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2026

CHINA-ARAB BUSINESS & INVESTMENT REPORT

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Preface I



At a time when global trade and investment are being reshaped by geopolitical fragmentation, technological transformation and new patterns of production, the approach of the United Arab Emirates (UAE) is clear: remain open, build resilient partnerships, and invest in the capabilities that will drive future competitiveness. China is central to this agenda. Our relationship is grounded in long-standing ties, but its significance today lies increasingly in what we can build together for the next phase of growth.

The scale and momentum of our economic relationship are already clear. UAE-China non-oil trade more than doubled since pre-pandemic levels, increasing from \$50.1 billion in 2019 to an initial \$111.0 billion in 2025. In 2025 alone, bilateral non-oil trade grew by 24.5% year on year, while UAE non-oil exports to China rose by 53.4%. In the first half of 2026, non-oil trade reached AED 180.7 billion, reaffirming China's position as the UAE's largest trading partner.

But scale is not our only measure of success. The next phase of UAE-China economic cooperation must be defined by value: more productive investment, deeper industrial linkages, faster commercialisation of technology, and stronger opportunities for businesses in both countries to reach new markets. This means turning our complementary strengths into partnerships that raise productivity, build capabilities and create sustainable economic value.

We see particularly strong potential in advanced manufacturing, the digital economy, renewable energy, financial services, logistics, sustainable mobility and tourism. There is already a solid foundation to build on. The \$10-billion China-UAE Cooperation Fund, extended for a further five

years in 2025, provides an established platform for two-way investment, while cooperation in areas ranging from clean energy and industrial technology to ports, aviation and digital trade continues to deepen. Small and medium-sized enterprises (SMEs) must be part of this next phase, with practical pathways to finance, partnerships, cross-border value chains and new customers.

Economic relationships also depend on connectivity between people and markets. Aviation, tourism and cultural exchange strengthen mutual understanding while supporting trade, investment and business mobility. As connectivity between the UAE and China expands, we should use it not only to increase visitor flows, but also to deepen partnerships in hospitality, destination development, technology-enabled tourism and the wider visitor economy.

This bilateral partnership also has a wider role within China-Arab economic relations. The opportunity is not simply to increase flows between individual markets, but to build stronger connections across investment, production, logistics, technology and trade. The UAE can contribute by connecting capital, enterprise and markets across Asia, the Middle East and Africa, while working with partners to develop commercially viable projects that respond to the distinct priorities of each economy.

Investopia is designed for precisely this purpose: to move from identifying opportunities to converting them into investable propositions and long-term partnerships. By bringing policymakers, investors, entrepreneurs and business leaders in one room, we can address the practical conditions that determine whether investment succeeds, including market access, financing, regulation, talent and strategic partnerships. This publication can contribute to that process by grounding the conversation in evidence and helping businesses and investors identify where the strongest opportunities for cooperation lie.

For the UAE, the direction is clear. We will continue to deepen international partnerships that support economic diversification, innovation and shared prosperity. With China, our ambition is to build on the remarkable growth of recent years and move towards a relationship that is broader in scope, deeper in investment and increasingly focused on the industries and technologies shaping the future. In that spirit, I look forward to the next chapter of UAE-China cooperation and to the wider opportunities emerging between China and the Arab world.

H.E. Abdulla Bin Touq Al Marri

Minister of Economy and Tourism, United Arab Emirates
Co-Chairman of Investopia



Preface II



Looking back over the past two decades, China's development story reads as nothing short of remarkable. In 2001, I had the privilege of negotiating China's entry into the World Trade Organization, a defining moment: China chose to fully integrate into the global economy, embrace international rules, and open its market to the world. At the time, many observers had their doubts: Could a country still in the midst of its own transition hold its ground in such fierce international competition? History has since provided a clear answer. Not only did China survive the challenge, but it grew stronger through competition—moving step by step from basic manufacturing to the frontiers of advanced technology, digital economy, and green transition.

Throughout this journey, we have come to believe deeply that openness requires both commitment and wisdom. China has gained development opportunities through openness and, in turn, has shared the dividends of its growth with the rest of the world. China's vast market, its complete industrial ecosystem, and its continuous stream of innovations have become important pillars of global economic stability. More importantly, China has always maintained that development should never be a zero-sum game, but rather a process that benefits all sides.

It is with this conviction that I have long been committed to promoting economic and trade exchanges and mutual understanding between China and the world, from my role as the Secretary-General of the Boao Forum for Asia to my current position as Co-Chairman of the Sino-International Entrepreneurs Federation (SIEF). In my view, the strongest bond between nations is not simple transactions, but partnerships built on lasting trust.

The Arab world stands as one of China's most valued partners. From the echoes of camel bells on the ancient Silk Road to today's cargo flights and fiber-optic cables spanning continents, the engagement between China and Arab nations has never ceased. Today, cooperation continues to deepen across traditional sectors such as energy and infrastructure, while new frontiers are being explored in fintech, renewables, and artificial intelligence. As a critical hub connecting Asia, Africa, and Europe, the Arab world is increasingly important to China's overall strategy of opening up.

This report has been created precisely to strengthen this partnership. It maps out the current landscape and future directions of China-Arab cooperation in business exchange and investment opportunities, supported by real-world case studies, to offer practical, actionable insights for public- and private-sector leaders. I hope that this report will serve as a window, helping our friends in the Arab world better understand China's development philosophy and market opportunities, while also giving Chinese companies a clearer view of dynamism and potential across the Arab region.

Let us take this report as a new starting point and move forward together to write the next chapter of China-Arab cooperation.

H.E. LONG Yongtu

Chief Negotiator for China's Resumption of the General Agreement on Tariffs and Trade
Co-Chairman of Sino-International Entrepreneurs Federation

Executive Summary

Over the past two decades, China has transformed from a low-cost manufacturing base into a global industrial, technological, financial, and infrastructure partner. At the same time, Arab economies — led by the United Arab Emirates and other major Gulf states — are accelerating their diversification agendas, centered on advanced industries, clean energy, digital transformation, logistics connectivity, tourism, and knowledge-based growth. The convergence of these two trajectories is reshaping the China-Arab business and investment corridor from a trade-led relationship into a deeper ecosystem of capital, technology, infrastructure, and industrial co-development.

This report showcases that the future of China-Arab cooperation will be defined not only by the scale of goods exchanged but also by the platforms, capabilities, and value chains jointly created. The traditional model of China as a supplier of goods and the Arab world as a source of energy and capital is being replaced by a more integrated framework: Chinese enterprises are localizing manufacturing, service, technology, and regional headquarters operations in the Arab world, while Arab investors and institutions are increasingly partnering with Chinese companies across energy, infrastructure, digital technology, mobility, finance, and third-market development.

At the center of this transformation is the United Arab Emirates. The UAE has evolved beyond its historical role as a transshipment hub into a strategic gateway and co-creation platform linking Asia, the Middle East, Africa, Europe, and beyond. Its world-class ports, airports, free zones, financial centers, industrial clusters, and regulatory frameworks make it one of the most effective launchpads for Chinese enterprises seeking to expand into the broader Global South. At the same time, the UAE's policy stability and diversification agenda make it a highly attractive partner for Chinese companies seeking long-term investment, localization, and technology deployment.

In Now Economy sectors — Logistics & Ports, Energy & Petrochemicals, Real Estate & Construction, Machinery & Equipment, and Culture & Tourism — cooperation is built on strong complementarity: the UAE provides global connectivity, capital depth, world-class infrastructure, and regional market access, while China brings industrial scale, engineering capacity, technology, and supply-chain integration. These sectors remain the foundation of the bilateral corridor, supporting faster trade flows, downstream energy partnerships, urban development, industrial localization, and stronger people-to-people exchange.

At the same time, New Economy sectors are becoming the main drivers of future growth - Renewables & Storage, Digital Infrastructure & AI, Trade Finance & Settlement, and Mobility & EVs - reflecting a shared shift toward sustainability, digitalization, and innovation-led development. The UAE's clean energy ambition, regulatory agility, financial infrastructure, and smart-city agenda align closely with China's leadership in solar, batteries, AI, fintech, electric vehicles, and advanced manufacturing. Together, these opportunities position China and the UAE to build a more resilient, technology-enabled, and future-ready China-Arab economic corridor — one defined not only by trade volume, but by co-investment, localization, and long-term value creation.

Looking ahead, four strategic themes emerge from these sectoral opportunities:

- First, the UAE is becoming a gateway to the Global South, enabling Chinese enterprises to access high-growth markets across the Middle East, Africa, South Asia, and Europe.
- Second, industrial localization is replacing simple export-led engagement, with Chinese firms increasingly establishing manufacturing, assembly, maintenance, R&D, and after-sales platforms within Arab industrial zones.
- Third, third-market co-investment is becoming a defining model, combining Chinese engineering and technology with Arab capital and regional connectivity to develop infrastructure, energy, logistics, and digital platforms in emerging markets.



- Fourth, talent enablement will determine the long-term sustainability of the corridor, requiring bilingual, technically skilled, and cross-culturally fluent professionals capable of operating across Chinese, Arab, and global business systems.

Meanwhile, the opportunity is matched by complexity. Governments and regulators must balance openness with safeguards around data sovereignty, cybersecurity, intellectual property, capital flows, and technology standards. Enterprises must adapt to local markets, build service ecosystems, manage competition, and move beyond short-term trading models. SMEs and start-ups must navigate licensing, banking, talent, and localization challenges while leveraging free zones and digital infrastructure. Investors must manage valuation differences, liquidity constraints at exit, governance standards, and the risks of deploying capital in fast-growing yet still-maturing markets.

The next decade will therefore be decisive. If China-Arab cooperation can move from opportunity identification to an institutionalized partnership — supported by regulatory trust, localized production, patient capital, and human capital development — it can become a model for South-South cooperation in a multipolar world. The corridor's future will be shaped not by passive flows of goods and capital, but by active co-creation: industries designed together, infrastructure financed together, technologies localized together, and growth scaled together.

Chapter 1

BACKGROUND

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Youth 4 Sustainability delegation experiencing autonomous driving technology during their inaugural visit to China in 2026.



The UAE–China partnership has entered a new phase of maturity, characterized not only by growing trade and investment flows, but by deeper collaboration across strategic sectors that will define the future economy. Building on decades of trust and mutual respect, both countries are increasingly focused on creating long-term value through industrial partnerships, advanced technologies, clean energy solutions, digital infrastructure, financial innovation, and talent development.

H.E. Hussain bin Ibrahim Al Hammadi

Ambassador of the United Arab Emirates to the People's Republic of China



From 2000 to 2025: Transformation Journey of China

Since its accession to the World Trade Organization in 2001, China transitioned from an export-driven, investment-led model to a more balanced economy powered by domestic consumption, technological upgrading, and high-quality development.

Macroeconomic Milestones

2001

WTO Accession

Integrated China into the global trading system, accelerating export growth and establishing the country as a central node in global manufacturing supply chains.

2001

10th Five-Year Plan

Focused on industrialization, urbanization, infrastructure expansion, and market reform, laying the foundation for China's post-WTO growth.

2006

11th Five-Year Plan

Shifted attention toward balanced growth, energy efficiency, environmental protection, and narrowing regional development gaps.

2011

12th Five-Year Plan

Prioritized domestic consumption, social welfare, industrial upgrading, and strategic emerging industries to rebalance the economy.

2013

Belt and Road Initiative

Expanded China's role from goods exporter to global infrastructure, investment, and connectivity partner across Asia, Africa, and Europe.

China-Arab Milestones

2004

Establishment of the China-Arab States Cooperation Forum

Created a formal multilateral dialogue mechanism between China and the Arab League, institutionalizing cooperation across trade, energy, infrastructure, investment, and political coordination.

2010

Establishment of China-Arab Strategic Cooperative Relationship

The Tianjin Declaration elevated relations from economic engagement to a strategic cooperative relationship of comprehensive cooperation and common development.



2015

Made in China 2025

Aimed to upgrade China's manufacturing base toward advanced, technology-driven sectors such as robotics, aerospace, EVs, and new materials.

2016

13th Five-Year Plan

Centered on innovation, green development, advanced manufacturing, supply-side reform, and the eradication of extreme poverty.

2020

Dual Circulation Strategy

Strengthened domestic demand and technological self-reliance while maintaining selective global trade and investment integration.

2021

14th Five-Year Plan

Embedded high-quality development, digital economy, technological autonomy, advanced manufacturing, and carbon neutrality goals.

2026

15th Five-Year Plan

Expected to guide China's next phase of modernization, with emphasis on domestic demand, new quality productive forces, and long-term economic resilience.

2016

China's First Arab Policy Paper

China issued its first comprehensive policy paper on Arab countries, articulating its approach to political, economic, energy, infrastructure, technology, and cultural cooperation with the Arab world.

2022

First China-Arab States Summit

Held in Riyadh, the inaugural summit elevated China-Arab relations and set a new framework for deeper strategic cooperation, with emphasis on trade, investment, infrastructure, energy, technology, and development partnerships.



For the Arab world, China’s transformation carries particular strategic relevance. As Arab economies pursue economic diversification, industrial upgrading, energy transition, and global market integration, China offers a combination of scale, technology, capital, and implementation capacity. The China-Arab partnership is therefore entering a new phase — one that moves beyond trade volume toward deeper cooperation in infrastructure, industry, investment, innovation, and sustainable development.

Over the past twenty-five years, the People’s Republic of China has undergone one of the most significant economic transformations in modern history. Its rise has not been defined by scale alone, but by a fundamental restructuring of its development model: from a labor-intensive, export-oriented economy into a highly urbanized, industrially sophisticated, and technology-driven global powerhouse.

This transformation has reshaped the architecture of global trade, supply chains, infrastructure development, and capital flows. China has become not only a manufacturing engine but also a major source of investment, innovation, digital infrastructure, clean energy technologies, and industrial capacity. Its expanding role across logistics, energy, advanced manufacturing, finance, and the digital economy has made it an indispensable partner for emerging markets seeking diversification, connectivity, and long-term growth.

The transformation of China from 2000 to 2025 has fundamentally changed what it brings to international partnerships. China is no longer viewed primarily as a source of low-cost procurement or as a buyer of raw commodities. It has become a global industrial, technological, financial, and infrastructure partner, supported by the rise of internationally competitive enterprises, the expansion of connectivity through the Belt and Road Initiative, and a growing emphasis on sustainability, resilience, and high-quality development.

Economic Indicator	Baseline (Year 2000)	Current Landscape (Year 2025)
Gross Domestic Product (GDP)	USD 1.21 Trillion ^[1]	~USD 18.5 Trillion ^[2]
Global Trade Position (Goods)	7th Largest Exporter ^[3]	1st (World's Largest Trading Nation) ^[4]
Total Goods Exports	USD 249 Billion ^[3]	~USD 3.4 Trillion ^[4]
Foreign Direct Investment (FDI)	USD 40.7 Billion (Inflow) ^[1]	~USD 160 Billion (Utilized Inflow) ^[5]
Urbanization Rate	36.2% ^[6]	66.2% ^[7]
R&D Intensity (% of GDP)	0.90% ^[8]	2.65% ^[9]
Outbound Tourists	10.5 Million ^[10]	~130 Million ^[10]
BRI Cumulative Investment	N/A (Initiative pre-dates 2013)	>USD 1.05 Trillion (Global aggregate) ^[11]



For China-Arab cooperation, the future of this corridor will be anchored by three structural pillars:

- **First, the rise of globally competitive Chinese enterprises creates new opportunities for joint ventures, technology transfer, and localized manufacturing.** Over the past decade, Chinese companies have moved rapidly up the value chain, evolving from contract manufacturers into proprietary technology leaders across sectors such as telecommunications, artificial intelligence, electric vehicles, renewable energy, advanced machinery, construction, and digital platforms. For Arab countries pursuing national transformation agendas such as Saudi Vision 2030 and We the UAE 2031, these companies can serve as important partners in industrial upgrading. By establishing production facilities, regional headquarters, service centers, and R&D platforms in Arab industrial zones, Chinese enterprises can help accelerate local manufacturing capacity, workforce development, and technology localization.
- **Second, the expansion of physical and digital connectivity is reducing friction across China-Arab trade and investment flows.** Through the Belt and Road Initiative and related bilateral frameworks, China and Arab partners are investing in ports, railways, airports, free zones, logistics parks, energy infrastructure, and industrial corridors. At the same time, digital connectivity is being strengthened through data centers, cloud infrastructure, 5G networks, subsea cables, smart logistics systems, and digital payment platforms. This dual physical-digital infrastructure base lowers transaction costs, improves supply-chain visibility, enhances trade resilience, and positions the China-Arab corridor as a more efficient bridge between Asia, the Middle East, Africa, and Europe.
- **Third, sustainability and resilience are becoming shared drivers of long-term cooperation.** As global markets place greater pressure on carbon-intensive industries, both China and Arab economies are accelerating their energy-transition agendas. China holds major advantages in the “New Three” green technologies — solar photovoltaics, lithium-ion batteries, and electric vehicles — as well as in grid equipment, energy storage, and clean manufacturing. Arab economies bring sovereign capital, world-class solar resources, industrial land, energy infrastructure, and strong policy commitment to decarbonization. This convergence creates significant opportunities for joint investment in renewable energy, battery storage, green hydrogen, low-carbon industrial zones, carbon capture, electric mobility, and sustainable urban development.

Together, these three pillars point to a new phase of China-Arab cooperation. The relationship is moving beyond trade volume toward deeper industrial integration, shared infrastructure platforms, and future-oriented investment partnerships. In an increasingly fragmented global economy, the China-Arab corridor can become a model for cross-regional cooperation built on connectivity, diversification, sustainability, and long-term resilience.





From Global to UAE: The Corridor to the Future Runs Through the UAE

As global economic gravity continues to shift toward emerging markets, the United Arab Emirates has positioned itself as one of the world's most important gateways linking Asia, the Middle East, Africa, Europe, and beyond. This role is not the result of geography alone. It is the outcome of a deliberate geoeconomic strategy: to build a country capable of intermediating capital, trade, talent, technology, and ideas across a rapidly changing global order.

For China-Arab cooperation, the UAE is increasingly central. It offers the infrastructure, regulatory openness, capital depth, and institutional stability required to translate cross-regional ambition into investable projects. To understand why the UAE has become a defining corridor for future growth, it is necessary to examine the global shifts now reshaping trade and investment flows:

- **Rebalancing: economic gravity is moving toward emerging markets.** Growth is increasingly being driven by the Global South, supported by demographic expansion, rising consumption, sovereign capital accumulation, and deeper South-South trade. Emerging economies are no longer peripheral markets; they are becoming primary engines of demand, production, infrastructure investment, and capital formation. This rebalancing creates demand for trusted hubs that can connect emerging markets with global capital and technology.
- **Realignment: global power is becoming more multipolar.** The international system is moving away from a unipolar structure toward a more diversified and multipolar order. Middle powers and regional anchors are exercising greater strategic autonomy, building flexible partnerships across political, economic, and technological blocs. In this environment, the UAE's neutrality, openness, and ability to engage across regions make it a natural platform for cross-bloc cooperation.
- **Reform: global governance is under pressure to adapt.** Emerging economies are calling for international institutions and financial frameworks to better reflect today's economic realities. The expansion of platforms such as BRICS+ and the Shanghai Cooperation Organization reflects a broader search for more inclusive models of governance, financing, and coordination. The UAE's ability to operate across traditional and emerging institutional systems gives it a unique role as a bridge between different economic architectures.
- **Resilience: supply chains are being redesigned for security and flexibility.** Recent global shocks have shifted corporate priorities from pure efficiency toward resilience. Companies are diversifying manufacturing bases, logistics routes, financing channels, and market access points. In this new environment, jurisdictions that offer political stability, logistical redundancy, regulatory clarity, and multi-directional connectivity are capturing a greater share of industrial and investment flows. The UAE is one of the clearest beneficiaries of this shift.



The Global Economic Rebalancing: G7 vs G77 + China GDP (Nominal GDP, USD TN)

Year	G7 GDP	G7 Share of Global GDP	G77 + China GDP	G77 + China Share of Global GDP
2001	21.8	64.7%	8.7	25.8%
2005	28.5	59.5%	15.2	31.7%
2010	33.1	49.9%	26.9	40.5%
2015	34.9	46.4%	34.5	45.9%
2020	39.2	45.9%	42.3	49.5%
2025E	51.7	43.9%	57.5	48.8%
2030F	62.0	41.6%	76.5	51.3%

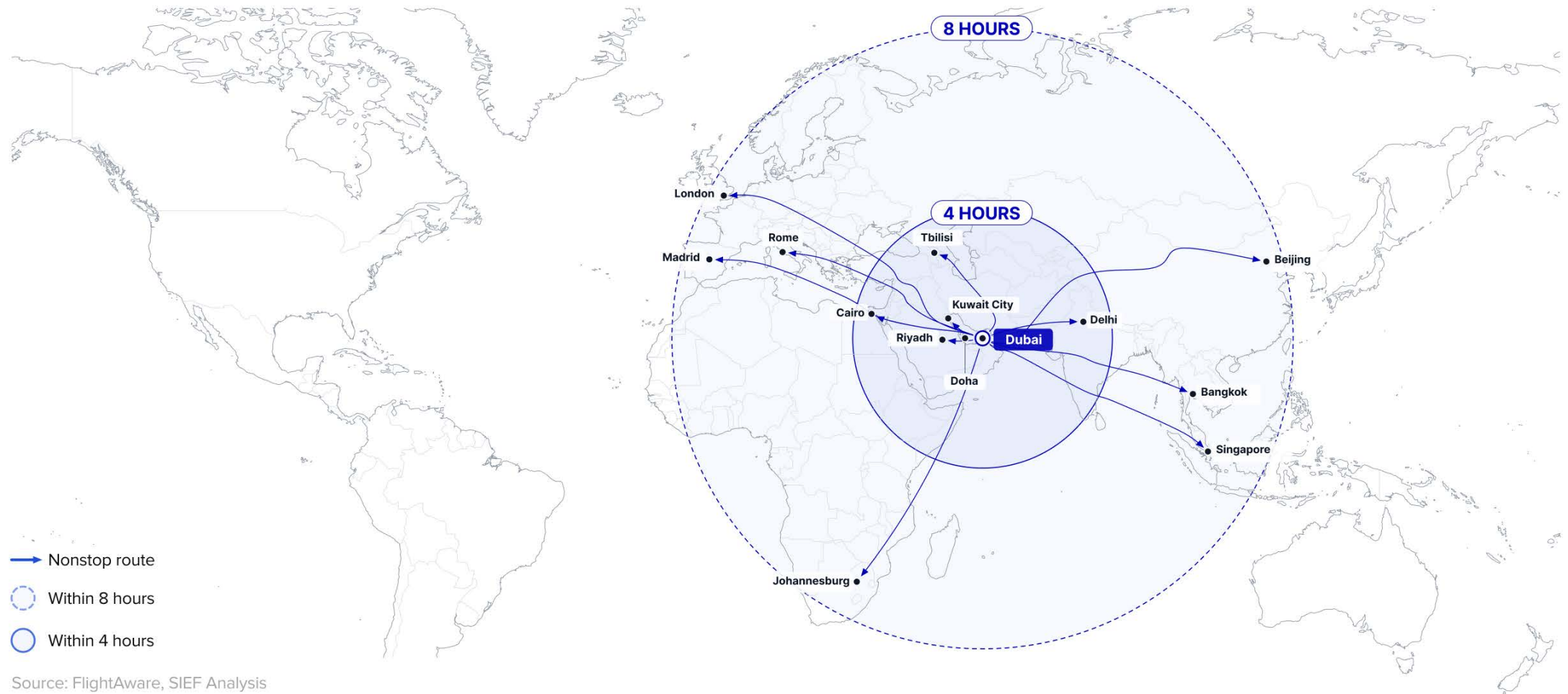
Against this backdrop, the UAE has engineered its economy to capture these structural transformations. By 2025, its position was validated by strong macroeconomic and connectivity indicators, including more than USD 48 billion in FDI inflows ^[13], non-oil foreign trade approaching USD 1.03 trillion ^[14], access to roughly one-third of the world's population within a four-hour flight, and access to two-thirds of the global population within eight hours ^[15].

These indicators demonstrate that the UAE's growth story is no longer primarily defined by hydrocarbons. The country has built a diversified platform for trade, finance, logistics, tourism, industry, technology, and investment. Its value lies not only in serving as a regional hub, but in functioning as a global connector between high-growth markets and the institutional capital, technology, and enterprises seeking access to them.

Ultimately, the UAE's role in the global economy has moved far beyond its traditional function as a transshipment hub. As economic and geopolitical gravity shifts toward the Global South, the UAE is emerging not only as a conduit for investment, trade, and market access but also as a sophisticated co-creation partner for the next generation of cross-regional growth.

By combining sovereign capital, institutional stability, world-class infrastructure, and foreign intellectual property, the UAE is actively helping to develop new industrial and technological platforms in clean energy, advanced manufacturing, logistics, artificial intelligence, digital finance, and the broader digital economy. For Chinese enterprises seeking global expansion, and for international capital seeking resilient growth opportunities, the UAE is no longer simply a corridor through which goods and investment flow. It is becoming a destination where the future of China-Arab and cross-regional integration is being designed, financed, localized, and scaled.

Flight Catchment for 4 and 8 Hours from Dubai





The UAE's ability to intermediate global trade and capital flows rests on three structural anchors:

- **World-class infrastructure** provides the physical foundation of the UAE's proposition. Its aviation and maritime assets — including Dubai International Airport, Zayed International Airport, Jebel Ali Port, Khalifa Port, and other national logistics platforms — give the country exceptional reach across Asia, Africa, Europe, and the Middle East. These assets are complemented by free zones, industrial parks, logistics districts, and premium commercial real estate that allow global companies to establish regional headquarters, distribution hubs, manufacturing bases, and innovation centers. Equally important is the quality of the UAE's built environment. Commercial and industrial assets increasingly adhere to global sustainability and wellness standards, including LEED, WELL, and Estidama. This gives multinational companies a future-ready operating base aligned with ESG requirements, talent expectations, and institutional investor standards.
- **Progressive regulatory frameworks** strengthen the UAE's role as a business platform. Comprehensive Economic Partnership Agreements with key emerging and developed markets are expanding preferential access and reducing trade barriers. More than 40 specialized free zones offer foreign ownership, efficient licensing, capital repatriation, sector-specific infrastructure, and internationally oriented legal frameworks. Financial centers such as DIFC and ADGM add further depth, providing common-law systems, sophisticated capital markets infrastructure, and globally recognized regulatory standards. The UAE has also paired business openness with talent attraction. Long-term residency schemes, including the Golden Visa, support the relocation of entrepreneurs, investors, scientists, executives, and skilled professionals. This is essential for the transition from a trade hub to a knowledge and innovation economy.
- **A strong commitment to economic diversification** gives foreign investors long-term policy clarity. National strategies such as UAE Centennial 2071 and We the UAE 2031 set out a clear vision for a knowledge-based, technology-driven, globally connected economy. The UAE Net Zero by 2050 Strategic Initiative further aligns industrial policy with the global decarbonization agenda. This policy consistency reduces uncertainty for investors and signals that capital deployed in the UAE is aligned with future-facing sectors rather than legacy growth models.

Chapter 2

NOW ECONOMY SECTOR DEEP-DIVE

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Phoenix Media Group established its UAE bureau in 2025, becoming the first mainstream Chinese media organization with full-fledged operations in the country.

“

Against the backdrop of an increasingly complex geopolitical landscape, cooperation between China and the United Arab Emirates continues to demonstrate strong momentum and broad prospects. The UAE was among the earliest countries to respond to China's initiative to establish the Asian Infrastructure Investment Bank (AIIB), becoming one of its founding members and actively participating in its establishment. Since then, it has played an important role in advancing infrastructure development and connectivity under the Belt and Road Initiative.

H.E. JIN Liqun

Founding President, Asian Infrastructure Investment Bank



Logistics & Aviation



China-UAE logistics cooperation is evolving beyond traditional trade flows into integrated ecosystems enabled by smart infrastructure, digital logistics, and sustainable supply chain solutions. This shift in logistics cooperation is strengthening supply chain resilience and enabling more efficient and future-ready global trade corridors.

H.E. Amna Lootah

Director-General, Dubai Airport Freezone and Dubai Commerce City

- Dubai International Airport (DXB): 95.2 MN^[18]
- Zayed International Airport (AUH): 32.5 MN^[19]
- Sharjah International Airport (SHJ): 19.48 MN^[20]

This aviation infrastructure is reinforced by some of the world's most globally connected carriers:

- Air Arabia serves 219 destinations across over 50 countries^[21]
- Emirates serves 152 destinations across 79 countries^[22]
- Flydubai serves 135 destinations across 58 countries^[23]
- Etihad Airways serves 91 destinations across 50 countries^[22]

For trade and logistics, this dense passenger network has significance beyond tourism: belly-hold cargo capacity enables the rapid movement of high-value, time-sensitive goods, including electronics, pharmaceuticals, precision equipment, and e-commerce parcels, from China into markets across the Middle East, Africa, and Europe.

On the maritime side, the UAE continues to consolidate its position as a hemispheric transshipment and distribution hub. Jebel Ali Port, DP World's flagship asset and the busiest port in the Middle East, handled 15.55 million TEUs in 2025, contributing to DP World's global throughput of 93.4 million TEUs^[24]. Abu Dhabi's AD Ports Group also recorded strong momentum, with container throughput rising 23% year-on-year to 7.7 million TEUs and general cargo volumes approaching 60 million tons^[25]. The newly launched CMA Terminals Khalifa Port reached a 74% utilization rate in its first year, handling more than 1.3 million TEUs, underscoring the UAE's continued investment in next-generation port capacity.

Industry Landscape

The foundation of China-Arab economic engagement is closely tied to the continuous movement of goods, capital, and talent. Within this architecture, the United Arab Emirates and China stand out as two pivotal nodes in global commerce. Cooperation in logistics and aviation is therefore not merely transactional but structural: the UAE provides world-class connectivity and a geostrategic gateway between Asia, the Middle East, Africa, and Europe, while China contributes unmatched manufacturing scale, export depth, and increasingly sophisticated supply chain capabilities.

On the aviation side, the World Economic Forum's Travel & Tourism Development Index 2024 ranks the UAE #1 globally for the quality of air transport infrastructure, and third for both the efficiency of air transport services and available airline seat kilometers^[16].

This strength is reflected in passenger throughput, which in 2025 reached a record of 159 million^[17], contributed by 3 major airports, including:



China, by contrast, brings the industrial and technological engine of global trade. As the world's largest manufacturing base and a leader in automated ports, cross-border e-commerce, smart warehousing, and high-speed rail freight, China has developed highly integrated logistics systems capable of moving goods at exceptional scale and speed. Chinese e-commerce platforms, third-party logistics providers, and industrial supply-chain operators have refined large-scale fulfillment, digital tracking, and inventory optimization across domestic and international markets.

The convergence of China's production scale and digital logistics capabilities with the UAE's aviation, maritime, and free-zone infrastructure creates a powerful China-Arab trade corridor. This corridor supports faster market access, more resilient supply chains, and deeper regional distribution into the Gulf, the broader Middle East, Africa, and Europe. As global companies reassess supply chain concentration and seek greater flexibility, China-UAE logistics and aviation cooperation is well-positioned to become a core enabler of China-Arab business and investment flows.

Strategic Opportunities

- 01 Development of Integrated Aerotropolis:** The expansion of Al Maktoum International Airport and the continued build-out of Dubai South are creating one of the world's most ambitious aviation-linked logistics ecosystems. For Chinese e-commerce platforms, third-party logistics providers, express delivery companies, and smart warehousing operators, Dubai South offers a strategic base to serve the Middle East, Africa, and Europe. Automated fulfillment centers, AI-enabled inventory management, customs-bonded warehousing, and rapid sea-air transfer between Jebel Ali Port and Al Maktoum International Airport could significantly improve the speed and resilience of cross-border distribution.
- 02 Expansion of Railway Infrastructure:** By connecting industrial zones, ports, logistics clusters, and urban centers, the Etihad Rail network has the potential to shift large cargo volumes from road to rail, reduce logistics costs, and improve

supply-chain efficiency. Chinese engineering groups, rolling stock manufacturers, signaling technology providers, and digital rail operators are well-positioned to support the next phase of this transformation. Beyond construction, cooperation can extend into smart rail operations, inland intermodal terminals, rail-port integration, and data-enabled freight management systems.

- 03 Inland Logistics Hub:** Cities such as Al Ain, strategically located between Abu Dhabi, Dubai, and Oman, can play a greater role as dry ports, cold-chain centers, and agricultural logistics nodes. As the UAE advances its food security agenda, Chinese companies with expertise in cold-chain infrastructure, IoT-enabled temperature monitoring, automated storage, and perishable goods distribution can support the development of resilient food logistics networks. Such facilities would strengthen the UAE's ability to manage agricultural imports, domestic production, and onward distribution across the GCC.
- 04 Green Logistics:** As shipping, aviation, and ground logistics face rising pressure to decarbonize, China and the UAE have scope to collaborate on green transport infrastructure, alternative fuels, and low-carbon operations. Potential areas include green shipping corridors, hydrogen and green methanol bunkering at UAE ports, electrified ground-handling fleets, solar-powered logistics parks, and battery-enabled warehouse operations. Chinese capabilities in renewable energy, batteries, electric commercial vehicles, and smart energy management can be integrated with the UAE's port, airport, and free-zone infrastructure to create a more sustainable regional logistics platform.



Future Outcomes

Looking ahead, the integration of China’s technological scale with the UAE’s global connectivity will have significance beyond bilateral economic gains. It can serve as a stabilizing force for regional and global trade by strengthening the physical and digital infrastructure underpinning supply chain resilience. Through joint investments in transformative platforms such as Dubai South, Al Maktoum International Airport, Etihad Rail, Al Ain logistics hub, and green logistics infrastructure, China and the UAE are well-positioned to shape the next generation of trade corridors linking Asia, the Middle East, Africa, and Europe.

The future of this cooperation will be defined by smart, multimodal, and sustainable logistics systems. Chinese capabilities in automation, e-commerce fulfillment, digital supply-chain management, electric mobility, and green energy can be integrated with the UAE’s aviation, maritime, rail, and free-zone infrastructure to create faster, more adaptive, and more carbon-efficient trade flows. In this sense, China and the UAE are not merely responding to the future of global logistics; they are helping to engineer it. Together, they can build resilient, technology-enabled corridors that support long-term China-Arab business and investment growth in an increasingly complex global economy.





CASE STUDY



keeta

Drone Delivery

Keeta Drone in the UAE exemplifies the structural evolution of bilateral logistics from conventional surface transport into highly integrated, low-altitude urban supply chains

Background

Keeta is the international food-delivery brand of Meituan, one of China's leading technology companies. Keeta Drone extends Meituan's delivery ecosystem into autonomous low-altitude logistics, combining drones, automated M-Ports, AI-powered route management and remote operations into an integrated Drone-as-a-Service platform. Backed by 900,000+ commercial orders globally, the model represents not simply the export of Chinese hardware, but the internationalization of a proven autonomous logistics ecosystem.

Collaboration Approach

As the first commercial market outside Greater China, Keeta worked closely with the Dubai Civil Aviation Authority to obtain regulatory approval, from a controlled pilot to part of Dubai's emerging low-altitude urban infrastructure, and to adapt its technology to demanding desert conditions with temperatures exceeding 50°C. Initial deployment at Dubai Silicon Oasis and expansion into residential and public environments in partnership with Dubai Municipality and Sobha Realty.

Impact & Outcome

Keeta has progressed from a controlled pilot to becoming part of Dubai's emerging low-altitude urban infrastructure. The case demonstrates a scalable China-UAE model: Chinese technology and operational scale + UAE regulatory innovation and urban testbed + deep local adaptation, creating a potential platform for wider expansion across the Middle East.



The China-UAE relationship has always been built on shared ambition, and Keeta Drone is proud to represent that spirit in the logistics sector.

Junwei Yang, General Manager, Keeta Drone



Energy & Petrochemicals



Historically, long-term trade agreements anchored bilateral energy ties. Today, supply security increasingly depends on moving beyond contracts toward joint investment in strategic infrastructure, such as regional pipelines, to strengthen resilience against geopolitical and physical constraints.

Ben Simpfendorfer
Author, *The New Silk Road*

Industry Landscape

The energy and petrochemicals sector remains the primary pillar of the economic relationship between the United Arab Emirates and China. Historically anchored in crude oil supply and long-term energy security, the partnership is now undergoing a structural shift from a traditional buyer-seller model toward a more integrated investment and industrial partnership. The UAE's role is expanding from an upstream supplier to a downstream and petrochemicals partner, while China's role is evolving from an energy consumer to a strategic investor, technology provider, and industrial co-developer.

This transition is supported by changing demand patterns and continued capacity expansion on both sides, where in 2025:

- UAE Crude Exports: 3.2 million bpd ^[26]
- UAE Production Capacity: 4.85 million bpd ^[27]

- China Import Demand: 11.6 million bpd (with the UAE supplying approximately 0.95 million bpd) ^[28]
- China Petrochemical Demand: 6% YoY growth in industrial feedstock appetite (specifically naphtha) ^[29]
- Downstream Scale: China's refining capacity reached 18.83 million bpd, aligning with the UAE's downstream growth ^[30]

The UAE's energy landscape is defined by capacity growth, export resilience, and downstream diversification. A key part of this resilience is the Abu Dhabi Crude Oil Pipeline, which enables approximately 1.1 million barrels per day of crude to bypass the Strait of Hormuz and flow directly to the Port of Fujairah for export to international markets ^[31]. This infrastructure strengthens the UAE's reliability as a global supplier and enhances its ability to serve Asian demand centers, including China.

Abu Dhabi National Oil Company's (ADNOC) continued expansion further reinforces this position. In pursuit of its target to reach 5 million barrels per day of production capacity by 2027, ADNOC has continued to invest heavily across upstream, midstream, downstream, and low-carbon solutions. Its planned USD 150 billion capital expenditure program for 2026–2030 reflects the UAE's ambition not only to expand production capacity ^[33], but also to capture more value across the hydrocarbon value chain through refining, petrochemicals, advanced materials, and lower-carbon energy solutions.

China remains the primary demand anchor for this partnership. While domestic transportation fuel demand is beginning to stabilize, China's industrial economy continues to drive strong demand for petrochemical feedstocks and refined products. The expansion of integrated refining and petrochemical complexes, including major projects such as Yulong Petrochemical, reflects China's broader shift toward chemicals-oriented refining and higher-value industrial materials.



This aligns closely with the UAE's downstream ambitions, particularly through platforms such as Borouge and the Borouge 4 expansion, which strengthen Abu Dhabi's position in polymers and advanced petrochemical products.

Current bilateral engagements provide a proven template for future expansion. In the upstream segment, Chinese national oil companies hold significant equity stakes in Abu Dhabi's concessions. China National Petroleum Corporation (CNPC) and China National Offshore Oil Corporation (CNOOC) maintain interests in both ADNOC Onshore and ADNOC Offshore concessions, supporting a steady flow of equity oil to Chinese refineries. In the downstream segment, cooperation has moved toward an "investment-for-demand" model. ADNOC's strategic investment in Rongsheng Petrochemical is a landmark example, with both parties establishing mutual equity participation to secure long-term offtake and refining stability. In parallel, joint ventures between Borouge and Chinese regional distributors have evolved into technical collaborations, with Emirati-produced polymers increasingly tailored to China's specific industrial requirements in the automotive and packaging sectors.

These existing frameworks demonstrate a clear transition from spot-market trading to long-term operational interdependence.

Strategic Opportunities

As China-UAE energy and petrochemicals cooperation matures, the center of gravity is moving beyond crude trade toward joint investment in high-value, integrated, and lower-carbon energy value chains. The structural alignment between China's long-term industrial demand and the UAE's capacity expansion creates a strong platform for Chinese capital, engineering expertise, refining capacity, petrochemical technology, and operational know-how. Moving forward, the key opportunities lie in three areas:

01 Deepening Upstream Partnerships: For Chinese national oil companies, securing a stable long-term energy supply remains a strategic priority. The UAE's continued push toward expanded production capacity to 5 million bpd provides an important opportunity for deeper upstream cooperation ^[27]. Chinese enterprises can move

beyond passive equity participation and play a more active role in field development, enhanced oil recovery, digital reservoir management, mature-field optimization, and cost-efficient production technologies. By combining Chinese technical capabilities with ADNOC's upstream asset base, both sides can strengthen supply security, improve asset productivity, and extend the long-term value of Abu Dhabi's onshore and offshore concessions.

02 Refining and Petrochemicals: Refining and petrochemicals provide a major platform for expanding joint investment. Both countries are seeking to capture more value across the hydrocarbon chain before the point of export or final consumption. The UAE's downstream expansion, particularly ADNOC's \$45 billion refinery expansion in Ruwais, which aims to add 600,000 bpd in capacity ^[34], creates opportunities for Chinese refiners, EPC firms, technology providers, and industrial investors to participate in large-scale refining and petrochemical projects. Reciprocal equity models — where Chinese firms invest in UAE downstream assets and UAE entities secure positions in Chinese integrated refining and petrochemical complexes — can help both sides hedge against volatility in refining margins, secure long-term offtake, and deepen operational interdependence.

03 High-Value Chemicals and Specialty Materials: The growth of advanced manufacturing, electric vehicles, photovoltaics, packaging, and lightweight industrial materials is creating strong demand for higher-value chemical products. The UAE offers a competitive feedstock base and an expanding industrial platform for producing these materials, while China brings specialized chemical manufacturing capabilities and great end-market demand. Platforms such as the TA'ZIZ Industrial Chemicals Zone in Ruwais create opportunities for joint ventures in midstream derivatives and specialty materials, including resins for solar applications, advanced automotive plastics, packaging materials, and performance polymers. This would allow both sides to move beyond basic petrochemical exports toward "Made in UAE" advanced materials tailored for regional and global markets.

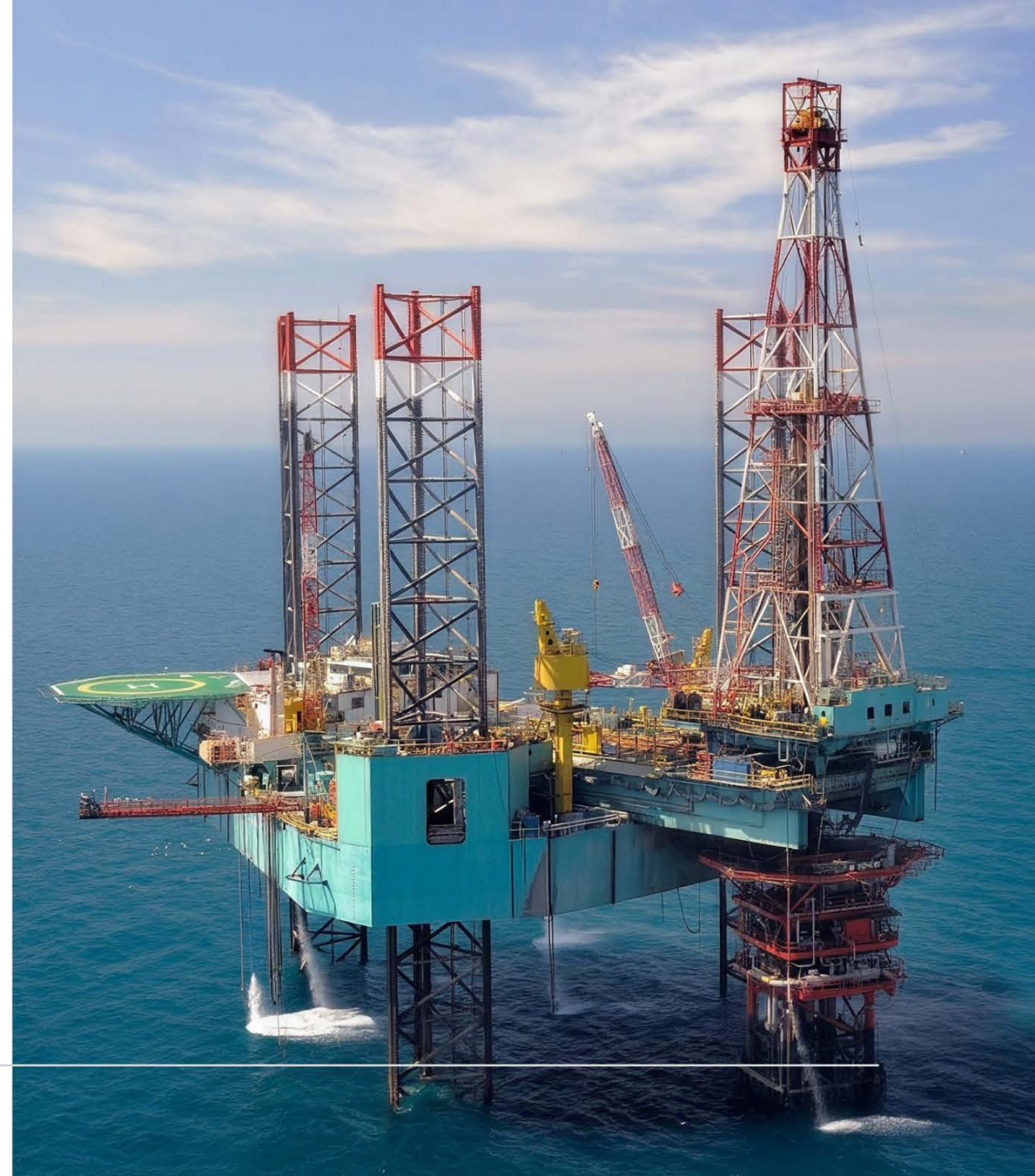


Future Outcomes

Looking ahead, the China-UAE energy partnership will be defined not only by volume growth but by the resilience, integration, and sustainability of the hydrocarbon value chain. As global energy markets become more fragmented, deeper upstream participation, downstream investment, and petrochemical specialization can help both countries secure critical supply chains, stabilize long-term demand, and create a more resilient South-South energy corridor.

The future of this cooperation will also be shaped by the need to reduce the carbon intensity of energy and industrial production. Both sides share an interest in “decarbonizing the barrel” to preserve the competitiveness of petrochemicals, fuels, and advanced materials in a carbon-constrained global economy. Carbon capture, utilization, and storage will be a major area of collaboration, with the UAE offering industrial clusters and geological storage potential, and China contributing engineering expertise, carbon utilization technologies, and experience from refining and heavy-industry applications.

By integrating Chinese carbon management technologies with Emirati upstream, downstream, and storage assets, both countries can lower the emissions profile of their joint operations while maintaining the long-term value of energy and petrochemical assets. In this sense, China and the UAE are not merely extending a traditional hydrocarbons relationship; they are building a more integrated, lower-carbon, and future-ready energy partnership capable of supporting long-term China-Arab business and investment growth.



CASE STUDY



Petroleum Joint Venture

CNPC-ADNOC collaboration moved from energy trading to jointly investing in, developing and securing the infrastructure and resources that underpin long term energy security.

Background

China National Petroleum Corporation (CNPC) is one of China's largest integrated oil and gas companies, and ADNOC is the UAE's leading energy group. Their partnership combines Abu Dhabi's hydrocarbon resources and production capabilities with China's technology, capital, operational expertise, and longterm energy demand. The relationship extends beyond conventional crude trade toward joint ownership and development of strategic energy assets.

Collaboration Approach

CNPC's participation deepened through long-term equity investment. In 2014, ADNOC and CNPC established Al Yasat Petroleum, owned 60% by ADNOC and 40% by CNPC, to develop onshore and offshore concession areas. In 2017, CNPC invested US\$1.77 BN for an 8% interest in ADNOC's 40-year onshore concession. It subsequently entered the Lower Zakum and Umm Shaif & Nasr offshore concessions, where CNPC currently retains 6% interests in each.

Impact & Outcome

The partnership has transformed China-UAE energy ties from a traditional supplier-customer relationship into longterm co-investment and coproduction. CNPC participates directly in some of Abu Dhabi's strategic oil assets, while Al Yasat provides a dedicated platform to jointly develop more technically and economically challenging fields and share expertise.

\$1.77BN

Total Foreign Investment

40

Years of Onshore Concession

40%

Foreign Ownership



Real Estate & Construction



China and UAE have a shared ambition to unlock opportunity through innovation, connectivity and cross-border investment. Destination development and hospitality play a critical role in this ecosystem, translating economic collaboration into world-class experiences that attract capital, talent and tourism.

Arch. Abdulla Al Abdouli
Group Chief Executive Officer, Marjan

Industry Landscape

The real estate and construction sector remains one of the most visible pillars of the economic relationship between China and the UAE. Historically anchored in contracting, engineering, and project delivery, the partnership is now evolving toward a more integrated urban-development model. The UAE's role is expanding from a market for large-scale construction into a platform for smart, sustainable, and investment-ready urban ecosystems, while China's role is evolving from contractor and equipment supplier to strategic builder, technology provider, infrastructure partner, and capital participant.

This transition is supported by changing demand patterns and continued capacity expansion on both sides, where in 2025:

- UAE Construction Market Size: USD 2.75 billion ^[35]
- Projected Construction CAGR: 4.2%+ through the end of the decade ^[35]

- UAE Construction and Transport Infrastructure Contracts Awarded: USD 40 billion+ ^[36]
- Dubai Real Estate Sales Transactions: 270,000+ properties ^[37]
- Dubai Real Estate Transaction Value: AED 917 billion ^[37]
- Abu Dhabi Real Estate Sales Transactions: 42,814+ properties ^[38]
- Abu Dhabi Real Estate Transaction Value: approximately AED 142 billion ^[39]

The UAE's built environment is defined by sustained urban expansion, infrastructure investment, and the development of integrated city ecosystems. National frameworks such as We the UAE 2031 continue to support high levels of infrastructure spending, while Dubai and Abu Dhabi remain the primary engines of real estate and construction activity. Dubai continues to lead as a highly liquid, globally visible real estate market, supported by luxury residential demand, branded developments, mixed-use communities, and strong off-plan sales. Abu Dhabi, meanwhile, has reached a historic milestone, with total real estate transaction value crossing the AED 100 billion threshold for the first time ^[38]. The strength of Abu Dhabi's market is particularly evident in its premium island developments. Saadiyat Island, Yas Island, and Al Reem Island have become major growth engines, collectively contributing approximately 60% of total transaction value ^[40]. This reflects a broader flight to quality, as buyers increasingly prioritize cultural assets, waterfront living, smart-city infrastructure, and high-end lifestyle environments.

This strong pipeline also creates execution pressure. The high volume of off-plan sales, especially in Abu Dhabi, requires developers to meet strict delivery timelines, control construction costs, and manage supply-chain inflation. As a result, the UAE market increasingly relies on international contractors capable of combining speed, scale, quality, and cost discipline. This is where Chinese enterprises play a critical role.



Chinese state-owned and private contractors have become important execution partners for the UAE's real estate and infrastructure pipeline. Companies such as China State Construction Engineering Corporation Middle East illustrate this integration, with involvement in complex and iconic developments including Ciel Tower in Dubai, designed to be the world's tallest standalone hotel at 377 meters, and the USD 5.1 billion Wynn Al Marjan Island Resort in Ras Al Khaimah ^[41], delivered in partnership with ALEC. These projects demonstrate the ability of Chinese contractors to support high-specification, technically complex, and globally visible developments.

Beyond physical construction, Chinese participation is extending into the digital and sustainable infrastructure of the UAE's urban ecosystems. Chinese engineering and technology companies are contributing to renewable energy infrastructure, ICT networks, IoT systems, 5G-enabled connectivity, and smart-city platforms. Shanghai Electric's role in the Mohammed bin Rashid Al Maktoum Solar Park and Huawei's deployment of digital infrastructure in master-planned developments such as Dubai South reflect how Chinese capabilities are supporting the next generation of low-carbon and digitally connected urban environments.

China also represents an important demand-side catalyst for the UAE's real estate market. Chinese investors, companies, entrepreneurs, and residents are increasingly active in the UAE's property sector, particularly in luxury residential and commercial assets. This dual role — as both a major builder and a growing source of end-user demand and capital — strengthens China's position as a key stakeholder in the UAE's urban development trajectory.

Taken together, these dynamics point to a more sophisticated relationship between China and the UAE in real estate and construction. The partnership is no longer defined solely by project contracting. It is increasingly shaped by integrated urban development, sustainable infrastructure, digital connectivity, capital participation, and long-term market demand. As the UAE continues to build next-generation cities and China expands its global construction, technology, and investment footprint, both sides are well-positioned to deepen cooperation across the full built-environment value chain.

Strategic Opportunities

As China-UAE real estate and construction cooperation matures, the center of gravity is moving beyond traditional contracting toward joint investment in high-value, technology-enabled, and sustainable built environments. The UAE's next-generation urban agenda — shaped by frameworks such as the Dubai 2040 Urban Master Plan, Net Zero by 2050, and long-term economic diversification strategies — provides a highly structured platform for Chinese capital, engineering expertise, construction technology, materials innovation, and project delivery capabilities, where:

- 01 Sustainable and Green Transformation:** Sustainable urban planning and green construction offer a major avenue for deeper cooperation. As the UAE advances its Net Zero by 2050 commitment, the built environment will need to shift toward low-carbon materials, energy-efficient buildings, climate-resilient design, and sustainable urban infrastructure. Chinese construction technology and materials firms, with experience in green steel, low-carbon cement, photovoltaic-integrated facades, energy-efficient systems, and large-scale sustainable project delivery, are well-positioned to support this transition. Local joint ventures and procurement partnerships can help build localized green building supply chains within the UAE, reducing embodied carbon while strengthening the country's sustainable construction ecosystem.
- 02 Modular and Advanced Construction:** The adoption of modular, prefabricated, and advanced construction methods represents a high-growth opportunity. As off-plan development expands, UAE developers are increasingly seeking delivery models that reduce construction timelines, improve quality control, and limit exposure to labor and supply-chain constraints. Chinese engineering firms bring strong capabilities in prefabricated construction, modular assembly, industrialized building systems, and large-scale 3D printing applications. By co-investing in localized prefabrication facilities within UAE industrial zones, Chinese companies can help developers accelerate project delivery, reduce material waste, and support emerging policy priorities around advanced construction technologies.



03

Digital Construction Technologies: Digital construction is becoming increasingly central to project delivery and lifecycle asset management. Building Information Modeling, digital twins, AI-enabled project management, predictive procurement, and automated site monitoring are moving from optional tools to core requirements for complex urban development. Chinese technology and engineering firms have extensively deployed these capabilities on domestic mega-projects and can adapt them to the UAE market. Joint ventures in PropTech, construction management software, BIM services, and AI-enabled project delivery can help UAE developers improve regulatory compliance, reduce operational costs, manage delivery risk, and optimize long-term asset performance.

Future Outcomes

Looking ahead, the integration of China's execution capacity and construction technology with the UAE's ambitious urban vision will have significance beyond bilateral economic gains. It can help upgrade the regional construction model by strengthening the physical, digital, and sustainable infrastructure that underpins next-generation cities. Through joint investments in green building materials, modular construction facilities, smart construction platforms, and digitally managed urban assets, China and the UAE are well-positioned to shape the future of urban development across the Middle East.

The future of this cooperation will be defined by sustainable, modular, and digitally enabled built environments. Chinese capabilities in engineering, prefabrication, green materials, digital twins, AI-enabled project management, and cost-efficient delivery can be integrated with the UAE's master-planned communities, infrastructure pipeline, real estate capital, and regulatory ambition. For the UAE, this collaboration can help ensure that major master plans are delivered on schedule, within budget, and to higher sustainability standards. For China, it provides a stable, high-value market for exporting advanced construction technologies and establishing global benchmarks. Together, both sides can build more connected, resilient, sustainable, and investment-ready urban centers that can support long-term China-Arab business and investment growth.





CASE STUDY



RAK Development Partnership



Marjan real estate development is moving from Chinese EPC & construction participation toward investment and development partnerships.

Background

Marjan is Ras Al Khaimah's leading master developer, responsible for major destinations including Al Marjan Island, RAK Central, Marjan Beach and Jebel Jais. China State Construction Engineering Corporation (CSCEC) and China Railway are among the Chinese companies involved in developments on Al Marjan Island, bringing large-scale construction capabilities and engineering expertise to RAK's rapidly expanding real estate market.

Collaboration Approach

Chinese participation has evolved primarily through project-based construction partnerships. Marjan awarded CSCEC the construction contract for the 441-room Rove Al Marjan Island resort in 2022. CSCEC was subsequently appointed main contractor for the AED 1.5 billion Oceano luxury residential development, delivering its complex structural, architectural, MEP, and façade works.

Impact & Outcome

Chinese participation has expanded from individual construction contracts to a broader role in delivering RAK's tourism and real estate ambitions, as Marjan actively engages investors from China across resorts, residential developments, and complementary infrastructure. It showcased the evolution from contracting to local delivery capability to investment and development partnerships, positioning Chinese companies to participate more deeply in RAK's next phase of growth.



Marjan is proud to contribute to the vision of Ras Al Khaimah, fostering partnerships that create enduring value and strengthen the China-Arab investment corridor.

Arch. Abdulla Al Abdouli, Group Chief Executive Officer, Marjan



Machinery & Equipment



The next chapter of China-UAE industrial partnership lies in moving beyond trade toward genuine co-creation — joint ventures that localize advanced manufacturing, transfer knowledge, and build supply chains that serve not just our two economies, but the wider Global South. Abu Dhabi's private sector stands ready to be an anchor partner in that transformation.

H.E. Ali Mohamad AlMarzooqi

Director-General, Abu Dhabi Chamber of Commerce and Industry

- UAE Manufacturing FDI: 6% year-on-year increase in capital inflows ^[44]
- China Mechanical & Electrical Exports: Exceeded USD 1.95 trillion, constituting nearly 42% of the nation's total export value ^[45]
- Chinese EPC Market Share in MENA: USD 19.4 billion in construction contracts, over 25-30% of the region's mega-projects ^[46]

The synergy between the two markets goes beyond volume. It is rooted in a shared commitment to Industry 4.0 and smart manufacturing. China has become a major platform for large-scale automation, with domestic production of industrial robots surpassing 500,000 units annually by 2025 ^[47] and industrial robot density exceeding 400 per 10,000 workers ^[48]. This technological capacity is increasingly relevant to the UAE's industrial modernization.

Rather than merely supplying traditional hardware, Chinese enterprises provide the digital and automated solutions needed to enhance the UAE's industrial efficiency. The UAE's push for modernization under initiatives like the Industrial Technology Transformation Index (ITTI) has seen a significant increase in the adoption of Chinese IoT and automated hardware solutions by local manufacturing firms. This technical alignment is particularly evident in the green energy sector.

As the UAE prioritizes sustainable infrastructure post-COP28, China's supply-chain advantage in the "New Three" high-tech exports — electric vehicles, lithium-ion batteries, and photovoltaic products — makes it an important partner. This capability allows UAE industrial players to deploy advanced manufacturing hardware at the scale and cost efficiency required to support the country's decarbonization and industrial growth targets.

Industry Landscape

Machinery and equipment represent a high-potential frontier for China-UAE industrial cooperation. Historically centered on equipment trade and project-based procurement, the sector is now evolving toward a more integrated industrial partnership. The UAE's role is expanding from an end market for imported machinery to a regional platform for manufacturing, logistics, and industrial localization, while China's role is shifting from an equipment supplier to an advanced manufacturing partner, automation provider, and value chain enabler.

This transition is supported by the UAE's policy-driven industrial expansion and China's global strength in advanced manufacturing, where, in 2025:

- UAE Non-Oil GDP Contribution: Reached a historic high of 78% of total GDP ^[42]
- UAE Industrial Sector GDP: Valued at USD 55.8 billion, accounting for 12.8% of total GDP ^[43]



Strategic Opportunities

Guided by federal frameworks such as Operation 300bn, which aims to raise the industrial sector's GDP contribution to AED 300 billion by 2031, and the Make it in the Emirates initiative, the UAE is actively incentivizing foreign industrial capital. Supported by structured financing from the Emirates Development Bank, China-UAE machinery cooperation is shifting from a traditional export model toward three distinct avenues of strategic integration.

01 Localization: Localized assembly and manufacturing within the UAE industrial zones represents the most significant structural opportunity. The UAE has developed a sophisticated network of specialized economic zones, enabling Chinese machinery firms to move from “selling to the UAE” toward “manufacturing in the UAE” for broader re-export to the Middle East and Africa. In 2025 alone, more than 25 major Chinese manufacturing firms established production facilities in the UAE. Investors are increasingly targeting specific zones based on industrial clustering:

- Abu Dhabi: Khalifa Economic Zones Abu Dhabi (KEZAD) serves as a primary hub for heavy machinery, automotive assembly, and primary metals, supported by deep-water port logistics. Masdar City offers a specialized ecosystem for R&D and the localization of green technologies and renewable energy machinery.
- Dubai: Jebel Ali Free Zone (JAFZA) remains a key node for heavy equipment logistics and cross-border distribution. Dubai Industrial City (DIC) is well-positioned for light-to-medium manufacturing and automated food-processing equipment. Dubai South is strategically suited to aerospace machinery and smart logistics hardware, while Dubai Airport Freezone (DAFZA) caters to high-tech, low-volume components such as precision instruments and advanced electronics.
- Northern Emirates: SAIF Zone in Sharjah provides a cost-effective base for SMEs specializing in light industrial machinery and packaging equipment, while RAKEZ in Ras Al Khaimah has become an important hub for heavy building-materials machinery and extractive industrial equipment.

02 Joint Service and Maintenance Ecosystems: Establishing joint service and maintenance ecosystems represents a high-margin opportunity. As the deployment of Chinese heavy equipment, automated guided vehicles, and industrial robots in the UAE expands, localized Maintenance, Repair, and Overhaul infrastructure will become increasingly important. Instead of relying on parts shipped from Shenzhen or Shanghai, Chinese Original Equipment Manufacturers can establish joint ventures with UAE engineering firms to build regional spare-parts depots and predictive maintenance centers. By using AI and IoT diagnostics, these localized service ecosystems can minimize downtime for UAE factories while generating recurring aftermarket revenue for Chinese manufacturers.

03 Machinery Deployment in Large-Scale Projects: There is also a clear opportunity to expand the deployment of Chinese machinery in large-scale projects. Chinese engineering conglomerates already possess a strong capacity for mega-project execution in the UAE. By leveraging this established EPC presence, Chinese firms can further integrate proprietary heavy machinery — from automated tunnel boring machines to large port-handling cranes — directly into the UAE's infrastructure pipeline. This vertical integration can equip UAE infrastructure projects with advanced, cost-efficient hardware while providing Chinese machinery manufacturers with large-scale procurement opportunities.



Future Outcomes

As both economies continue to industrialize and diversify, machinery and equipment cooperation is evolving from transactional trade-based exchange toward a deeper industrial partnership. The primary outcome of this alignment will be the joint development of a more resilient regional value chain. By anchoring Chinese advanced manufacturing capabilities within the UAE's world-class industrial zones, the partnership can support the creation of a decentralized manufacturing hub. This would help mitigate global supply-chain vulnerabilities and reduce localized inflation for industrial assets.

For the UAE, localization can accelerate the objectives of Operation 300bn by supporting a more automated and self-sufficient domestic manufacturing sector. For China, the UAE provides an institutional-grade springboard for advanced machinery and “New Three” green technologies to access the broader Middle East and Africa markets. Ultimately, this structural integration strengthens the geoeconomic competitiveness of both nations in a rapidly fragmenting global industrial landscape.



CASE STUDY



Bilateral Industrial Zone

The Zone provided Chinese machinery and manufacturing companies with a localized production base while supporting Abu Dhabi's industrial diversification ambition.

Background

The China–UAE Industrial Capacity Cooperation Demonstration Zone is a flagship bilateral industrial platform located within KEZAD. Established under China–UAE government cooperation and operated by Jiangsu Provincial Overseas Cooperation and Investment Company, the Zone covers a planned 12.2 km², including a 2.2 km² start-up area. It focuses on sectors including equipment manufacturing, new energy, metal processing, and advanced manufacturing industries.

Collaboration Approach

Following bilateral agreements on industrial capacity and investment cooperation, the Zone was formally launched in 2017. Its model goes beyond a conventional industrial park: it provides Chinese manufacturers with land, built-to-suit factories, infrastructure, and localized business services, while leveraging KEZAD and Khalifa Port to connect production in Abu Dhabi with markets across the Middle East, Africa, and beyond.

Impact & Outcome

With approximately 80,000 m² of buildings and 8.5 km of road and pipeline infrastructure constructed in the startup area, the Zone has created a platform for Chinese companies to shift from “Made in China and exported to the UAE” to “Made in the UAE for regional markets.” More than a dozen manufacturing and business companies have been attracted to the Zone, and its first manufacturer has begun production.

\$1.4BN

Total Foreign Investment

12.2 km²

Planned Industrial Zone

48

Chinese Companies Established



Culture & Tourism



As travel deepens and evolves, it is no longer simply about visitor flows. China-Arab cultural and tourism cooperation is becoming one of the most exciting partnerships of our time, evolving from people-to-people exchange into a broader platform for investment, innovation, and the co-creation of world-class travel experiences that speak to global travelers everywhere.

Pansy Ho

Executive Chairman, China Chamber of Tourism

Industry Landscape

Culture and tourism cooperation between China and the UAE is built on rapidly deepening people-to-people ties. Historically supported by aviation connectivity, hospitality, and visitor flows, the partnership is now evolving into a broader cultural and creative-economy corridor. The UAE's role is expanding from a destination market into a regional hub for tourism, events, destination management, and cultural exchange, while China's role is evolving from an outbound source market to a creative-industry partner, cultural collaborator, and premium travel destination for Emirati and Arab visitors.

This transition is supported by the UAE's tourism diversification agenda and China's outbound travel recovery, where:

- UAE Tourism Strategy 2031 Target: AED 450 billion tourism contribution to GDP, AED 10 billion additional investment, and 40 million hotel guests by 2031^[49]

- UAE Hotel Establishments in 2025: 1,243 hotels^[50]
- Hotel Occupancy in 2025: 79.3%^[50]
- China Outbound Trips: 145.9 million in 2024^[51]
- Chinese Arrivals to Dubai: 824,000 visitors in 2024, up 31% year-on-year^[52]

The UAE's tourism landscape is defined by deep hospitality, diverse destinations, and strong policy support. The UAE Tourism Strategy 2031, launched under the "Projects of the 50" agenda, aims to strengthen the country's unified tourism identity, diversify tourism products, build tourism capabilities, and increase tourism investment. This framework has positioned tourism as one of the strongest contributors to the UAE's economic diversification agenda. The strength of the UAE's tourism platform is reflected in both scale and quality. Strong hotel revenues, high occupancy rates, and a large national room supply demonstrate the maturity of the country's hospitality infrastructure. Dubai continues to lead as a global destination for urban tourism, luxury retail, entertainment, and MICE. Abu Dhabi is expanding its cultural, museum, family entertainment, and premium island offerings. Ras Al Khaimah is emerging as a distinctive destination for nature, adventure, lifestyle, and luxury leisure. Together, these emirates form a diversified national tourism ecosystem capable of serving Chinese leisure travelers, business travelers, families, investors, and cultural tourists.

Air connectivity is a critical enabler of this tourism corridor. Etihad Airways' mainland China expansion — adding Shanghai Pudong, Guangzhou, Chengdu, Hangzhou, and Shenzhen to its existing Beijing service — will take its mainland China network to 35 weekly flights across six destinations through 2027, supported by its joint venture with China Eastern Airlines and cargo cooperation with SF Airlines^[53]. Together with services operated by Emirates, flydubai, Air Arabia, and Chinese carriers, including China Eastern, China Southern, Air China, Hainan Airlines, and Juneyao, the China-UAE air network is forming one of the densest Asia-Middle East travel corridors.



China remains one of the world's most dynamic outbound tourism markets. Within this market, the UAE has emerged as a standout destination, supported by visa facilitation, expanding direct flights, safety, high-quality hospitality, luxury retail, family attractions, and "China-ready" visitor infrastructure. Widespread acceptance of Alipay and WeChat Pay, Mandarin-speaking guides, Chinese-language services, and tailored Chinese New Year programming have strengthened the UAE's appeal to Chinese travelers.

In the reverse direction, Emirati and Arab travelers are increasingly seeking premium, experience-led journeys centered on luxury hospitality, cultural immersion, family-friendly attractions, shopping, gastronomy, and heritage. China is well-positioned to serve this demand, supported by 30-day visa-free access for UAE and GCC nationals and a deep portfolio of cultural destinations, including Shanghai, Beijing, Hangzhou, Chengdu, and Xi'an.

Taken together, these dynamics demonstrate a clear transition from tourism exchange toward a broader cultural and creative-economy corridor. China-UAE cooperation is no longer defined solely by arrivals and hotel nights. It is increasingly shaped by destination promotion, creative-industry partnerships, heritage collaboration, premium travel experiences, digital marketing, and people-to-people exchange — positioning culture and tourism as a core enabler of wider China-Arab connectivity.

Strategic Opportunities

As China-UAE culture and tourism cooperation matures, the center of gravity is shifting beyond visitor volume toward deeper cultural, creative, and experiential collaboration. The UAE's national tourism agenda — anchored in the UAE Tourism Strategy 2031 and complemented by Abu Dhabi's Tourism Strategy 2030, the Dubai 2040 Urban Master Plan, and Ras Al Khaimah's 2030 vision — provides a structured platform for Chinese investors, content creators, tourism operators, and creative-industry partners, where:

01 Ras Al Khaimah as a Strategic Growth Frontier: Ras Al Khaimah is emerging as a high-potential growth frontier within the UAE's tourism landscape. The emirate

welcomed a record 1.35 million overnight visitors in 2025, with Chinese arrivals growing by 19% year-on-year, and aims to nearly triple visitor numbers and double the number of hotel keys by 2030 [54]. Its natural assets — including Jebel Jais, the Hajar Mountains, and pristine coastlines — together with landmark developments such as the USD 5.1 billion Wynn Al Marjan Island integrated resort, the 85-million-square-foot Marjan Beach masterplan, and the entry of luxury brands including Janu, Four Seasons, Fairmont, and Taj [41], create concentrated opportunities for Chinese hotel operators, leisure investors, MICE specialists, and adventure-tourism partners. Building on existing collaborations with Huawei Petal Ads and Trip.com, Ras Al Khaimah can position itself as the UAE's flagship outdoor, lifestyle, and luxury-leisure destination for Chinese travelers, complementing Dubai and Abu Dhabi.

02 Media and Creative Industry Partnerships: Media and creative-industry partnerships represent a major opportunity to strengthen mutual cultural visibility and build durable cultural infrastructure. Co-production agreements, location filming, animation, gaming, and short-form content collaboration can expand the reach of both countries' cultural narratives. The 2024 China Media Group–Arab League cooperation agreement, the November 2025 China-Arab Cultural Dialogue Event in Dubai, and existing Chinese-Arabic broadcasting platforms have laid early groundwork for deeper cooperation. Coordinated promotion through China's leading digital ecosystems — including WeChat, Douyin, Xiaohongshu, and Weibo — can further extend UAE destination branding to younger, digitally native Chinese travelers.

03 Premium Outbound Travel from the UAE to China: Premium outbound travel from the UAE and the wider Arab region to China is becoming a high-value opportunity. With 30-day visa-free access for UAE and GCC nationals to mainland China and rapidly expanding direct air capacity, China is emerging as a premium destination for Emirati and Arab travelers. Curated experiences — including Hangzhou's West Lake and tea heritage, Suzhou's classical gardens, Chengdu's panda sanctuaries and Sichuan culinary scene, Xi'an's Tang Dynasty legacy and Silk Road history, Shanghai's contemporary arts and luxury retail, and Sanya's tropical resort offering — align closely with Emirati and Arab

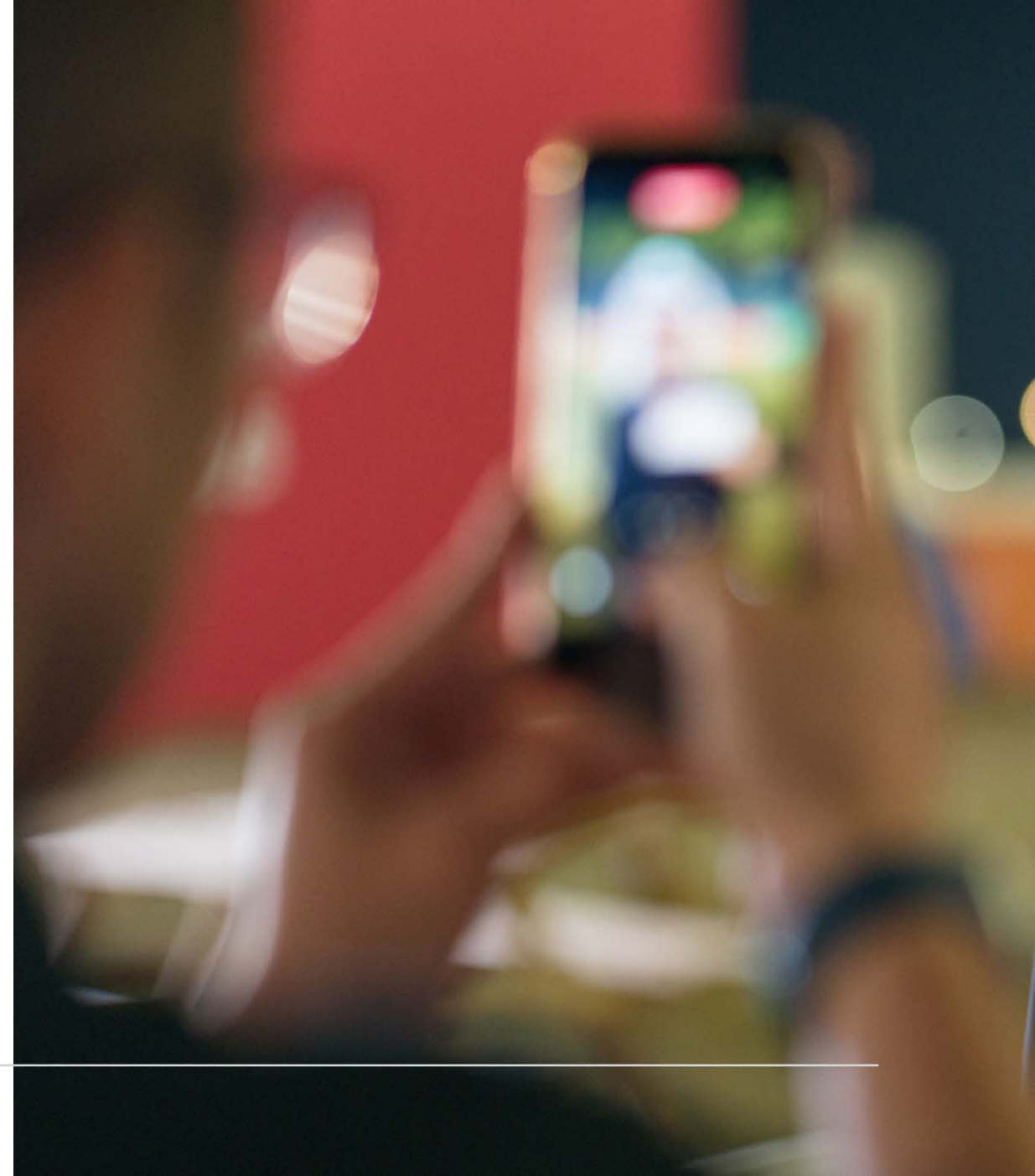


preferences for cultural depth, family experiences, and high-end hospitality. UAE travel groups, family offices, and hospitality investors can co-develop curated leisure programs, wellness retreats, halal-friendly travel packages, and private aviation experiences tailored to this audience, supported by Mandarin-Arabic guiding services and integrated payment platforms.

Future Outcomes

Looking ahead, China-UAE culture and tourism cooperation has the potential to become a defining pillar of the broader China-Arab relationship. By aligning China's outbound tourism demand and creative-industry scale with the UAE Tourism Strategy 2031, Abu Dhabi's Tourism Strategy 2030, the Dubai 2040 Urban Master Plan, and Ras Al Khaimah's 2030 vision, both sides can build a tourism and creative-economy corridor that delivers durable cultural, commercial, and people-to-people value.

The future of this corridor will be shaped by digital-first marketing, immersive cultural experiences, expanding direct air connectivity, and integrated payment and language services that make the UAE more accessible to Chinese travelers and China more approachable for Emirati and Arab visitors. As Chinese travelers continue to discover the UAE's heritage, hospitality, and modernity, and as Emirati and Arab travelers explore China's civilizational depth and dynamic urban centers, both sides are well-positioned to strengthen cultural understanding, expand two-way visitor flows, and create a more connected China-Arab tourism and creative-economy corridor for the next decade.





CASE STUDY



Media-driven Tourism

Phoenix's UAE engagement demonstrates an emerging model of media-enabled tourism and cultural diplomacy.

Background

Phoenix Media Group is one of the world's leading Chinese-language international media groups, operating an integrated network spanning television, digital platforms, publications, and social media, with more than 500 million TV viewers globally. In the UAE, Phoenix has increasingly evolved from news coverage into a strategic communications platform, connecting major UAE events, government initiatives, and business opportunities with Chinese-speaking audiences worldwide.

Collaboration Approach

Phoenix established its Middle East bureau in the UAE in 2025 to deepen its engagement with regional government entities. From strategic media partnerships for major events such as the Open Masters Games Abu Dhabi and Abu Dhabi Sustainability Week to tourism promotion for Dubai and Ras Al Khaimah, Phoenix has delivered billions in media exposure to Chinese-speaking audiences for the UAE's destination storytelling.

Impact & Outcome

Phoenix's UAE engagement creates a reinforcing ecosystem where the major UAE events generate content and visibility, Chinese-language media builds awareness and understanding, and destination partnerships convert attention into deeper tourism, cultural, and business engagement. Phoenix therefore illustrates how media can become long-term infrastructure for China-Arab people-to-people connectivity, not simply reporting bilateral relations but actively enabling them.



Leveraging its global network and capabilities, Phoenix will deepen its collaboration with the UAE in areas of brand communications, cultural exchange, and broader people-to-people engagement.

CHI Xiaoyan, Executive Director, Phoenix New Media

Chapter 3

NEW ECONOMY SECTOR DEEP-DIVE

2026
China-Arab Business & Investment Report





SIEF connecting leading Chinese AI companies with Dubai leadership at the Dubai AI Festival.

“

Digital economy cooperation between China and the Arab countries represents one of the most strategic opportunities of our time. China brings scale, technological capability, digital infrastructure, e-commerce ecosystems, artificial intelligence applications, and advanced manufacturing integration, while the Arab world offers young populations, ambitious national transformation agendas, strategic geography, and rapidly growing digital markets.

H.E. Dr. Ali Mohammed Al-Khouri

Chairman, Arab Federation for Digital Economy



Renewables & Storage



The rapid advancement of renewables and advanced energy storage is emerging as the most dynamic pillar of China-Arab strategic cooperation. As energy systems shift toward greater intermittency, the joint development of utility-scale solar and grid-scale BESS holds profound strategic significance for regional collaboration. We should not only to accelerate local green diversification but also to join forces with regional partners to scale high-efficiency, reliable clean energy solutions across broader global emerging markets.

LI Xiande
Chairman, JinkoSolar

Industry Landscape

The acceleration of the global energy transition is reshaping the architecture of China-Arab economic cooperation. Within this transformation, renewables and storage have become one of the most strategic areas of collaboration between China and the UAE. The UAE's role is expanding from a regional energy producer to a clean energy investor, solar deployment leader, and low-carbon hydrogen platform, while China's role is evolving from a technology supplier to a full value-chain partner across solar manufacturing, battery storage, grid systems, and clean energy equipment.

This transition is supported by the UAE's long-term clean energy strategy and China's global scale in renewable manufacturing and deployment, where:

- UAE Clean Energy Investment Target: AED 150–200 billion by 2030^[55]
- UAE Clean Energy Generation Target: 32% by 2030 and 50% of the total energy mix by 2050^[55]
- UAE Low-Carbon Hydrogen Target: 1.4 mtpa by 2031 and 14.9 mtpa by 2050^[56]
- China Solar PV Additions in 2024: 357 GW^[57]
- China Cumulative Solar Capacity: 1.05 TW^[57]
- China New Energy Storage Capacity in 2024: 73.76 GW / 168 GWh^[58]
- China New Storage Additions in 2024: 42.37 GW / 101 GWh^[58]

The UAE's renewable energy landscape is defined by scale, ambition, and project execution. The UAE Energy Strategy 2050 targets a major expansion of clean energy, supported by the UAE Net Zero by 2050 Strategic Initiative, the National Hydrogen Strategy 2050, and the Dubai Clean Energy Strategy 2050. Together, these frameworks position the UAE not only as a domestic clean energy market but as a regional and global platform for renewable energy investment, project development, and low-carbon industrial transformation. The UAE's solar capacity has expanded rapidly through world-leading utility-scale projects. The Mohammed bin Rashid Al Maktoum Solar Park in Dubai is one of the world's largest single-site solar parks under the Independent Power Producer model, with operational capacity reaching 3,860 MW and a long-term expansion pathway toward 2030. In Abu Dhabi, Al Dhafra Solar PV, Noor Abu Dhabi, and Al Ajban Solar PV demonstrate the country's ability to deliver large-scale solar assets. The planned Khazna solar-plus-storage project, combining 5.2 GW of solar power with 19 GWh of battery storage, marks a major shift from renewable capacity addition toward round-the-clock clean power delivery^[59].



Masdar plays a central role in this clean energy agenda. With projects across more than 40 countries on six continents and a combined capacity exceeding 65 GW, Masdar has become one of the UAE's most important global clean energy platforms. Its target of reaching 100 GW of renewable energy portfolio capacity by 2030^[60], alongside its ambition to become a leading producer of green hydrogen, reinforces the UAE's role as both a clean-energy investor and a project-development partner for emerging markets.

China brings the industrial and technological engine of the global clean energy transition. It has established a dominant scale in solar PV manufacturing, deployment, and employment, accounting for a major share of global solar capacity additions and total installed capacity. China installed 357 GW of solar PV in 2024, bringing cumulative solar capacity to 1.05 TW, and reached its combined 2030 solar and wind capacity target ahead of schedule^[60]. This depth in manufacturing and deployment provides the cost leadership and technological scale required to accelerate renewable energy deployment in markets such as the UAE and the wider Arab world.

China's leadership also extends decisively into energy storage. By the end of 2024, China had reached 73.76 GW / 168 GWh in cumulative new energy storage capacity, with 42.37 GW / 101 GWh added in 2024 alone^[58]. Lithium-ion batteries account for the overwhelming majority of installed storage capacity, while the growth of independent, shared, and renewable co-located storage reflects the maturity of integrated solar-plus-storage and wind-plus-storage business models. Companies such as CATL, BYD, EVE Energy, Hithium, and Sungrow are shaping global grid-scale storage deployment.

Taken together, these dynamics point to a highly complementary China-UAE partnership in renewables and storage. The UAE provides capital, project execution capacity, regional connectivity, and clean energy ambition, while China contributes manufacturing scale, storage technology, deployment expertise, and cost efficiency. The convergence of these strengths creates a powerful platform for faster decarbonization, more resilient energy systems, and broader access to renewable solutions across the Gulf, the wider Middle East, Africa, and emerging markets globally.

Strategic Opportunities

As China-UAE renewables and storage cooperation matures, the focus is shifting beyond equipment supply toward joint investment in integrated clean energy ecosystems. The UAE's clean energy agenda — spanning utility-scale solar, grid-scale storage, green hydrogen, and decarbonized industrial value chains — provides a structured platform for Chinese capital, manufacturing capacity, engineering expertise, and digital energy management capabilities, where:

- 01 Utility-Scale Solar Development:** Building on the success of Al Dhafra Solar PV, where China's Jinko Power holds a 20% stake and CMEC served as EPC contractor, there is significant scope for deeper Chinese participation in next-generation solar megaprojects. Beyond module supply, Chinese companies can contribute to project development, EPC services, smart inverter and tracker technologies, and bifacial solar innovation. As the Mohammed bin Rashid Al Maktoum Solar Park expands toward its raised 2030 target and projects such as Al Ajban move forward, Chinese developers, financiers, and technology providers can participate as consortium partners alongside Masdar, EWEC, and DEWA.
- 02 Grid-Scale Battery Energy Storage:** The 19 GWh battery energy storage system component of the Khazna solar-plus-storage project signals the UAE's pivot toward dispatchable renewable power and round-the-clock clean energy delivery. Chinese battery manufacturers and energy storage system integrators — including CATL, BYD, EVE Energy, Sungrow, and HyperStrong — are well-positioned to support this transition. Cooperation can extend across lithium iron phosphate battery supply, sodium-ion grid-scale battery storage deployment, energy management software, and integrated solar-plus-storage solutions that improve grid stability and reduce curtailment. Chinese players bring proven, at-scale operational know-how directly relevant to the UAE's emerging storage pipeline.

03

Green Hydrogen and Low-Carbon Ammonia: The UAE's National Hydrogen Strategy 2050, with its 15 mtpa production ambition, combined with planned hydrogen oases at sites such as Ruwais, KEZAD, and Masdar City, creates a long-term platform for joint development^[62]. Chinese capabilities in electrolyzer manufacturing, large-scale renewable power integration, and ammonia logistics can support the build-out of green hydrogen and ammonia production, including offtake corridors to Asian markets such as Japan, South Korea, and China. Joint development of decarbonized industrial clusters — covering green steel, fertilizers, and sustainable aviation fuels — can further anchor the UAE's role as a global hydrogen export hub.

Future Outcomes

Looking ahead, integrating China's manufacturing scale and storage technology with the UAE's clean energy infrastructure and capital deployment will have significance beyond bilateral cooperation. It can help accelerate the deployment of cost-competitive, dispatchable renewable energy across emerging markets and support the development of cleaner, more resilient energy systems. Through joint investments in transformative platforms such as the Mohammed bin Rashid Al Maktoum Solar Park, the Khazna 24/7 solar-plus-storage project, hydrogen oases at Ruwais and KEZAD, and Masdar's 100 GW global portfolio, China and the UAE are well positioned to shape the next generation of clean energy corridors linking Asia, the Middle East, Africa, and Europe.

The future of this cooperation will be defined by integrated, dispatchable, and export-oriented clean energy systems. Chinese capabilities in solar manufacturing, battery storage, electrolyzers, and smart grid technologies can be combined with the UAE's utility-scale project execution, sovereign capital, and regional connectivity to create faster, more reliable, and more cost-competitive clean energy solutions. In this sense, China and the UAE are not merely participants in the global energy transition; they are co-architects of it. Together, they can build resilient, technology-enabled clean energy platforms that support long-term China-Arab business and investment growth while accelerating decarbonization across the Global Majority.





CASE STUDY



Round-the-Clock Engagement

Chinese renewable-energy companies are moving beyond equipment exports toward core technology and delivery partners for the UAE’s next generation of energy infrastructure.

Background

Developed by Masdar in collaboration with EWEC, the Round-the-Clock (RTC) project in Abu Dhabi is the world’s first gigascale solar-and-battery project designed to deliver 1GW of continuous renewable power, 24 hours a day. The US\$6.1 billion project integrates 5.2GW of solar PV with 19GWh of battery storage. Chinese companies play a central role across the project’s technology stack, including POWERCHINA, JinkoSolar, JA Solar, Huawei, and CATL.

Collaboration Approach

Rather than entering through a single investment or supply contract, Chinese companies participate through an integrated value-chain model spanning engineering (e.g., POWERCHINA serves as one of the EPC contractors), equipment (e.g., JinkoSolar supplies 2.6 GW of PV modules), and energy storage (e.g., CATL provides the entire 19GWh battery energy storage system). Masdar selected partners in 2025 based on their ability to deliver proven technologies at unprecedented scale.

Impact & Outcome

The project demonstrates how combining complementary strengths such as UAE project development and capital + Chinese engineering and clean energy technology + global financing in addressing one of renewable energy’s fundamental constraints— intermittency—by transforming solar generation into dispatchable baseload power at unprecedented scale.

\$6.1BN

Total Investment

5.2GW

Solar Modules

19GWh

Battery Energy Storage System



Digital Infrastructure & AI



With the growing needs of digital & AI infrastructure, we look forward to exploring how capital, technology, and talent flowing through hubs like Abu Dhabi and Dubai can support greater collaboration across China and create a more stable, innovation-driven environment for investors and entrepreneurs.

Mark Cutis

Senior Advisor, Abu Dhabi Investment Council

Industry Landscape

The next chapter of China-Arab economic engagement will be increasingly shaped by data, computing power, digital finance, and intelligent systems. Within this transformation, digital infrastructure and AI have become one of the most strategic areas of China-UAE cooperation. The UAE's role is expanding from a regional business and financial hub into a platform for advanced computing, data centers, applied AI, fintech, and digital government, while China's role is evolving from technology provider into a full ecosystem partner across cloud infrastructure, internet platforms, mobile payments, smart cities, and large-scale digital deployment.

This transition is supported by the UAE's national digital agenda and China's deep technology ecosystem, where:

- UAE Digital Economy Target: digital economy's contribution to GDP from 9.7% in 2022 to 19.4% within 10 years ^[63]

- UAE AI Economic Contribution Target: up to USD 91 billion, which accounts for nearly 14% of GDP by 2030 ^[64]
- UAE FinTech Market in 2024: USD 3.16 billion with USD 265 million funding raised ^[65]
- Digital Banking Adoption: 89% of UAE consumers use digital-first banking solutions ^[65]

The UAE's digital landscape is defined by regulatory ambition, institutional leadership, and rapid infrastructure development. The UAE Digital Economy Strategy aims to expand the role of digital sectors in national GDP, while the UAE National Strategy for Artificial Intelligence 2031 positions the country as a global AI hub. The UAE was the first country in the world to appoint a Minister of State for Artificial Intelligence in 2017, and Abu Dhabi is home to the Mohamed bin Zayed University of Artificial Intelligence, the world's first graduate-level, research-based university dedicated exclusively to AI. Financial technology is another major pillar of this digital transformation. The UAE is emerging as a regional fintech and digital payments leader, supported by high digital banking adoption, strong smart device penetration, growth in fintech funding, and a national payment infrastructure. The Aani instant payments platform has expanded account-to-account transfers across licensed financial institutions and merchants, while the Digital Dirham marks a major step in the country's blockchain-based central bank digital currency agenda, covering retail, wholesale, and cross-border use cases.

On the infrastructure side, the UAE is one of the largest data center hubs in the Middle East. It was also the first country in the Arab region, and fourth globally, to launch a 5G network, and has committed 500 MHz of the 6 GHz band to Wi-Fi 6E and industrial IoT use ^[66]. This foundation supports next-generation public and private connectivity, advanced computing, data-driven services, and AI-enabled applications across government, finance, logistics, energy, and urban systems.



China brings the technological scale and operational depth required to make these strategies executable. As home to leading cloud providers, foundation-model labs, and digital-platform companies, China combines strengths in cloud infrastructure, large language models, smart-city deployment, mobile payments, fintech ecosystems, and large-scale 5G and 6G rollouts. These capabilities are directly relevant to the UAE's ambition to build future-ready digital infrastructure and apply AI across critical sectors.

Taken together, these dynamics point to a highly complementary China-UAE digital infrastructure and AI partnership. The UAE provides regulatory agility, sovereign capital, geostrategic positioning, and advanced infrastructure, while China contributes technological scale, platform expertise, and at-scale operational know-how. The convergence of these strengths creates a powerful China-Arab digital corridor that supports faster digital trade, more resilient cross-border payment systems, and richer applications of AI across logistics, energy, finance, and government services across the wider Middle East, Africa, and Asia.

Strategic Opportunities

As China-UAE digital cooperation matures, the focus is shifting beyond hardware and connectivity toward integrated platforms that combine compute, data, AI, and financial infrastructure. The UAE's digital agenda — spanning smart cities, AI-enabled government, fintech, digital assets, and data center expansion — provides a structured platform for Chinese cloud providers, AI labs, fintech players, and platform operators, where:

01 Smart City and Government Applications: Building on Dubai's smart city legacy and the appointment of chief AI officers across government, there is significant scope for Chinese companies with proven experience in city-scale digital deployments to participate in the UAE's smart city build-out. Key application areas include traffic management, public safety, urban services, and citizen-facing digital platforms. Chinese capabilities in computer vision, IoT, and platform integration can support next-generation infrastructure across Dubai, Abu Dhabi, and emerging master-planned communities.

02 AI-Enabled Logistics, Energy, and Industrial Systems: The UAE's ambition to embed AI across logistics, ports, aviation, and energy creates significant scope for collaboration with Chinese AI and industrial software firms. Use cases include AI-driven port operations and predictive maintenance at Jebel Ali, Khalifa Port, and Etihad Rail; optimization of LNG and refining operations; demand forecasting in renewables; and AI-managed grid balancing as the UAE expands solar and nuclear capacity. China's experience in industrial AI, computer vision, and large-scale model deployment can be combined with the UAE's well-instrumented infrastructure assets.

03 Fintech Infrastructure and Digital Payments: The growth of Aani, the rollout of the Digital Dirham, and the maturation of the DIFC and ADGM fintech ecosystems open multiple pathways for cooperation with Chinese fintech players. Areas of opportunity include cross-border payment connectivity, including real-time payment infrastructure, QR-based merchant solutions, embedded finance, AI-driven credit scoring, fraud detection, and digital wealth management. Chinese expertise in scaling digital wallets and super-app ecosystems can be combined with the UAE's regulatory framework to create solutions for the broader MENA market.

04 Data Centers and Cloud Infrastructure: As one of the largest data center hubs in the Middle East, the UAE is positioned to benefit from continued capacity expansion and rising AI compute demand. There is meaningful scope for Chinese cloud providers, hyperscalers, and data center operators to invest alongside local champions, particularly in AI training infrastructure, sovereign cloud, and edge computing deployments. Joint investment in green data centers — leveraging UAE renewable energy and Chinese cooling and energy-management technologies — represents a particularly attractive area for cooperation.

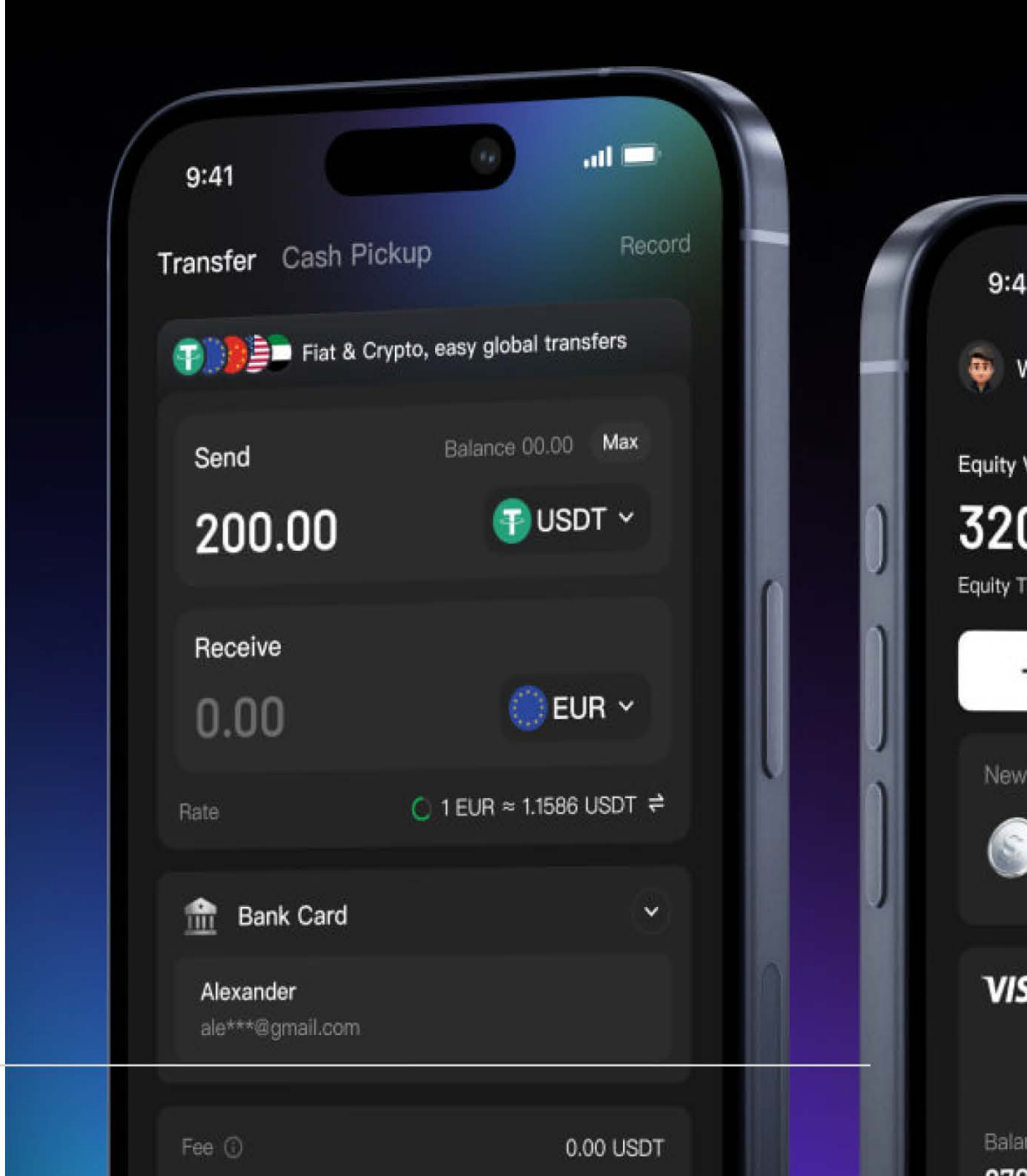


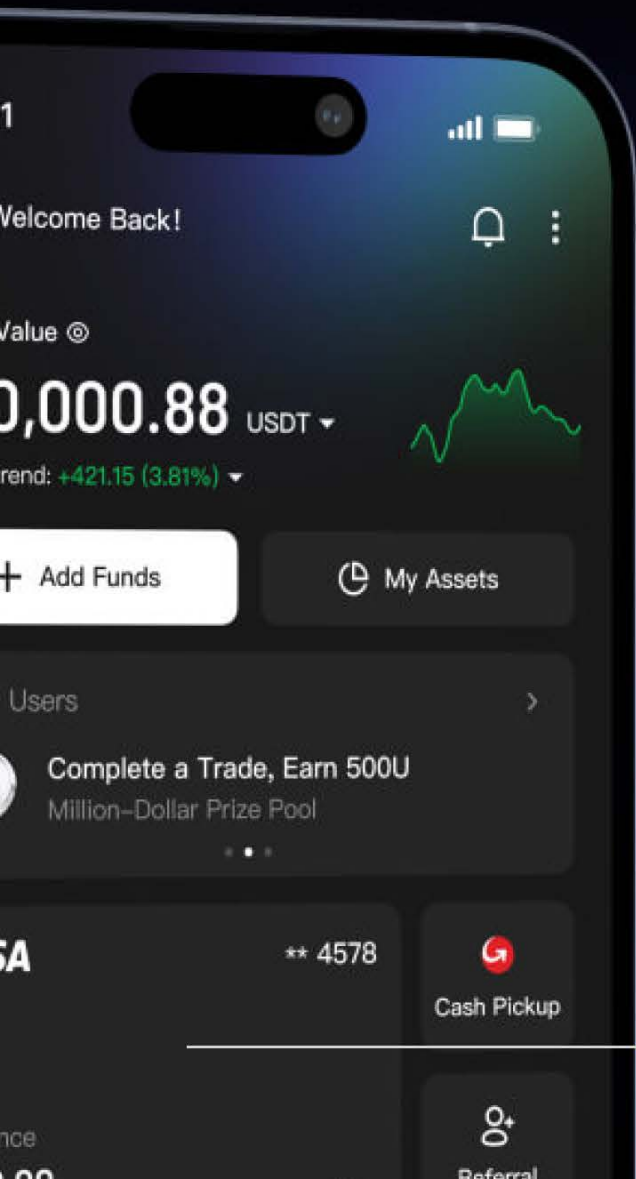
Future Outcomes

Looking ahead, the integration of China’s platform scale and applied AI capabilities with the UAE’s regulatory openness, capital, and digital infrastructure will have significance beyond bilateral cooperation. It can support the deployment of trusted, interoperable digital systems across emerging markets. Through joint investments in smart cities, AI-enabled government, fintech infrastructure, data centers, and digital asset platforms, China and the UAE are well-positioned to shape the next generation of digital corridors linking Asia, the Middle East, Africa, and Europe.

At the same time, as both sides accelerate digital transformation, collaboration on standards, cybersecurity, and talent development will be essential. Aligning technical standards for AI, data exchange, and digital identity; strengthening cybersecurity cooperation for critical infrastructure; and jointly developing AI and digital-finance talent through institutions such as MBZUAI will help ensure that the digital corridor is both ambitious and trusted.

In this sense, China and the UAE are not merely participating in the global digital economy; they are co-engineering parts of its core infrastructure. Together, they can support long-term China-Arab business, investment, and innovation flows in an increasingly complex world.





CASE STUDY



Web3 Open-finance Platform



Klickl aims to provide a compliant infrastructure layer that lets businesses and institutions move and settle value across traditional and digital financial networks.

Background

Klickl is a UAE-headquartered Web3 open-finance platform building financial infrastructure that connects traditional banking, payments, treasury, stablecoins, and digital assets. Rather than operating solely as a crypto exchange or wallet, Klickl is developing an integrated financial operating system that combines accounts and payments, digital-asset services, cards, merchant solutions, treasury tools, and embedded-finance infrastructure.

Collaboration Approach

Klickl selected Abu Dhabi as its headquarters and international base, leveraging the UAE's connectivity between China, the Middle East, Africa, and global markets and its emerging regulatory framework for digital assets. It has combined technology development with regulatory compliance, banking connectivity, risk management and institutional partnerships — using Abu Dhabi not simply as a market, but as a platform from which to build trusted digital finance infrastructure.

Impact & Outcome

From the UAE, Klickl has developed an integrated platform spanning accounts and payments, FX and treasury, stablecoin settlement, cards, custody, brokerage, and embedded finance. Its corporate infrastructure supports merchant collections, global transfers, and digital asset payments and settlement for businesses.



Rooted in the Middle East, powered by Chinese innovation, and built for global value movement — Klickl is creating compliant financial infrastructure for the next era of the digital economy.

Michael Zhao, Founder & CEO, Klickl



Trade Finance & Settlement



As cooperation between China and Arab countries continues to deepen across energy, infrastructure, advanced manufacturing, the digital economy, and emerging industries, the financial systems will need to provide more diversified, resilient, and efficient support, including trade finance, local-currency settlement, RMB clearing, supply chain finance, green finance, and cross-border investment and financing services.

H.E. LIU Mingkang

Founding Chairman, China Banking Regulatory Commission

Industry Landscape

Trade finance and settlement are critical enablers of deeper China-UAE economic integration. As bilateral trade reaches record levels, both sides are increasingly focused on building the financial infrastructure needed to efficiently fund, clear, and settle cross-border commerce. Within this architecture, the UAE's role is expanding from a regional banking and liquidity hub into a platform for local-currency settlement, Islamic finance, digital payments, and cross-border treasury services, while China's role is evolving from trade counterparty into a provider of RMB settlement infrastructure, credit facilitation, and next-generation digital settlement solutions.

This transition is supported by the scale of China-UAE trade and the maturity of bilateral financial cooperation, where in 2025:

- China-UAE Non-Oil Bilateral Trade: USD 111.5 billion in 2025 with 24.5% growth YoY^[67]
- China's Share of UAE Non-Oil Trade: 11%^[67]
- Chinese Companies Operating in the UAE: 15,000+^[68]
- AED-RMB Currency Swap Line: USD 4.9 billion^[69]
- RMB Trade Finance Ranking: 2nd-largest trade finance currency after the US dollar^[70]
- CIPS Network: 176 direct participants and 1,514 indirect participants across 121 countries and regions^[71]

The China-UAE trade relationship has crossed a major threshold. Non-oil bilateral trade surpassed USD 100 billion for the first time in 2025^[72], reinforcing China's position as the UAE's largest global trading partner and the UAE's role as China's largest trading partner in the Arab world. The UAE also serves as a key re-export hub, reaching more than 400 cities across the Middle East and North Africa. This deep, two-way commercial relationship creates structural demand for trade finance, working capital, foreign exchange management, and efficient cross-border settlement.

The UAE's financial landscape provides the host environment for this corridor. Leading institutions such as Emirates NBD, First Abu Dhabi Bank, Abu Dhabi Commercial Bank, and Mashreq, together with specialist Islamic banks, provide trade finance, structured lending, treasury services, and Sharia-compliant financial solutions. The Dubai International Financial Center (DIFC) and Abu Dhabi Global Market (ADGM) further strengthen this role through English-common-law-based regulatory regimes, sophisticated capital markets infrastructure, and a major concentration of regional bank treasuries and asset managers.

At the central-bank level, the UAE and China have built one of the most institutionally mature



local-currency settlement frameworks in the region. The renewed AED-RMB bilateral currency swap agreement between the Central Bank of the UAE and the People's Bank of China provides a local-currency liquidity backstop to support trade and financial transactions. By reducing dependence on third-currency intermediation, the swap line strengthens the foundations for greater use of AED and RMB in bilateral commerce. This framework is reinforced by cooperation in central bank digital currencies. Alongside the swap renewal, the two central banks signed an MoU on CBDC cooperation, including participation in the mBridge platform connecting the UAE, China, Hong Kong, and Thailand. This extends bilateral settlement beyond conventional banking rails into programmable, cross-border digital settlement infrastructure.

The RMB settlement infrastructure in the UAE has also deepened. Agricultural Bank of China was designated by the People's Bank of China as the official RMB clearing bank in the UAE upon the formal opening of its Dubai Branch in May 2017, building on its earlier DIFC presence since 2013. UAE-based participants now represent a meaningful part of the CIPS network, including seven UAE-domiciled direct participants: ABC Dubai, ABC DIFC, Bank of China Dubai, Bank of China Abu Dhabi, ICBC Abu Dhabi, ICBC Dubai DIFC, and Bank of Communications DIFC.

At the network level, the Cross-Border Interbank Payment System provides the dedicated infrastructure for RMB clearing and settlement. In 2024, CIPS processed RMB 175.49 trillion in payments across 8.2 million transactions, with both volume and transaction counts having more than tripled since 2020^[73]. By mid-2025, the network reached financial institutions in 121 countries and regions, offering a robust rail for RMB-denominated trade and investment flows between China and the UAE.

The growing international role of the renminbi further supports this corridor. The RMB ranked as the 6th most active currency for global payments by value in December 2025 and ranked 2nd in trade finance in October 2025, after the US dollar^[70]. This indicates that RMB use is particularly relevant in trade-related corridors, including China-Middle East flows.

Taken together, these dynamics point to a more sophisticated China-UAE trade finance and settlement relationship. The partnership is no longer defined only by banking presence or trade volumes. It is increasingly shaped by local-currency liquidity, RMB clearing infrastructure,

digital settlement rails, Islamic finance capability, and cross-border treasury services. As global trade reorders around new corridors and currency choices, China-UAE trade finance and settlement cooperation is positioned to become a core enabler of broader China-Arab business and investment flows.

Strategic Opportunities

As China-UAE financial cooperation matures, the focus is shifting from bilateral banking presence toward the joint development of next-generation settlement infrastructure, local-currency rails, and digital trade-finance platforms. This creates three major avenues for deeper cooperation:

- 01 Expansion of Local-Currency Settlement:** With the AED-RMB swap line in place and UAE banks already connected to CIPS, there is significant room to scale AED-RMB invoicing, settlement, and pricing across core trade flows, including energy, machinery, electronics, and consumer goods. Greater use of RMB and AED in bilateral trade can reduce foreign-exchange costs, lower correspondent-banking risks, and provide UAE corporates and sovereign entities with more diversified currency options. Cooperation can also extend to RMB-denominated bond issuance, including Panda and Dim Sum bonds by UAE issuers, RMB cash management solutions for Chinese corporates operating in the GCC, and RMB-based commodity pricing in selected segments.
- 02 Digital Trade Finance Platforms:** The joint development of digital trade finance platforms can materially reduce processing times and operational risks along the China-UAE corridor. Technologies such as blockchain, electronic bills of lading, smart contracts, and AI-driven document and risk processing can help modernize trade finance infrastructure. UAE-based hubs such as the DIFC and ADGM, together with the Central Bank's FIT Program, can serve as testbeds for interoperable digital trade-finance utilities that link Chinese exporters, UAE-based regional treasury centers, and downstream buyers across the Middle East, Africa, and South Asia.
- 03 Digital Settlement Infrastructure:** Project mBridge provides a major opportunity to deepen China-UAE cooperation in digital settlement. Jointly developed by the BIS Innovation Hub, the Digital Currency Institute of the People's Bank of China, the

Central Bank of the UAE, the Hong Kong Monetary Authority, the Bank of Thailand, and, since 2024, the Saudi Central Bank, mBridge has reached the Minimum Viable Product stage and is now live. In November 2025, His Highness Sheikh Mansour bin Zayed Al Nahyan, Vice President of the UAE and Chairman of the CBUAE, executed the first official cross-border Digital Dirham transaction to China on mBridge, with the Governors of the CBUAE and the People's Bank of China in attendance. Building on this milestone, both sides have scope to deepen mBridge usage for real-value commercial trade settlement, integrate the Digital Dirham and e-CNY into corporate treasury workflows, and explore programmable payments for trade finance, escrow, and supply-chain financing.

Future Outcomes

Looking ahead, deeper China-UAE cooperation in trade finance and settlement can help both economies build a more resilient, diversified, and technology-enabled financial corridor. By combining UAE liquidity, Islamic finance depth, and regulatory hubs such as DIFC and ADGM with China's scale in trade settlement, CIPS connectivity, and CBDC innovation, both sides can offer corporates a broader currency menu, faster settlement, and richer financing options across the trade lifecycle.

The future of this cooperation will be shaped by three converging shifts: the steady rise of local-currency invoicing and settlement, particularly in RMB and AED; the digitization of trade documents, payments, and credit through blockchain, AI, and CBDC infrastructure; and the gradual extension of these tools from large institutional flows to mid-market and SME trade. Chinese capabilities in fintech, e-commerce-based trade finance, and digital platform engineering can be combined with the UAE's capital pools, Islamic finance expertise, and regulatory agility to create faster, safer, and more inclusive trade-finance systems.

At the same time, as trade volumes grow, both sides will need to reinforce the foundations of this financial corridor. Cybersecurity for critical payment infrastructure, robust governance of CBDC and digital-asset platforms, aligned data and privacy standards, and continuous talent development in trade finance, Islamic finance, and digital finance will be essential. In this sense, China and the UAE are not merely intermediating bilateral trade; they are jointly engineering core elements of a more multipolar, technology-enabled global trade-finance ecosystem capable of supporting long-term China-Arab business, investment, and innovation flows.





CASE STUDY



Project mBridge

China–UAE cooperation in Project mBridge exemplifies joint development of the financial infrastructure through which future trade could be settled.

Background

Project mBridge is a multicentral-bank digital currency platform designed to enable faster, lower-cost, and more direct cross-border payments and foreign-exchange settlement. China and the UAE became founding participants in 2021 through the Digital Currency Institute of the People’s Bank of China (PBOC) and the Central Bank of the UAE (CBUAE), alongside the Hong Kong Monetary Authority, the Bank of Thailand and initially the BIS Innovation Hub. Saudi Arabia joined as a full participant in 2024.

Collaboration Approach

China and the UAE have participated not simply as users, but as co-developers of the infrastructure that enables participating commercial banks to conduct peer-to-peer crossborder payments using wholesale central bank digital currencies rather than multiple correspondent-bank intermediaries. Their central banks helped develop and validate the technology, regulatory framework, and governance model, while Chinese and UAE commercial banks participated in real-value testing.

Impact & Outcome

In January 2024, His Highness Sheikh Mansour bin Zayed Al Nahyan, Vice President, Deputy Prime Minister, Chairman of the Presidential Court and Chairman of the Board of the CBUAE, initiated the first crossborder payment of 'Digital Dirham', the CBUAE's CBDC, to China worth AED 50 million through mBridge. It also marked the first real-value cross-border CBDC payment between a MENA country and a country outside the region on an MVP-ready platform.

AED 50MN

1st Digital Dirham Payment to China

20

Participating Banks

5

Central Bank Participants



Mobility & EVs



China and the UAE share a high degree of policy alignment, while the UAE's ambitious development of new energy and smart mobility provides significant opportunities for Chinese automakers and intelligent driving technologies. China can contribute complete vehicles, full-stack autonomous driving technologies, and integrated operational solutions, while the UAE provides market access, infrastructure, and policy support.

ZHANG Junyi
Founding Partner, NIO Capital

Industry Landscape

Mobility and electric-vehicle cooperation between China and the UAE is driven by shared priorities in sustainable transport, smart cities, and industrial diversification. The UAE's role is expanding from an automotive import market to a platform for clean mobility adoption, charging infrastructure, fleet electrification, and autonomous transport, while China's role is evolving from a vehicle supplier to a full value-chain partner across electric vehicles, batteries, charging technology, energy management, and autonomous driving.

This transition is supported by the UAE's national and emirate-level mobility strategies and China's global leadership in electric mobility, where:

- UAE National EV Adoption Target: EVs to reach 50% of total vehicles on UAE roads by 2050 ^[74]
- UAE EV Market Growth: projected annual growth of 27.20% between 2023 and 2027 ^[75]

- GCC EV Market Size: projected to reach approximately USD 9.4 billion by 2029 ^[75]
- China Vehicle Production: 31.28 million vehicles in 2024 ^[76]
- China NEV Production: 12.89 million units in 2024 ^[76]
- China NEV Share of Total Vehicle Sales: approximately 41% ^[76]

The UAE's mobility landscape is defined by policy ambition, infrastructure expansion, and growing market demand. The UAE National Electric Vehicles Policy aims to reduce energy consumption in the transport sector, build a centralized charging-station database, and maintain the country's global leadership in road quality. The Ministry of Energy and Infrastructure's Global EV Market project, launched in 2023, further aims to have EVs account for 50% of total vehicles on UAE roads by 2050 ^[74]. The UAE ranks first in the region and seventh worldwide in electric-vehicle market readiness, with a projected annual growth rate of 27.20% between 2023 and 2027 ^[75]. The broader GCC EV market is projected to reach approximately USD 9.4 billion by 2029 ^[75]. Beyond passenger cars, electric commercial vehicles — including trucks, vans, and buses — are emerging as a particularly important growth segment, with Chinese OEMs such as BYD, Yutong, Zhongtong, and Farizon Auto already entering the UAE through partnerships with Al-Futtaim, Jameel Motors, United Diesel, and others.

At the emirate level, Dubai is accelerating fleet electrification and the adoption of autonomous mobility. Under the Dubai Green Mobility Strategy 2030, government procurement targets for electric and hybrid vehicles have increased from an initial 10% in 2016 to 20% from 2025 and 30% from 2030 ^[77]. The Roads and Transport Authority has also committed to converting Dubai's entire taxi fleet to 100% eco-friendly vehicles by 2027 ^[78]. In parallel, the Dubai Autonomous Transportation Strategy aims to make 25% of Dubai's total transportation autonomous by 2030, covering metro, buses, taxis, and last-mile transport, supported by dedicated regulatory frameworks for autonomous vehicles ^[79].



Charging infrastructure is becoming a critical enabler of the UAE's clean mobility transition. Public and private charging networks are expanding rapidly, anchored by DEWA's EV Green Charger initiative in Dubai and by Abu Dhabi's plan to install around 70,000 charging points by 2030 [80]. The Ministry of Energy and Infrastructure is also developing a national ultra-fast EV charging corridor connecting the seven emirates. Closing the gap with mature EV markets will require sustained investment in charging hardware, energy systems, and grid upgrades.

China brings the industrial and technological engine of global electric mobility. In 2024, China produced 31.28 million vehicles and sold 31.44 million, maintaining its position as the world's largest auto market for the 16th consecutive year. New energy vehicle production reached 12.89 million units, while sales reached 12.87 million, accounting for approximately 41% of total vehicle sales and ranking first globally for the tenth consecutive year^[81]. China is also home to the world's largest EV battery, charging equipment, electric bus, and electric truck industries, supported by deep upstream capabilities in lithium, cathode, anode, and power electronics.

Taken together, these dynamics point to a highly complementary China-UAE mobility and EV partnership. The UAE provides ambitious electrification targets, large-scale infrastructure programs, smart-city demand, and regulatory momentum, while China contributes industrial scale, EV technology, battery systems, charging equipment, and integrated supply-chain capacity. As global automotive supply chains reconfigure around new energy and software-defined vehicles, China-UAE mobility cooperation is well positioned to evolve from vehicle trade into a fully integrated ecosystem partnership spanning technology, infrastructure, and energy.

Strategic Opportunities

As China-UAE mobility cooperation deepens, the focus is shifting from one-off vehicle sales toward integrated deployment of EV fleets, charging and energy infrastructure, and autonomous mobility solutions. The most significant near- to medium-term opportunities cluster around four priority areas:

- 01 EV Fleets for Public Transport, Logistics, and Ride-Hailing:** Government commitments to electrify public-sector fleets, taxi fleets, and parts of last-mile logistics provide a clear, scaled opportunity for Chinese electric buses, taxis, vans, and trucks. The RTA's target to convert Dubai's taxi fleet to 100% eco-friendly vehicles by 2027 further reinforces this demand [78]. Chinese OEMs such as BYD, Yutong, Zhongtong, Farizon, and others can partner with UAE distributors, fleet operators, and ride-hailing platforms to deploy electric fleets at scale. Battery-swap models and fast-charging models can also be tailored to UAE duty cycles and climate conditions.
- 02 Charging Infrastructure and Smart Energy Systems:** Reaching the UAE's charging-density goals — including Abu Dhabi's target of approximately 70,000 charging points by 2030 and the national ultra-fast charging corridor [80] — will require deeper cooperation across hardware, software, and energy systems. Chinese capabilities in DC fast chargers, megawatt charging, V2G/V2X, smart grid integration, solar-plus-storage charging hubs, and battery second-life applications can be combined with UAE utilities such as DEWA and ADDC, as well as local developers, to build a resilient, low-carbon charging backbone.
- 03 Autonomous and Connected Mobility:** Dubai's target of 25% of transportation to be autonomous by 2030, together with its forward-looking regulatory framework, creates a structured environment for autonomous driving deployment. Chinese autonomous vehicle companies, such as WeRide, which has already received preliminary approval from the UAE Cabinet, along with leaders in robotaxis, autonomous shuttles, autonomous trucks, and HD mapping, can partner with the RTA, Dubai Future Foundation, and private operators to deploy autonomous services in designated zones. These solutions can be integrated with public transport and position Dubai as a regional showcase for autonomous mobility across the Middle East.
- 04 Local Assembly and EV Industrial Cooperation:** In line with the UAE's industrial diversification agenda, including Make it in the Emirates and Operation 300bn, there is room for Chinese OEMs and battery suppliers to establish regional assembly, kitting, or battery-pack operations in UAE industrial zones such as KIZAD and JAFZA. Such investments can serve the GCC, the wider Middle East, and Africa while supporting the transfer of know-how in EV manufacturing, battery management, and software-defined vehicle architectures.

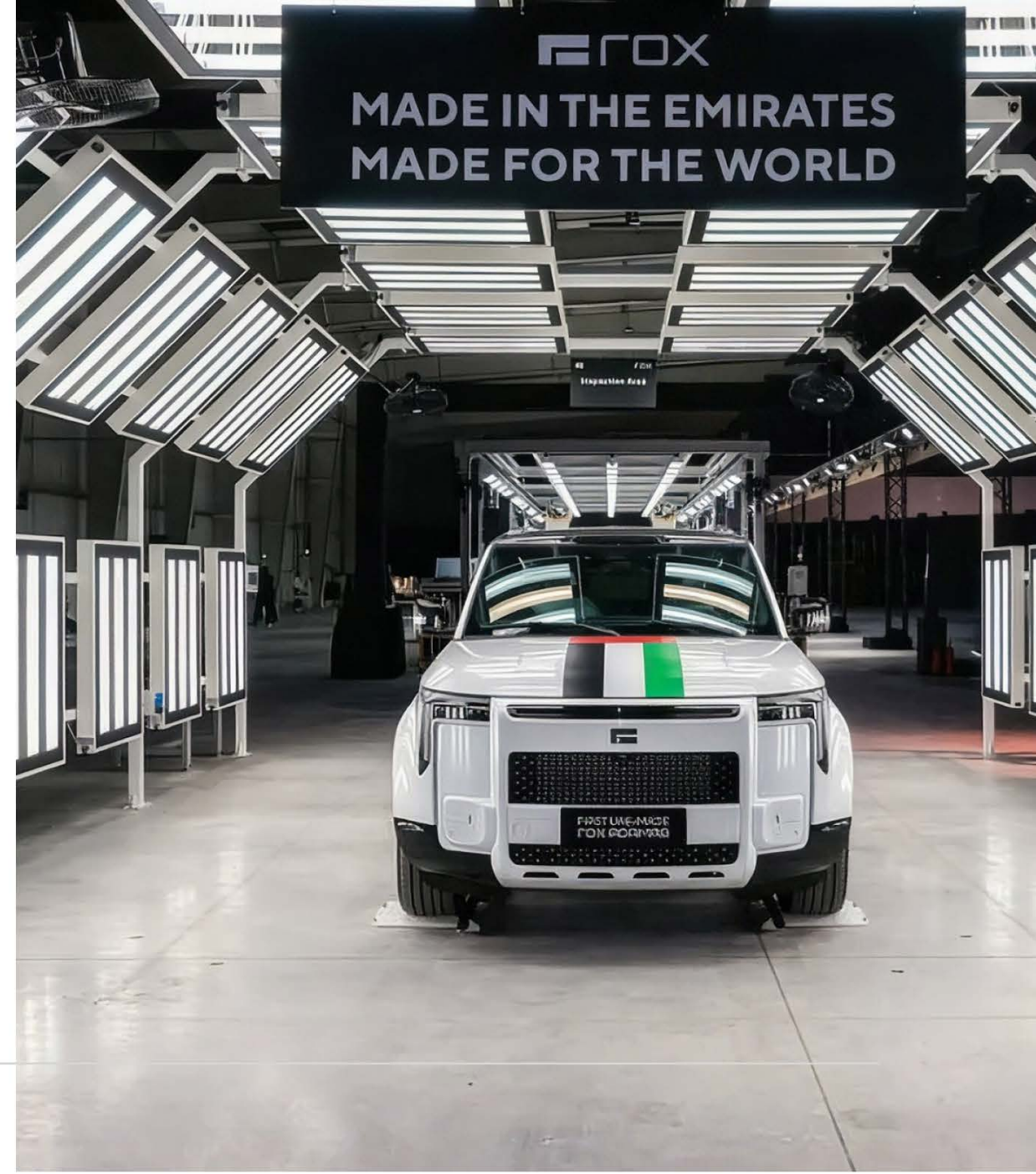


Future Outcomes

Looking ahead, China-UAE cooperation in mobility and EVs is well-positioned to evolve into a deeply integrated ecosystem partnership. The relationship is moving beyond vehicle trade toward a model in which Chinese OEMs, battery and charging equipment makers, autonomous driving technology providers, and energy storage specialists work alongside UAE utilities, fleet operators, regulators, and industrial zones to deliver electrified, connected, and autonomous mobility at the city and national scales.

The future of this cooperation will be shaped by three converging shifts: rapid electrification of fleets and private vehicles in line with UAE 2030 and 2050 targets; the maturation of autonomous and connected mobility from pilots to commercial-scale deployment in Dubai and Abu Dhabi; and the integration of mobility with the broader energy transition, including renewables, hydrogen, and smart-grid solutions. Chinese strengths in EV scale, software-defined vehicles, and battery innovation, combined with the UAE's capital pools, regulatory agility, and infrastructure ambition, can create a genuine end-to-end mobility ecosystem.

At the same time, success will depend on cooperation around standards, safety, and talent. Harmonizing EV charging and battery-swap standards, building robust safety and liability frameworks for autonomous vehicles, ensuring cybersecurity for connected-car and charging infrastructure, and developing local skills in EV manufacturing, charging operations, and AV engineering will be essential. In this sense, China and the UAE are not merely trading vehicles; they are jointly engineering a next-generation mobility platform with the potential to support long-term China-Arab business, investment, and innovation flows across transport, energy, and smart cities.





CASE STUDY



ROX | روكس الإمارات

“Made in the Emirates” EV

ROX demonstrates the next stage of China–UAE mobility & EV cooperation by transforming the UAE from a destination market into a production and innovation base.

Background

ROX is a Chinese company focused on luxury all-terrain new-energy vehicles, integrating REEV technology, intelligent systems, AI, and advanced manufacturing. ROX has delivered more than 5,000 vehicles in the UAE and 20,000 across MENA, establishing itself among the UAE’s leading luxury all-terrain SUV brands above US\$80,000. As ROX’s most important market, the UAE’s demand has helped shape its product development, from extreme-heat adaptation and luxury configurations to localized intelligent features.

Collaboration Approach

Supported by the Abu Dhabi Investment Office (ADIO), ROX established its global headquarters in Abu Dhabi and a regional parts hub in Dubai, while participating in Make it in the Emirates and building partnerships across the local industrial ecosystem. In May 2026, ROX partnered with KEZAD Group to establish a 10,000 sqm Advanced AI Manufacturing Center in Abu Dhabi, and the facility commenced production in September.

Impact & Outcome

ROX has moved beyond selling Chinese-manufactured vehicles to building an integrated UAE automotive ecosystem spanning manufacturing, AI, design, supply chains and exports. The Abu Dhabi facility can locally sub-assemble more than 80 types of vehicle components and is complemented by a ROX AI Lab and Design Studio, targeting 20,000 vehicles in 2027 and 300,000 annually by 2030, serving both regional and global markets.



We see the UAE as home, not just a market.

Jarvis Yan, Founder & CEO, ROX Motor

Chapter 4

WHAT'S NEXT

2026
China-Arab Business & Investment Report





China-UAE delegation jointly advancing the Global South food security agenda at the Africa Food Systems Forum.

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Looking ahead, China–Arab cooperation will increasingly extend beyond bilateral trade and investment toward joint development in third-country markets, industrial partnerships, and the deployment of capabilities and expertise. This will help shape a new model of cooperation that brings together “China’s industrial capabilities + the UAE’s role as a global hub + the growth markets of the Global South.” Such a model has the potential to create new opportunities for both countries while injecting fresh momentum into regional economic transformation, South–South cooperation, and global development.

H.E. ZHOU Yiping

Founding Director, United Nations Office for South-South Cooperation



Future Outlook

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China and the UAE continue to shape the future of global trade, investment, and economic progress through strong economic ties, strategic leadership, and deeper cross-border collaboration. Building on this strong relationship, we remain committed to empowering entrepreneurs and strengthening the position of SMEs by fostering impactful partnerships, driving innovation, and creating platforms that support sustainable growth and long-term economic opportunity across our regions.

Mansoor Abduljabbar Al Sayegh
Chairman, Abu Dhabi Youth Business Council

The economic architecture between China and the Arab world, with the UAE as a strategic anchor, has moved well beyond its historical reliance on transactional trade. As demonstrated across logistics, aviation, energy, infrastructure, digital technology, and advanced manufacturing, the relationship is undergoing a structural realignment: from a trade-centric model toward an investment, innovation, and industrial-integration ecosystem.

Looking toward the end of the decade, the China-Arab economic corridor will increasingly be defined by deeper industrial localization, technology co-development, cross-border capital deployment, and shared strategic foresight. The next phase of cooperation will not be measured only by the volume of goods exchanged, but by the platforms, capabilities, and partnerships jointly created across the corridor.

Gateway to the Global South

The UAE is no longer merely an end-market for Chinese goods. It has evolved into a critical regional base for Chinese enterprises seeking to expand across the broader Global South. Supported by world-class logistics infrastructure, financial hubs, aviation connectivity, and a growing network of Comprehensive Economic Partnership Agreements, the UAE offers Chinese companies a highly effective platform for reaching markets across the Middle East, Africa, South Asia, and Europe.

For Chinese corporations navigating shifting geopolitical trade dynamics, establishing regional headquarters, distribution hubs, and investment platforms in the UAE provides strategic flexibility. Dubai and Abu Dhabi offer the connectivity, regulatory clarity, and institutional stability required to reroute supply chains, manage regional operations, and access high-growth emerging markets.

Industrial Localization

The era of simple export-led engagement is giving way to a deeper model of industrial localization. Chinese companies are increasingly moving from selling in the region to producing, assembling, maintaining, and servicing within it. UAE industrial zones and free economic areas provide the infrastructure, policy support, and market access required for this transition.

This shift is especially relevant in sectors such as electric mobility, renewable energy, batteries, advanced manufacturing, machinery, construction materials, digital infrastructure, and smart logistics. Localized manufacturing and after-sales ecosystems can reduce shipping risks, improve service reliability, mitigate tariff exposure, and support regional supply-chain resilience.



More importantly, they align directly with Arab economic diversification agendas by supporting technology transfer, workforce development, and domestic industrial capacity.

Third-Market Co-Investment

Capital flows between China and the UAE are also evolving into more sophisticated, multilateral investment models. Rather than limiting cooperation to bilateral projects, Chinese and Emirati institutions are increasingly positioned to co-invest in third markets across Africa, Central Asia, South Asia, and the wider Middle East.

This model combines the UAE's sovereign capital, institutional finance, geopolitical neutrality, and regional connectivity with China's strengths in engineering, procurement, construction, digital infrastructure, and industrial technology. Together, both sides can jointly develop renewable energy projects, logistics corridors, industrial parks, digital platforms, ports, rail networks, and urban infrastructure in emerging markets.

Third-market co-investment can become a defining feature of future China-Arab cooperation. It allows both sides to share risk, pool capabilities, and scale development impact across regions where demand for infrastructure, energy, digital connectivity, and industrial capacity remains high.

Talent Enablement

As physical and digital infrastructure deepens, human capital will become one of the most important determinants of success. The next phase of China-Arab cooperation requires a larger pool of professionals who are bilingual, technically capable, commercially sophisticated, and cross-culturally fluent. This goes beyond language skills. The corridor will need talent who understand Chinese technology ecosystems, Arab regulatory environments, international compliance standards, project finance, supply chain management, digital platforms, and industrial operations. Joint research centers, university partnerships, executive education programs, technical training institutes, and corporate talent exchanges can help build this next generation of China-Arab business leaders.

Talent enablement will be especially important in high-growth sectors such as AI, renewable energy, electric vehicles, smart manufacturing, logistics, fintech, and advanced materials. Without localized talent, technology transfer and industrial localization will remain limited. With the right talent base, however, the China-Arab corridor can move from project-based cooperation to sustained innovation-led growth.

Taken together, these themes point to a more mature phase of China-Arab business and investment. The future corridor will be shaped not only by trade flows but also by localized production, shared platforms, joint financing, digital infrastructure, green technology, and human capital development. For China, the UAE offers a trusted launchpad into the Arab world and the wider Global South. For the UAE and Arab economies, China offers industrial scale, technology depth, infrastructure delivery, and long-term partnership capacity. The strategic opportunity now is to convert this complementarity into durable institutions, investable platforms, and co-created industries that can define the next decade of cross-regional growth.



Key Takeaways



Through our partnership with international platforms such as SIEF and Investopia, as well as strategic relationships with the Chinese government, excellent collaboration opportunities for Chinese businesses and investors exist in Ras Al Khaimah and the broader Arab region.

H.E. Lody Embrechts

Senior Advisor for International Relations, Office of the Ruler of Ras Al Khaimah

As the China-Arab economic corridor deepens, stakeholders must navigate a more complex landscape of structural opportunities and operational risks. The next phase of collaboration will require a shift from opportunistic trade toward resilient, localized, and institutionally grounded partnerships. Governments, enterprises, start-ups, and investors each have distinct roles to play in shaping this next chapter.

Government & Regulator

For governments and regulators, the China-Arab corridor offers a strategic opportunity to accelerate the transition toward knowledge-based, innovation-driven economies. Chinese capabilities in artificial intelligence, renewable energy, smart logistics, electric mobility, industrial automation, and digital finance can support national diversification agendas across the Arab world. At the same time, the UAE and other regional hubs can strengthen their position as neutral, multipolar platforms for global trade, investment, and technology flows. However, deeper integration also requires careful regulatory coordination.

Key challenges include data sovereignty, intellectual property protection, cybersecurity, cross-border capital flows, digital-asset governance, and compliance with global standards. Governments will also need to manage the geopolitical sensitivities associated with advanced technology adoption while preserving openness, trust, and strategic autonomy.

Enterprise & Platform

For large enterprises and platform companies, the corridor provides strong first-mover opportunities. Chinese firms can establish localized manufacturing, service, logistics, and regional headquarters platforms in the UAE and wider Arab region, using these bases to access MENA, Africa, South Asia, and Europe. Sectors such as EVs, renewable energy, digital infrastructure, machinery, advanced materials, logistics, and e-commerce offer particularly strong potential.

The key risk is competitive intensity. As more global players enter the region, market saturation, rising customer acquisition costs, supply-chain volatility, and talent competition will increase. To succeed, enterprises must move beyond export-led models and build durable local ecosystems, including after-sales service, technical training, local partnerships, regulatory engagement, and culturally adapted products.

SME & Start-up

For SMEs and start-ups, the China-Arab corridor offers major opportunities in agile, high-growth sectors such as cross-border e-commerce, fintech, green technology, logistics software, AI applications, digital payments, and specialized B2B services. UAE free zones, digital infrastructure, accelerator programs, and investor networks provide a favorable environment for testing and scaling regional business models.



Yet SMEs face practical barriers. Initial setup costs, licensing complexity, corporate banking requirements, talent shortages, and market-entry fragmentation can be significant. Start-ups must therefore approach the region with disciplined localization strategies, clear regulatory planning, and strong local partners. Those that combine Chinese product speed with regional market understanding will be best positioned to scale.

Investors

For investors, the corridor offers attractive opportunities across decarbonization, clean energy, infrastructure, logistics, advanced manufacturing, AI, fintech, digital platforms, and localized technology ecosystems. Sovereign capital, family offices, development finance institutions, and private investors can use co-investment structures to share risk and build scalable platforms across China, the UAE, and third markets.

The main risks relate to exit liquidity, valuation mismatches, governance standards, and the relative immaturity of some regional capital markets. Investors will need disciplined underwriting, stronger governance frameworks, and aligned expectations between Chinese entrepreneurs and Middle Eastern institutional capital. The strongest opportunities will combine technology relevance, regional scalability, and clear monetization pathways.

The China-Arab business and investment landscape has entered a more mature phase of structural engagement. The true value of this corridor will not be measured only by trade volume or capital flows, but by the quality of the industries, platforms, technologies, and institutions jointly created.

Future success will depend on four priorities: regulatory trust, industrial localization, cross-cultural talent, and long-term capital alignment. For China, the Arab world offers markets, capital, connectivity, and strategic depth. For Arab economies, China offers technology, industrial scale, execution capacity, and global supply-chain integration. Together, both sides have the opportunity to build a sustainable, technologically advanced, and resilient economic corridor for the next decade.





Institutions

Sino-International Entrepreneurs Federation (SIEF) is a global, non-profit, non-partisan organization established in 2008 by Rt. Hon. Gordon Brown, Jean-Pierre Raffarin, Hon. John Howard, and H.E. Long Yongtu. It is incorporated in Zurich and headquartered in Beijing at the Prince Palace, serving as a trusted facilitator connecting leading business leaders across industries, continents, and cultures. Over the past decades, it has helped public- and private-sector leaders achieve their goals by advising on strategy, policy, and delivery.

Website: <https://www.sief.org>

Investopia launched in November 2021 by His Highness Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, and Ruler of Dubai, and H.E. Abdulla Bin Touq Al Marri, UAE Minister of Economy, as a UAE-based platform that brings together the global investment community around investment opportunities in new economies. It bridges the Now Economies, changing and evolving, driven by global disruptions and innovation, and the New Economies emerging because of the rapid advancements happening every single day.

Website: <https://www.investopia.ae>

Supporting Partner

HSC Asset Group is an elite team of investment specialists building a bridge between China and the MENA region, with a professional focus on investment, technology transfer, strategic partnership development, capital structuring, fund execution, and management expertise.

Website: <https://www.hscassetgroup.com>

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