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QATAR

The sovereign State of Qatar, ruled by the Al Thani Family is situated midway along the Western Coast of the Arabian Gulf. In terms of population and geographical size Qatar is one of the smaller Arab Emirates; it occupies about 11.437 km² with approximately 2,9 million people living and working in Qatar.

Qatar is overall a politically stable, rich country (one of the highest income per capita). It is estimated that 90% of the inhabitants are expatriates.

The Qatari economy has proven to be resilient in the face of crisis. In 2017 the country was hit by an air, land and sea blockade by its neighbors and the small Emirate showed strong capacity to manage the crisis until its end in January 2021.

In 2018, the **Qatar Free Zone Authority (QFZA)** was established to oversee and regulate the new free zones in Qatar, offering opportunities and benefits for businesses seeking to enter the Qatari market. According to QFZA, Qatar is on its way to compete with i.e. Dubai as one of the most attractive markets in the Middle East. Please refer to appendix (1).

Many reports reveal that Qatar's F&B segment benefits from the presence of a resilient business environment and a wealthy consumer base. The high disposable incomes of Qatari consumers along with food being major source of entertainment are other driving factors behind F&B sectoral growth.

Classical entertainment options in Qatar may be limited, but there is a huge demand for food events and food festivals in the city where hundreds of food stalls are ready to offer a wide range of cuisines. Another growing market are food trucks visiting university campuses and schools offering mainly fast-food products or coffee and sweets.

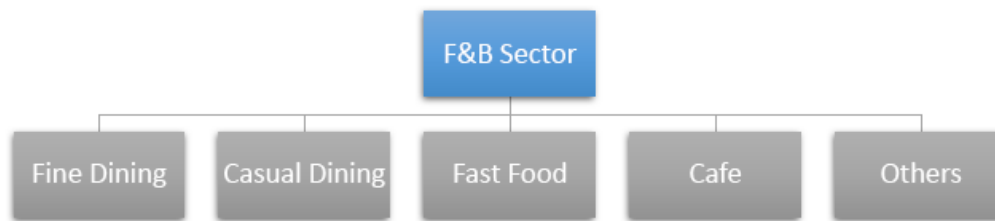
1 F&B Sector Overview

The food and beverage (F&B) sector are a dynamic industry expected to reach \$7.22 trillion in 2023, driven by a growing population, increasing disposable incomes, expanding e-commerce sales channels, and rising demand for organic and functional foods and beverages.

The F&B sector of Qatar has thrived over the years due to the cultural diversity of the country's population and tourism growth that has given rise to a host of restaurants serving various cuisines from around the world. Eating and drinking are considered an integral part of the culture and an essential medium of socializing. The F&B sector of Qatar is estimated to be US\$8.9 billion in 2023, and the market is expected to grow annually by 5.62% (CAGR 2023-2028). The F&B sector significantly contributes to the Qatari economy, accounting for approximately 1.5% of GDP. The industry also employs a substantial number of people, directly and indirectly. The Qatari government supports the food and beverage sector and has taken several steps to promote its growth. These include providing financial incentives to investors, developing food processing, and packaging facilities, and encouraging the adoption of new technologies. (Statistica, 2023).

The F&B sector of Qatar can be divided into five segments with each segment catering to a different target market across nationalities & income groups.

The market segments are as follows :



Fine dining restaurants in Doha offer a luxurious dining experience with an average per-person meal price of approximately QAR 300. They are typically located in five-star hotels and cater to high-income consumers and tourists. Examples include Nobu and Hakkasan. However, setting up a fine dining restaurant is expensive, and there is a risk of food waste due to the emphasis on serving fresh food. Additionally, the rapid hotel development in the country may lead to an oversupply of fine-dining restaurants and lower customer traffic.

Casual dining restaurants in Qatar offer affordable meals in a relaxed atmosphere, with prices ranging from QAR 100-150 per person. They are popular among both Qataris and expatriates, contributing 25-30% to the Food and Beverages sector revenues. These restaurants offer a variety of cuisines at reasonable prices. However, they face challenges from competition and price-sensitive customers.

Fast food restaurants offer standardized food with a focus on speed of service. The average meal price per person ranges between QAR 25-30 and includes a burger, fries, and a drink. However, costs can vary based on the restaurant type, location, and items ordered. While fast food provides convenience, a major challenge is the shift in consumer preferences towards healthier eating, which may impact their market share.

A cafe is defined as a restaurant that does not offer table service. Customers order their food from a counter and serve themselves. Cafes serve food and beverage products, including coffee, hot and cold drinks, pastries, baked goods, sandwiches, etc. The average meal price per person ranges from QAR 30 to QAR 50. Cafes play a unique role as a place for socializing or meeting, making it difficult for other segments to compete in this regard.

The "Other" category includes cafeterias, dessert parlors, and beverage outlets. Cafeterias offer affordable meals, while dessert parlors focus on ice cream and desserts. Beverage outlets serve fresh juices, milkshakes, tea, and coffee.

1.1 Consumer Structure

According to official statistics, Qatar has a population of 2,9 million inhabitants. A minority of 11% are considered as Qatari nationals, while other Arab represent 12,3%. A significant percentage of 68,3% represent other Asian nationalities, some 40,8% are blue collar workers. The largest Asian community are Indians (650.000 inhabitants), representing 35,2% of all Asians and 23,1% of Qatar's total population. The rest of the represented groups are Africans (5,1%), Western expatriates (European, North American and Oceanian with a percentage of approximately 3%) and Central and South American expatriates (0,1%).

Origin	Percentage
Qataris	11,1%
Other Arabs	12,3%
Other Asians	68,3% (40,8% of them; 27,9% of total - blue collar workers)
Africans	5,1%
Western (European, North American and Oceanian)	3%
Central and South American	0,1%

The IMF forecasts the growth of Qatar's population to remain relatively stable over the next five years – once the economic impact of the pandemic has been overcome. One reason for this is the lower oil price that has dominated in recent years, leading to a number of job cuts and reductions in benefits for expatriates. These have led, in turn, to a change in the structure of this segment of the population, as the new expatriate arrivals tend to feature a slightly lower purchasing power, due to their intention of saving money rather than spending.

Qatari citizens amount to the highest average income in the world (according to purchase power parity per-capita GDP) since 1998. According to World Atlas, in 2023, the GDP/head was USD 112.000. Consequently, Qatar's residents affluent spend more on luxury goods and experiences than those from the rest of the GCC countries. This is one of the factors leading to the recent surge of the country's retail sector compared to its neighboring countries. In addition, the great proportion of expatriates living in the country (88.9%) modifies the way that the sector is developed, giving a greater variety to consumer demand. This is the case, for example, in the food sector, as the expatriates' preferences increase the demand for processed foods, fast foods and dining out options. The sector then subsequently adapts to satisfy of these demands.

In the long run, rising income translates into higher demand for healthy eating options & premium goods. This will encourage consumptions of certain market segments such as Organic/Vegan/Gluten free Food, as well as Diet Food etc. Rising health consciousness in the F&B sector is expected to increase opportunities for food and drink producers that can introduce healthy options in Qatar. The demand for organic food is steadily increasing in the country with a shift to natural ingredients and functional drinks for hydration, as the food-processing industry becomes more segmented. The development of new malls & hotels would significantly contribute to the opening of new F&B outlets. Approximately 16 new malls and two real estate developments in Lusail and Msheireb are scheduled to commence operations within the next few years giving rise to an estimated 1,870 new F&B outlets.

1.2 Food Security

Contrary to most countries in the GCC region, Qatar's strategy encourages local production by boosting crop yields through massive investments and converting semi desert spaces into arable land. The Qatar National Food Security Program (QNFSP) was launched in 2011. The program aims at developing strategies to meet about 60% of its food needs through domestic production. By modernizing agricultural practices, implementing the latest technologies, subsidies to attract private investors and increasing the dedicated water reserves for agriculture. Qatar has made significant progress in domestic agricultural production. About 25% of vegetables consumed in Qatar are now produced locally. Using its revenue from the oil and gas exports, Qatar is able to finance its expensive ambitions, given the high cost of water desalination and making land cultivable by using fertilizers.^{1 2}

¹<https://portal.www.gov.qa/wps/portal/topics/Environment+and+Agriculture/nationalfoodsecurityprogram>

² Food Security Strategy in Qatar: <https://www.ecomena.org/food-security-qatar/>

The annual Global Food Security Index (GFSI) 2019 published by The Economist Intelligence Unit, has revealed Qatar to be the number one nation for food security among 15 Middle Eastern and North African countries. See: Qatar ranked first in the Arab World in indicators of achieving food security. ³

In January 2020 the Ministry of Municipality and Environment published the New Qatar National Food Security Strategy 2018-2023⁴.

1.3 Import Dependency

The food and beverage (F&B) sector in Qatar rely heavily on imported raw materials. Even though there are many suppliers in Qatar, so the cost of switching suppliers is low, the sector is still highly dependent on global supply chains because it imports most of its raw materials. The Qatari government is taking steps to reduce the country's reliance on imported food and beverages. For example, the government is investing in domestic agriculture and food processing. However, it is likely that Qatar will continue to import a significant portion of its food and beverages in the foreseeable future.

Despite efforts to increase domestic agricultural and livestock production, Qatar will remain heavily dependent on food imports. For example, the growing dairy industry does not automatically mean that the country will be able to reduce its dependence on food imports, since animal feed still must be imported. Driven by abundance over the last decade, the local consumer demands a variety of food and beverage options that are not produced locally.

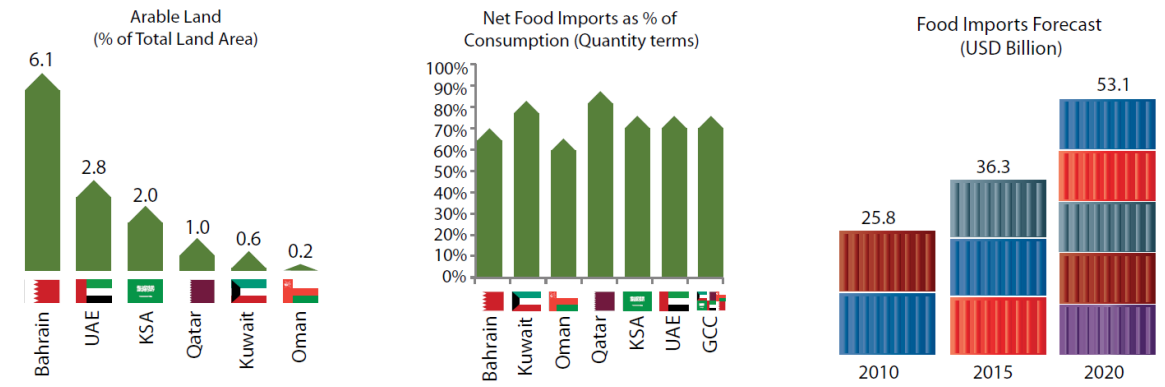
The Qatari government has undertaken numerous initiatives to encourage its local companies to expand into regional and international markets, as envisioned in Qatar National Vision 2030. These initiatives include the establishment of Hamad Port, participation in food expos and development of new malls and hotels.

The establishment of a new major seaport in Qatar (the Hamad Port) will assist in finding export markets for local companies operating in the F&B sector. In addition to finding export markets, the development of this major seaport will also allow convenient import of raw materials related to the F&B industry. Therefore, Hamad port, with its geostrategic location, will allow local companies to charter new trading routes and strengthen trade relations with external markets.

In 2021, the Qatari government launched a new initiative to promote the export of Qatari food and beverage products to international markets. The initiative includes a number of measures, such as organising trade missions, participating in trade fairs, and providing financial assistance to exporters. Furthermore, The Qatar Development Bank launched a new program in 2022 to support the development of small and medium-sized enterprises (SMEs) in the food and beverage sector. The program provides SMEs with access to funding, training, and mentorship (QNA, 2023).

³ Qatar on right track for national food security: <https://m.gulf-times.com/story/626400/Qatar-on-right-track-for-national-food-security>

⁴ <http://www.mme.gov.qa/pdocs/cview?siteID=2&docID=19772&year=2020>



Source: AADO, Farrelly & Mitchell Research, EIU

1.4 FIFA World Cup

The hosting of the FIFA World Cup 2022 had a significant impact on the food and beverage sector of Qatar. The tournament brought in over 1.2 million visitors, who spent heavily on food and drinks. According to Qatar Tourism, the food and beverage sector generated over QAR 5 billion in revenue during the World Cup. This represents an increase of over 20% compared to the same period in 2021. The World Cup also created a number of new jobs in the food and beverage sector. The Supreme Committee for Delivery & Legacy estimates that over 10,000 people were employed in the sector during the tournament. The World Cup also helped to raise awareness of traditional Qatari cuisine. Many visitors to Qatar had the opportunity to try traditional Qatari dishes for the first time.

2 Qatari F&B Imports

2.1 Pre-Blockade Food Imports of Qatar

Qatar agri-food imports have grown at 4.21 per cent (CAGR4) in recent years, reaching \$5.3 billion in 2022. Rice is Qatar's top agri-food import, valued at \$188 million in 2022. As shown in Table 1, other important agri-food imports include lamb, live sheep, frozen chicken fowls, frozen chicken cuts, food preparations, bread and pastry, frozen boneless beef, chocolate and other preparations, bran, wheat, milk and cream powder and fresh or chilled boneless beef. Most of these imports are used in traditional meals in Qatar, which are similar to those in other Middle Eastern countries. Beef, chicken, and vegetables are part of traditionally popular stews, such as "machboos" and "saloonia," often served at family gatherings.

Notable in Table 1 is the growth of frozen boneless beef imports at 25.8 per cent CAGR from \$44 million in 2018 to \$110.5 million in 2022, which corresponds to an increase in volume of almost 9,000 tonnes for the period. Wheat has more than doubled in the same period, reaching \$92 million in 2022. Bread and baked imports grew at 13.4 per cent CAGR. Baked goods are viewed as tasty and convenient and are particularly popular with children and adults for breakfast. They are also eaten as snacks, so demand is strong all year round. All income groups buy baked goods as these products are affordable and widely available. Frozen chicken cuts, and milk and cream powder imports increased at 13.4 and 11.8 per cent CAGR, respectively.

2.2 Major Imports by Product

Table 1 – Top Qatari agri-food imports

Description	Total 2018-2022 \$	2018 \$	2019 \$	2020 \$	2021 \$	2022 \$	CAGR %
Total	22,133,267,286	4,474,472,461	4,308,838,163	4,223,512,549	3,850,094,534	5,276,349,579	4.21
Semi-milled or wholly milled rice	989,367,001	201,894,005	215,566,981	228,614,635	154,444,476	188,846,904	-1.66
Fresh or chilled lamb carcasses	861,933,756	249,257,456	224,716,274	203,774,234	60,456,884	123,728,908	-16.06
Live sheep	844,195,683	183,422,790	159,338,770	176,104,899	145,291,579	180,037,645	-0.46
Frozen chicken fowls	742,281,384	133,781,823	139,729,203	139,905,433	107,419,607	221,445,318	13.43
Frozen chicken cuts and edible offal of fowls	631,290,206	106,896,414	128,821,418	108,006,288	110,537,972	177,028,114	13.44
Food preparations	458,990,081	69,779,537	75,545,896	84,838,115	103,472,700	125,353,833	15.77
Live horses	411,108,868	94,235,767	19,071,885	17,397,278	147,103,751	133,300,187	9.06
Bread, pastry, cakes, biscuits	409,688,450	67,507,683	72,161,817	81,032,115	76,673,614	112,313,221	13.57
Frozen boneless beef	336,563,977	44,119,525	53,122,653	60,671,923	68,123,171	110,526,705	25.81
Chocolate and other preparations	320,378,189	73,456,185	54,730,367	64,850,610	46,622,339	80,718,688	2.39
Bran, sharps and other residues of wheat	310,190,081	115,829,733	44,241,560	47,187,242	36,139,786	66,791,760	-12.86
Wheat	306,429,728	39,200,791	42,798,996	63,811,019	67,724,655	92,894,267	24.07
Milk and cream powder unsweetened > 1.5% fat	303,025,570	54,072,662	61,522,041	60,132,243	42,846,857	84,451,767	11.79
Fresh or chilled boneless beef	297,697,078	45,570,373	49,731,399	58,423,907	60,557,651	83,413,748	16.32

2.3 Qatari F&B Imports

Table 2 shows Qatar's list of diverse agri-food suppliers. India leads this list, accounting for 11.4 per cent in value of all Qatar agri-food imports in 2022. Completing the top 10 suppliers list are Australia, Turkey, United States (U.S.), Brazil, the Netherlands, Oman, Iran, France and the United Kingdom (U.K.). In recent years, Qatar has expanded its trade relationship with other countries including Brazil, Kuwait, and some countries in Southeast Asia. Brazil has significantly increased its exports of poultry products to Qatar with a CAGR of 18.8 per cent in all agri-food products for the period 2018 to 2022, becoming Qatar's third largest supplier in 2022, as shown in Table 2.

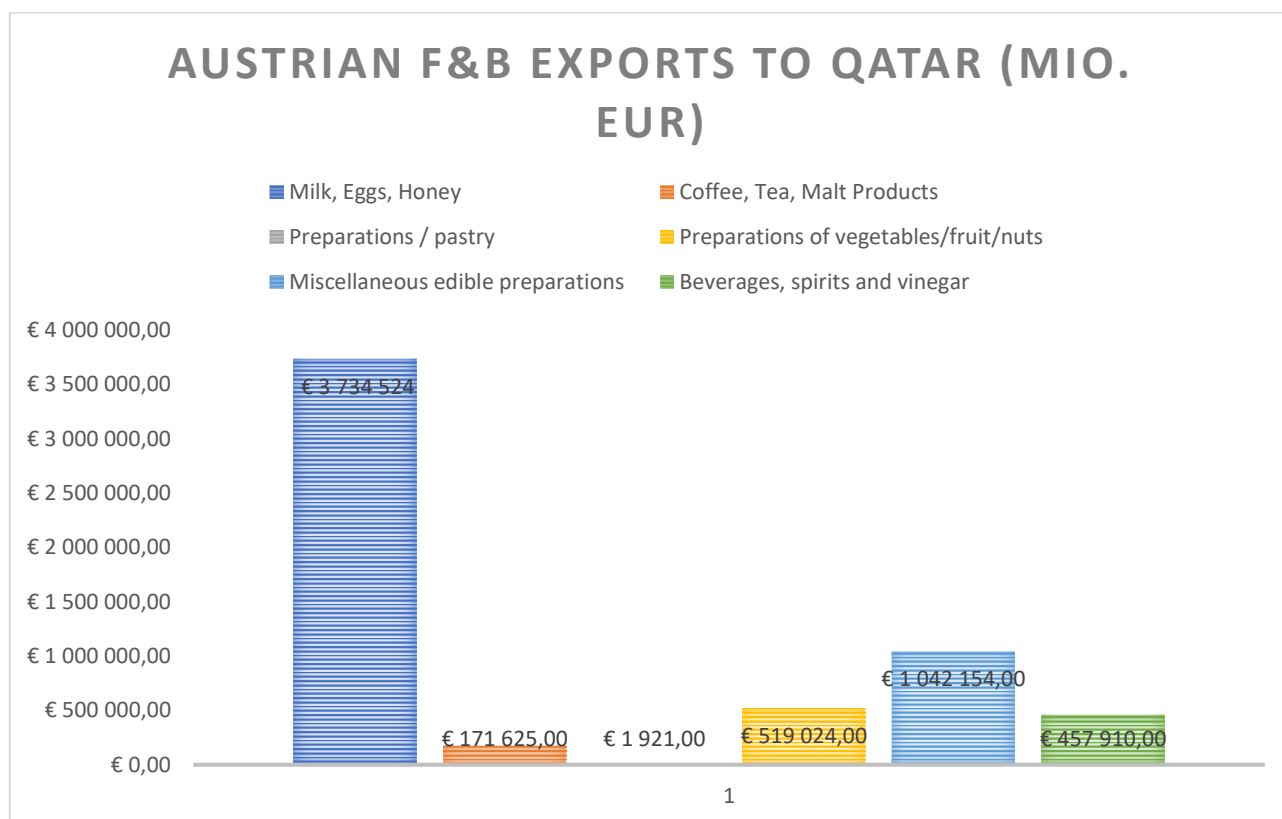
Table 2 – Top 10 suppliers of agricultural and agri-food products to Qatar

Countries	Total 2018-2022 \$	%	2018 \$	2019 \$	2020 \$	2021 \$	2022 \$	CAGR %
World	22,133,267,295	100.00	4,474,472,455	4,308,838,169	4,223,512,562	3,850,094,534	5,276,349,575	4.21
India	2,562,334,529	11.58	518,272,444	488,039,841	515,672,716	440,221,529	600,127,999	3.73
Australia	1,736,086,112	7.84	418,546,699	429,288,148	382,844,304	221,781,460	283,625,501	-9.27
Türkiye	1,362,377,997	6.16	241,011,614	262,074,384	236,324,918	223,372,150	399,594,931	13.47
U.S.	1,332,876,390	6.02	244,665,278	248,557,107	273,565,204	226,380,453	339,708,348	8.55
Brazil	1,175,685,401	5.31	187,668,066	214,683,628	208,872,074	191,514,756	372,946,877	18.73
Netherlands	988,614,639	4.47	186,200,513	188,489,425	191,942,357	166,577,593	255,404,751	8.22
Oman	812,447,113	3.67	165,163,382	164,715,179	150,235,596	124,514,929	207,818,027	5.91
Iran	776,351,226	3.51	208,276,930	152,886,767	145,675,833	159,481,815	110,029,881	-14.75
France	646,730,711	2.92	128,532,953	141,902,928	148,457,656	84,953,692	142,883,482	2.68
U.K.	587,341,326	2.65	117,840,109	125,207,960	116,360,644	98,535,752	129,396,861	2.37

Source: Global Trade tracker – June 2023

2.4 F&B Imports from Austria

Austrian F&B enjoy a solid demand in Qatar. Even though Austria ranks only 34th as a supplier of the Qatari market, the Austrian suppliers are well known among the demanding clientele – be it expats or Qatari nationals. With over EUR 5 Mio. in beverage exports, Austria is one of the market leaders in this field. Austrian Energy Drinks and organic juices are well positioned in all points of sale of the country.

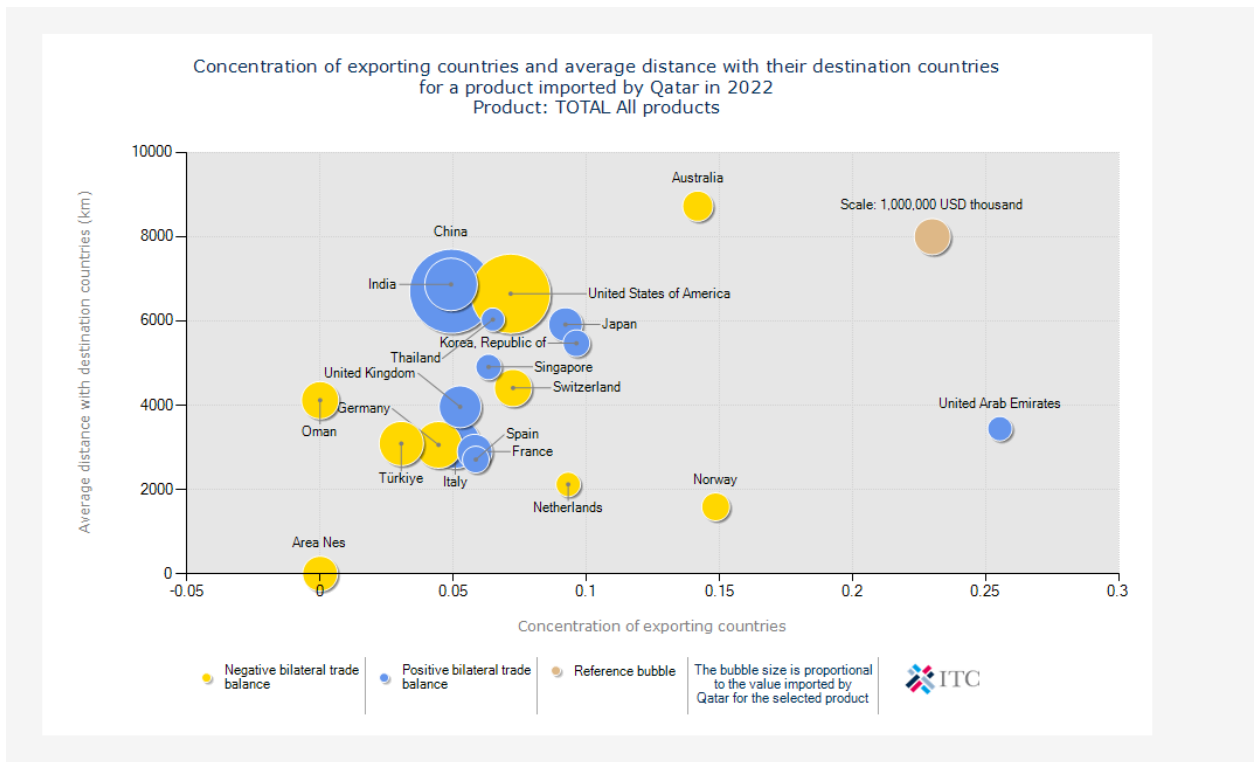


In 2020, the breakdown of expenditures shows that the following amounts were spent on different categories: 486,427.00 Euros on beverages, 640,304.00 Euros on edible preparations, 387,012.00 Euros on vegetable and fruit preparations, 63,232.00 Euros on cereal and pastry products, 67,562.00 Euros on coffee and spices, and 1,266,747.00 Euros on milk, eggs, and honey. The following year, the expenses changed to 406,450.00 Euros for beverages, 653,632.00 Euros for edible preparations, 455,143.00 Euros for vegetable and fruit preparations, 417,210.00 Euros for cereal and pastry products, 42,752.00 Euros for coffee and spices, and 1,687,599.00 Euros for milk, eggs, and honey. The years 2022 and 2023 also showed fluctuations in expenditure, with varying amounts spent on each category, giving a comprehensive overview of the changes over time.

In 2023, the import of food and beverage products included a variety of items. These products were categorized into different groups with corresponding monetary values. The categories and their respective values in Euros are as follows:

- Beverages, spirits, and vinegar: 457,910.00 Euro, mainly consisting of water and flavored water products.
- Miscellaneous edible preparations: 1,042,154.00 Euro, including food preparations, extracts, essences, and concentrates from tea or mate.
- Preparations of vegetables, fruit, nuts, or other parts of plants: 519,024.00 Euro, primarily comprising jams and fruit juices.
- Preparations of cereals, flour, starch or milk; pastrycooks products: 1,921.00 Euro, such as waffles, pizzas, and quiches.
- Coffee, Tea, Mate, and Spices: 171,625.00 Euro, involving both caffeinated and decaffeinated coffee.
- Milk, Eggs, Honey: 3,734,524.00 Euro, encompassing milk, cheese, and honey.

These notes provide insight into the significant import values for various food and beverage categories in 2023.



Source: www.trademaps.org

3 Local Production & Companies

Qatar used to import more than 90 percent of its food, and continuously launching several initiatives and projects that aim at increasing local production and achieving self-efficiency in the basic produces.

As a result of the 2017-blockade, the Qatari government strongly supported any initiative that could have a beneficial effect on the self-sustainability of the country. By granting incentives for new projects and by facilitating the process of establishing new business, local producers were able to quickly expand their market share and were able to achieve a certain degree of self-sustainability.

3.1 Food Security Initiatives by the Qatari Government

To ensure food security, the government has successfully implemented several measures like increasing local food production and building strategic storage facilities for essential food items to provide for six months supplies. The government also diversified sources of import through exploring alternative markets, upgrading local markets and enhancing logistical services.

The National Food Security Strategy was based on basic pillars like: Development and increase of local production of fresh foods, considering.

- 1- the proper utilization of natural resources Diversification of foreign trade sources to avoid exposure to any potential
- 2- risks that may arise in crises and emergencies Formation of strategic stockpiles in the country of food commodities that can be stored for long periods.

Qatar has successfully enhanced its storage capabilities by implementing project to build food security facilities and warehouses in Hamad Port (area of more than 0.5 Mn Sq.M). The project includes storage silos, manufacturing facilities specializing in rice, raw sugar, and edible oils. The project has been equipped with

appropriate infrastructure and equipment for handling, processing, packing, reloading, and transport operations associated with the project.

Under Qatar's National Food Security Strategy 2018-2023, it was aimed to increase local meat production and increase self-sufficiency. To enhance local meat production, government has initiated a number of projects such as the following:

1. 8 projects for Red Meat Breeding and Fattening having a potential production target of 1,200 MT annually.
2. 4 projects for Aquaculture having a potential production of 3,610 MT annually.
3. 3 projects for Table Eggs having a potential production of 13,500 MT annually.
4. 2 Projects for Animal Feed Concentrates having a potential production of 50,000 MT annually.

In 2021, the government of Qatar has achieved a self-sufficiency of 18% for the fresh red meat category. The target is to achieve 30% self-sufficiency for fresh red meat by 2023. Qatar witnessed substantial growth at all levels from 2017 to 2021 to reach 1.48 Mn livestock representing 62.4% Sheep, 26.1% Goats, 8.1% Camels and 3.4% Cows.

3.2 Fishery and Agriculture

Qatar has a relatively short coastline of 563 km and coastal waters are characterized by extreme meteorological and hydrological conditions with temperatures varying from 19°C to 32°C, high evaporation rates and high salinities. Qatar waters are relatively poor in marine resources. Total capture production increased from 4,400 ton in 1999 to currently about 15,000 tons, which covers 74% of the domestic demand. The most common catch are emperor fishes (3,900 ton in 2013), followed by narrow-barred Spanish mackerel and groupers, which are a highly valuable but an overexploited resource.

The ministry paid great attention to fish farming and set up the Water Research Center in Ras Matbakh as a basic requirement for the establishment of small and medium enterprises for aquaculture in the coming years. Qatar is likely to become self-sufficient in fish supply within five years and the government is currently working on floating cage fish farming and shrimp farm construction projects.

The Ministry of Municipality and Environment aquaculture department is planning to license six projects to meet its fish production gap of 600 tonnes per year. Currently the fish requirement in Qatar reaches 46000 tonnes annually while current production stands at 40000 tonnes. Qatar is producing 1000 tonnes of fresh water fish annually and bounding to increase production in the near future with the use of modern technology to meet the growing demand.

3.3 Livestock and Poultry

The livestock sector of Qatar has experienced a remarkable surge in 2021, with 1.5 million registered heads of livestock. This significant growth has not only boosted local dairy and meat production but also instilled a sense of optimism.

In 2022, the livestock sector in Qatar experienced a substantial surge, with the number of livestock, including goats, sheep, camels, and cows, reaching a remarkable 1,537,355, as reported by the Livestock Affairs Department of the Ministry of Municipality.

Of the total, 948,983, or 62 percent, are sheep, followed by 428,147 goats with a 28 percent share. The number of camels and cows reached 116,359 and 43,866 respectively.

The statistics reveal a total of 15,644 animal keepers and 6,785 livestock farms (locally known as 'Al Adhab'). Notably, the local milk production hit 195,000 tonnes last year, marking a self-sufficiency rate of 97 percent.

Production of red meat reached 11,000 tonnes; 60,000 tonnes were available for consumption, recording 18 percent self-sufficiency. Fresh chicken production reached 28,000 tonnes; 27,000 tonnes were available for consumption, recording 104 percent self-sufficiency.

A total of 11,000 tonnes of table eggs were produced last year in the country; 37,000 tonnes were available for consumption, recording 30 percent self-sufficiency. The Livestock Affairs Department, in direct support to farms, provided 6,269 tonnes of fodders. A total of 327 keepers benefitted from the fodder support program.

The strategy for supporting livestock and developing livestock farm complexes is based on several pillars and axes, including preserving the sustainability of natural resources and working to ensure the environment's safety.

During the study period, 34 projects were licensed to produce chicken, eggs, and red meat. Twenty Projects are operating, and 14 Projects are under construction.

The Department launched several initiatives and programs to boost the agricultural sector. For example, an initiative to develop livestock farms and complexes, which began in 2019, achieved 45 percent of its target in 2021. Other initiatives include encouraging the private sector to get involved in food security projects and developing veterinary services and animal quarantine facilities.

For further information, please visit

https://ossform.qdb.qa/en/Documents/QDB_Meat%20Processing%20in%20Qatar_English_17Nov22.pdf

3.4 Agriculture and Aquaponics

According to analysts at Mordor Intelligence, Qatar's agriculture industry is expected to witness buoyant growth this year, as the market size is anticipated to reach \$170.95m (QR622.34m).

The report states that by 2029, the market size will amount to \$223.10m (QR812.20m), surging at a compound annual growth rate (CAGR) of 5.47 percent during the forecast period.

Last year, analysts at the research group noted that the market size reached about \$162.08m (QR 590.09m) and will total an amount of \$211.53m (QR 770.13m) by 2028, growing at the same CAGR.

Market experts have identified key trends that are reshaping the agriculture sector, notably the expanding adoption of high-technology farming products. These include precision agriculture tools, vertical farming systems, and automated irrigation systems, all of which are revolutionizing the way we farm and ensuring a more sustainable future.

Qatar's agriculture industry has demonstrated remarkable resilience, even in the face of challenging climates. The country's adoption of sustainable and intelligent agriculture techniques, such as Hydroponics, smart irrigation, and aquaponics, has significantly improved the utilization of arable land and the quality of produce. In 2021, Qatar launched a national agriculture project utilizing aquaponics and Hydroponics, projected to reach a production capacity of 32,000 metric tons per year. The country's ambitious aim is to achieve self-sufficiency and cover 70 percent of the market's needs by 2024. Qatar has also launched a comprehensive food security program, demonstrating its commitment to innovative solutions and sustainable systems.

3.5 Frozen Food

Qatar Frozen Food Market size will witness rapid growth during 2020-2026. Busy work life has increased the demand for ready to eat food products, which would propel the demand for frozen food products in the

country. Additionally, the time and efforts involved in the preparation of ready to eat meals are comparatively low which is another key factor driving the growth of such products during the forecast period.

Qatar Meat Production Company

Qatar Meat Production Company has Meat Processing facility operating with a state-of-the-art technology within the Middle East.

The facility occupies an area of 6000 Square Meters with more than 2000 Square Meters of refrigerated storage space; enables them to have a start-up capacity of over 3000 Tons annually, covering respective ranges:

- Frozen Processed Meat: (beef and chicken burgers, kababs, meat balls, hotdogs, frankfurter and sausages)
- Frozen Range: chicken fillet, strips, tenders, nuggets and popcorn.
- Chilled Processed Meat: beef and chicken mortadella, salami, pastrami and smoked turkey.

National Food Company (ZAD Holding)

National Food Company is in the business of further processed frozen food category and has been active in the market for more than two decades. Their brand "Al Arabia" has an extensive range of frozen food products such as nuggets, burgers, kebabs, samosas, green vegetables.

3.6 Food & Beverage Industry

The food and beverage industry in Qatar consist of number of 86 factories with almost 177 number of products that is segregated as follow:







National Food Company

- Frozen & mince meat roll
- Frozen & mince meat in bags
- Frozen & mince meat in plate
- Meat products
- Meat hamburger

Marwa International Pure Water Bottling Factory

- Drinking water in bottles - 19 Litre

Al Arabia Mineral Water & Packaging Factory

- Drinking water in bottles
- Drinking water in bottles - 19 Litre
- Drinking water in cups
- Drinking water in bottles - 5 Litre

Al Wajbah Water Factory

- Artificial mineral waters in bottles

Arab Qatari Company For Poultry Production

- Poultry, fresh or chilled
- Table eggs
- Poultry food

Qatar Foods Industries Company "Foodco" - Branch

- Palm oil
- Sunflower oil
- Canola oil
- Corn oil
- Vegetable oil

Al Mana Coca Cola Company

- Drinking water in bottles
- Carbonated drinks

Qatari Tunisia Food Industries Company

- Olive oil packing

Ali Bin Ali Beverage Company

- Concentrated juice in bottles 20 Litre
- Concentrated juice in bottles 5 Litre
- Drinking water in bottles - 0.350 Litre
- Carbonated water in bottles of glass - 0.355 Litre
- Carbonated water in bottles of plastic - 1.25 Litre
- Carbonated water in bottles of plastic - 0.5 Litre
- Carbonated water in bottles of plastic - 2.25 Litre

Conserved Foodstuffs Distributing Company - Khazan Qatar

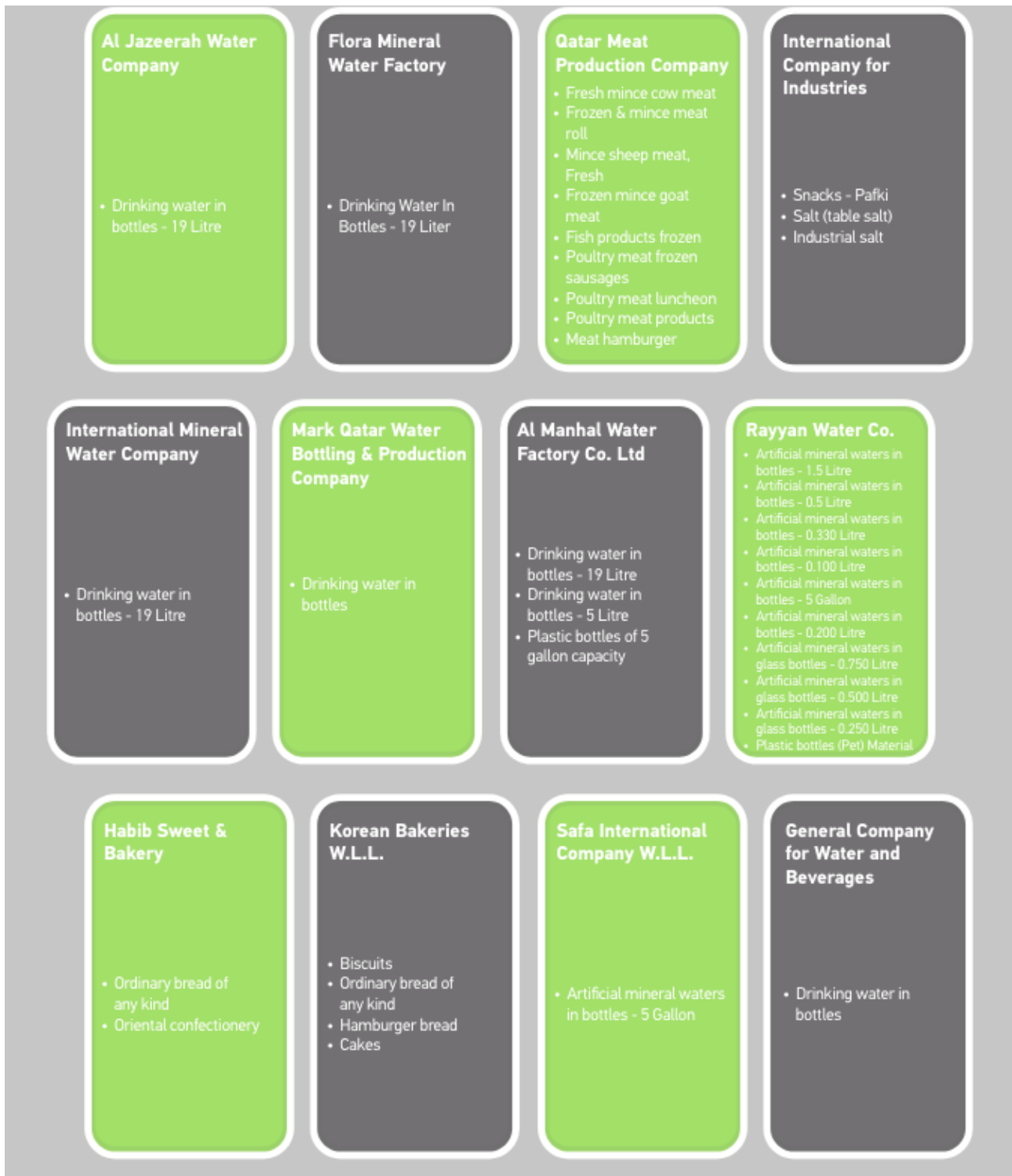
- Sugar packing
- Potato chips
- Pop corn
- Drinking water in bottles - 1.5 Litre
- Drinking water in bottles - 0.5 Litre
- Drinking water in bottles - 0.350 Litre
- Drinking water in bottles - 15 Litre
- Plastic vottles (Pre-form)

Qatar Food Factories Co. W.L.L - Qatar Pafki

- Potato chips
- Pop corn
- Pop corn with novtella

Qatar Flour Mills Co.

- Packed barley
- Flour
- Macaroni
- Bakery products
- Cakes
- Wheat flour bran









4 F&B Outlets, Stores and Wholesalers

4.1 Retail & Supermarkets

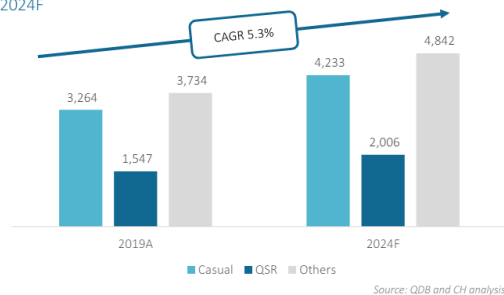
The Qatari middle market itself is also continuously expanding. The local supermarket chain Al Meera remains dominant in the Qatari market, even though there are a large number of international players operating in the segment, as Al Meera included 58 branches by the end of 2018 (53 in Qatar and 5 in the Sultanate of Oman) ; The Al Meera Group also operates the country's Géant hypermarket and WHSmith bookstores. Meanwhile, the international Spar Group began its operations in Qatar in 2017 at Tawar Mall, followed by opening two other stores in 2018 in B-Square Mall and Zero3 Mall. The Carrefour international hypermarket chain is present in Qatar through 12 outlets in malls in Doha (City Center, Villaggio Mall, Ezdan Mall , Landmark Mall, Dar El Salam Mall, Lagoona Mall, Al Mirqab Mall and Mall of Qatar) and in Al Wakrah. The chain is regionally operated by Majid Al Futtaim Retail. Monoprix has three outlets in Qatar and is the most high-end retailer in the country.

4.2 F&B Outlets

Qatar's F&B sector in 2023 is a vibrant blend of tradition and modernity, driven by its diverse population and international events. The sector is evolving rapidly, adapting to new trends and consumer preferences.

Qatar's demographic is skewed towards a young urban population that prefers the convenience of dining out as compared to eating at home. This, coupled with the high per capita income, limited entertainment options due to the weather conditions and the interest for diversified F&B outlets has supported the rapid growth of the local F&B sector. Qatar's pursuit of increasing population and tourism are other key factors which have encouraged the F&B sector to flourish however, the recent past has delivered a number of challenges for business owners to contend with including the blockade imposed on Qatar in 2017 and, more recently, the unprecedented situation caused by the COVID-19 pandemic. With the blockade being lifted during 2021, and the impact of the COVID-19 pandemic seemingly coming to an end, there is a renewed optimism about the sector which is expected to experience a significant boost at the end of the year as a result of the FIFA World Cup 2022 ("FIFA2022").

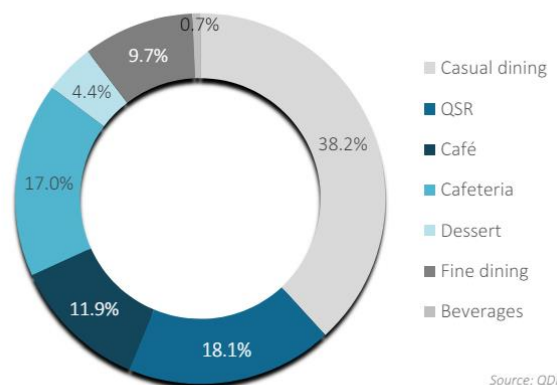
RESTAURANT MARKET: SEGMENT BREAKDOWN (QARM): 2019A – 2024F



	INDIAN	ITALIAN	FAST FOOD (AMERICAN)	ARABIC	OTHERS
Casual dining	12.0%	11.0%	6.0%	16.0%	55.0%
QSR	16.0%	N/A	22.0%	17.0%	45%
Fine dining	5.0%	11.0%	N/A	5.0%	79.0%

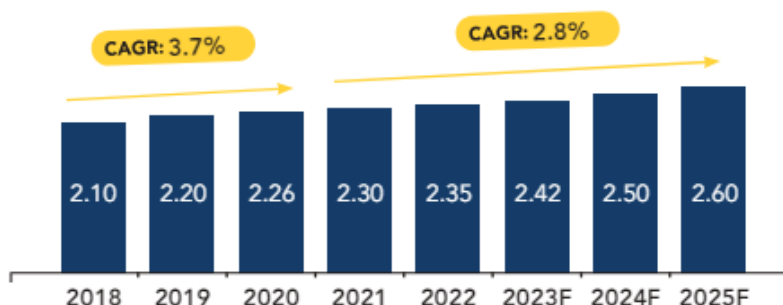
Source: QDB

RESTAURANT MARKET: BREAKDOWN BY CATEGORY



4.3 Wholesale

Qatar`s food production industry accounts for approximately 10% of the countries domestic consumption. Qatar depends mainly on food imports for local needs. Food consumption was forecast to grow at a compound annual growth rate (CAGR) of 10% up to 2019 for international entrepreneurs and traders, as well to the manufacturers, suppliers, food technology companies, and hospitality services on food and beverage.



Source: Food Security Department, Qatar

The F&B products segment, characterized by a large presence of international brands, either manufactured regionally through local factories or imported through distributors, accounts for the lion`s share of the market at 70%. However, the food service segment, led by international chains and represented by regional franchise partners, is set to outperform the sector`s growth, expanding by 8.4% annually until 2021⁵.

The key F&B Importers in Qatar are the following:

Company	Telephone/Fax	Website	Sector
Nasser Bin Khaled and Sons Trading Company	T +974 44516301 F _874 44883009	Not available	Importer/Distributor Whole Categories
Qatar National Import and Export Company	T +974 4456 2222 F +974 4456 2299	www.qnie.com	Importer/Distributor Representation of some Austrian Products
Doha Drug Store	T +974 44506245 F +974 44605322	www.dohadrugstore.com	Importer/Distributor Representation of some Austrian Products
Ali Bin Ali Establishment	T +974 4446 9888/ 4469 7777 F +974 4436 9911	www.alibinali.com	FMSG/Restaurants/ Ownership of Supermarket
Friendly Food Qatar	T +974 44686363 F +974 44685757	www.friendlyfoodqatar.com	FMCG / Horeca Distribution
Quality Food Services W.L.L.	T +974 44500901 +974 44419190 F +974 44500902	www.qualitygroupintl.com	FMCG/Restaurants
Benina Food Qatar	T +974 44887283	www.beninafood.com	FMCG /Delicatessen
ABUISSA Marketing & Distribution	T +974 44466969	www.abuissa.com	FMCG/Ownership of Restaurants

⁵ <http://www.gulf-times.com/story/581856/F-B-market-in-Gulf-set-to-grow-to-196bn-by-2021>

Arizona Trading Company	T +974 44551526 F +974 44661529	www.arizona-qatar.com	FMCG Product
Brouq Food Trading	T +974 44472124 F +974 40396500	www.brouqtrading.com	FMCG
Broadway International Agency	T 974 44116077 F 974 44116022	www.bgcqa.com	FMCG products/Distribution

5 Regulatory Framework

The Government of Qatar continues to develop its standards regime to meet internationally and regionally recognized norms and practices, such as the International Standardization Systems Organization (ISSO). The Qatar Laboratories and Standardization Affairs is in charge of developing and conformity assessment body for Qatar. However, Qatari government ministries such as the Ministry of Public Health, the Ministry of Energy, Ministry of Commerce and Industry, and Ministry of Municipality and Environment provide recommendations for standards. The Qatar Laboratories and Standardization Affairs continually develop new standards and criteria for various items and merchandize.

Ministry of Public Health

Food Safety Department – Ports Health and Food Control Section

T +974 44070226

E port.health@moph.gov.qa

W www.moph.gov.qa

5.1 Import Regulations

Qatar's Customs and Ports Law covers all aspects of the import and export of goods to and from its ports: Hamad International Airport, Salwa Overland Customs, Mesaieed Port, Doha Port and Ras Laffan. Qatar has strict regulations, which must be adhered to, in order to obtain customs clearance of goods. All goods must be recorded on a customs declaration form and a manifest presented to the customs authority on arrival. Failure to comply with the customs law may result in delays, holding of goods, penalties, storage/demurrage fees, or the return of goods to origin. In serious infringements, legal action may be taken.

General Authority of Customs

P.O. Box 81, Doha, State of Qatar

P +974 4441-1149

F +974 4441-4959

W www.customs.gov.qa/eng/

Port Health and Food Control Section / Ministry of Public Health (MOPH) have the authority to control imported food under the provisions of the Food Control Law No. 8 / 1990, amended by Law No. (4) / 2014. Port Health and Food Control Section follows Food Safety and Environmental Health division / Public Health Department, control over all imported food: fruit, vegetables, species, meat and meat products, milk, fish and all other foods that are imported to Qatar from all over the world.

Qatar Technical regulations and standards are the references to comply imported Foods. Any foodstuff matching with the requirements released for use and any foodstuff proves to be unsafe or noncompliance (destroyed or re-exported).

Qatar Technical Regulations and Standards can be divided into two groups: General group includes general requirements for all types of food as Qatar Technical regulation No. QS 9 (labeling requirements), Qatar Technical regulation No. QS2500 (List of permitted additives), Qatar Technical regulation No. QS 150 (Mandatory Expiration dates for food products). The second group can be called specific group which determine the specific requirement for each type of food.

With the implementation of the food importers pre-registration system, Qatar wants to make sure that imported products comply with Qatar standards requirements. The **registration process** can be completed online on the homepage of the relevant authority.

5.2 Import Procedures

All importers are required by law to have an import license. Import licenses are issued only to Qatari nationals, or to the Qatari partner in a limited liability partnership and must be registered with the Ministry of Economy and Commerce. This regulation also applies to foreign owned entities operating in Qatar.

Qatar Laboratory Sampling

Random samples are collected routinely from meat and poultry products entering Qatar. The product is examined for Pesticides, Salmonellae, and other pathogenic bacteria.; Total bacteria counts.; Heavy metals.; Species identification tests for pork tissue, including lard, in formulated product.

Recommended shelf life for frozen beef and poultry products is twelve (12) months; for minced meats, it is nine (9) months; for fresh beef, it is 21 days; and for fresh mutton, it is 14 days.

Eligible Products

- Fresh/frozen red meat and meat products, except pork.
- Fresh/Chilled and frozen poultry and poultry products.
- Poultry products heated to a core temperature of 70°C for at least 3.6 seconds or 74°C for at least 1 (one second).
- Pork and pork products: Only through the Qatari based "Qatar Distribution Company", which is the only company authorized by the Qatari Government to import pork and pork products into Qatar.

Labeling Requirements

Fresh/frozen meat and poultry, packaged meat and poultry must bear the following structures: Production (slaughter/freezing) and expiration dates. Date format requirements for Qatar must conform to the following: Day/Month/Year for products with a shelf life of three (3) months or less.

For products with a shelf life of more than three (3) months, both the Day/Month/Year and Month/Year formats are acceptable. Dating should be in numeric format and bilingual (English/Arabic). Arabic stickers are allowed.

A statement that the product has been slaughtered according to Islamic principles is required. Metric Net Weight - Presently, Qatar has a tolerance of 10 percent variation in the labeled net weight. The Country of origin must be mentioned on the label.

Certification Requirements

All imported meats, including beef and poultry products, require a health certificate issued by the country of export and a "Halal" slaughter certificate issued by an approved Islamic center in that country. Islamic Information & Documentation Certification GmbH is an approved center by Qatar for Halal and Halal Slaughterhouse Certificates.

Handling/Storage Requirements

Special Handling - Qatar requires that instructions for consumers concerning storage, preparation and other special handling requirements accompany shipments.

Packaging - Vacuum packaging is not required.

Documents

Qatar Customs will only accept official invoices, official Certificate of Origin (COO) & packing lists; these are now mandatory. Shipment without these documents will not be cleared under any circumstances and shall be returned back to origin.

It is now mandatory to write the HS CODE of the Commodity in the official invoices and COO; otherwise Shipment will not be accepted for clearance.

“COUNTRY OF ORIGIN” OR “MADE IN” fields are mandatory for each piece, on materials, and on cartons.

Shipments originating from Europe: Please mention clearly on the COO the country of origin. Example: ‘Country of Origin: European Community – Austria. If the Products are made in two different countries, the Country of Origin should be both countries in the COO, Invoice, and on the materials. Example: **‘European Community – Austria & Germany.’**”

The ‘COUNTRY OF ORIGIN’ OR ‘MADE IN MARK’ details on the shipment should match the information on the Official Invoice, COO, and on the materials. (Any discrepancies will cause the shipment to be returned to the origin.)

Import Documentation

There are some special requirements for food clearance at Doha customs, below are the import documentation.

- Invoice, packing list and the CO is a must with all documentation requirement.
- Legalized Health Certificate issued by concerned health department/Ministry and attested by the Qatari Embassy/Consulate from Origin.
- The date of production and expiry must be clearly shown on each sale unit. Stick-on labels are not acceptable.
- The ingredients of each item should be printed both in Arabic and English language with indelible ink with correct quantity and weight.
- Phytosanitary certificate for leaves and vegetables, issued by NPPS (National Plant Protection Organization) from the Origin.
- Non-Radiation certificate for all shipments from European Union and Japan and should be attested by the Qatari Embassy/Consulate from Origin.
- The Shipment must have +60% shelf life while arriving in Qatar. Otherwise, PHD will destroy the items at consignee’s expense.

The following documents are required for imported foods:

- Commercial invoice
- Packing list
- Bill of Lading
- Health certificate from the country of origin; please refer to Appendix 2 for template.
- Halal slaughter certificate (for poultry and meat products)
- Certificate of origin
- Radiation free certificate (for European products only)
- Spices must be accompanied by a certificate stating that it is free of pesticides and herbicides.

The invoice, Halal slaughter, health, and country of origin certificates must be notarized by the Qatari Embassy or Consulate in the exporting country. Please refer to appendix 3 for template.

Rejected consignments for health/quality reasons must be returned to the country of origin or destroyed within maximum of two weeks. This grace period can be extended if extenuating circumstances exist. Health certificates are required for all food products. While health certificates for meat products are issued regularly, obtaining certificates for processed food products such as grocery items can prove challenging for exporters. In most cases, exporters can obtain health certificates from their respective State governments. Products denied entry due to labeling infractions may later be cleared upon appeal to the Food Control Section of PHD/NHA, provided the infraction was minor. Labeling infractions deemed serious will result in rejection of a shipment with little chance of a successful appeal. Serious labeling infractions include label tampering, missing or incorrectly printed production/expiry dates and dates printed on stickers rather than the original label/packaging.

5.3 Taxes & Duties

All goods imported into Qatar are subject to customs duties, based on a percentage value of goods (typically 5%), or a per unit basis. The value of goods is calculated according to the Regulations under the Customs and Ports Law.

Qatar-Customs and Import Duty Calculator <https://customsdutyfree.com/qatar-customs-and-import-duty-tax-calculation-method/>

Excise tax

The Qatar Excise Tax Law No. (25) Of 2018 comes into effect on 1 January 2019 and is the foundation of the new Excise Tax system that Qatar is introducing and is based on the Common Excise Tax Framework signed by the six Gulf Cooperation Council ("GCC") states. Excise Tax will be administered by the newly established General Tax Authority ("GTA") which replaces the Qatar Tax Department ("QTD") as the competent authority for managing all taxes in Qatar. The Qatar Excise Tax Law sets out the various rules and obligations for taxpayers.

The Excise Tax Executive Regulations, which have yet to be published, is expected to provide more details on the compliance requirements relating to Excise Tax. A copy of the Qatar Excise Tax Law (in Arabic) and other key information is now available on the General Authority of Customs (GAC) website http://www.customs.gov.qa/eng/EX_Tax.php

General Tax Authority

The General Tax Authority ("GTA") has been established as a separate entity, under the supervision of the Ministry of Finance, and oversees the implementation of all taxes in Qatar.

Excise Tax is applied to the import, production, stockpiling and storing of excise goods. Excise Tax is applicable on the following goods at their respective tax rates:

- Tobacco products – 100% tax rate
- Carbonated drinks (non-flavored aerated water excluded) – 50% tax rate (HS Code 22090090)
- Energy drinks – 100% tax rate HS Code 22029090)
- Special goods – 100% tax rate


5.4 Halal

A certificate of Islamic (Halal) Slaughter is required. Exporters may obtain a Certificate of Islamic Slaughter from a member of an Islamic Center or Islamic organization listed below. A certificate of Islamic Slaughter is a certificate issued by a member of a Muslim organization recognized by the importing country to provide this service; the certificate states that animals were slaughtered according to Moslem religious requirements. This certificate must accompany products labeled "Halal". The certificate must be endorsed by the Qatar Consulate in the exporting country and must accompany all shipments. In the absence of a Qatari Embassy/Consulate, endorsement by any of the GCC or Arab Embassy/Consulates will be accepted.

Halal certification will be required for the following products:

Fresh/frozen unprocessed products bearing Halal label claims must be accompanied by an appropriate Halal certificate. Alternatively, a written assurance from the exporter that an appropriate Halal certificate will be supplied to accompany that shipment before it reaches its destination.

Processed products with Halal label claims, raw materials used in processed products with Halal label claims must be accompanied by an appropriate Halal certificate.

Austria	Islamic Information & Documentation Certification GmbH (IIDC)		29 Oct 2018
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See: HALAL Certification in Qatar: <https://blipsnip.com/halal-certification-in-qatar/>

6 Trends, Business Opportunities & SWOT of the Qatari F&B Sector

The annual food consumption in Qatar is expected to grow mainly due to population growth, urbanization, the widening upper class, and the growing expatriate population. Food consumption is also positively impacted by growing tourism levels, driven by the 2022 FIFA World Cup.

As part of The Qatar National Vision 2030, the country has been actively expanding its international relationships to diversify its sources of food imports since the 2017 Gulf Rift. The Qatari plan consists of the creation of a national food security system that includes price, availability, nutritional quality, and safety that requires a combination of production, trade, and forward planning. This government plan has already started to materialize in 2022, with countries as far as the southern tip of the Americas, Brazil and Uruguay becoming top suppliers of chicken and milk powder, respectively.

Boneless beef (fresh and frozen) imports have seen a CAGR of 21.3 per cent for the 2018 to 2022 period, reaching \$193.9 million in 2022. Retail volume sales of meat will continue to expand at a robust pace during the forecast period 2023 to 2027, as population continues to grow. Wheat imports have also seen an increase from 191,000 tonnes in 2018 to 213,000 tonnes in 2022 in volume, valued at \$93 million in 2022 with a CAGR of 24.1 per cent for the 2028 to 2022 period.

The dairy category shows continuous growth with a CAGR of 11.8 per cent (2018-2022). The top four suppliers were Oman, the Netherlands, France and Uruguay.

Table 3 – Qatar total global agri-food imports of specific products by category (in value)

Description	Total 2018-2022 \$	% of total imports	2018 \$	2019 \$	2020 \$	2021 \$	2022 \$	CAGR %
Total agri-food products	22,133,267,286	100.00	4,474,472,461	4,308,838,163	4,223,512,549	3,850,094,534	5,276,349,579	4.21
Chicken products total	1,528,210,354	6.90	268,884,380	296,589,571	276,518,646	241,743,583	444,474,174	13.38
Frozen and fresh boneless beef	634,261,055	2.87	89,689,898	102,854,052	119,095,830	128,680,822	193,940,453	21.26
Wheat	306,429,728	1.38	39,200,791	42,798,996	63,811,019	67,724,655	92,894,267	24.07
Milk and cream powder unsweetened	303,025,570	1.37	54,072,662	61,522,041	60,132,243	42,846,857	84,451,767	11.79
Potatoes (prepared or preserved)	217,159,901	0.98	31,906,813	44,250,462	44,993,140	37,887,341	58,122,145	16.18
Pork products	130,651,880	0.59	39,023,032	32,557,732	20,457,700	15,309,174	23,304,242	-12.09
Beans (dried, fresh or chilled, preserved)	93,454,317	0.42	16,982,374	17,602,237	21,122,002	16,121,397	21,626,307	6.23
Honey	59,649,994	0.27	9,186,201	10,950,371	14,690,486	12,145,787	12,677,149	8.39
Green peas (fresh, frozen and prepared)	36,085,722	0.16	6,837,219	6,876,273	7,472,453	6,245,470	8,654,307	6.07
Dried, shelled chickpeas	32,647,006	0.15	7,003,557	5,297,426	5,792,555	6,275,712	8,277,756	4.27

Source: Global Trade tracker – June 2023

Prepared potatoes are becoming a popular food product in Qatar. Frozen fries are widely popular among children and also attracting adults as an easy and tasty snack or meal component. Qatar imported close to 28,000 tonnes of processed potatoes in 2022, valued at \$58.1 million with a CAGR value of 16.2 per cent for the 2018 to 2022 period.

Pork products are only available to expatriates carrying a license and they are only sold via the country's licensee – QDC in Doha. In 2022, Qatar imported 6,000 tonnes of pork products, up four per cent from 2018. In 2022, pork imports were valued at \$23 million, with sausages and similar products being close to 80 per cent of the total. Turkey, the Netherlands, the Philippines, the U.S. and Brazil were the main suppliers.

Shelf stable beans are also very popular among Qataris, and baked beans with the expatriate population. Canned chickpeas and other beans are widely used in cooking, due to their convenience in comparison to

dried alternatives. In 2022, chickpeas imports reached \$8.3 million with a CAGR of 4.3 per cent for the 2018 to 2022 period. In the case of beans, imports reached \$21.6 million in value and a CAGR of six per cent for the 2018 to 2022 period

Honey imports have been growing steadily year after year. They reached 1,900 tonnes in 2022, an increase of 600 tonnes with respect of 2018 and a total value of \$12.6 million. The CAGR for the 2018 to 2022 period was 8.3 per cent.

Green peas are viewed as a nutritious convenient food to keep in stock. The demand for processed green peas comes from their use in a wide range of dishes. In 2002, imports of green peas reached \$8.6 million, with frozen processed green peas representing over 42 per cent of the total in value. Frozen processed peas reported a CAGR of 5.3 per cent for the 2018 to 2022 period.

Qatar may be an interesting market to explore, considering the growth of specific food categories, its desire to expand its already diverse pool of suppliers, and the fact that it has one of the highest purchasing power per person rates in the world.

6. Trends

- ⇒ The growing proportion of working couples is expected to spur the demand for packaged foods and ready meals as well as eat-out options.
- ⇒ The expansion of the non-oil-sector is expected to attract a bigger variety of expats.
- ⇒ Increased penetration of organized retail (hypermarkets, supermarkets) is likely to increase the demand for packaged, organic and healthy high quality processed food.
- ⇒ Due to the blockade and the increased feeling of national pride, consumers are likely to buy more "Made-in-Qatar" goods – if they are perceived as having equal or higher quality and taste. Government driven marketing campaigns as well as subsidies for local production are expected to strengthen this trend.
- ⇒ Emerging of private labels as a lower-price option for consumers.
- ⇒ Growing demand for healthy and organic foods as consumers become more educated.
- ⇒ An advancing food processing segment: the UAE and KSA have already managed to position themselves as food-processing hubs. Due to the blockade and the diversification initiatives, Qatar is increasing the number of local factories to reduce import-dependency and to utilize the re-export potential of processed foods.
- ⇒ Digitalization of the sector: digital marketing already plays a key role in influencing consumer behavior. While online shopping for groceries is still developing, online ordering for food delivery is omnipresent. Services such as Talabat, Carriage and Uber Eats are popular.

7. STRENGTHS – Qatar's competitive advantage

- Third-largest gas reserves in the world & world's leading exporter of LNG resulting in huge financial buffers allowing the economy to remain resilient during crises.
- Economic diversification strategy supporting development of non-hydrocarbon sectors
- Hosting of World Cup 2022 (followed by the Asian Cup 2027 – the bid is still ongoing; and the Asian Games 2030 – Qatar won the bid to host the Asian Games 2030) sustains infrastructure and construction activities, therefore guaranteeing a demanding consumer base.
- Sizeable and growing high-spending expatriate population.
- Food consumption is expected to receive a significant one-time-boost through the WC2022.
- High per capita income supports political stability and purchasing power of the customers.

8. OPPORTUNITIES - Growth Drivers for Qatar

- Growing consumer base.
- Developing tourism sector.

- Rising health awareness, consumers are willing to pay more and shift towards healthy food options.
- Since the beginning of the blockade, Qatar is looking for new suppliers.

WEAKNESSES


- Monetary policy dependent on the currency peg regime.
- Persistent dependence on hydrocarbon revenues to finance imports in the medium and long term.
- Formalized import procedures, high costs and document requirements.
- Hot and arid climatic conditions, scarce water resources.

CHALLENGES/THREATS

- With increasing quality of food imports arises the need to develop robust logistic infrastructures to limit transit times and food wastage.
- Reduction of government subsidies and public wages might tighten the liquidity of the consumer base in the mid-term.
- Rising geopolitical uncertainty: Possible negative impacts of rising diplomatic and geopolitical tensions.
- Volatile legal environment, leaving very little time to contribute towards the food standards and potential new taxes as well as foodstuff requirements in the market.

7 Fairs and events

The main fairs and trade shows taking place in Qatar that cover the sector of F&B goods are:

Title	Coverage	Date and venue	Website
 <p>Qatar International Agricultural Exhibition (AGRITEQ)</p>	Platform for local and international agriculture stakeholders in the fields of agricultural technologies, equipment and related products	Spring; Doha Exhibition and Convention Center - DECC, Doha, Qatar	www.agriteq.com
 <p>Hospitality & Food Qatar 2024</p>	Platform for hotels, restaurants, cafes and franchise investors who want to buy and network with potential customers from the entire Gulf region	Fall; Doha Exhibition and Convention Center - DECC, Doha, Qatar	www.hospitalityqatar.qa

8 APPENDIX

- (1) The Qatari government and QFZA has identified the following “new” industry sectors of interest for foreign engagement:
- 1) Logistics – high value industrial and consumer markets (food packaging, high value spare parts – aviation and maritime, pharma supply chain etc.).
 - 2) Chemicals and heavy industries – utilization of natural gas for energy production and raw material. Specialty chemicals, formulation chemicals, advanced polymers etc.
 - 3) Automotive, marine and aviation
 - 4) Energy technologies – energy storage, energy market and systems, energy efficiency and renewable energy (solar). Hydrogen as energy storage and large-scale production for export is gaining increasing interest in Qatar Oil Company and government.
 - 5) Pharma and medical technologies
 - 6) Food and agriculture/aquaculture technology – the focus on this report.
 - 7) Water and waste management – circular technologies.
- (2) Qatar Food Importers Guide 2017 (PDF)
<https://www.moph.gov.qa/Admin/Lists/PublicationsAttachments/DispForm.aspx?ID=76&RootFolder=%2A>

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