

## THE POTENTIAL OF THE MIDDLE EAST MARKET FOR BRAZILIAN DIMENSION STONES

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Some countries in the Middle East enjoy a privileged economic situation due to petroleum production and are significant importers of dimension stones. The seven main regional importers by decreasing order of classification are: Saudi Arabia, United Arab Emirates (UAE), Kuwait, Qatar, Jordan, Oman and Bahrain.

In 2015, these countries were responsible for imports that totaled US\$ 1.86 billion (Chart 1). Only Oman and Bahrain individually imported less than US\$ 100 million in 2015. In total, stone imports made by Saudi Arabia and UAE were US\$ 1.28 billion.

The three largest stone suppliers for these seven countries in the 2011-2015 period are presented in charts 2-8. China appears as the main supplier of all of them. Turkey, India and Italy also appear as important suppliers. These countries stand out for their supply of finished products for contractor works.

In 2015, Brazilian dimension stone exports for the seven countries in focus totaled only US\$ 7.6 million (Chart 9). There are two explanations for the weak performance: Brazilian export companies still do not have the capability to supply works in the international market; and the market penetration in the Middle East cannot be achieved by the mere participation in regional and international stone industry fairs, even if offering finished products.

Through its agreement with Apex-Brasil, ABIROCHAS is beginning its work of “Commercial Intelligence” in the Middle East. The work is based on the identification of the main stakeholders in the construction industry in public and private works.

The objective is also the elaboration of the tariff profile of the countries in focus, in order to recognize any eventual barriers, preferential tax treatment, bilateral and multilateral agreement in effect, etc. The geographical/geopolitical groupings in existence for the countries covered regionally are shown in Table 1.

The outlook is excellent, because, even not directly exported by Brazil, dimension stones “made in Italy” and “made in China” originating from Brazil have a marked presence in large hotels, airports, mosques and shopping malls of the region. It is fundamental that the Brazilian export capacity of finished products is expanded, in cut pieces for flooring and counters, as well as truly complete cut-to-size projects.

It is our belief that solid Brazilian quartzite constitutes a promising variety in the Middle East target countries. Both the esthetic attributes of quartzite – similar to those of marble –, may be used as a basis for commercial promotion. Additionally, for their light colors, practically mono-mineralized materials, quartzite does not absorb excessive heat in the sun and does not present physical-mechanical problems, such as cracking by thermal dilation of its mineralogical constituents.

**Chart 1 - Main importers of processed stones (6802) in the Middle East  
amounts in US\$ million**

Countries	2011	2012	2013	2014	2015
Bahrain	12.5	15.9	18.9	24.8	17.6
Jordan	33.1	35.8	51.4	80.3	111.5
Kuwait	78.0	72.8	109.9	159.2	224.9
Oman	15.7	39.0	36.4	49.4	57.8
Qatar	111.0	105.1	182.3	161.4	164.9
Saudi Arabia	429.3	551.8	595.0	607.3	825.6
Arab Emirates	283.3	305.3	387.0	437.8	456.1
<b>Total</b>	<b>962.9</b>	<b>1,125.7</b>	<b>1,380.8</b>	<b>1,520.2</b>	<b>1,858.4</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

**Chart 2 – Main suppliers (6802) to Bahrain  
amounts in US\$ million**

Country	2011	2012	2013	2014	2015
China	3.1	5.2	6.3	6.3	5.9
Turkey	1.1	2.0	1.4	1.8	2.2
India	1.0	1.7	1.3	1.6	1.9
Others	7.4	7.1	9.8	15.1	7.7
<b>Total</b>	<b>12.5</b>	<b>15.9</b>	<b>18.9</b>	<b>24.8</b>	<b>17.6</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

**Chart 3 - Main suppliers (6802) to Jordan  
amounts in US\$ million**

Country	2011	2012	2013	2014	2015
China	13.2	16.9	25.0	42.9	80.0
Palestine	9.1	8.5	9.0	19.2	12.0
Egypt	0.9	1.8	3.6	5.8	6.7
Others	10.0	8.7	13.8	12.4	12.7
<b>Total</b>	<b>33.1</b>	<b>35.8</b>	<b>51.4</b>	<b>80.3</b>	<b>111.5</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

**Chart 4 - Main suppliers (6802) to Kuwait  
amounts in US\$ million**

Country	2011	2012	2013	2014	2015
China	18.3	19.5	37.8	60.6	131.2
Italy	28.7	29.7	34.1	52.0	39.5
Turkey	5.1	5.6	8.1	7.3	15.8
Others	25.9	17.9	29.9	39.4	38.3
<b>Total</b>	<b>78.0</b>	<b>72.8</b>	<b>109.9</b>	<b>159.2</b>	<b>224.9</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

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**Chart 5 - Main suppliers (6802) to Oman**  
amounts in US\$ million

Country	2011	2012	2013	2014	2015
China	4.5	17.3	16.3	27.1	40.5
India	2.9	7.0	5.7	5.9	8.7
Turkey	3.1	4.1	3.0	3.8	4.0
Others	5.2	10.6	11.4	12.6	4.7
<b>Total</b>	<b>15.7</b>	<b>39.0</b>	<b>36.4</b>	<b>49.4</b>	<b>57.8</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

**Chart 6 - Main suppliers (6802) to Qatar**  
amounts in US\$ million

Country	2011	2012	2013	2014	2015
China	30.0	37.6	53.1	54.3	62.0
Italy	43.2	20.2	60.2	32.2	27.0
India	3.8	5.4	7.7	8.8	13.7
Others	34.0	41.9	61.3	66.1	62.2
<b>Total</b>	<b>111.0</b>	<b>105.1</b>	<b>182.3</b>	<b>161.4</b>	<b>164.9</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

**Chart 7 - Main suppliers (6802) to Arábia Saudita**  
amounts in US\$ million

Country	2011	2012	2013	2014	2015
China	110.8	133.1	202.1	171.4	415.2
Turkey	61.9	84.9	93.3	108.3	111.1
Italy	84.2	132.2	107.3	90.5	79.6
Others	172.4	201.6	192.3	237.1	219.8
<b>Total</b>	<b>429.3</b>	<b>551.8</b>	<b>595.0</b>	<b>607.3</b>	<b>825.6</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.

**Chart 8 - Main suppliers (6802) to Emirados Árabes**  
amounts in US\$ million

Country	2011	2012	2013	2014	2015
China	108.5	101.6	136.9	164.6	172.6
Italy	39.6	53.4	65.4	67.0	85.3
Turkey	29.0	41.3	44.0	45.5	49.2
Others	106.2	108.9	140.5	160.8	149.0
<b>Total</b>	<b>283.3</b>	<b>305.3</b>	<b>387.0</b>	<b>437.8</b>	<b>456.1</b>

Source: COMTRADE / Strategic Market Management, Apex-Brasil.



**Chart 9 – Brazilian exports of processed stones (6802) to the main importing countries of the Middle East - 2015**

Country	Physical volume (t)	Revenue (US\$ thsd)	Avg price (US\$/t)
<b>Arab Emirates</b>	6,187.5	4,397.8	710
<b>Jordan</b>	3,695.2	1,315.6	360
<b>Saudi Arabia</b>	1,224.9	1,302.5	1.060
<b>Qatar</b>	458.2	281.9	620
<b>Kuwait</b>	345.5	224.2	650
<b>Oman</b>	80.6	55.1	680
<b>Bahrain</b>	26.6	20.0	750
<b>Total</b>	12,018.5	7,597.1	630

Date source: Alice base of MDIC - <http://aliceweb.mdic.gov.br/>

**Table 1 – Main geographic / geopolitical regional groupings**

ARAB LEAGUE	MIDDLE EAST	GCC	MENA	UAE
Saudi Arabia	Saudi Arabia	Saudi Arabia	Saudi Arabia	Abu Dhabi
Algeria			Algeria	Ajman
Bahrain	Bahrain	Bahrain	Bahrain	Al Fujairah
Qatar	Qatar	Qatar	Qatar	Sharjah
Comoros				Dubai
Djibute			Egypt	Ras al Khaimah
Egypt			UAE	Umm al Qaywayn
UAE	UAE	UAE		
Yemen	Yemen			
Democratic Yemen	Democratic Yemen			
	Iran		Iran	
Iraq	Iraq		Iraq	
	Israel		Israel	
Jordan	Jordan		Jordan	
Kuwait	Kuwait	Kuwait	Kuwait	
Lebanon	Lebanon		Lebanon	
Libia			Libia	
Marroco			Marroco	
Mauritius				
Oman	Oman	Oman	Oman	
Palestine	Palestine		Palestine	
Syria	Syria		Syria	
Sudan			Sudan	
Tunisia			Tunisia	

CCG – Conselho de Cooperação do Golfo / GCC – Gulf Cooperation Council; MENA – Middle East and North Africa Countries; UAE – Emirados Árabes Unidos / UAE – United Arab Emirates.