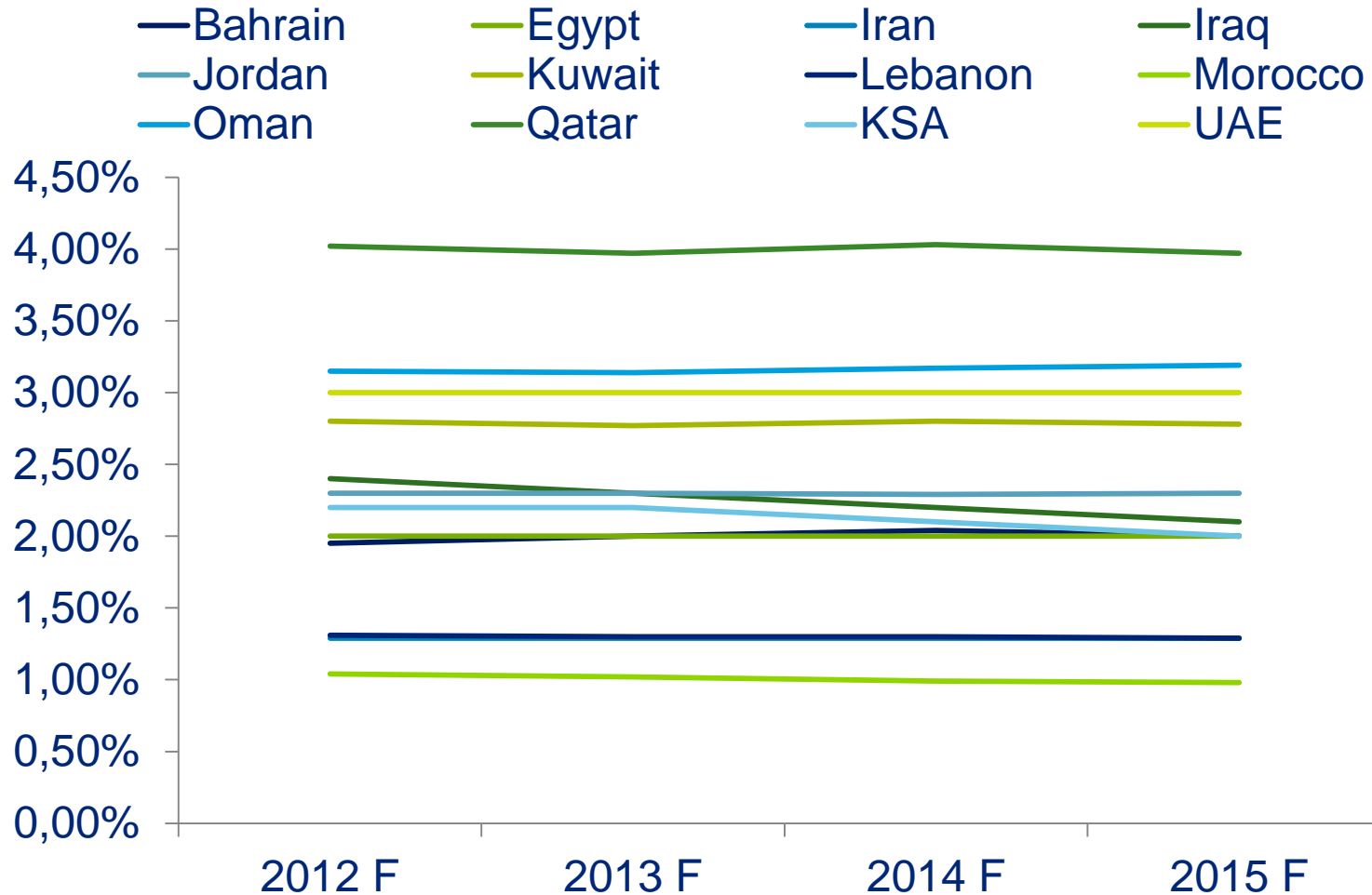
## GDP Current – Growth (%) 2011-2015



Source: IMF; Deloitte

# MENA Economic Performance I *GRP and Population*

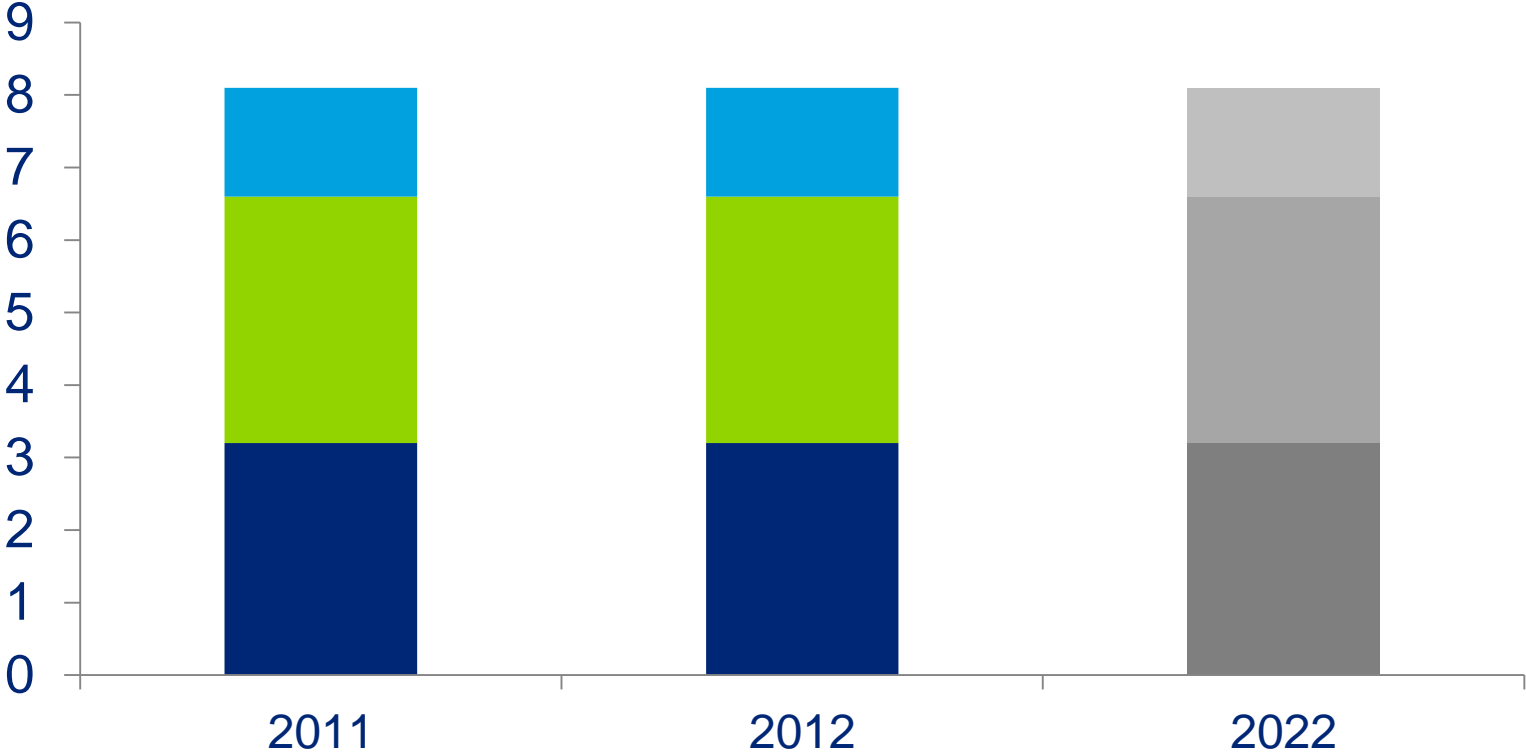
## Population Growth (%) 2011-2015



# Middle East Travel & Tourism | *Middle East Travel & Tourism performance*

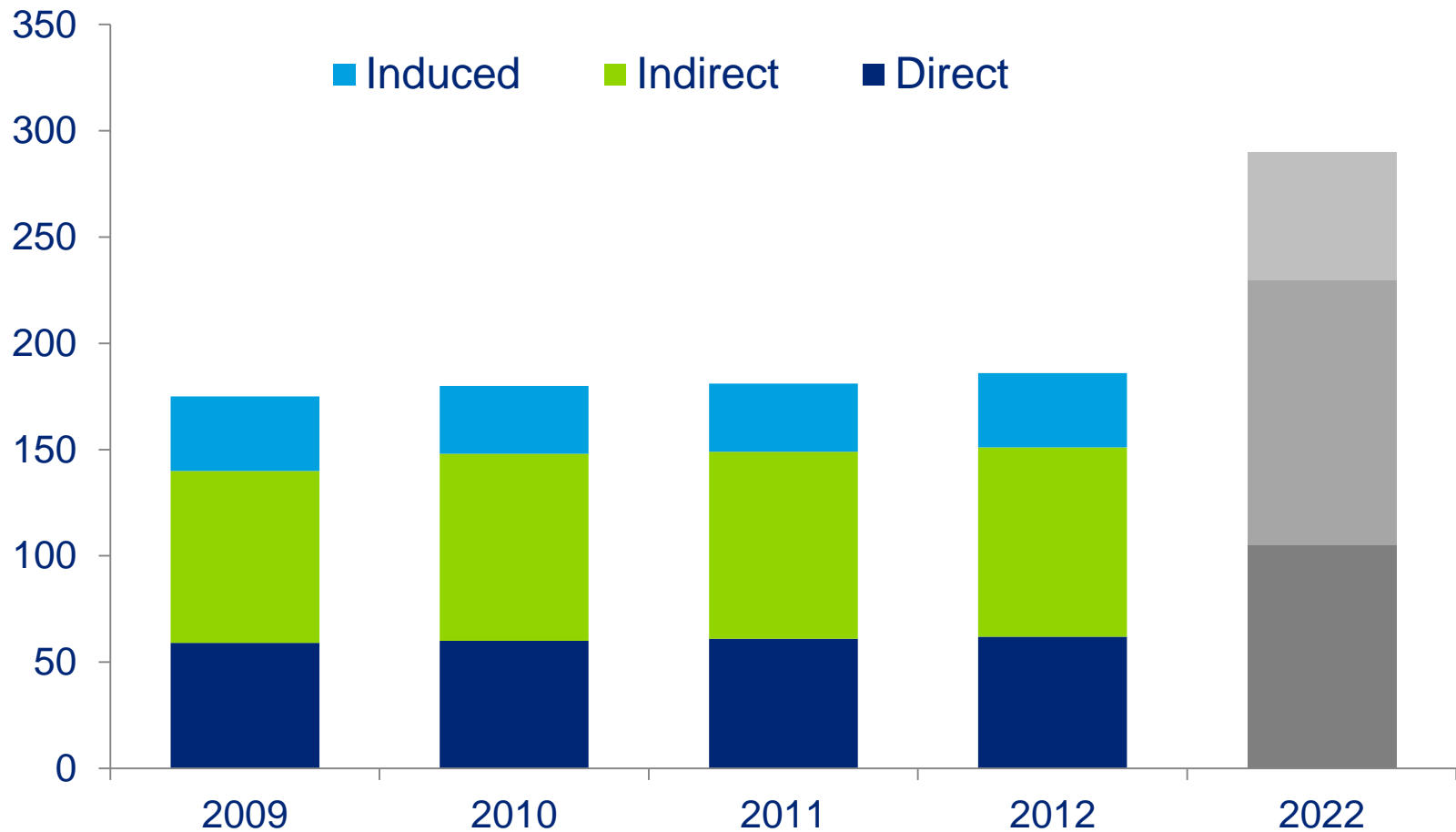
## Middle East Total Contribution to GDP (%)

■ Induced    ■ Indirect    ■ Direct



Source: WTTC Economic Impact Report; Deloitte

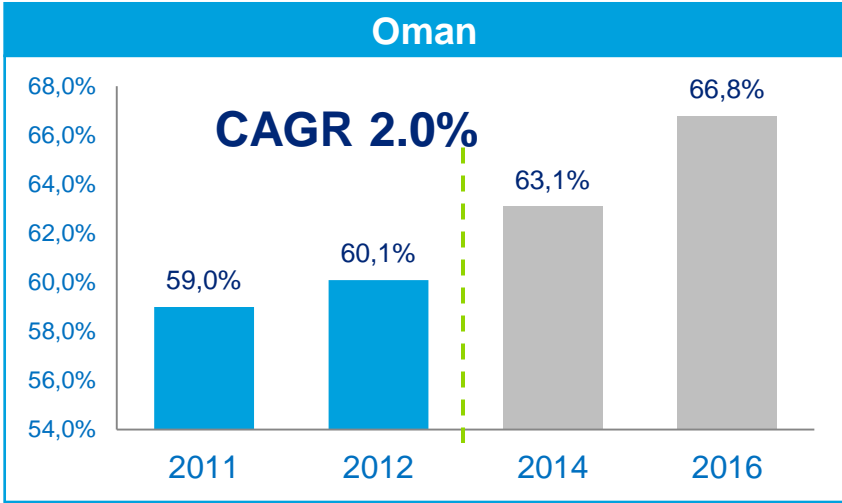
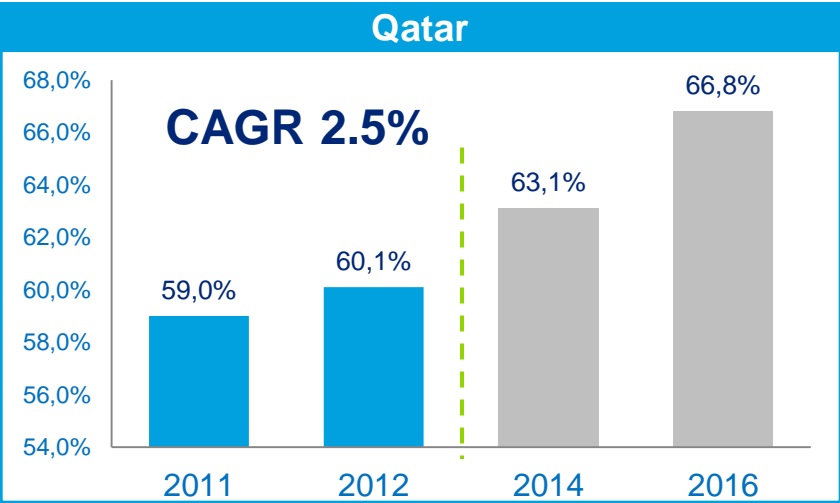
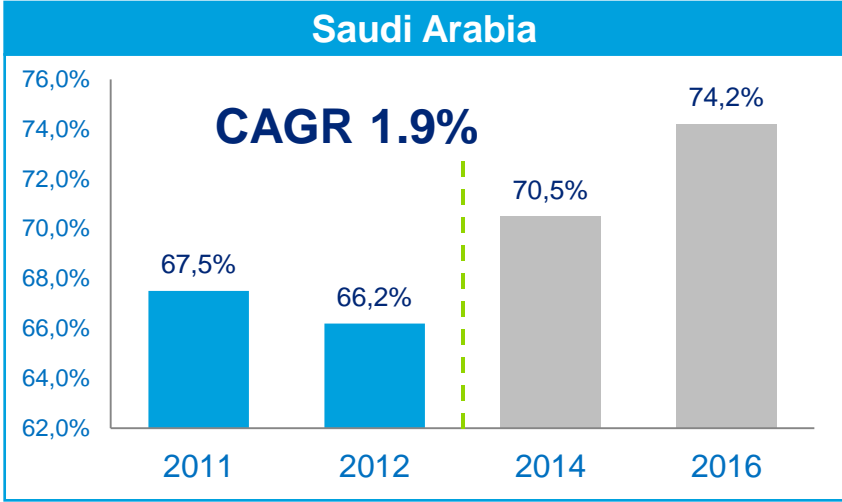
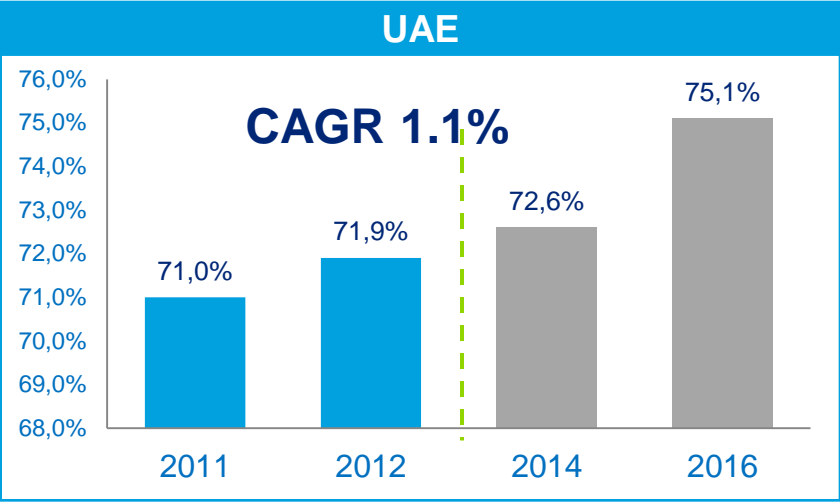
## Middle East Total Contribution to GDP Breakdown (USD Billion)





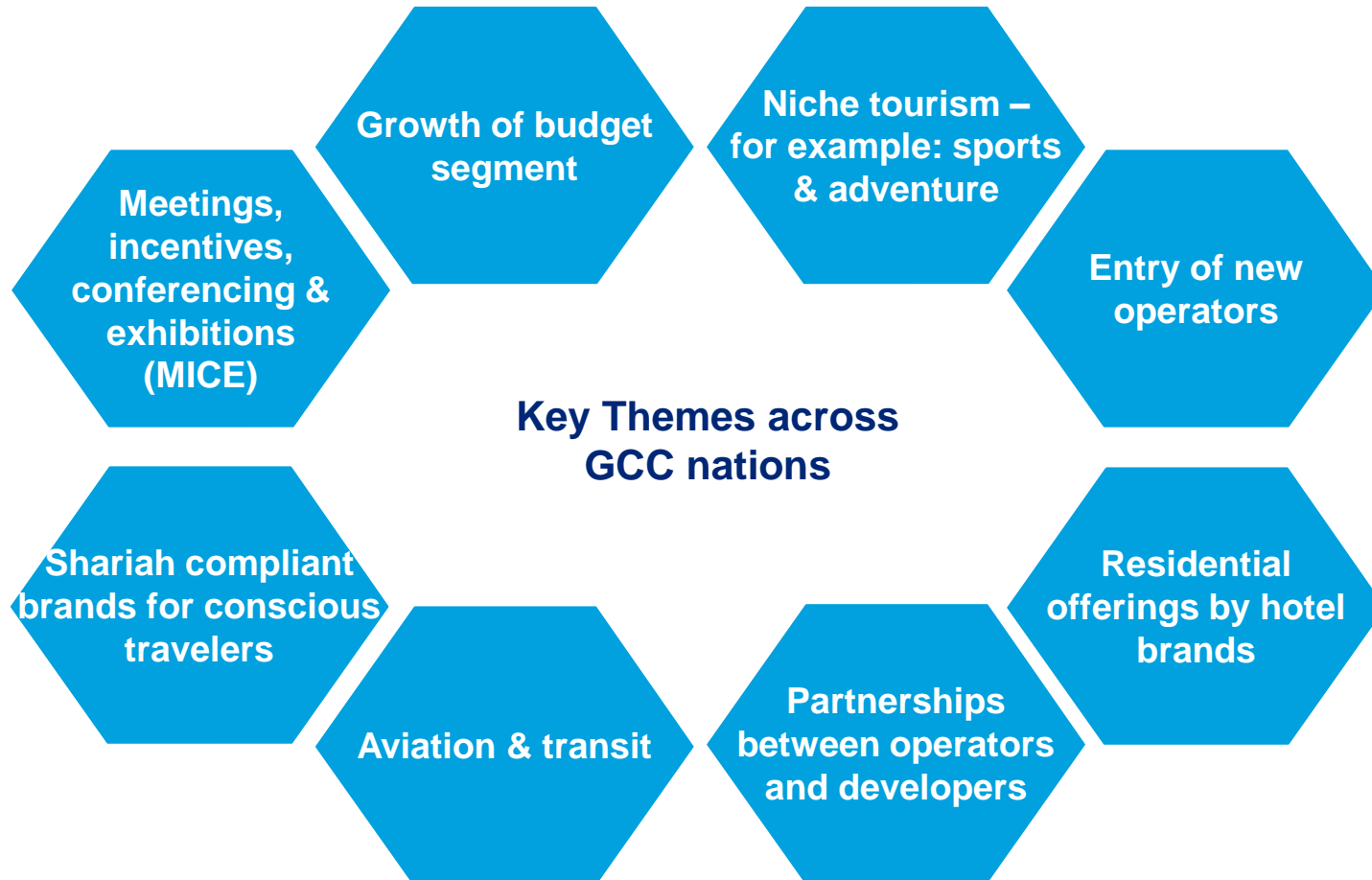
# Middle East Travel & Tourism | Hotel occupancy rate projections

■ Hotel Occupancy Rate % ■ Projected Hotel Occupancy Rate %



Source: Alpen Capital; Deloitte

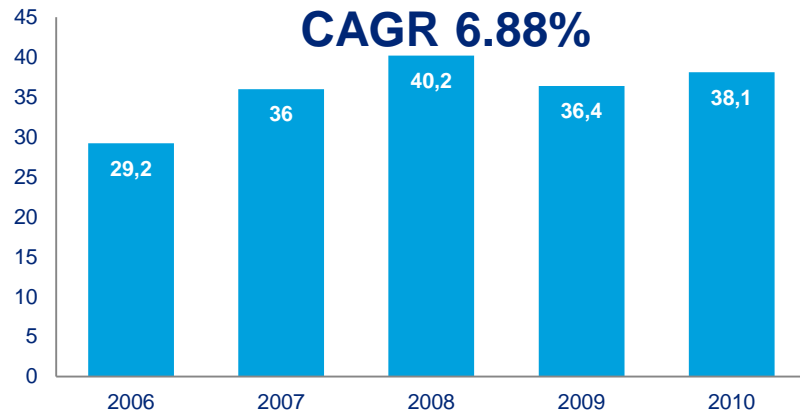
# Middle East Travel & Tourism | *Key trends*



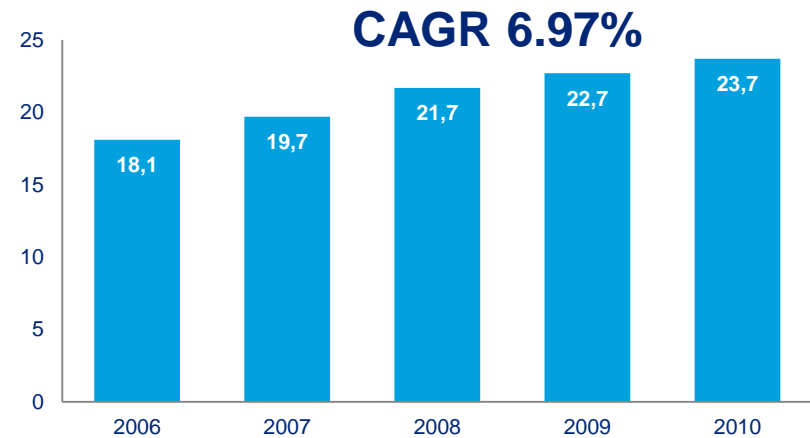
# Middle East Retail | Retail Trade market size 2006-2010

■ Retail trade size (sales USD \$ Billion)

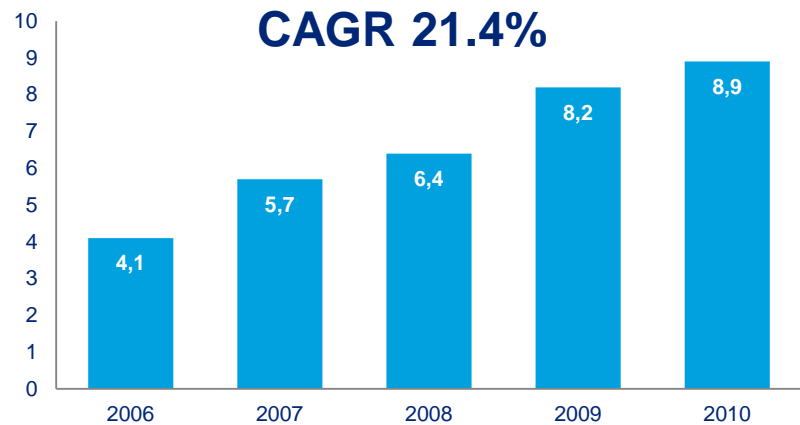
## UAE



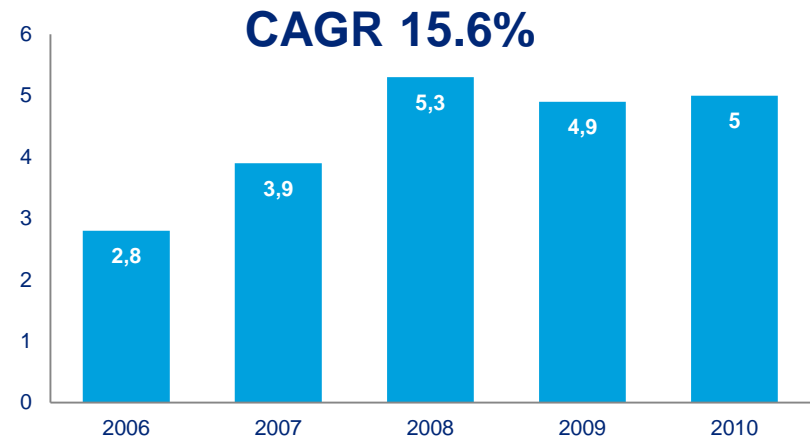
## Saudi Arabia



## Qatar

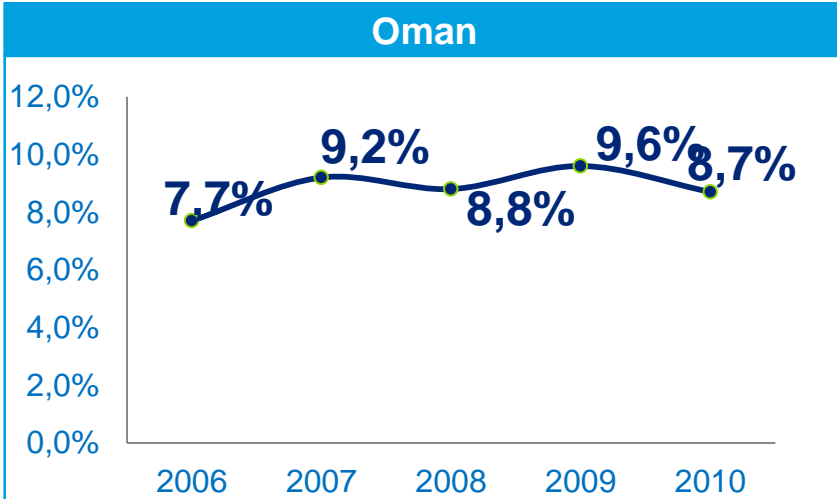
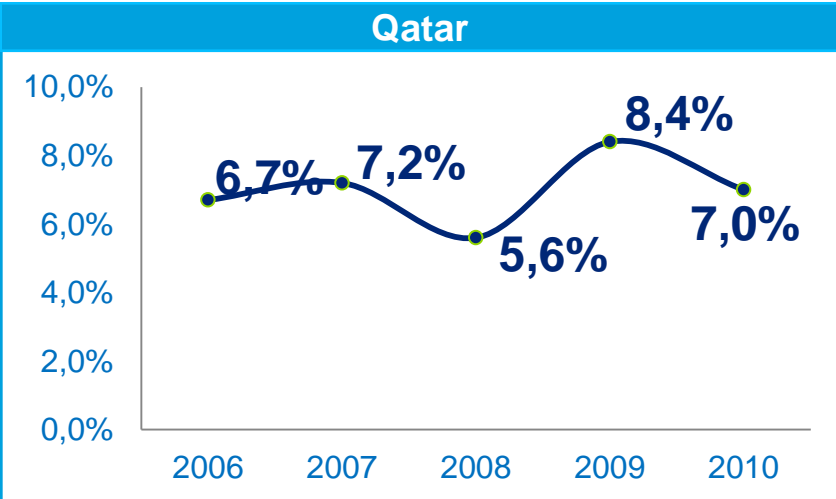
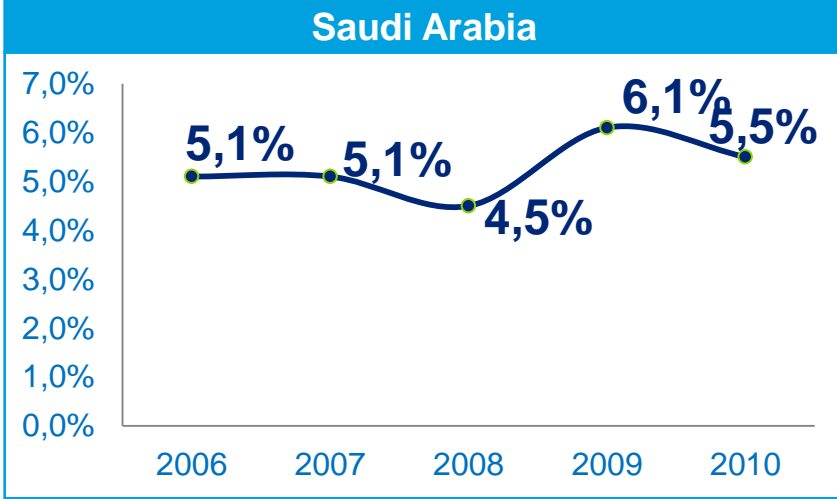
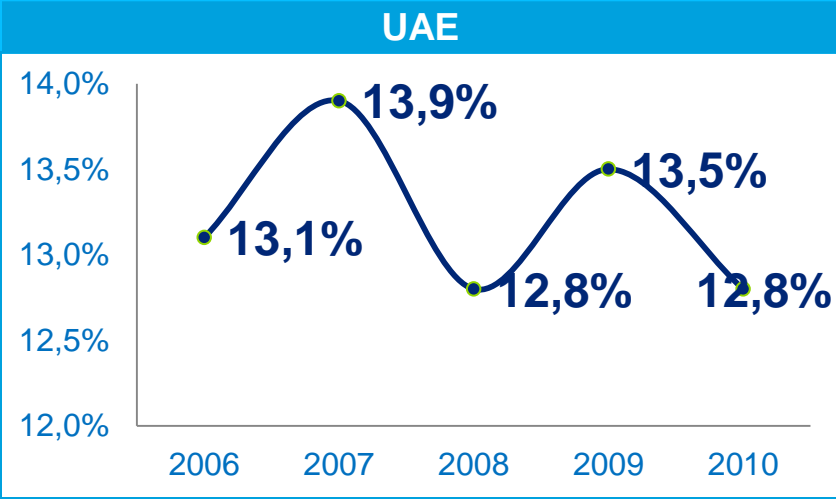


## Oman



# Middle East Retail | Contribution to GDP

■ GDP at Current Prices (USD Billion) ■ Retail Trade as a Percentage of GDP



Source: Alpen Capital; Deloitte

# Middle East Retail | *Key consuming trends – Emerging Market& GCC*



## Final Thoughts

- MENA tourism attractiveness is (overall) increasing
- MENA airlines are (overall) getting stronger
- MENA passenger movement will likely continue to increase
- Key growth markets will likely be China and India
- What more can be done?
  - More demand generators – reason to visit e.g. Mohammad Bin Rashid City
  - Be aware of what is happening in the East e.g. Singapore
  - Continue to innovate and move forward

Q & A