

# Stone Industry in the MENA Region

## Part I



April 2015

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## I. Introduction

Stone is one of the oldest and most widely used building material in human history. As a material, stone has always played an important role in the construction and architecture. Stones used for building are naturally occurring rocks of igneous, sedimentary or metamorphic origin, which are sufficiently consolidated to use in building construction. The principal types of stones consist of marble, granite and other natural stones such as limestone, travertine, basalt, sandstone, serpentine, diabase, and slate.

There are two main types of building stones used in the GCC: dimension stone and decorative stone. Dimension stone is often quarried and prepared in blocks, according to standard specifications and can be used without much processing, whereas decorative stone is quarried and later cut, or carved, to improve its appearance. Decorative stone is more often used in interior construction for decoration and monuments, than as a standard building material. Stone chosen for building construction is selected for its properties of durability, attractiveness and economy.

Marble, which is metamorphosed limestone is a naturally green material and is suitable for applications in sustainable building. It has a highly decorative appearance and is durable, chemical resistant and easy to maintain. Ceramic tiles are a mixture of clays that are pressed into shape and fired at high temperatures to harden. Ceramic tiles are glazed, or unglazed depending on the intended use.

Stone and ceramics are major building materials used in construction and contribute a significant percentage towards total project values in the GCC.

Against this backdrop, this report highlights the value of building projects at fit out stage in the GCC, since application of stone and ceramics usually takes place during the final stages of construction. The report also focuses on market trends, regulation and demand for stone in GCC countries. Moreover, the report provides trade analysis and major trade partners for stone in major Middle East countries.



## II. GCC building construction market

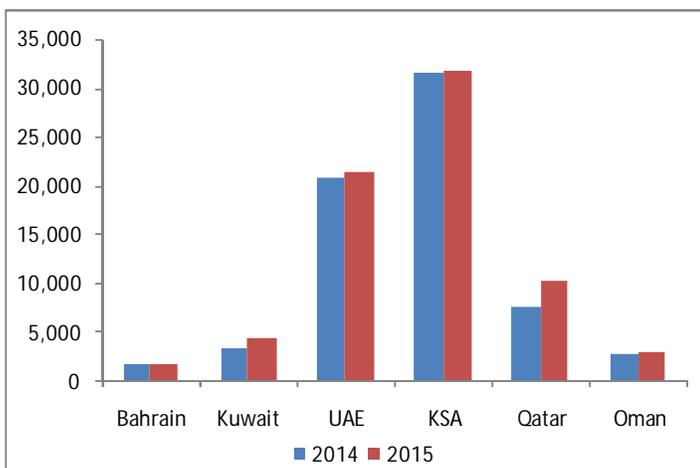
Construction activity in Qatar and the UAE has begun to heat up as these countries move closer to hosting prestigious world-renowned events, such as the FIFA World Cup 2022 and the Expo 2020 Dubai, respectively, driven by the need to attract foreign investment, while showcasing the countries on a global platform. The largest construction market KSA, with its already ongoing expansion and diversification plans across sectors has made vast upgrades to its infrastructure, including transportation, logistics, massive economic cities, airports and railroad infrastructure. Declining oil price has strongly impacted Bahrain, as a large portion of the government revenues stem from oil, despite being the most diversified economy in the region. Additionally, political instability continues to

randomly influence the country's growth prospects and policy. Kuwait and Oman have reacted with cautious spending and revenue side measures to the falling oil prices, while not compromising on developmental spend, as can be seen in the project completions for 2014 and 2015. Oman is also building the foundations of its growth model with tourism as the cornerstone.

### GCC value of building projects at fit out stage

The building project values in 2014 and 2015 have been taken from Ventures Onsite database ([www.venturesonsite.com](http://www.venturesonsite.com)) on the basis of year of completion. Building projects worth more than USD 67.6 billion were completed in 2014 across segments of the building sector that include residential, commercial, hospitality, retail, medical, education and mixed use projects. The figure is likely to reach USD 71.97 billion in 2015, thus posting a healthy growth of 6.5 percent year on year, with a number of projects nearing completion in different GCC countries.

#### GCC building projects value completed in 2014 and due for completion in 2015 (USD Mn)



Source: Ventures Onsite Database ([www.venturesonsite.com](http://www.venturesonsite.com))

### III. GCC stone industry

Stone is mainly used in buildings as tiles for floors and paving; special works such as balustrades, columns, fireplaces or fountains; structural works, internal and external wall cladding and stairs or steps. The major end-users of stone and stone products in building construction in the GCC are construction contractors, interior fit out companies, landscape contractors and stone cladding contractors.

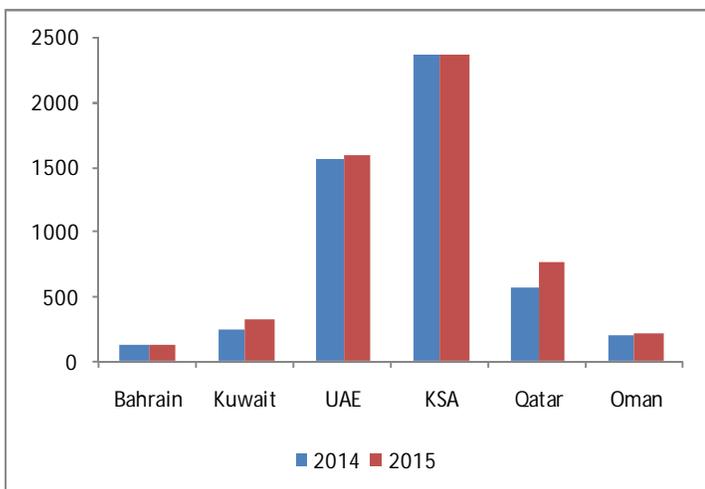


The market demand for stone in GCC countries has been estimated, taking into consideration the project value spent on stone works- mainly flooring, structural works, internal and external wall cladding, out of the total project value. Flooring work is usually carried out by main contractors, or the interior fit out companies. Landscaping works and internal and external wall cladding using stones are generally sub-contracted by the owner of the project/ consultants or main contractors to interior fit out companies, landscape contractors and stone cladding contractors.

## Market size and growth of the GCC stone market

Stone products constitute approximately 6 per cent to 10 per cent of the building project value at fit out stage. The percentage of project value spent on stone products varies according to building project type such as residential, commercial, hospitality, retail, medical, education and mixed use projects. Based on the building project value at fit out stage in GCC countries, the market size for marble, stone and ceramics is estimated as USD 5.1 billion in 2014. The market size is expected to reach USD 5.4 billion by the end of 2015. With a share of 47 percent, KSA with its largest growing construction market is the largest market for marble and stone, followed by the UAE with a share of 31 percent in 2014. Qatar, with its FIFA World Cup 2022 spurred construction activities, is the third with an 11 percent share, followed by Kuwait, Oman and Bahrain with 5 percent, 4 percent and 2 percent shares respectively. The marble, stone and ceramics market closely mirror the movement of the building construction industry, as they constitute a significant portion of the total project costs.

**GCC market size for marble, stone and ceramic in USD million (2014 & 2015)**



Source: Ventures Middle East Analysis

## Trends in the stone industry in the GCC

GCC countries are increasingly embracing sustainable and green building development wherein environmentally-friendly materials are used to build and the construction process ensures that there is minimal degradation of the environment. Ratings - such as BREEAM in the United Kingdom and LEED of the United States - have been introduced to encourage builders to conserve scarce resources through green building codes that help in establishing standards across the global construction industry. The United States Green Building Council (USGBC) estimates that a green building, on average would reduce energy usage by 30 percent, carbon emissions by 35 percent, water use by 30 to 50 percent, and generate waste cost savings of 50 to 90 percent. Both these and the regional green building codes such as ESTIDAMA and Qatar Sustainability Assessment System (QSAS) of Abu Dhabi and Qatar, all encourage using sustainable raw materials and those that help achieve these conservation targets for a green building.



Although usage of dimension stone is limited in the GCC, there is an increasing preference seen, mainly in projects that aim to be LEED certified. Dimension stone, which is inherently earth-friendly, has a higher advantage over steel, concrete, glass and laminated plastics that have energy intensive manufacturing process and create significant air and water pollution. As an entirely natural product, dimension stone also has an advantage over synthetic or artificial stone products, as well as composite materials. Natural stone therefore is an accepted alternative when selecting sustainable building materials for a green project. Dimension stone has certain attributes such as recyclability, durability and ease of maintenance, which makes it an environmentally friendly product. In addition, no toxic materials are used in its processing, no direct greenhouse gas emissions are emitted and the water used during processing is almost completely recycled. Besides these qualities, the natural stone industry constantly works to make its processes environmentally friendly by minimizing waste, preventing pollution, and conserving natural resources.

As demand for green buildings has increased, ceramic tile manufacturers have also started manufacturing tiles from recycled materials. Key manufacturers of ceramic and porcelain tiles in the Middle East have introduced a variety of green products that can improve the environmental quality of buildings. Some tile manufacturers use recycled glass in their ceramic products, for glazing applications, in line with the sustainability standards. With respect to the quality of stone and stone products, the specifications provided by consultants on projects have to be satisfied. In the GCC, high

preference exists for stone products that meet green building standards, in order to achieve LEED credits.

### Regulation for the stone industry in the GCC

As per the LEED requirement, marble or stone used in a green building should be quarried within a 500-mile (800 km) radius of the building being constructed. This gives a clear advantage to local manufacturing companies. Marble is 100 percent reusable and can be retrieved for new construction, used as paving, or crushed for use as aggregates. A number of stone and marble suppliers in the GCC are promoting sustainable practices by ensuring the quarries from where they procure their raw materials adopt efficient and enhanced processes. In addition, recycling of unused stone in a different form and breaking the uneven stones into standard dimensions for tiling applications are other practices directed towards reducing waste. There are also green methods adopted for stone cleaning (for re-use), such as removing the black gypsum crusts that form on marble and limestone by applying sulfate-reducing bacteria to the crust.

According to LEED Green Building Rating System, stone and stone products help to improve the building quality and thereby achieve LEED credits in several categories:

- Sustainable Sites (SS) Credit 7.1: Heat Island Effect, Non-Roof: Using light-colored natural stone with a solar-reflective index of 29 or greater can reduce heat-island effects.
- Energy and Atmosphere (EA) Credit 1: Optimize Energy Performance: Natural stone has good thermal mass, which positively impacts indoor

ambient air temperature, and thus, energy efficiency.

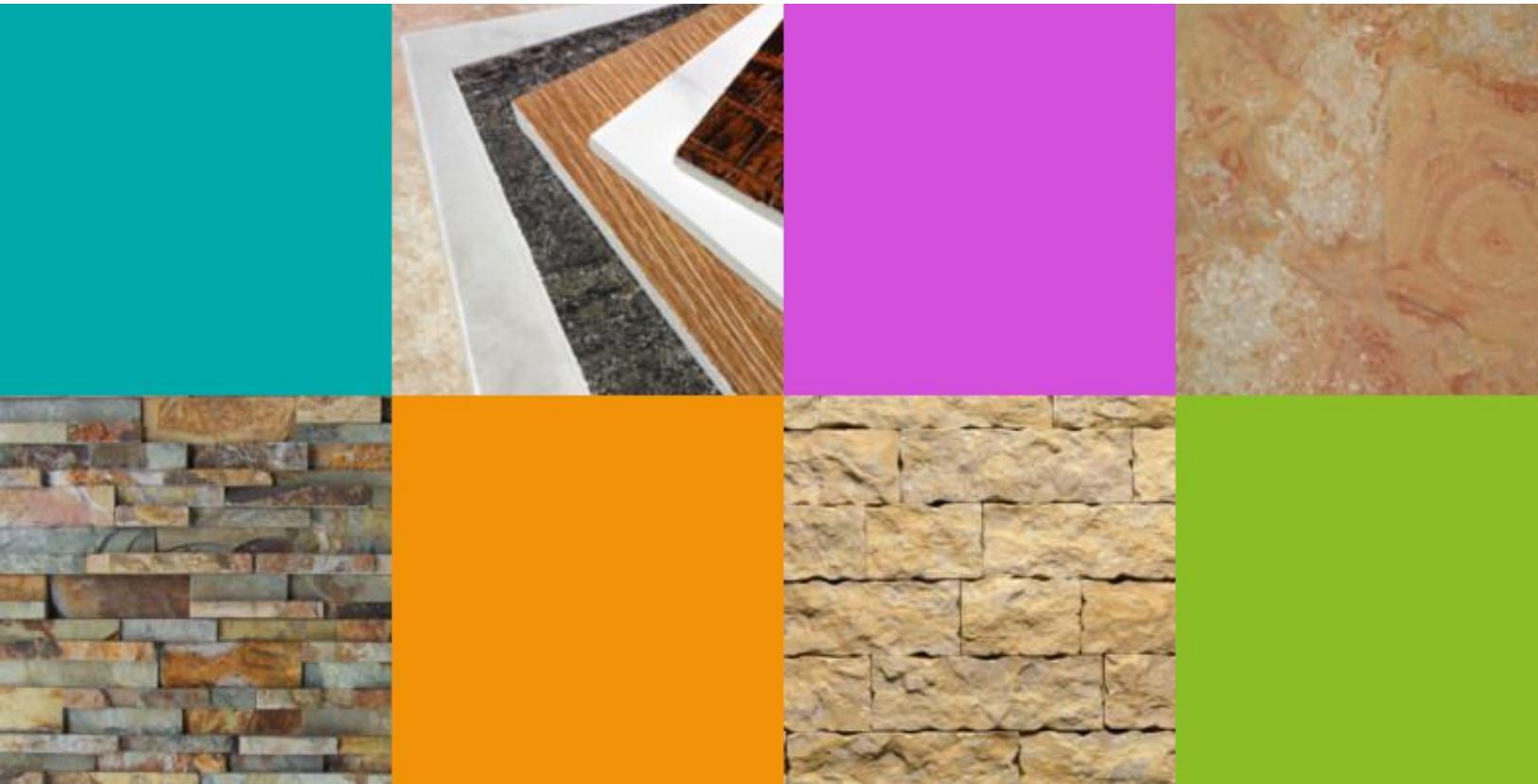
- Materials & Resources (MR): Due to the durability of stone, there are several credits in the MR category that can potentially be garnered.
  - MR Credits 1.1 & 1.2 Building Reuse, Maintain 75-95 percent of Existing Walls, Floors, and Roof: These credits apply if the life-cycle of existing building stock can be maintained in a project.
  - MR Credits 2.1 & 2.2 Construction Waste Management, Divert 50-75 percent from Disposal: These credits apply if “waste” stone used in construction is diverted to a beneficial use rather than being disposed.
  - MR Credits 3.1 & 3.2 Materials Reuse, 5-10 percent: These credits apply if salvaged stone products can be reused for another purpose in a building design.
  - MR Credits 5.1 & 5.2 Regional Materials, 10-20 percent Extracted, Processed & Manufactured: These credits apply if the project uses natural stone that has been extracted, harvested or recovered, as well as manufactured, within 500 miles of the project site for a minimum of 10 percent of the total materials value.
- Innovation and Design (ID): Use of natural stone may contribute to exceptional performance in areas such as life-cycle cost and durability, mold resistance, and improved air quality.

‘ANSI/NSC-373’ for natural stone in 2014, which cover nine facets of a quarry and fabricator’s operation, including water usage and recycling, custody and transportation, site and plant management, land reclamation and adaptive use, corporate governance, energy use and conservation, management of excess process materials and waste, safer chemical and materials management and human and health considerations. As per the new standard, sustainability of natural stone now encompasses how the stone is quarried, processed and transported and how its use impacts the facilities, environments and people who work with it.

On the global front, Natural Stone Council (NSC) has announced the new sustainability standard

# Stone Industry in the MENA Region

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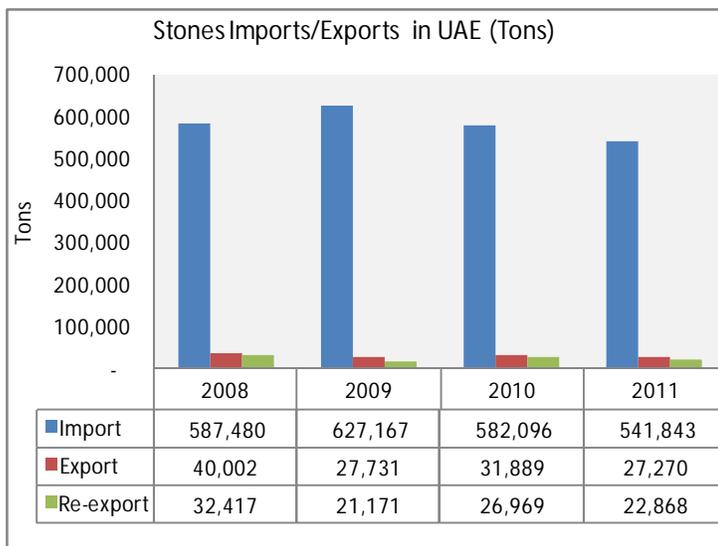
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## I. Trade analysis of stones in MENA region

The following section examines the import, export and re-export of stones in the major MENA countries. The section also highlights the major export and import partners for stone trade for each country. HS Code: 6802 (Worked monumental/building stone & art; mosaic cube, granules) has been used for the trade analysis.

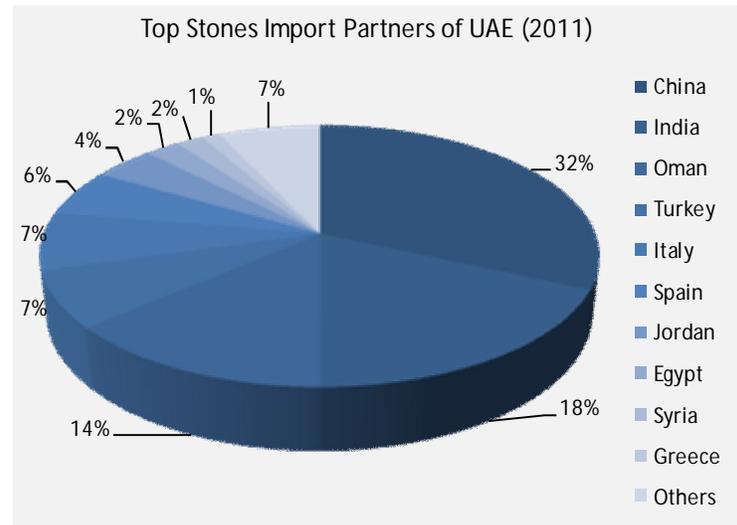
### UAE trade analysis

UAE has been a net importer of stones, with volume of imports of stones reaching 541,843 Tons in 2011. UAE exports and re-exports of stones accounts to a small percentage with total exports volumes reaching only 27,270 Tons in 2011.



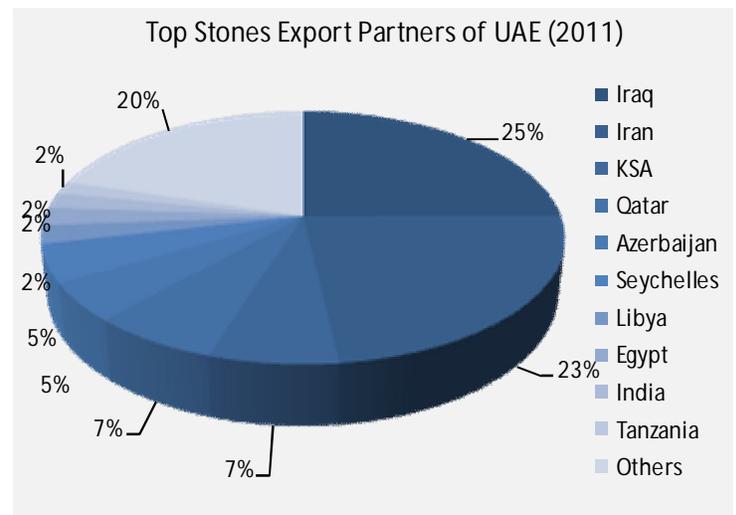
Source: UNComtrade, Trademap

China has been a dominant imports partner with a share of 32 percent of total UAE imports of stones, followed by India with 18 percent share and Oman with 14 percent.



Source: UNComtrade, Trademap

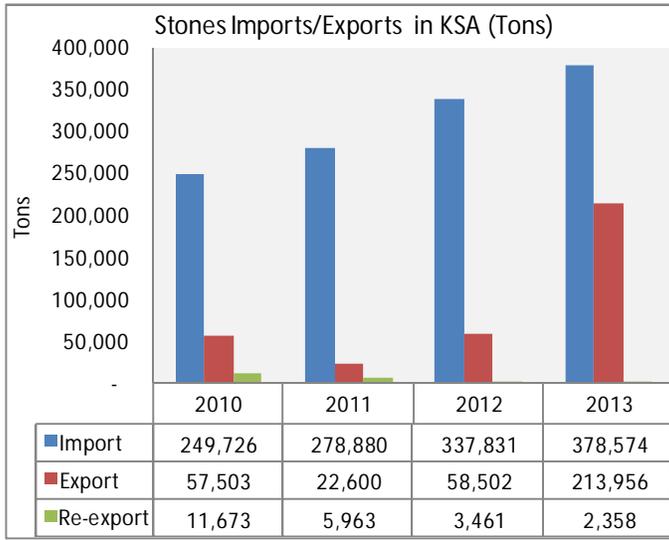
Iraq has been the largest exports partner with a share of 25 percent, followed by Iran with 23 percent and KSA and Qatar with 7 percent in UAE exports of stones.



Source: UNComtrade, Trademap

### KSA trade analysis

KSA imports reflected an increasing trend from 249,726 Tons in 2010 to 378,574 Tons in 2013. Exports registered a sharp increase in 2013 reaching 213,956 Tons compared to 58,502 Tons in 2012.



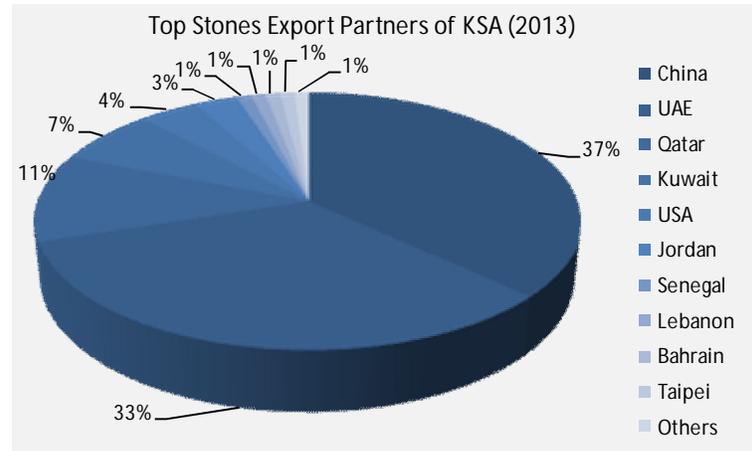
Source: UNComtrade, Trademap

In 2013, Jordan was the largest import partner with an exorbitant share of 58 percent, followed by China and Syria with a share of 14 percent each.



Source: UNComtrade, Trademap

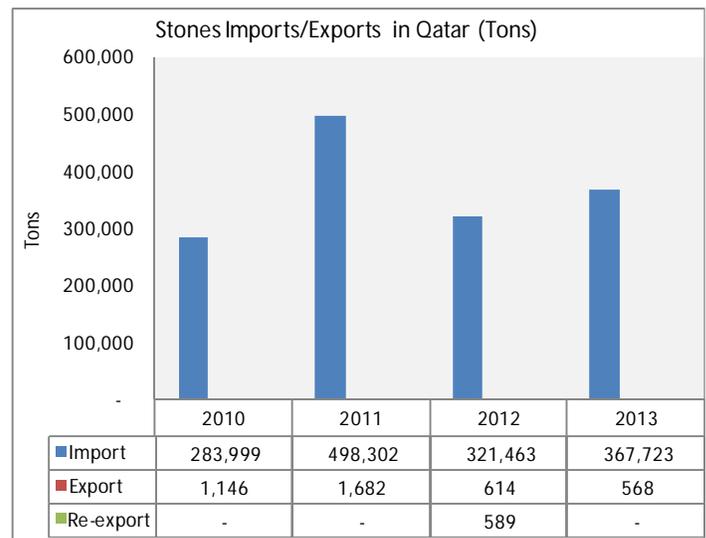
China and UAE were the major partners of KSA for stones exports with a share of 37 percent and 33 percent respectively in 2013.



Source: UNComtrade, Trademap

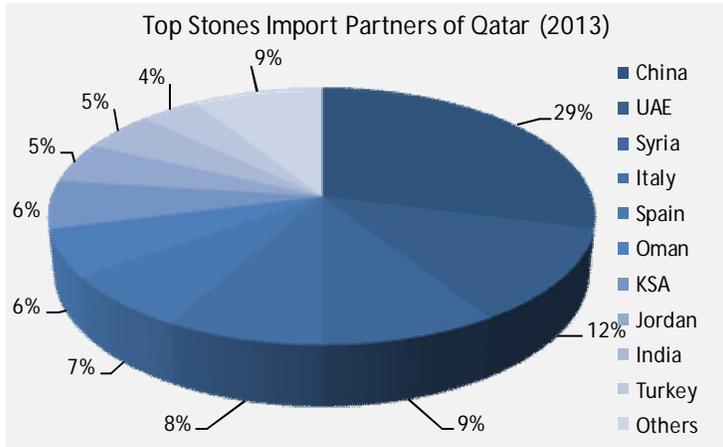
### Qatar trade analysis

Qatar imports of stones shrank in volume in 2012, with stones imports reducing to 321,463 Tons from 498,302 Tons in 2011. However, imports registered a reviving trend in 2013 with imports increasing to 367,723 Tons. Export of stones from Qatar was marginal compared to imports which accounted to 568 Tons in 2013.



Source: UNComtrade, Trademap

29 percent of imports of stones to Qatar came from China, 12 percent from UAE, 9 percent from Syria, and 8 percent from Italy. Spain, Oman and KSA followed with 7 percent, 6 percent and 6 percent respectively.



Source: UNComtrade, Trademap

91 percent of the stones from Qatar were exported to other GCC countries itself such as KSA, Bahrain, UAE and Kuwait. The remaining small percentage was exported to UK, USA, Turkey, Thailand etc.

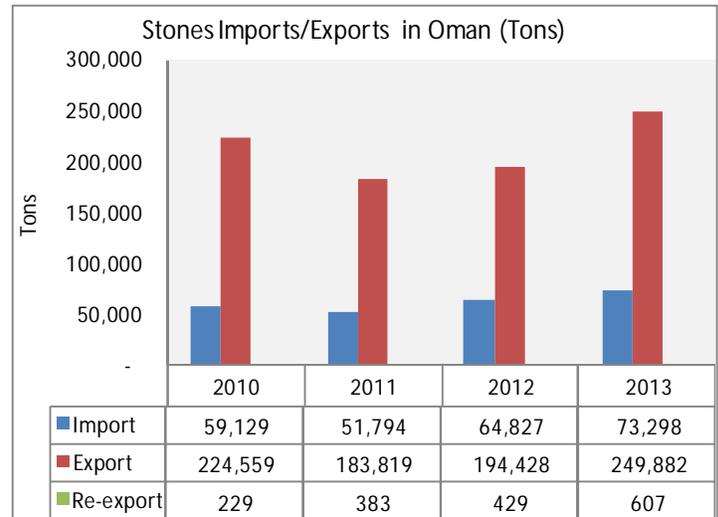


Source: UNComtrade, Trademap

### Oman trade analysis

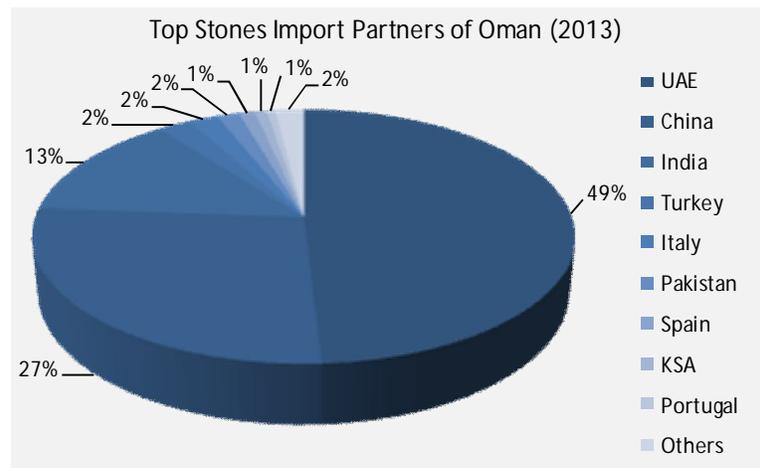
Apart from other GCC countries, Oman is a net-exporter of stones with exports indicating an

increasing trend since 2011. Exports grew from 183,819 Tons in 2011 to 249,882 Tons in 2013, out of which re-exports accounts to only small percentage.



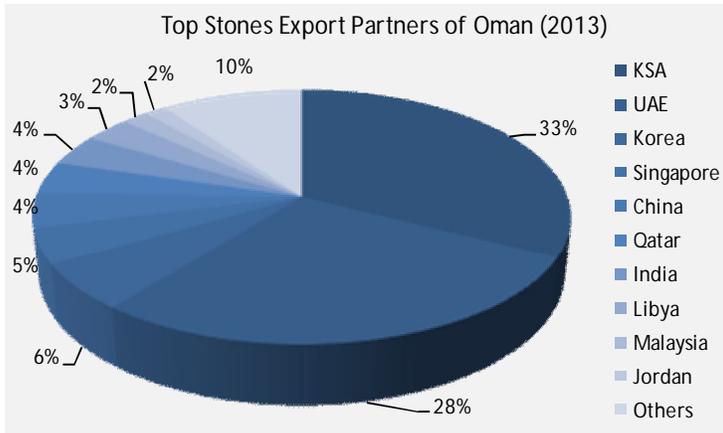
Source: UNComtrade, Trademap

UAE dominated Oman's imports with a share of 49 percent, followed by China at 27 percent and India at 13 percent.

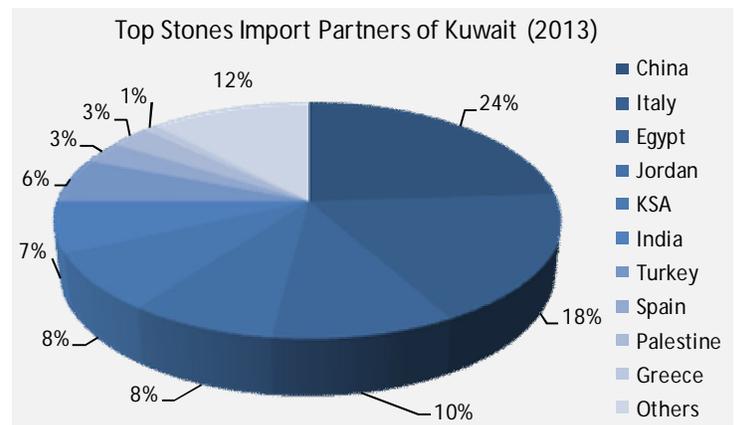


Source: UNComtrade, Trademap

KSA and UAE were the major export partners of Oman together accounting to 61 percent share in 2013. Korea and Singapore followed with a share of 6 percent and 5 percent respectively.



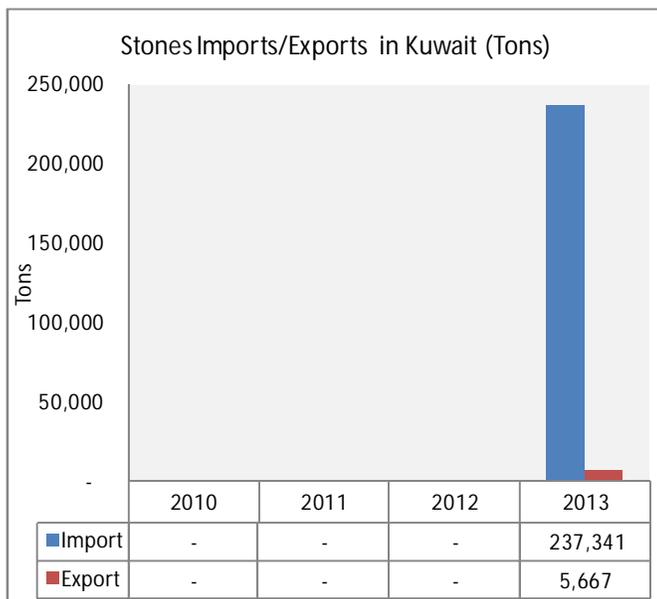
Source: UNComtrade, Trademap



Source: UNComtrade, Trademap

### Kuwait trade analysis

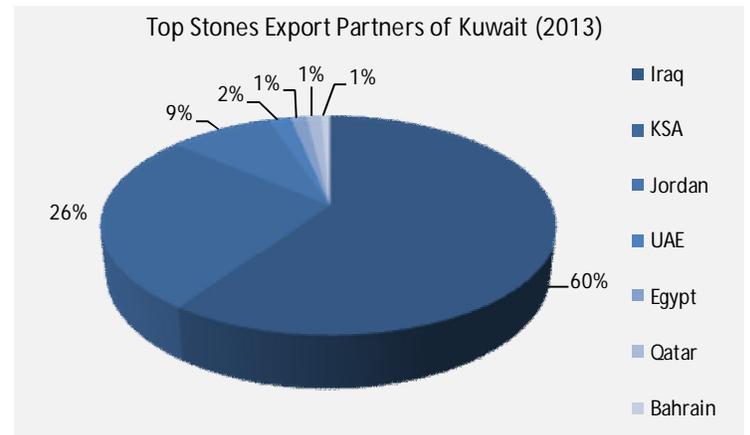
During 2013, Kuwait imported stones of volume 237,341 Tons while export was 5,667 Tons.



Source: UNComtrade, Trademap

The main import partners of Kuwait for stones included China, Italy, Egypt, Jordan and KSA with a share of 24 percent, 18 percent, 10 percent, 8 percent and 8 percent in 2013.

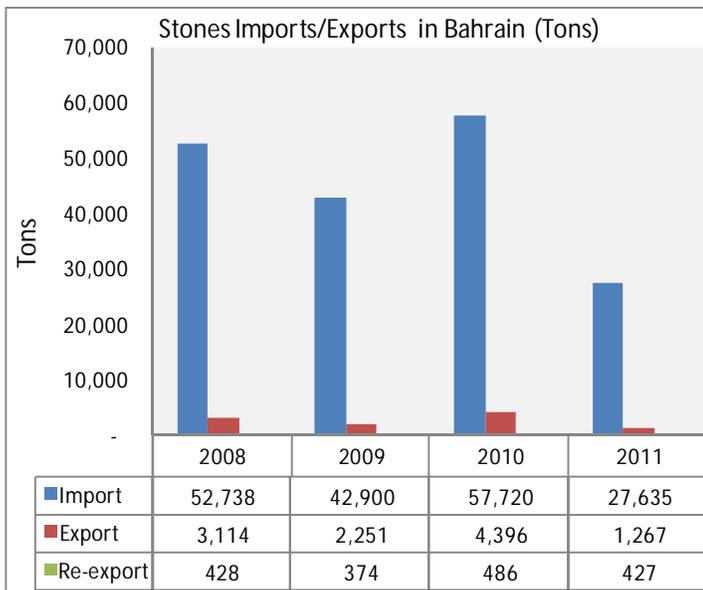
In 2013, Iraq was the major export destination of Kuwait with 60 percent of share, followed by KSA with a significant share of 26 percent.



Source: UNComtrade, Trademap

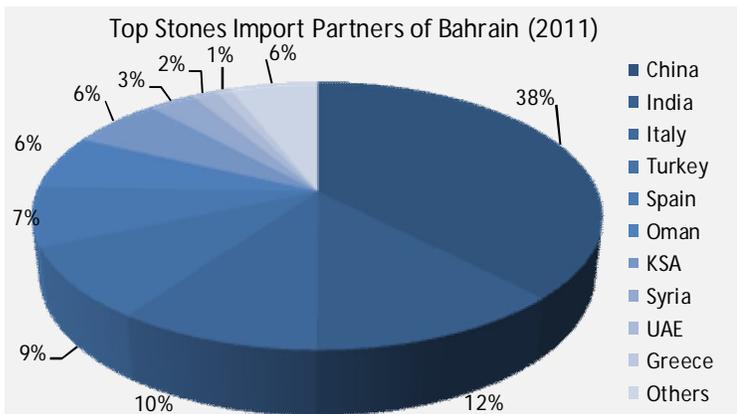
### Bahrain trade analysis

Bahrain exports of stones have fluctuated during 2008-2011 with maximum exported volume reached 57,720 Tons in 2010. In 2011, imports decreased significantly to 27,635 Tons. Exports also declined in 2011 with volume reaching 1,267 Tons, out of which 427 Tons was re-exports.



Source: UNComtrade, Trademap

China was the leading import partner for Bahrain stones, with a share of 38 percent in 2011. Other major import partners were India, Italy, Turkey and Spain with a share of 12 percent, 10 percent, 9 percent and 7 percent.



Source: UNComtrade, Trademap

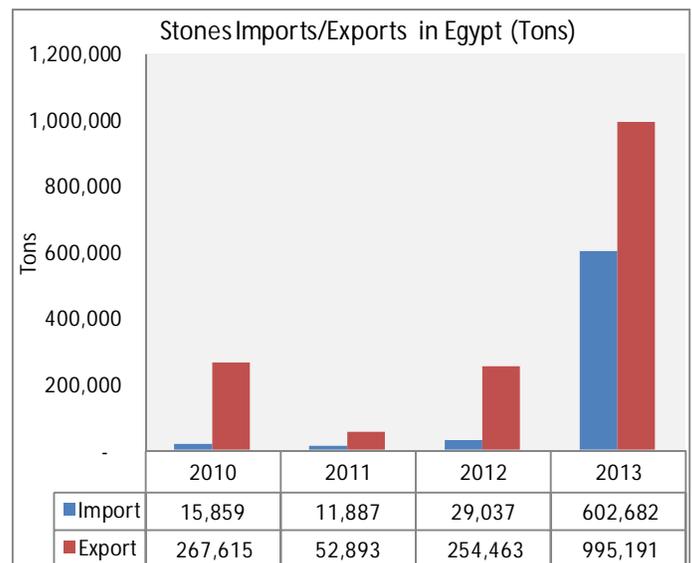
KSA was the first export market for Bahrain in terms of stones export with a share of 46 percent, followed by Qatar at a share of 40 percent. These two export market accounted to 86 percent of the total exports from the region.



Source: UNComtrade, Trademap

### Egypt trade analysis

Egypt was a net-exporter of stones; however both exports and imports witnessed a sharp increase since 2011. Volume of stones exports and imports was 995,191 Tons and 602,682 Tons respectively in 2013.

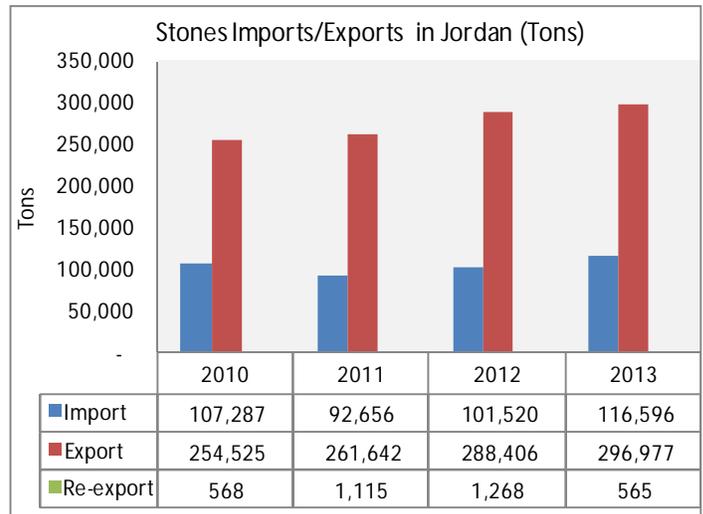
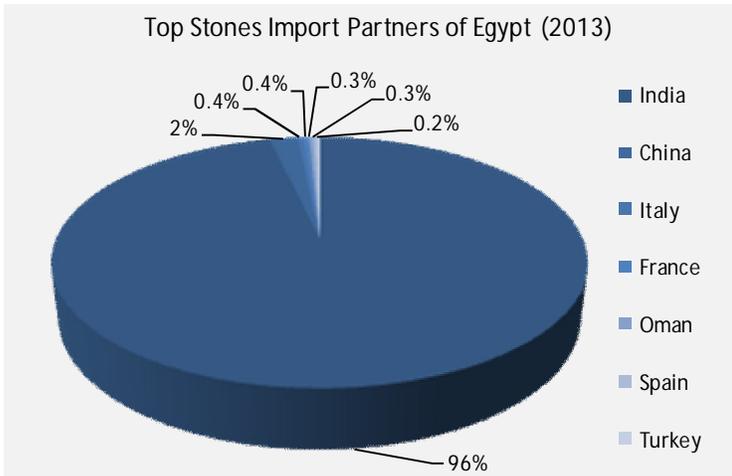


Source: UNComtrade, Trademap

India was the dominant import partner of Egypt and supplied 96 percent of the stones imports in 2013.

The remaining small percentage was supplied by China, Italy, France, Oman, Spain and Turkey.

Export volume reached 296,977 Tons in 2013 from 254,525 Tons in 2010.

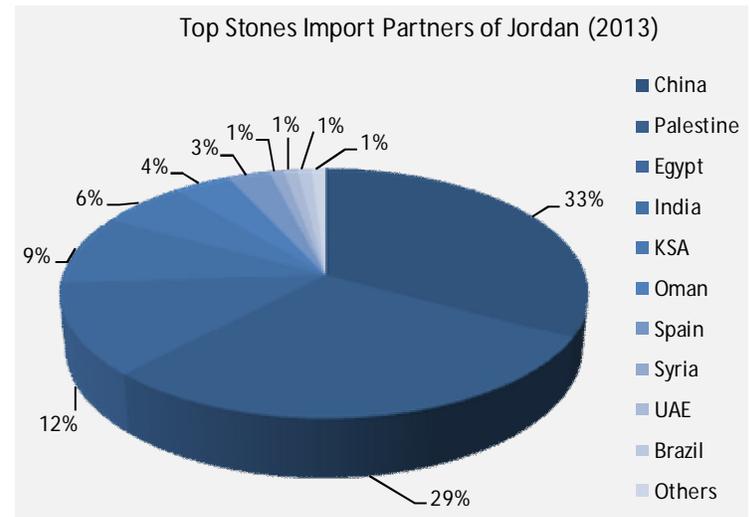
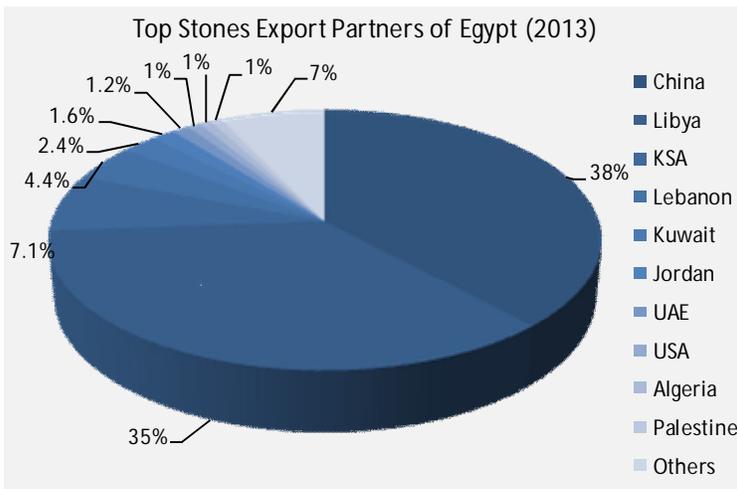


Source: UNComtrade, Trademap

Source: UNComtrade, Trademap

China and Libya were the leading export markets for stones from Egypt accounting to 38 percent and 35 percent respectively in 2013. Egypt exported 377,788 Tons and 352,767 Tons of stones to China and Libyan markets respectively.

China was the largest import partner. It accounted to 33 percent of the total imports in 2013, followed by Palestine (29 percent), Egypt (12 percent), India (9 percent) and KSA (6 percent).



Source: UNComtrade, Trademap

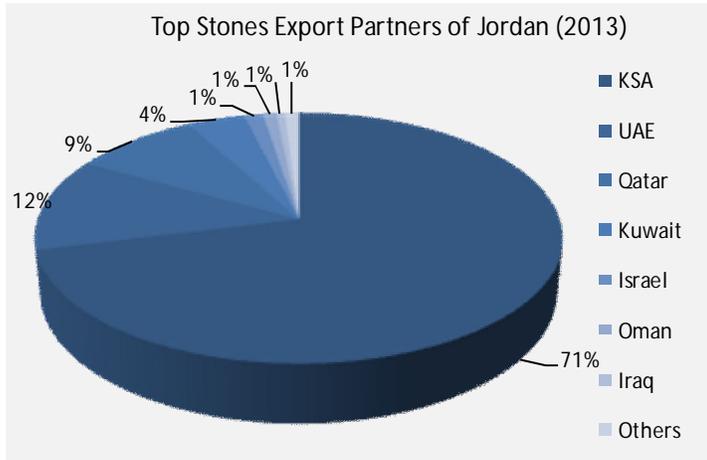
Source: UNComtrade, Trademap

### Jordan trade analysis

Jordan was a net exporter of stones with exports maintaining an increasing trend during 2010-2013.

In 2013, KSA was Jordan's most important export partner with a total export share of 71 percent, while

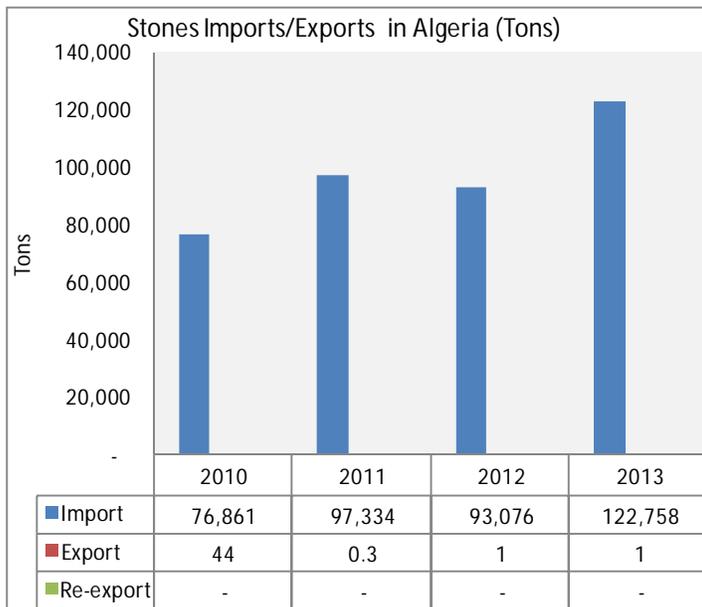
UAE holds a distant second place with a share of 12 per cent.



Source: UNComtrade, Trademap

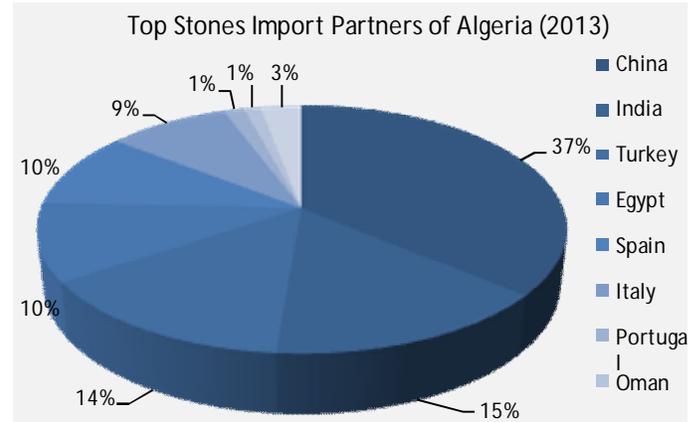
### Algeria trade analysis

Despite a positive trend, Algeria imports of stones had fluctuated during 2010-2013. The maximum export volume was in 2013, when it reached 122,758 Tons. Export of stones from Algeria has been negligible. The total export volume of stone was only 1 Ton in 2013, which was exported to Italy.



Source: UNComtrade, Trademap

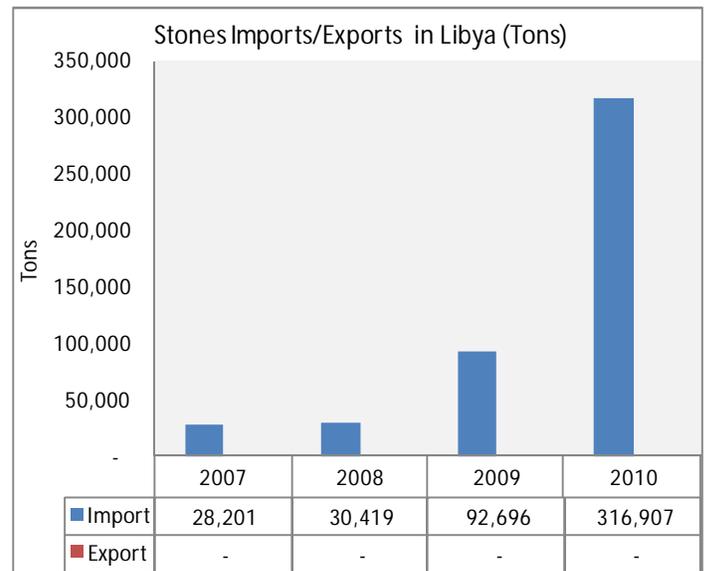
China has the largest share of Algerian import pie, accounting for 37 percent of the total imported volume in 2013. It is followed by India (15 percent), Turkey (14 percent), Egypt (10 percent), Spain (10 percent) and Italy (9 percent).



Source: UNComtrade, Trademap

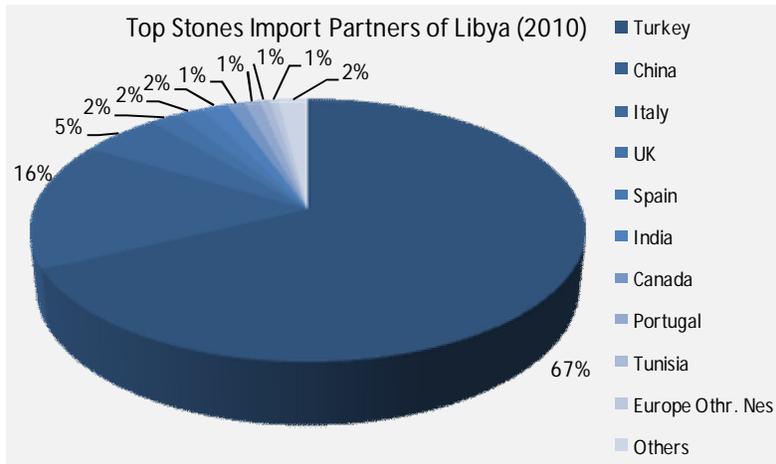
### Libya trade analysis

From 2007 to 2010, Libyan imports of stones showed an increasing trend. In 2010, Libya's imports of stone increased enormously to reach 316,907 Tons from 92,696 Tons in 2009.



Source: UNComtrade, Trademap

Major source of import of stones to Libya was Turkey covering 67 percent of the import volume in 2010. China and Italy contributed 16 percent and 5 percent respectively to the import pie in 2010.



Source: UNComtrade, Trademap

### Morocco trade analysis

Stones imports to Morocco totaled 192,018 Tons in 2013. The import of stones depicted a stable trend since 2011, even though there was a marginal decline of 1.5 percent in import volume in 2013 when compared to 2012.



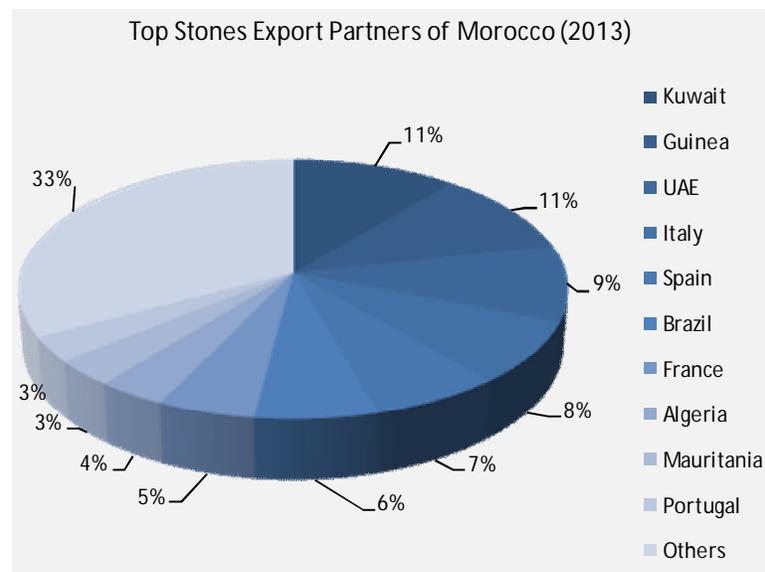
Source: UNComtrade, Trademap

Spain and Italy accounted to 80 percent of the stones import volume to Morocco in 2013. Other import partners were China (5 percent), Turkey (4 percent), Egypt (3 percent), Portugal (3 percent), India (3 percent) and others.



Source: UNComtrade, Trademap

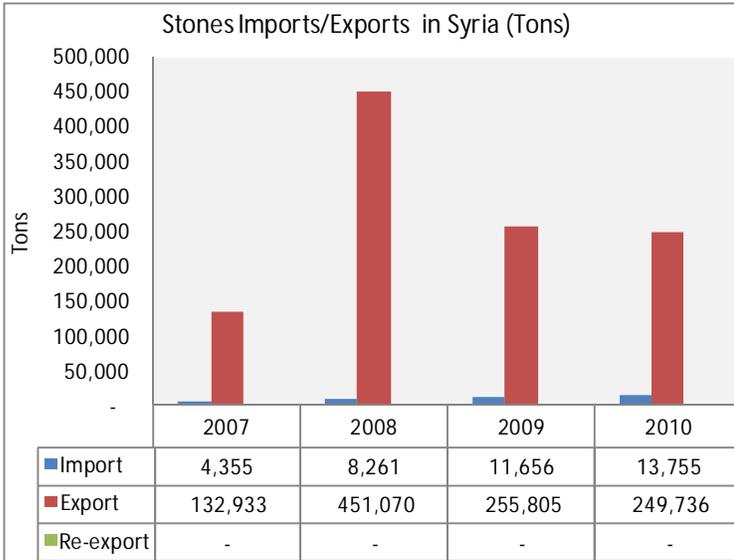
The largest export markets for stones in 2013 were Kuwait (11 percent), Guinea (11 percent), UAE (9 percent), Italy (8 percent), Spain (7 percent) and Brazil (6 percent).



Source: UNComtrade, Trademap

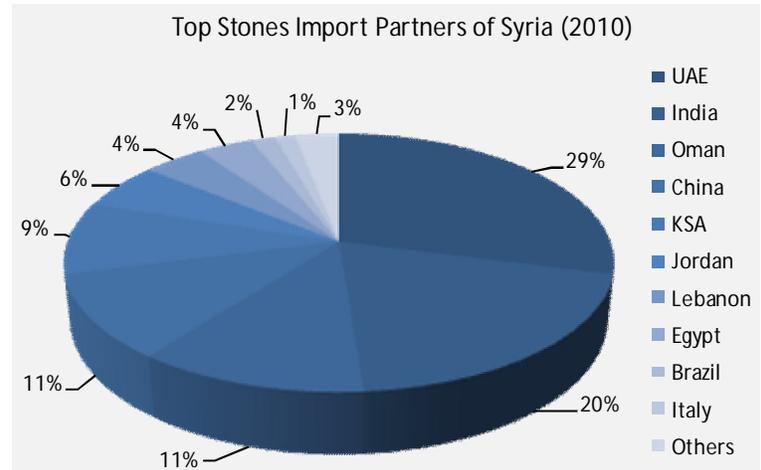
### Syria trade analysis

In 2008, Syria's total export volume was more 451,070 Tons. By 2010, the volume dropped to 249,736 Tons. Meanwhile, import volume registered an increasing trend even though the volume is low when compared to exports.



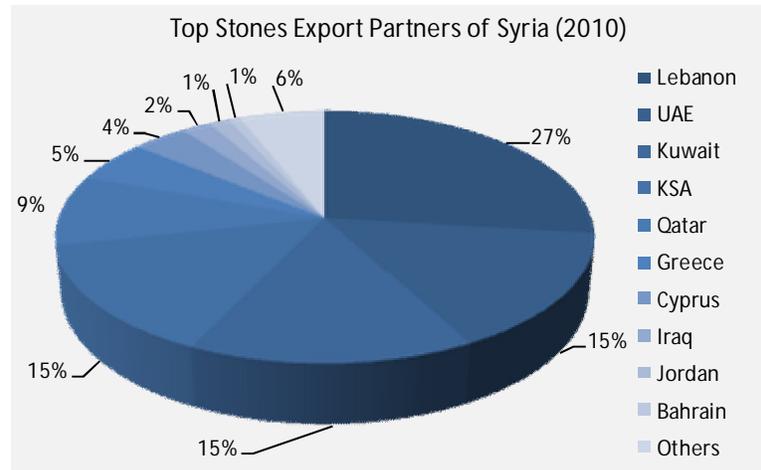
Source: UNComtrade, Trademap

UAE and India were the top import partners of Syria for stones in 2010 contributing to 29 percent and 20 percent of the share respectively. Other significant import sources include Oman (11 percent), China (11 percent), KSA (9 percent) and Jordan (6 percent).



Source: UNComtrade, Trademap

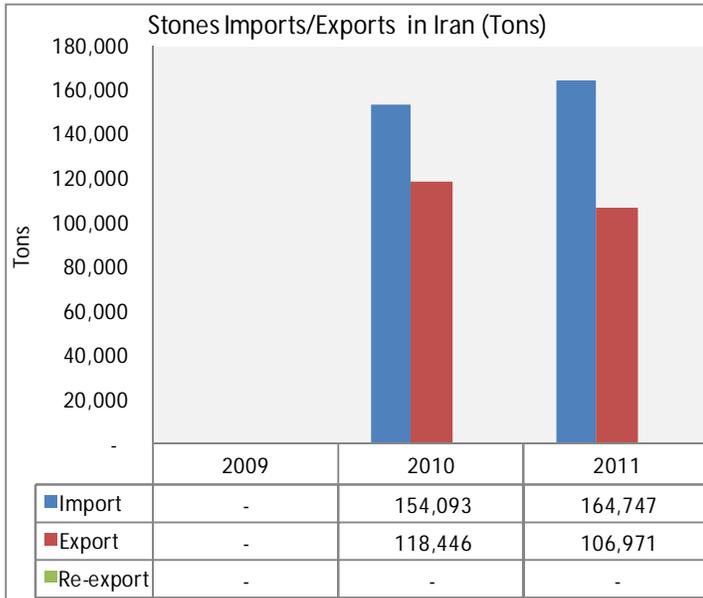
Lebanon was the largest export-trading partner for Syria, and in 2010 bought 27 percent of the total export volume of stones. Other key buyers of Syria's stone products were UAE (15 percent), Kuwait (15 percent) and KSA (15 percent).



Source: UNComtrade, Trademap

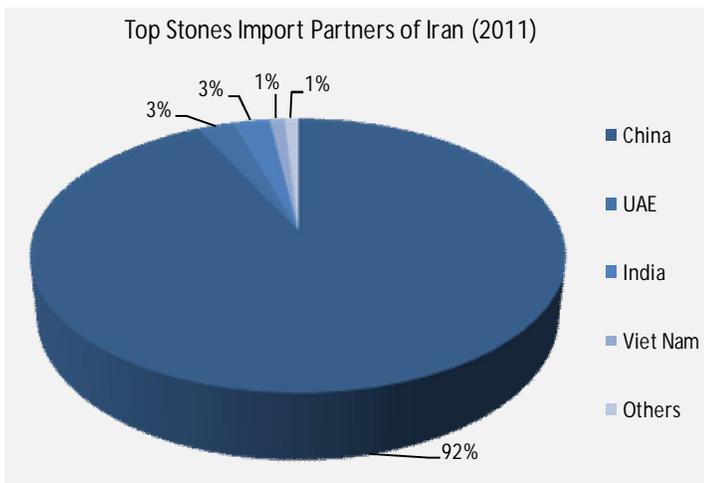
### Iran trade analysis

Iran's import increased from 154,093 Tons in 2010 to 164,747 Tons in 2011 at a year-on year growth of 7 percent. Meanwhile, exports plummeted from 118,446 Tons in 2010 to 106,971 Tons in 2011.



Source: UNComtrade, Trademap

China was the substantial importer of stones with a share of 92 percent of total import volume. Remaining small percentage has been imported from UAE (3 percent), India (3 percent), Vietnam (1 percent) and others.



Source: UNComtrade, Trademap

Iraq topped the export pie of Iran's stones export in 2011, with a share of 29 percent followed by Azerbaijan and UAE with 16 percent and 10 percent shares respectively.



Source: UNComtrade, Trademap

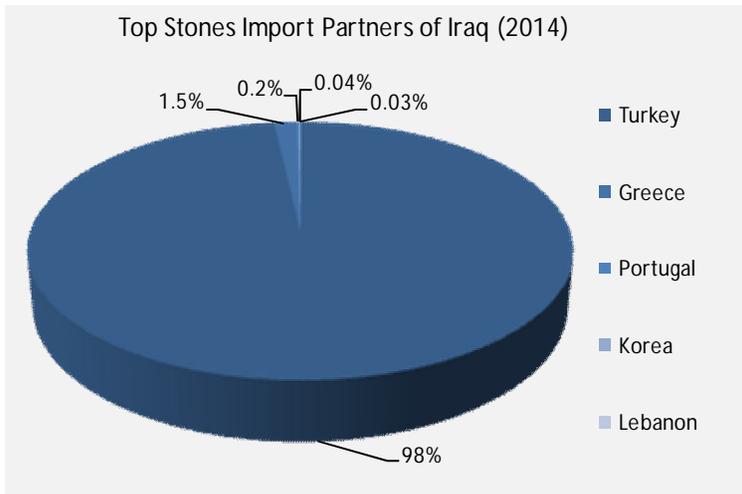
### Iraq trade analysis

Iraq's export of stones was 364,643 Tons in 2014, down by 47 percent from 689,884 Tons in 2013. Lebanon was the only export partner for Iraq in 2014, where the export volume accounted to 1 Ton.



Source: UNComtrade, Trademap

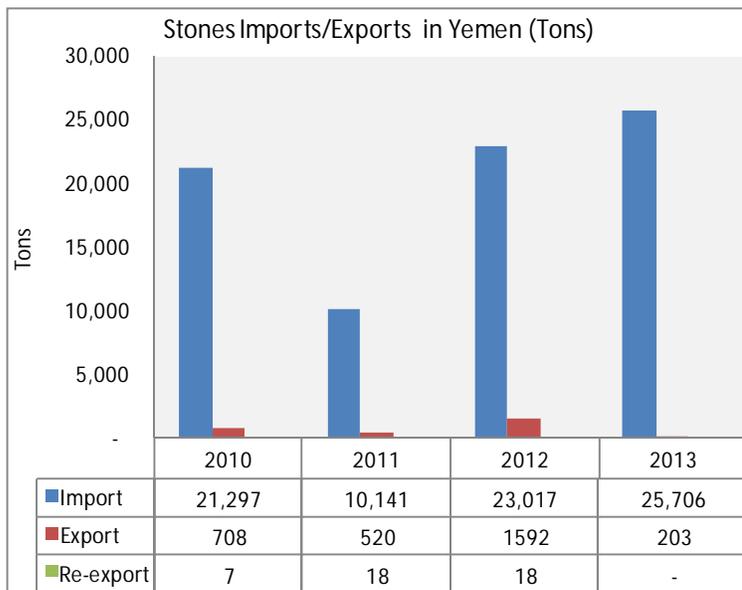
In 2014, 98 percent of the stones were imported from Turkey which accounted to 358,029 Tons.



Source: UNComtrade, Trademap

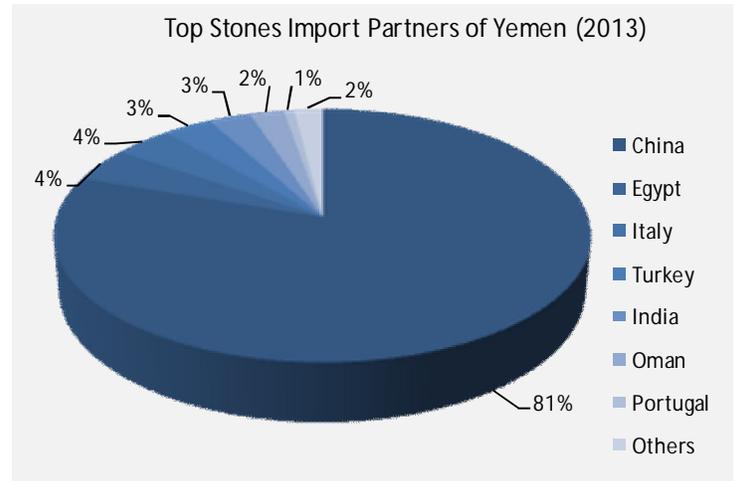
### Yemen trade analysis

Import of stones to Yemen has been increasing steadily between 2010 and 2013, however saw a drop in 2011 and has been recovering ever since. In 2013, Yemen's stones export volume increased to 25,706 Tons, up from 23,017 Tons in 2012.



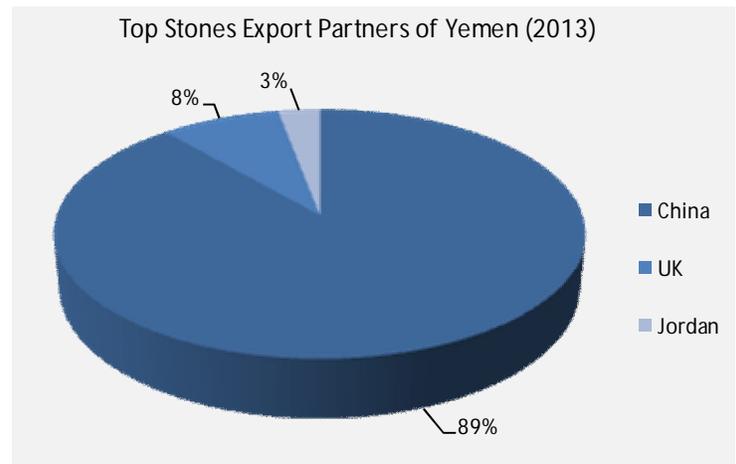
Source: UNComtrade, Trademap

In 2013, the top country for Yemen's stones imports was China (81 percent) with total imported volume recording 20,861 Tons.



Source: UNComtrade, Trademap

China is Yemen's largest trading partner for both imports and exports in 2013. China accounted to 89 percent of the total imported volume, followed by UK and Jordan contributing smaller percentages to the import pie.

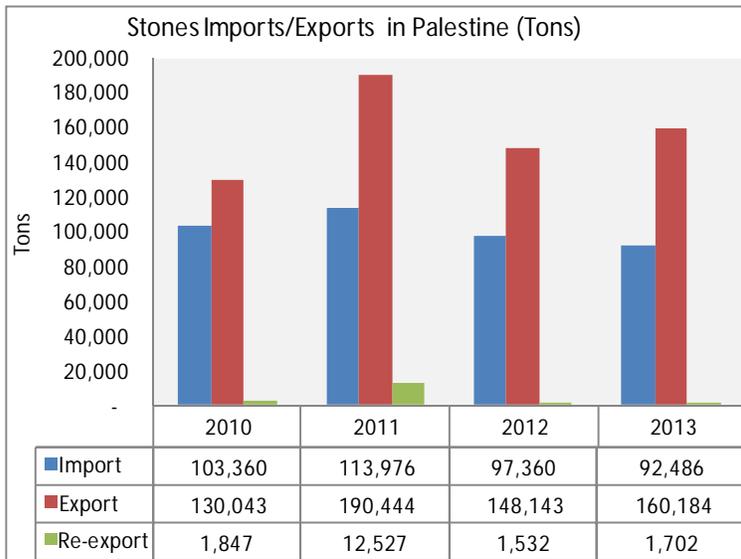


Source: UNComtrade, Trademap

### Palestine trade analysis

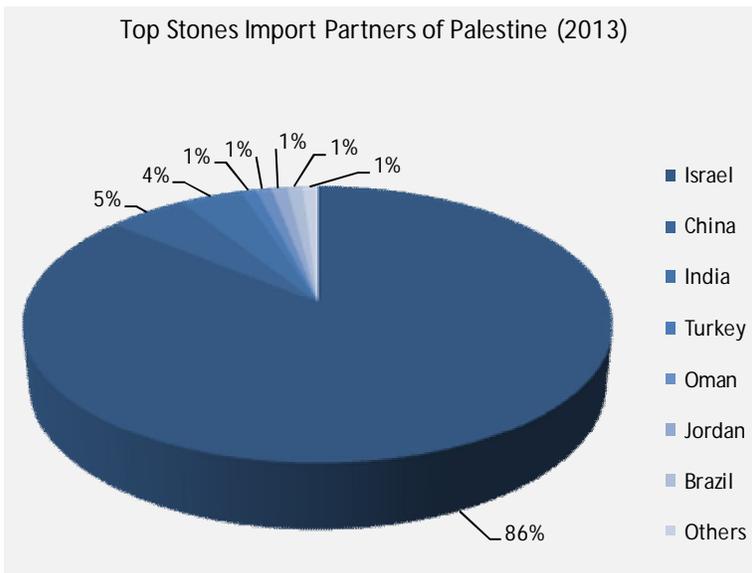
Palestine exports increased from 2012 to 2013, from 148,143 Tons to 160,184 Tons. However, from 2011

to 2012 there was a drop of 22 percent, from 190,444 Tons to 148,143 Tons.



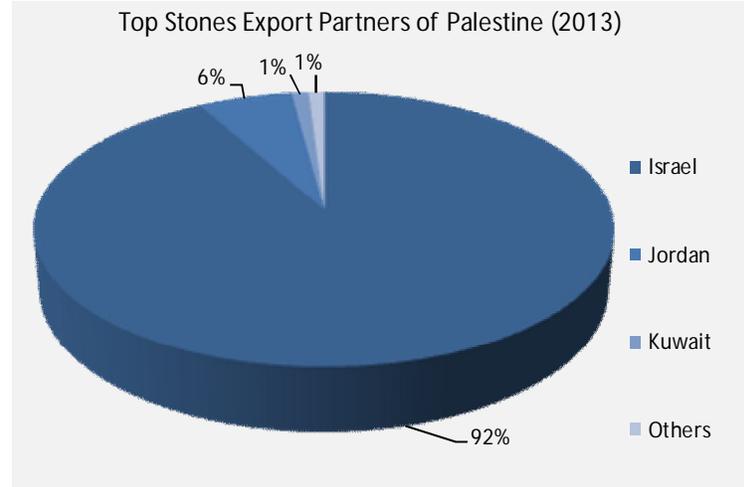
Source: UNComtrade, Trademap

Israel was the major import partner of Palestine in 2013, it accounted for more than 86 percent of volume of imports.



Source: UNComtrade, Trademap

Israel was also the largest export destination for stones from Palestine and totaled to 92 percent of the export share.



Source: UNComtrade, Trademap

## II. Key news on GCC stones industry

### New sustainability standards announced for natural stone

Source: <http://www.stoneworld.com/articles/88040-new-sustainability-standards-announced-for-natural-stone>

Tough new sustainability standards for natural stone were recently announced by the Natural Stone Council (NSC), which said they would level the playing field between man's oldest building material and other building components. The product of nearly five years in the development stage, the new standard, called "ANSI/NSC-373, Sustainable Production of Natural Dimension Stone" will allow quarriers, processors and fabricators of natural stone who consistently meet or exceed the standards to label and promote their stone products as "certified Genuine Stone". The associated Chain of Custody standard is a companion document that tracks the material as it moves from the quarry through manufacturing and through the supply chain to the ultimate destination, including the jobsite or

the end user. Distributors can obtain certification under the Chain of Custody protocols.

### **Plan to re-use 30m tonnes of construction waste**

**Source:**<http://thepeninsulaqatar.com/news/qatar/288871/plan-to-re-use-30m-tonnes-of-construction-waste>

Qatar is looking to re-cycle and re-use the huge collection of construction waste stored at various parts of the country. Qatar Authority for Standards and Specifications at the Ministry of Environment yesterday discussed with officials and private agencies the possibility of re-using used rubble, bricks, stones and concrete blocks for new projects by adhering to the government's construction quality standards. Ministry officials said an estimated 30m tonnes of waste are being stored in the Rowdat Rashid storage area. This waste could be effectively recycled and re-used for new projects, including buildings, road constructions and making hollow bricks. This would not only help reduce imports of primary construction materials significantly but will also help clean the environment.

### **Saudi Binladin buys 50% stake in Italian company**

**Source:**<http://www.constructionweekonline.com/article-29383-saudi-binladin-buys-50-stake-in-italian-company/>

One of Saudi Arabia's largest construction companies, Saudi Binladin Group (SBG), has announced that one of its divisions has bought a 50% stake in Italian marble manufacturer Marmi di Carrara in a deal worth \$61mn.

SBG's Saudi Marble & Granite Factory Company already has close ties with the Tuscan firm, having

bought around a fifth of the company's output last year.

Among the projects that Saudi Marble & Granite has worked on include ministry buildings and palaces in Saudi Arabia, as well as Dubai International Airport, Abu Dhabi International Airport and New Delhi Airport.

According to the company's website, Saudi Marble & Granite already produces 100,000m<sup>3</sup> of marble and granite from 14 quarries across the kingdom.

### III. Major building construction projects at fit out stage across the GCC

SI	Project Name	Country	Client	Consultant	Contractor	Est. Value in USD Mn	Construction Completion
1	Abu Dhabi Airport Expansion - Midfield Terminal	UAE	Abu Dhabi Airports Co. (ADAC)	Kohn Pedersen Fox Associates (KPF)	Consolidated Contractors International Company (CCC) / Arabtec Construction / Tepe Akfen Ventures (TAV)	2,942	Q2, 2017
2	Pearl Dubai in Tecom	UAE	Pearl Dubai FZ LLC	Middle East Engineering Consultants (MEECON) / Le Gris Designers	Al Habtoor Leighton (HLG)	2,016	Q4, 2017
3	Viceroy Hotels, Resorts & Residences in Palm Jumeirah	UAE	SKAI Holdings Ltd LLC	Engineering Consultants Group (ECG) / Palm & Turner Architects	China State Construction & Engineering Corporation (CSCEC)	1,000	Q4, 2016
4	Damac Towers by Paramount in Downtown Dubai	UAE	Damac Properties, Dubai / Paramount Hotels & Resorts	Conin Incorporated Consultants / Khatib & Alami Consolidated Engineering Company	Tepe Akfen Ventures (TAV)	1,000	Q4, 2016
5	Concourse 4 in Dubai International Airport	UAE	Dubai Aviation Engineering Projects (DAEP)	Dar Al Handasah Consultants (Shair and Partners)	Al Jaber Engineering and Contracting (ALEC)	816	Q2, 2015
6	The Louvre Museum on Saadiyat Island	UAE	Tourism Development & Investment Co. (TDIC)	Buro Happold, Dubai / Pascall & Watson (UK) / Ateliers Jean Nouvel, France	Constructora San Josa SA / Oger Abu Dhabi / Arabtec Construction	653	Q4, 2015
7	Al Habtoor City (Al Habtoor Palace) - St. Regis, Westin & W Hotel	UAE	Al Habtoor Group	Khatib & Alami Consolidated Engineering Company, Dubai / Atkins, Dubai	Al Habtoor Leighton (HLG)	515	Q3, 2016
8	Dubai Design District (D3) - Phase 1 (11 Buildings)	UAE	Tecom Investments	Woods Bagot / Kling Consult	Amana Contracting & Steel Buildings Company	504	Q1, 2015
9	The Onyx on Sheikh Zayed Road	UAE	Ishraqah Development / Zahran Group	KEO International Consultants / Adnan Saffarini	Al Shafar General Contracting (ASGC)	500	Q4, 2015
10	Presidential Palace in Corniche	UAE	Presidential Court	Ewan Architectural Engineering Consultancy / WSP Middle East Architectural &	Consolidated Contractors International Company (CCC) / Ghantoot Contracting	490	Q2, 2015

				Engineering Consultancy			
11	Opus Development in Business Bay	UAE	Omniyat Properties	Brewer Smith & Brewer Gulf (BSBG)	Brookfield Multiplex	463	Q2, 2015
12	Dusit Thani on Palm Jumeirah	UAE	Al Osaimi Group	Khatib & Alami Consolidated Engineering Company, Sharjah	Omis Contracting	409	Q3, 2015
13	National Guard - Housing Units - Phase 2	KSA	Saudi National Guard	Dar Al Handasah Consultants (Shair and Partners), Riyadh / Saudi National Guard	Saudi Binladin Group	3,600	Q3, 2015
14	King Abdulaziz International Airport Expansion - Main Terminal Package - Phase 1	KSA	General Authority for Civil Aviation (GACA), Saudi Arabia	Aeroports de Paris Ingenierie (ADPI) / Atkins / Dar Al Handasah Consultants (Shair and Partners)	Saudi Binladin Group	3,013	Q1, 2015
15	Grand Mosque Expansion in Makkah	KSA	The High Commission For The Development of Makkah Province / General Presidency for affairs of the Prophet's Mosque	Dar Al Handasah Consultants (Shair and Partners)	Saudi Binladin Group	2,500	Q4, 2016
16	Prince Mohammad Bin Abdulaziz Airport Expansion in Madina - Phase 1	KSA	General Authority for Civil Aviation (GACA), Saudi Arabia / Tibah Airports Operation Company	Zuhair Fayez Partnership Consultants / Halcrow Group Ltd	Saudi Oger, / Al Rajhi Holding / TAV Airports	2,406	Q1, 2015
17	Stations for Makkah - Madina (Haramain) Railway Link - Phase 1 (Package 2)	KSA	Saudi Railways Organization (SRO)	URS Corporation, Abu Dhabi / Atkins, Dubai / Dar Al Handasah Consultants (Shair and Partners), Makkah / Foster + Partners, UK (Foster & Partners) / Saudi Consulting Services (SaudConsult), Riyadh / Saudi Consolidated Engineering Company (Khatib & Alami),	Saudi Binladin Group / Saudi Oger / El Seif Engineering Contracting Company (ESEC) / Yapi Merkezi	2,400	Q2, 2015
18	Jeddah Kingdom	KSA	Kingdom Holding Company	Hyder Consulting / Arup, UK / Langan	Saudi Binladin Group	1,500	Q4, 2018

	Tower			International			
19	Expansion of Makkah Holy Haram - Mataaf Circle	KSA	General Presidency of Holy Mosques Affairs	-	Saudi Binladin Group	1,000	Q3, 2015
20	Expansion of Makkah Holy Haram - Eastern & Western Sides	KSA	General Presidency for affairs of the Prophet's Mosque / Madina Development Authority	Dar Al Handasah Consultants (Shair and Partners), Makkah	Saudi Binladin Group	1,000	Q4, 2015
21	Jabal Omar Development - Phase 1	KSA	Jabal Omar Development Company / Hilton International / Hyatt Regency / Marriott International; Global Sales Middle East & Africa / Mercure Hotels / Resta Hotels & Resorts / Sofitel Hotels	Saudi Consolidated Engineering Company (Khatib & Alami) / Dar Al Handasah Consultants (Shair and Partners) / Design & Construction Engineering (DEC) / Consolidated Consultants, Jordan	Nesma & Partners Contracting Company	908	Q3, 2015
22	Sidra Medical & Research Centre	Qatar	Qatar Foundation for Education Science & Community Development	Ellerbe Beckett	Consolidated Contractors Company (CCC) / Midmac Contracting / Contrack International / Obrascon Huarte Lain SA (OHL), Spain	2,400	Q3, 2015
23	Doha Festival City	Qatar	Bawabat Al-Shamal / Al Futtaim Group / Qatar Islamic Bank / Aqar Real Estate Development Company	Arab Engineering Bureau (AEB)	Qatari Arabian Construction Company / Amana Contracting and Steel Buildings	1,650	Q4, 2017
24	Doha Convention Centre & Tower Project	Qatar	Qatari Diar Real Estate Investment Company (QDREIC) / Barwa Real Estate Company, Qatar	-	Midmac Contracting / Six Construct	1,350	Q4, 2017
25	Qatar Petroleum District	Qatar	Barwa Real Estate Company, Qatar / Qatar Petroleum (QP)	KEO International / AECOM	Al Jaber Engineering / Midmac Contracting / Bouygues Construction	1,300	Q1, 2016
26	Mall of Qatar	Qatar	-	KEO International Consultants / Chapman Taylor, UK	Urbacon Construction	824	Q4, 2016
27	NDIA - North Node - Phase 3a	Qatar	NDIA Steering Committee	-	Midmac Contracting / Six Construct	745	Q3, 2015
28	Msheireb Downtown Doha - Phase 3	Qatar	Msheireb Properties	Buro Happold / Gensler / Atelier Ten	HBK Contracting / Obayashi	669	Q1, 2016

29	Msheireb Downtown Doha - Phase 2	Qatar	Msheireb Properties	Buro Happold / Gensler / Atelier Ten	Arabtec Construction	630	Q4, 2015
30	Muscat International Airport - Passenger Terminal	Oman	Ministry of Transport & Communications, Oman	Hill International LLC	Bechtel / Bahwan Contracting Company (BCC) / Enka Teknik, Turkey	1,826	Q3, 2016
31	New Terminal at Salalah International Airport	Oman	Ministry of Transport & Communications, Oman	Hill International	Galfar Engineering & Contracting / Larsen & Toubro (L&T) Limited	760	Q2, 2015
32	Resort at Sifah	Oman	Muriya Tourism Development Company	-	Lupp Middle East LLC	300	Q4, 2018
33	Omran Convention & Exhibition Centre - Phase 1 Package 2	Oman	Ministry of Tourism, Oman / Omran Office	RMJM (Robert Mathew Johnson Marshall) Limited, UK / Dar SSH International Engineering Consultant (SSH International Consultants)	Carillion Alawi	201	Q4, 2016
34	The Wave - Kempinski Hotel	Oman	Kempinski Hotel, Ajman / Omani Hospitality Company	WSP Middle East Architectural & Engineering Consultancy	Carillion Alawi	200	Q4, 2015
35	Rimal Development in Baushar	Oman	Aqar (Al Khonji Real Estate & Development L.L.C.)	Panorama Engineering Consultancy	Al Binaa Construction L.L.C.	200	Q1, 2015
36	Multipurpose Complex at Bowsher	Oman	Public Authority for Social Insurance (PASI)	Dar Al Handasah Consultants (Shair and Partners)	Carillion Alawi	182	Q4, 2015
37	Shaden Al Hail	Oman	Tilal Development Company (TDC)	PDW Architects, Indonesia	Adhi Oman	150	Q2, 2016
38	Jaber Al Ahmed Al Sabah Hospital	Kuwait	Ministry of Health, Kuwait / Ministry of Public Works (MPW), Kuwait	Gulf Consult / Langdon Wilson	Kuwait Arab Contractors	1,057	Q4, 2015
39	Jaber Al Ahmad Cultural Center	Kuwait	Amiri Diwan	Pan Arab Consulting Engineers (PACE)	Al Hani Construction & Trading Company	815	Q4, 2015
40	Sabah Al Salem University - College of Science and the Faculty Club (COSc)	Kuwait	Kuwait University Construction Program (KUCP)	Gulf Consult / NBBJ, UK	Khalid Ali Al Kharafi & Brothers Company / China Metallurgical Group Corporation, China	638	Q2, 2016
41	Sabah Al Salem University - College of Business &	Kuwait	Kuwait University Construction Program (KUCP)	Gulf Consult / Cambridge 7 and Associates (US)	Al Hani Construction & Trading Company / Sinohydro Corporation, China	495	Q1, 2016

	College of Women (COBW)						
42	Sabah Al Salem University - College of Engineering & Petroleum (COEP)	Kuwait	Kuwait University Construction Program (KUCP)	Gulf Consult / Cambridge 7 and Associates (US)	Khalid Ali Al Kharafi & Brothers Company / China Metallurgical Group Corporation, China	490	Q2, 2016
43	Ministry of Education Headquarters	Kuwait	Ministry of Education, Kuwait / Ministry of Public Works (MPW), Kuwait	Cambridge 7 and Associates (US) / Gulf Consult / NBBJ	Mohammed Abdulmohsin Al Kharafi & Sons Company WLL	266	Q4, 2015
44	Burj Al Shaya Center	Kuwait	Al Shaya Group	KEO International / LG Consulting / Gensler Associates	Al Bahar Construction Company	260	Q1, 2016
45	Headquarters for Kuwait Investment Authority	Kuwait	Kuwait Investment Authority	KEO International	First United General Trading & Contracting Co.	258	Q3, 2016
46	Amwaj Waves - Phase 1	Bahrain	Lona Real Estate	Davenport Campbell, Australia	Charilaos Apostilides (Dar Al Bahrain Contracting Company)	396	Q2, 2015
47	Four Seasons Hotel in Bahrain Bay	Bahrain	Arcapita	COWI Gulf A/S / Skidmore, Owings & Merrill (SOM)	Six Construct	150	Q4, 2015
48	Sukoon Tower in Juffair	Bahrain	Al Mannai Trading & Investment Company Ltd.	Syrconsult Consulting Engineers	Panorama Contracting & Engineering Services Ltd. (Al Mannai Trading & Contracting)	138	Q4, 2015
49	Dragon City	Bahrain	China Middle East Investment and Trade Promotion Centre (Chinamex) / Diyar Al Muharraq	Gulf House Engineering	Nass Contracting	68	Q2, 2015
50	5-Star Hotel & Multi-storey Apartment at Bahrain Investment Wharf	Bahrain	V.K Universal Property Management Company	Future Engineering Consultants	Al Namal Construction Company (Saudi Delmon Contracting)	50	Q4, 2015

Source: Ventures Onsite Database ([www.venturesonsite.com](http://www.venturesonsite.com))