



# Qatar National Manufacturing Strategy

2030-2024

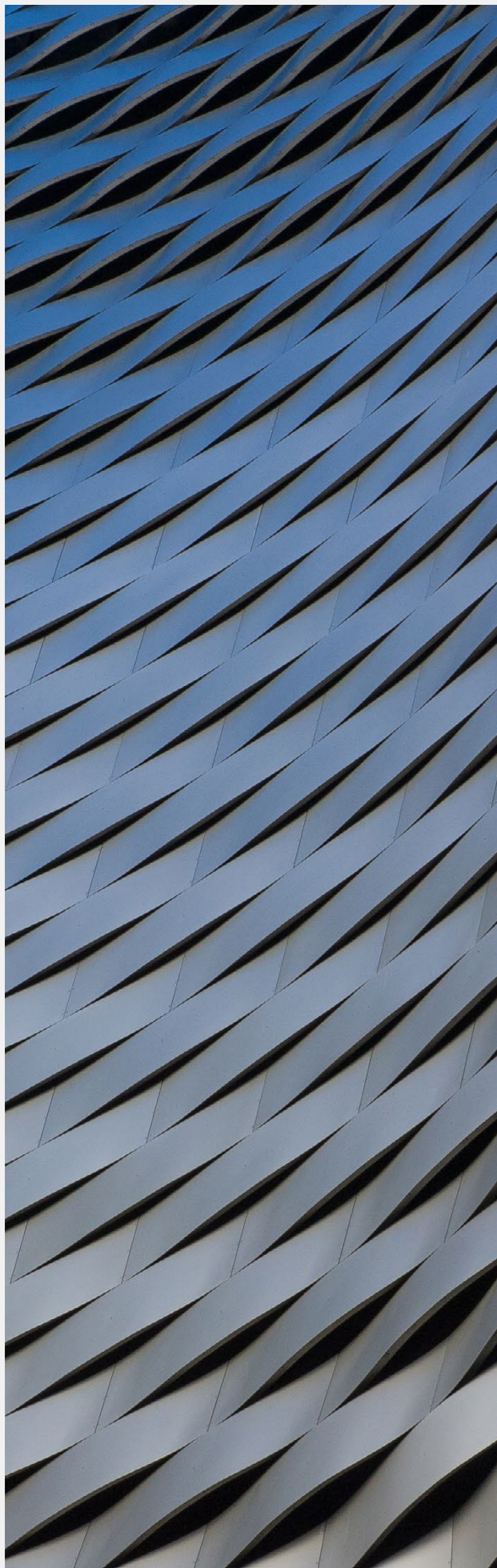
◆ —  
Innovative  
manufacturing  
for a sustainable  
future  
— ◆

“ Enhancing economic diversity and moving towards increasing labour productivity and efficiency in the public sector, while encouraging the private sector to invest

Opening of the 49th session of the Shura Council

His Highness Sheikh Tamim bin Hamad Al Thani  
The Amir of Qatar





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## Speech of His Excellency the Minister of Commerce and Industry

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The Qatar National Manufacturing Strategy 2024-2030 aims to support sustainable development goals in alignment with the Third National Development Plan, contributing to the aspirations and targets of Qatar National Vision 2030. This will be achieved by building a high-value, diversified industrial sector that relies on advanced technology and innovation, stimulating and doubling the contribution of the private sector in driving growth in the coming phase, ensuring a transition towards a more diversified, competitive, and sustainable economy.

**His Excellency Sheikh Faisal bin Thani bin Faisal Al Thani**  
Minister of Commerce and Industry

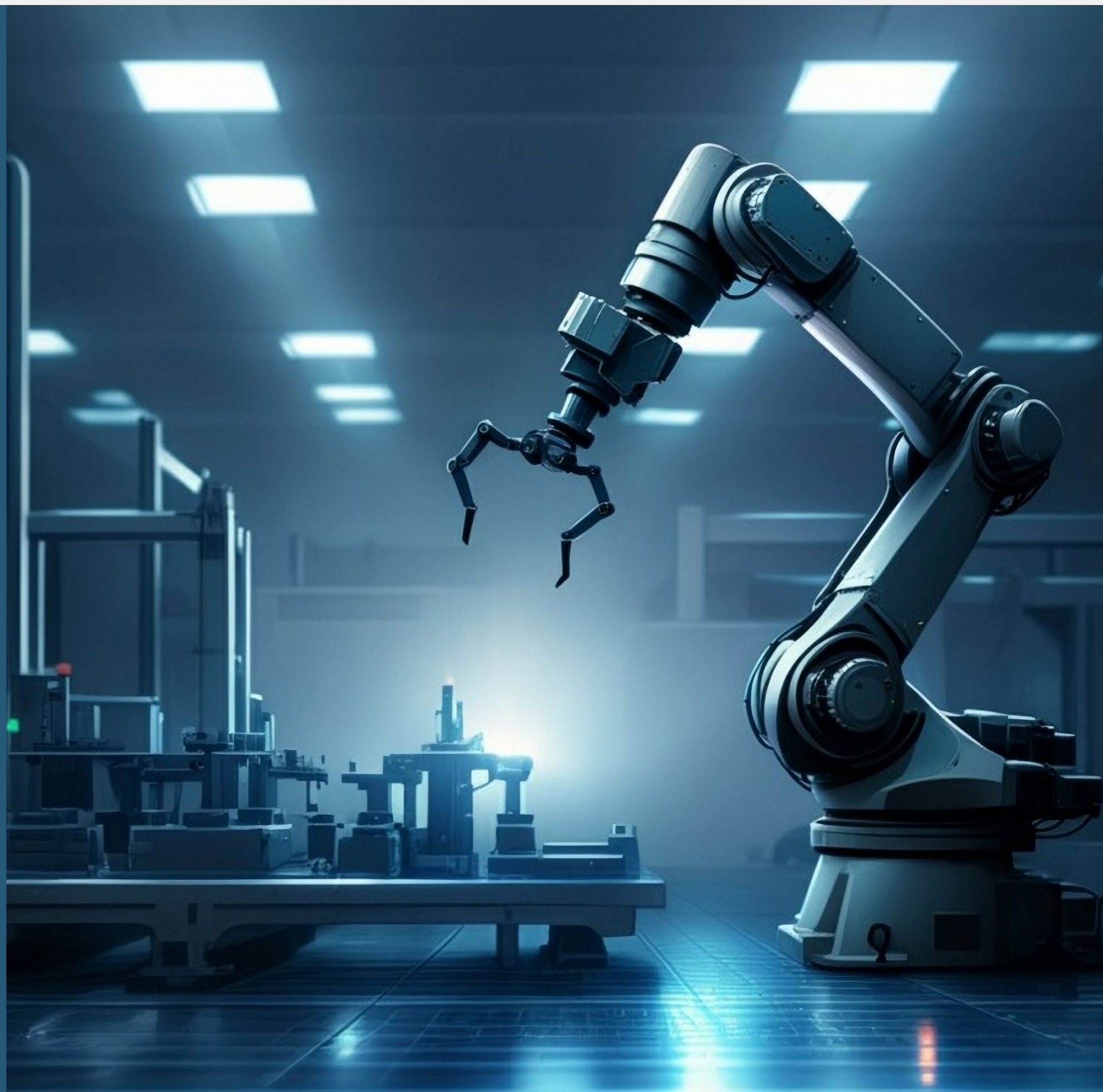
# 01

## The Qatar National Manufacturing Strategy

2024-2030

The Qatar National Manufacturing Strategy 2024-2030 aims to enhance a resilient and diversified industrial future characterized by increased value, innovation, sustainable growth, and strong private sector participation.

The Qatar National Manufacturing Strategy 2024-2030 has been designed using a results-based strategic planning methodology. This framework aligns each initiative with specific outcomes, which are tracked through Key Performance Indicators (KPIs), and the initiatives measured using SMART objectives.



# 02

## Vision for the Industrial Sector and Business Development

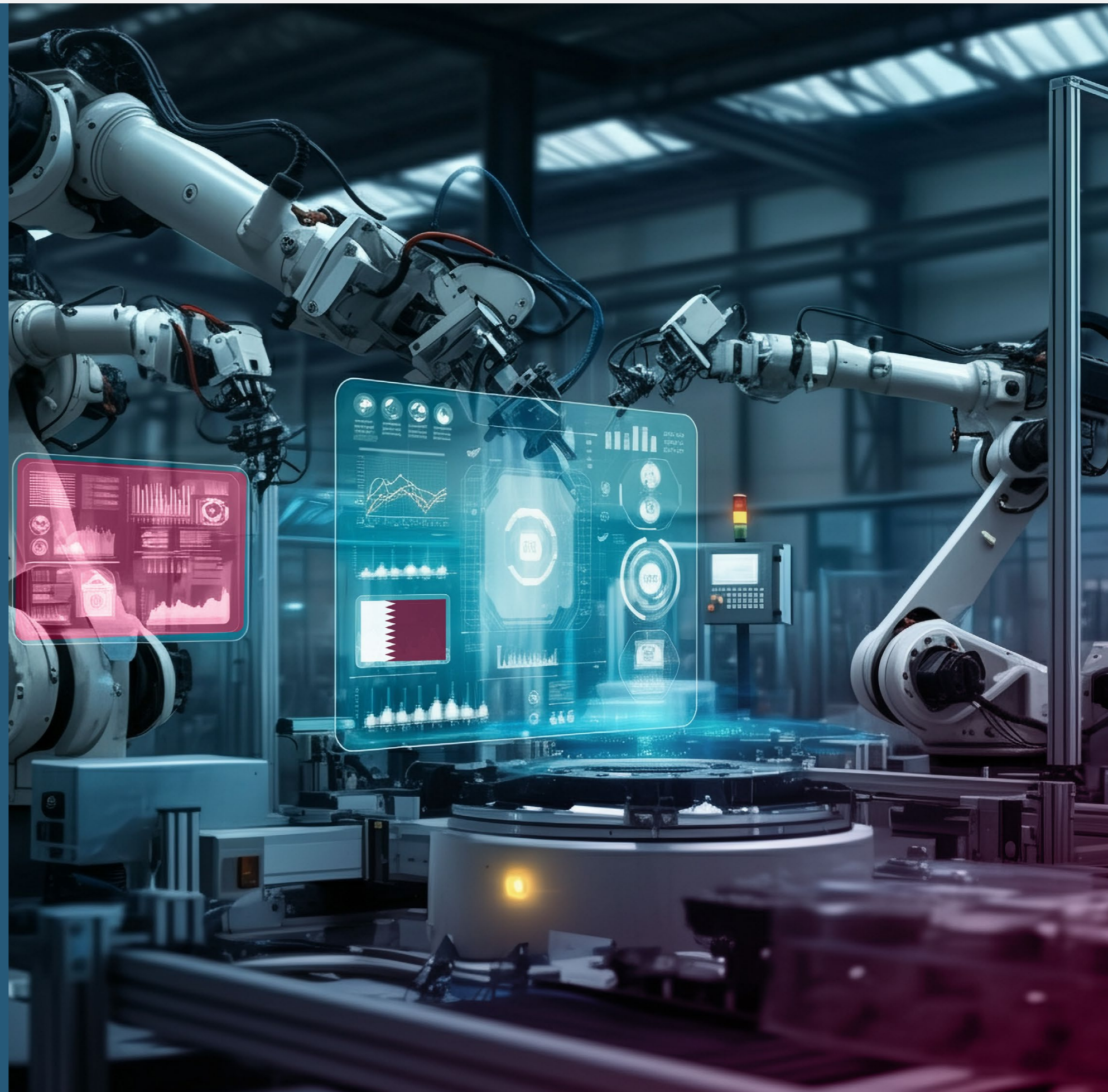
A high-value, resilient, and diversified industrial sector that leverages advanced technology, innovation, and the dynamism of the private sector to manufacture products that can compete in international markets.



Aligned with Qatar National Vision 2030



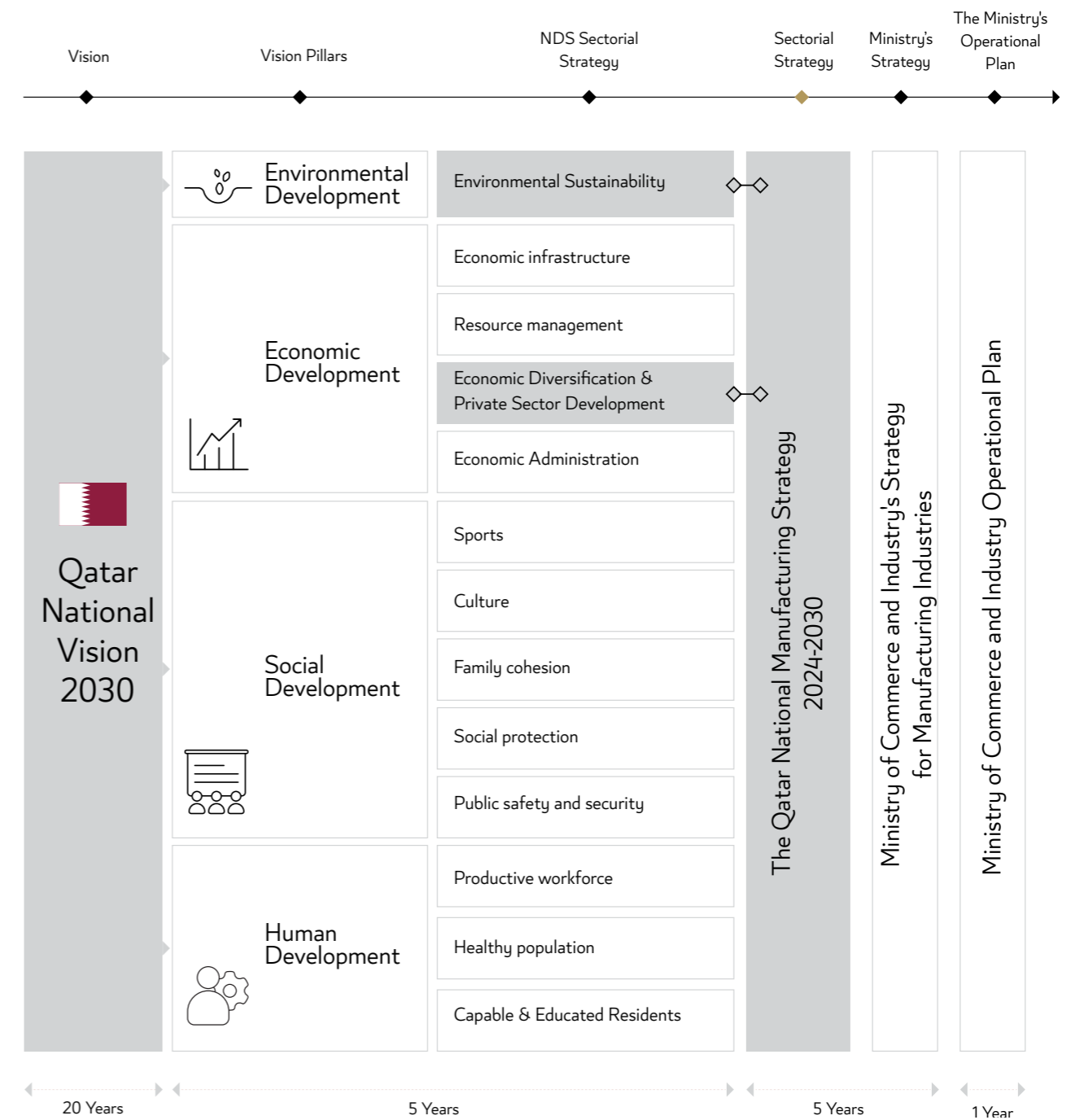
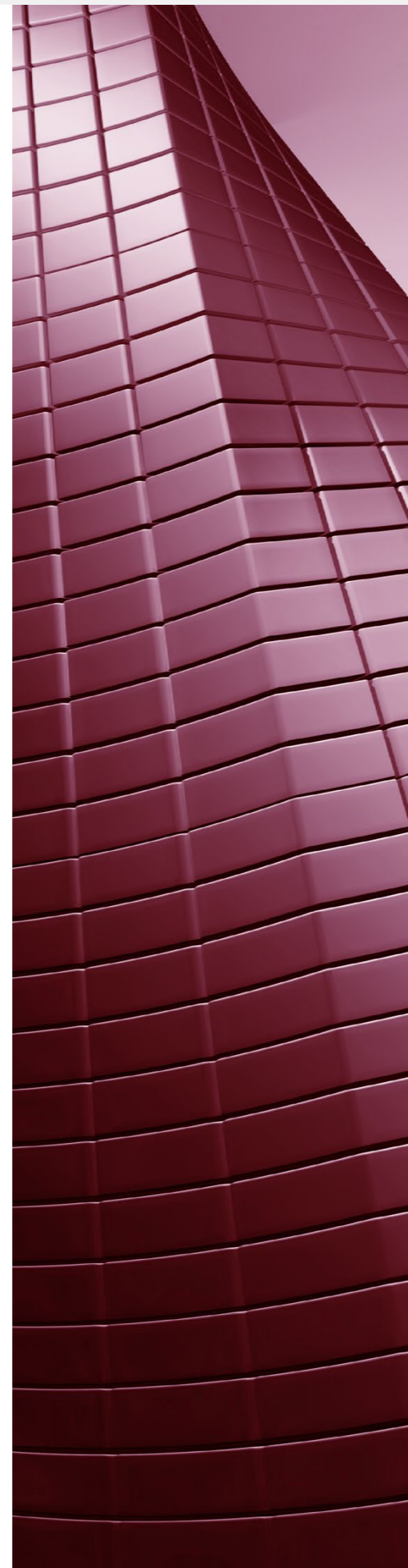
In integration with the Third National Development Strategy (NDS-3)



# 03

## Industrial Strategy and Vision 2024-2030

The strategy includes 60 major projects within the framework of results-based strategic planning, with key performance indicators to ensure specific and measurable objectives are achieved.



# 03

## Industrial Strategy and Vision 2024-2030

◆

The Ministry of Commerce and Industry will lead the main implementation process, with support from other government entities, based on their competencies. The strategy will be executed in three phases, starting with the quick wins phase, followed by the major impact phase, and concludes with the complementary phase to enhance achievements and address challenges.



- 01 **Quick Wins**  
(until end of 2024)
- 02 **Major Projects**  
from start of 2025  
until end of 2028
- 03 **Complementary Projects**  
from start of 2029  
until end of 2030

This phase primarily targets quick-win projects with limited scope and low cost, which can be implemented in relatively short time frames. These projects have a clear impact in a specific area. Quick-win projects are those that decision-makers aim to implement at the beginning of the strategy to stimulate long-term performance.

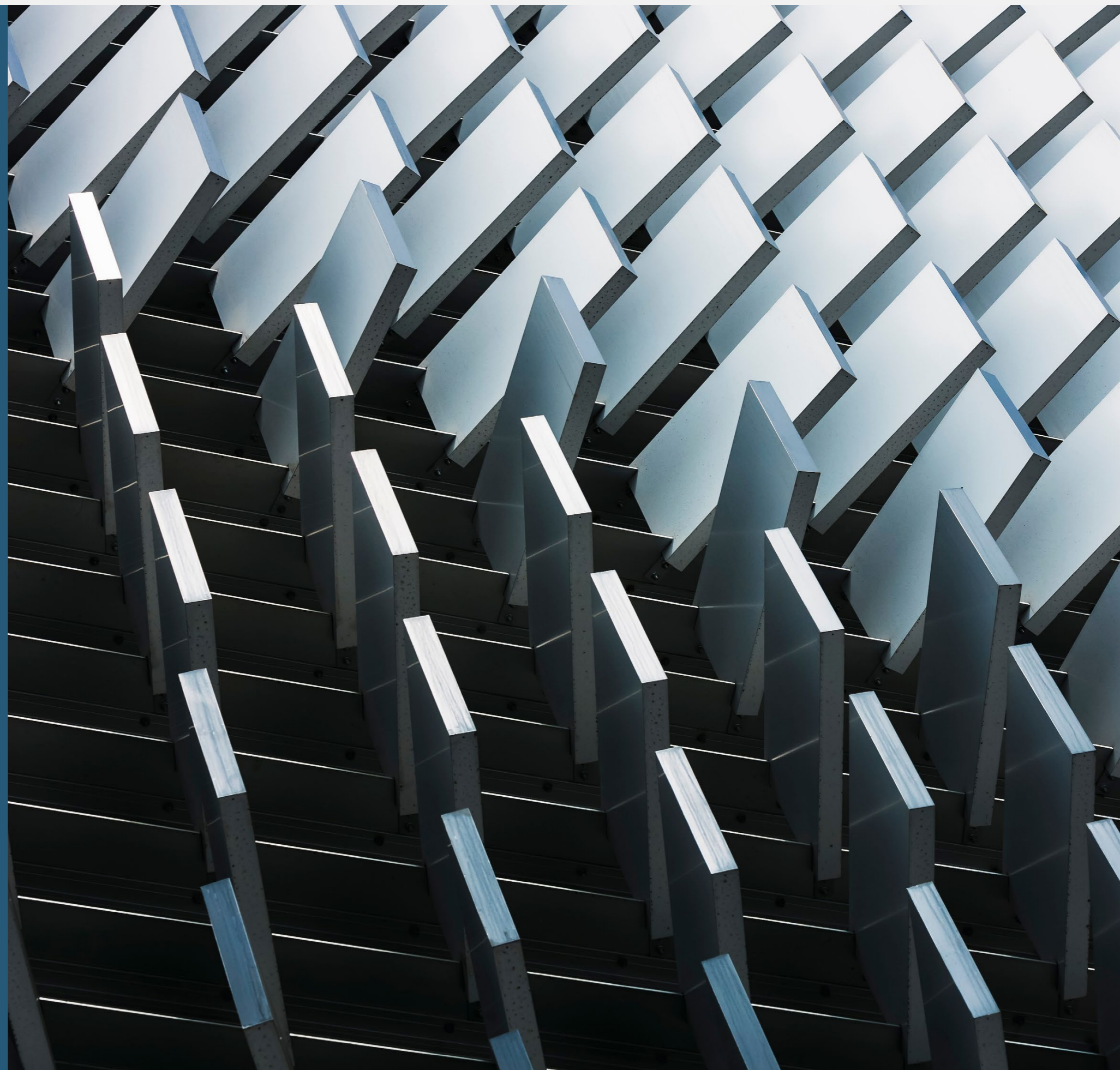
The remaining major projects that will be implemented are high-cost projects that have a direct and indirect impact on many activities and industrial sectors. The results of these projects will take time to show their effects on a broad scale, and the success of the strategy at this stage will be determined by these projects. It is important to note that these projects will pave the way for many other enhancements.

This phase will serve as a complementary period to cover any new projects added during the strategy period and compensate for any delays in the implementation of the original projects.



# 04

## Strategic Goals

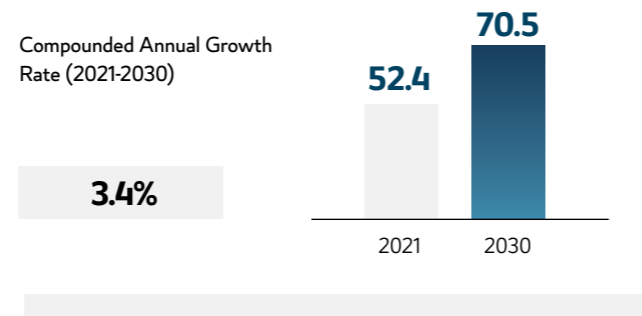


# 04

## Strategic Goals

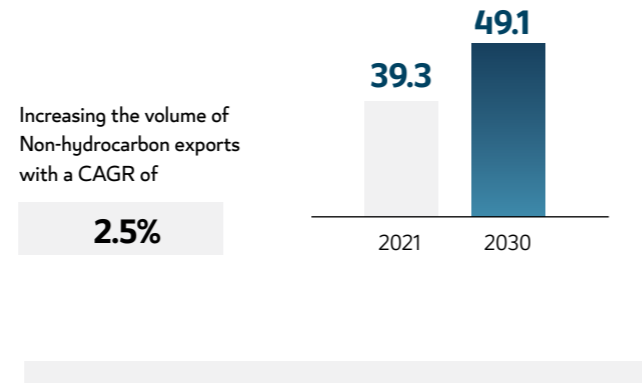
### Increase the Added Value of the Manufacturing Sector to 70.5 Billion Qatari Riyals

Compounded Annual Growth Rate (2021-2030)



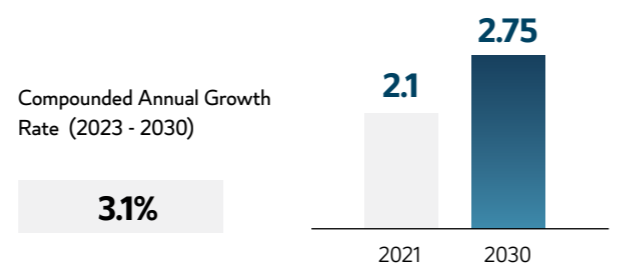
### Increase Non-Hydrocarbon Exports to 49.1 Billion Qatari Riyals

Increasing the volume of Non-hydrocarbon exports with a CAGR of



### Increasing Annual Investment in the Manufacturing Sector to 2.75 Billion Qatari Riyals

Compounded Annual Growth Rate (2023 - 2030)

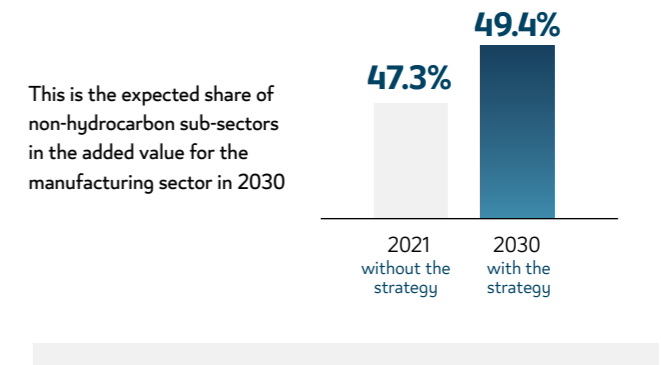


# 04

## Strategic Goals

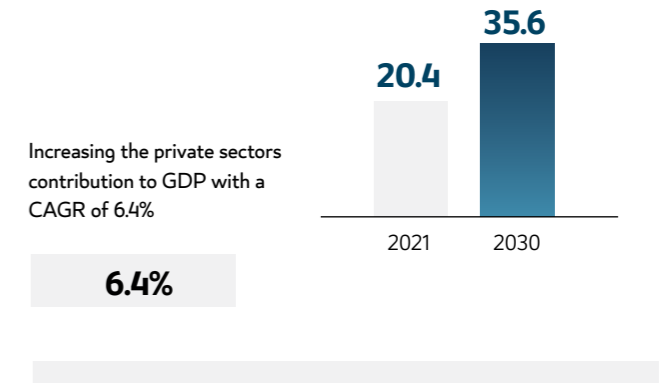
### Diversification of the Manufacturing Sector to 49.4%

This is the expected share of non-hydrocarbon sub-sectors in the added value for the manufacturing sector in 2030



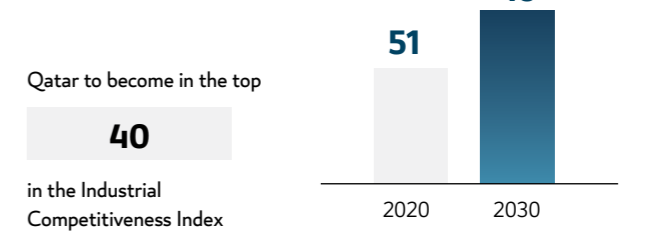
### Raise the Contribution of the Private Sector to the Added Value

Increasing the private sectors contribution to GDP with a CAGR of 6.4%



### Increasing Industrial Competitiveness Raising Qatar's ranking in the Competitive Industrial Performance Index (CIP)

Qatar to become in the top

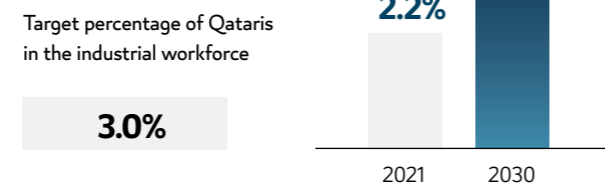


# 04

## Strategic Goals

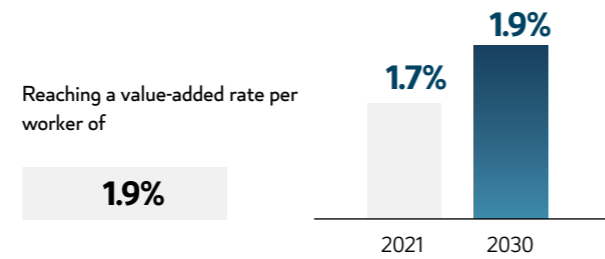
### Qatarization in Manufacturing

Increasing the percentage of Qatari workforce in the industrial sector(%)



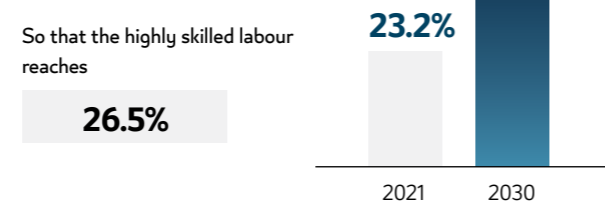
### Labour productivity

Increase the value added per worker



### Knowledge-Based Industries

Increase the proportion of manpower that is highly skilled

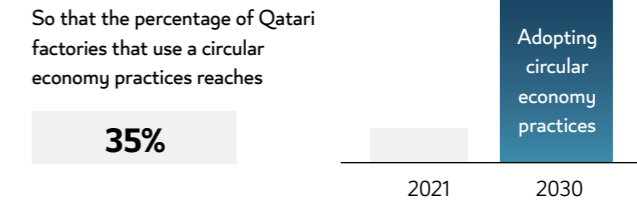


# 04

## Strategic Goals

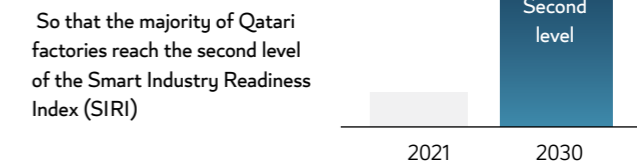
### Green Manufacturing

Transition to circular economy practices



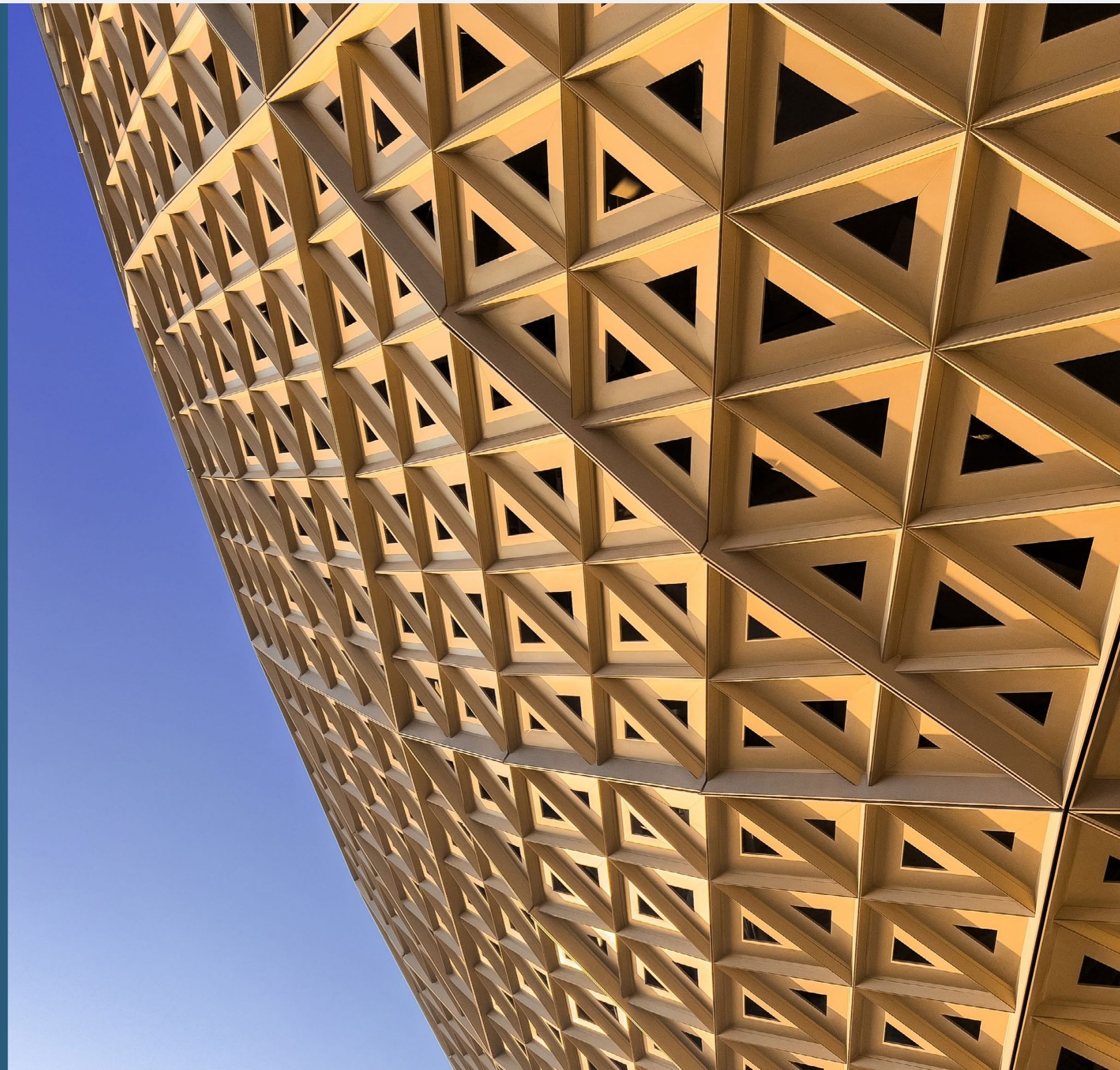
### Smart Industries

Raising the readiness of Qatari factories for smart industry



# 05

## Strategy and Implementation Partners



# 05

## Strategy and Implementation Partners

### 9 Programmes

A group of interconnected initiatives that share in achieving common results

- 01 Industrial Clusters
- 02 The Fourth Industrial Revolution
- 03 International Trade
- 04 Workforce Development
- 05 Research, Development, and Innovation
- 06 Development of Government Operations
- 07 Investment and Financing
- 08 Environmental Sustainability
- 09 Localization Programmes

# 05

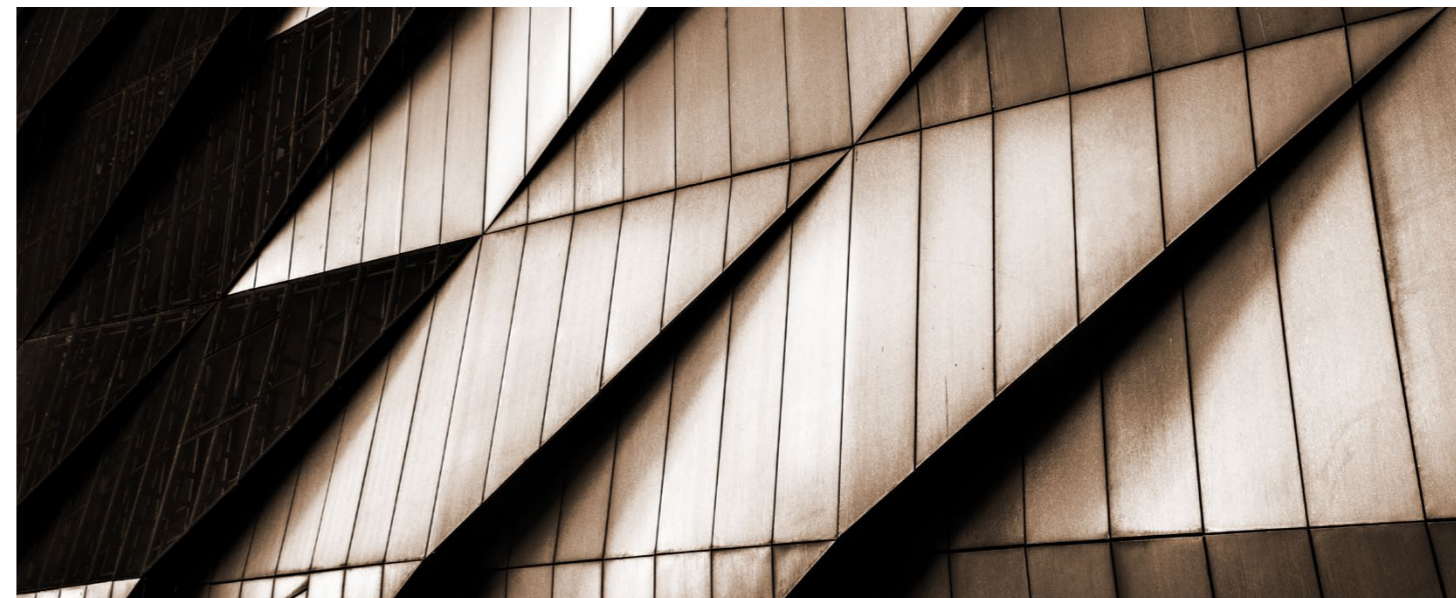
## Strategy and Implementation Partners

### 15 Initiatives

A specific set of interconnected projects aimed at achieving a measurable goal

### 60 Projects

Forming the basis of the strategy's operational work, the project consists of a set of activities to be carried out by the concerned entity, with specific inputs allocated such as budgets and work teams

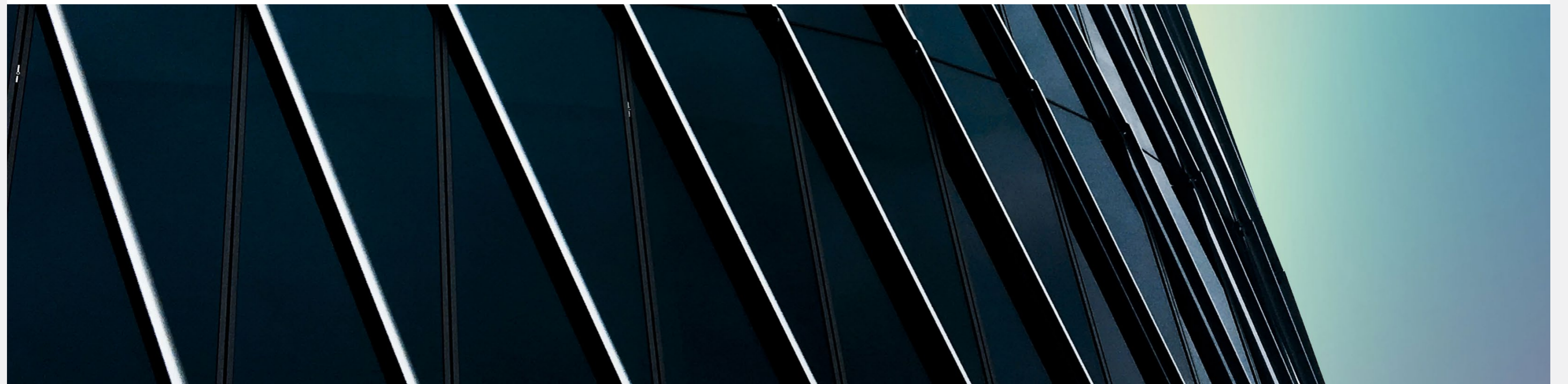


# 05

## Strategy and Implementation Partners



## Main Partners



# 06

## Priority Industrial Sectors



# 6.1

Priority Industrial Sectors

Pharmaceuticals

## The Current Situation in Qatar

5 Factories

451 Million QAR Investment



# 6.1

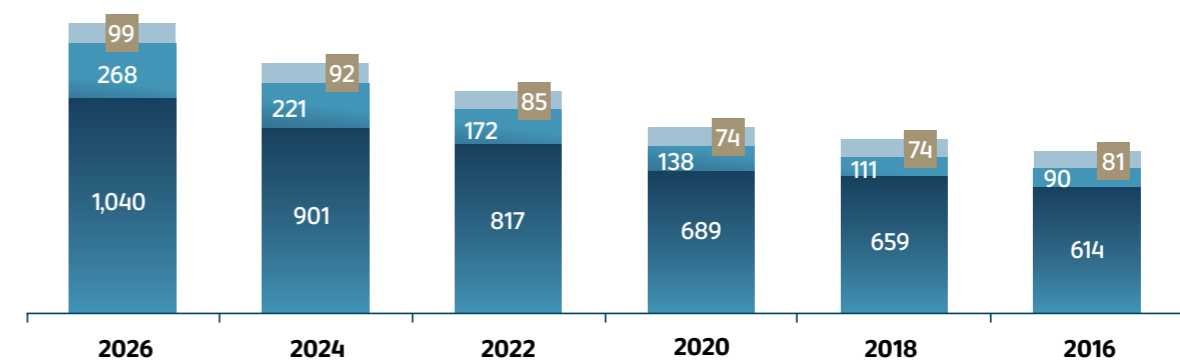
Priority Industrial Sectors

Pharmaceuticals

## Global Market Growth of Pharmaceutical Sector – in Billions of USD

- The global pharmaceutical market grew by 2.6% annually from 2012 to 2020, reaching \$901 billion in 2020.
- It is expected that the growth of the pharmaceutical market will accelerate to 9.3% annually from 2021 to 2026, reaching approximately \$1.4 trillion by 2026.
- The growth rate of the generic drugs market is also expected to accelerate, where it grew by 2.6% annually from 2012 to 2020. However, it is expected to grow by 6.0% annually from 2021 to 2026, reaching approximately \$100 billion by 2026.

Global Pharmaceutical Market Size  
Billion USD





# 6.1

## Priority Industrial Sectors

### Pharmaceuticals

- It is expected that local, regional, and global pharmaceutical markets will grow rapidly in the coming period by providing opportunities for local manufacturers.
- The pharmaceutical sector is the most heavily invested sector in research and development as a percentage of revenue globally, with more than **15%** of revenue spent on research and development.



# 6.2

Priority Industrial Sectors

Chemicals & Petrochemicals

The Current Situation in Qatar

72 Factories

79 Billion QAR Investment



# 6.2

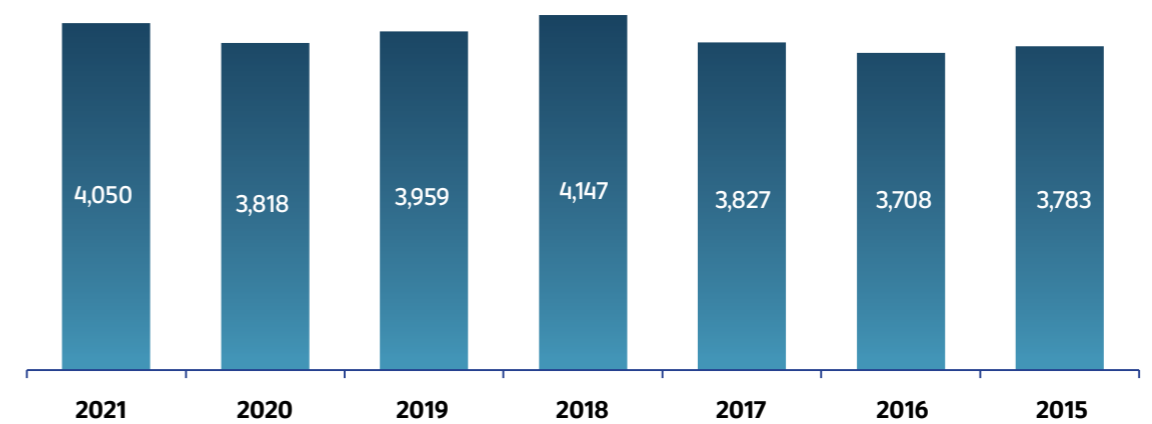
Priority Industrial Sectors

Chemicals & Petrochemicals

Global Chemicals and Petrochemicals Market Size - Billion Dollars

- In 2021, the sector recovered and grew by more than 6%.
- Factors that will negatively impact growth include rising raw material costs, a decline in research and development investments, and intense market competition.
- The petrochemical market is expected to grow at a cumulative rate of 6.5% until 2030.
- The speciality chemicals market is expected to grow at a cumulative rate of 4.3% until 2030
- The basic chemicals market is expected to grow at a cumulative rate of 4.2% until 2030

Total Revenue of Chemical Industries Worldwide  
Billion USD



# 6.2

## Priority Industrial Sectors

### Chemicals & Petrochemicals

- The chemicals and petrochemicals sub-sector contributed **52%** of the real value added from manufacturing in Qatar and **45%** of its industrial exports in 2021. Qatar is a leading producer of nitrogen fertilisers, with **5.8 million tons** of urea produced annually by Qatar Fertiliser Company (QAFCO), which constitutes about **11%** of the global supply.
- Qatar Energy announced that «QAFCO» will build the world's largest blue ammonia plant (Project Ammonia 7), producing **1.2 million tons annually** by 2026.
- A new petrochemical plant is currently being constructed, including an ethane cracker with an ethylene capacity of **1.9 million tons per year**, which will increase Qatar's polyethylene production capacity by **64%** by 2026.
- Petrochemicals have stronger demand than transportation fuels, and this sector is the fastest growing in global oil demand, accounting for more than a third of the growth until 2030.



# 6.3

Priority Industrial Sectors

Plastics

The Current Situation in Qatar

116 Factories

3 Billion QAR Investment



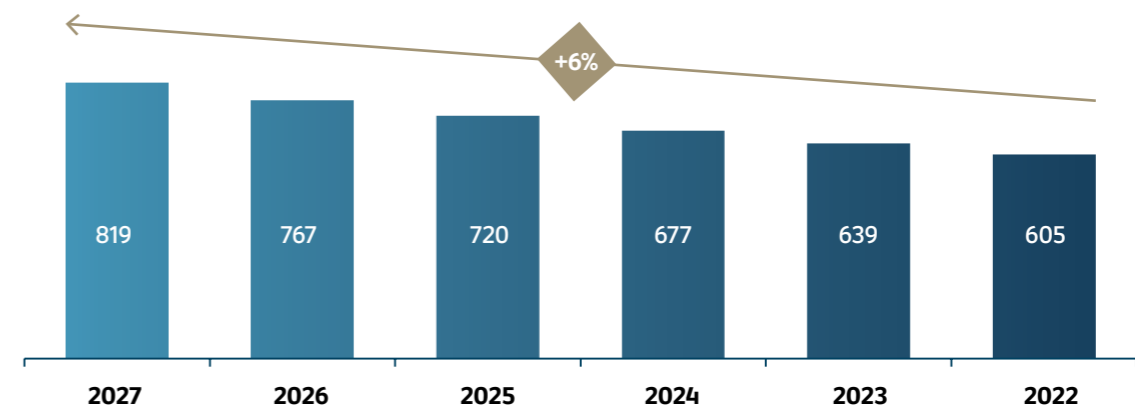
# 6.3

Priority Industrial Sectors

Plastics

## Global Plastics Market Size - Billion Dollars

- The COVID-19 pandemic led to a limited decrease in global plastic usage rates compared to the overall decline in economic activity, attributed to the increased use of personal protective equipment and single-use plastics.
- The extrusion applications sector (straws, hoses, pipes, and window frames) is expected to expand rapidly. Emerging markets in construction and automotive sectors in the Asia-Pacific region are expected to rapidly increase the demand for plastics.

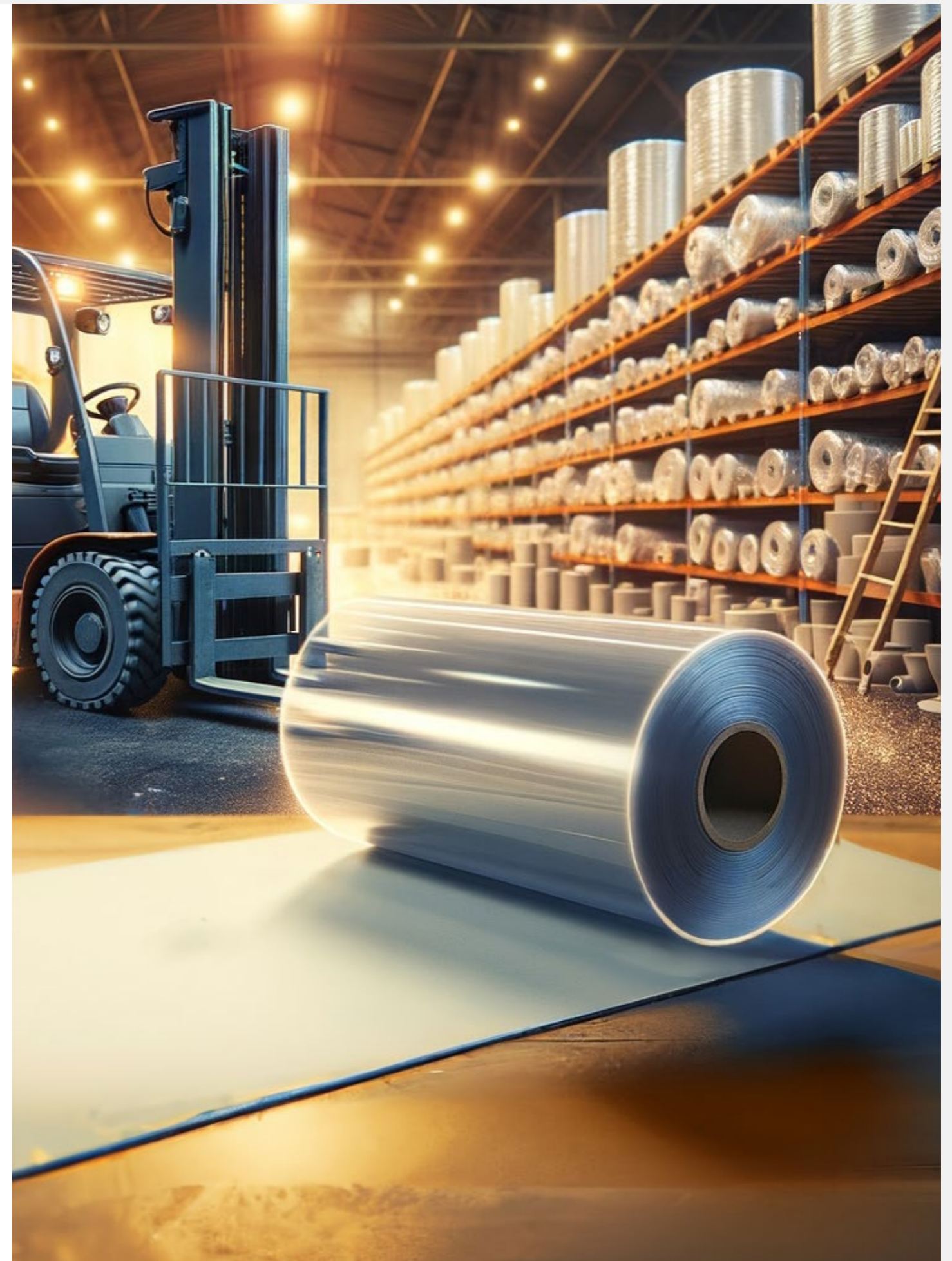


# 6.3

## Priority Industrial Sectors

### Plastics

- Packaging is the leading sector in global plastic production, followed by construction and textiles.
- Polyethylene production in Qatar is characterised by low production costs, in addition to contributing a significant share of global production (about 4%).
- Local plastic product manufacturers include a rapidly growing base of 116 factories, with a compound annual growth rate of 12% over the past five years. These factories primarily produce finished products for the construction, building, and packaging markets.
- It is expected that by 2050, the demand for oil for plastics per capita will surpass the demand for oil for road passenger transport.



# 6.4

Priority Industrial Sectors

Food & Beverage

The Current Situation in Qatar

83 Factories

75 Billion QAR Investment



# 6.4

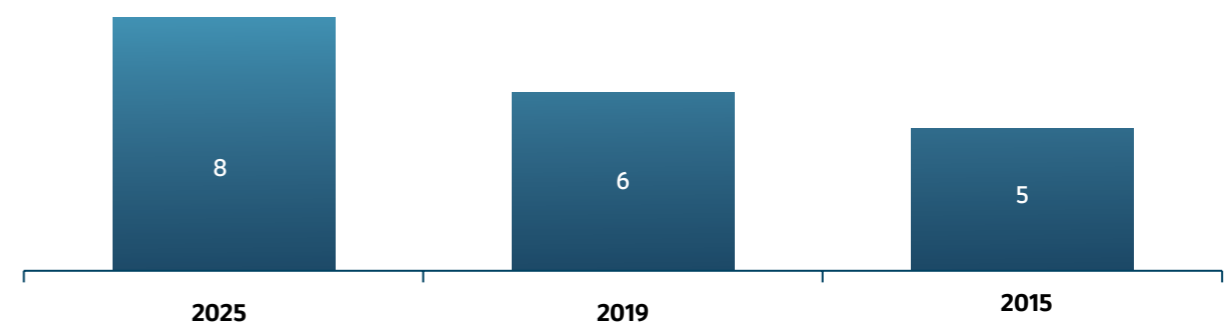
Priority Industrial Sectors

Food & Beverage

Global Food and Beverage Market Size - Billion Dollars

- The size of the food and beverage market has experienced significant growth over the past five years, reaching **\$5.9 trillion** in 2019 with a compound annual growth rate (CAGR) of **5.7%**.
- The market is expected to rise to **\$7.5 trillion** in 2023 and **\$8.5 trillion** in 2025 with a CAGR of 6.1%.

Global Food and Beverage Market Size  
Trillion USD

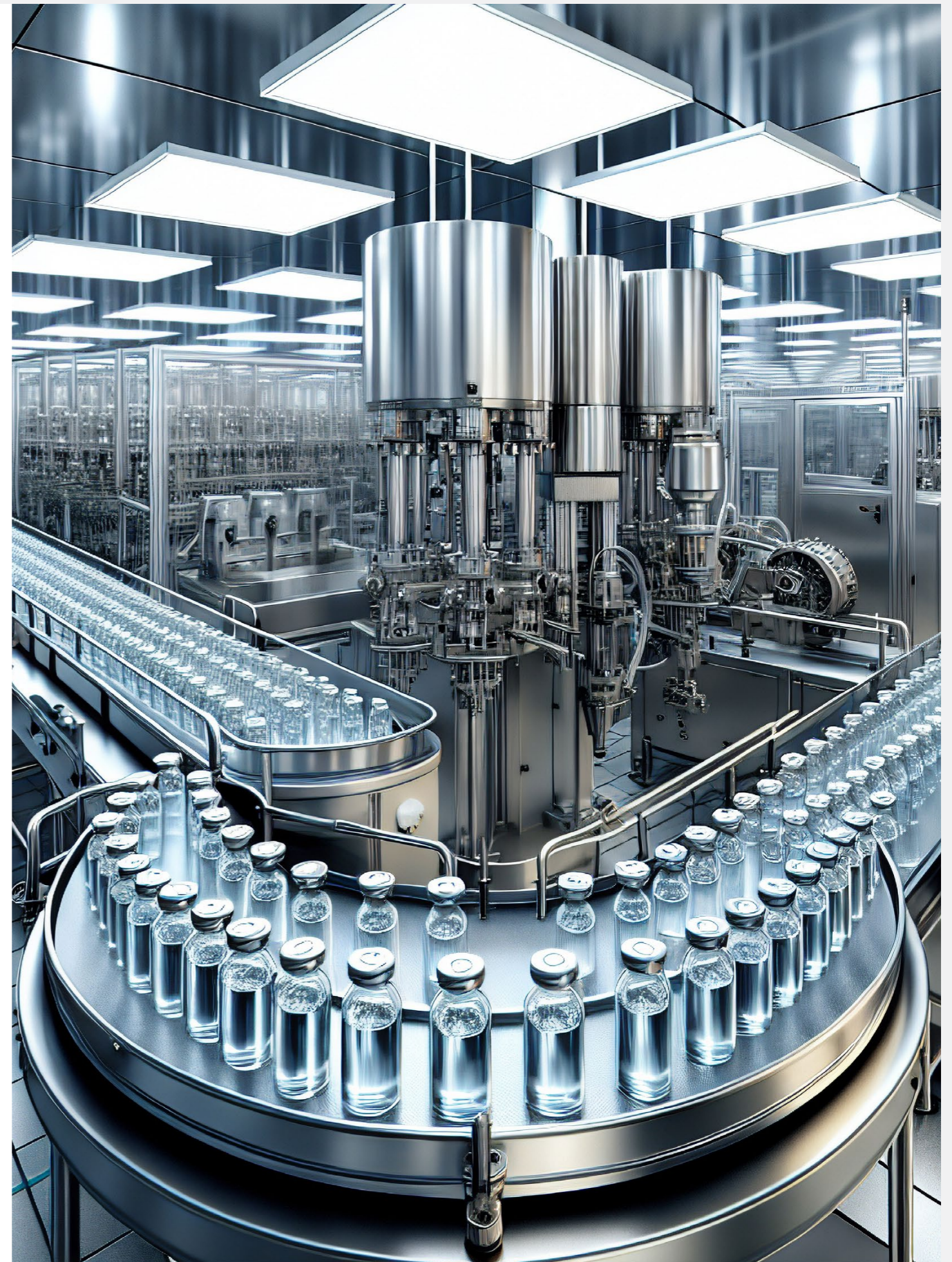


# 6.4

## Priority Industrial Sectors

### Food & Beverage

- There are significant investments in the food and beverage manufacturing sub-sector in Qatar, totalling approximately **7.5 billion** Qatari riyals in 2021, with continued growth opportunities.
- The employment rate in Qatar's food and beverage sub-sector is relatively high, accounting for about **13.0%** of the total workforce in the manufacturing sector.
- The Fourth Industrial Revolution will continue to grow rapidly and will be integrated into the food and beverage sub-sector.
- Among all food and beverage activities, dairy activities alone accounted for more than half (**60%**) of the total share of investment.
- The share of food and beverage in Qatar's total added value has remained steady over the past five years, ranging between **2.0% and 4.0%**.



# 6.5

Priority Industrial Sectors

Metals and Fabricated Metals

The Current Situation in Qatar

171 Factories

25 Billion QAR Investment



# 6.5

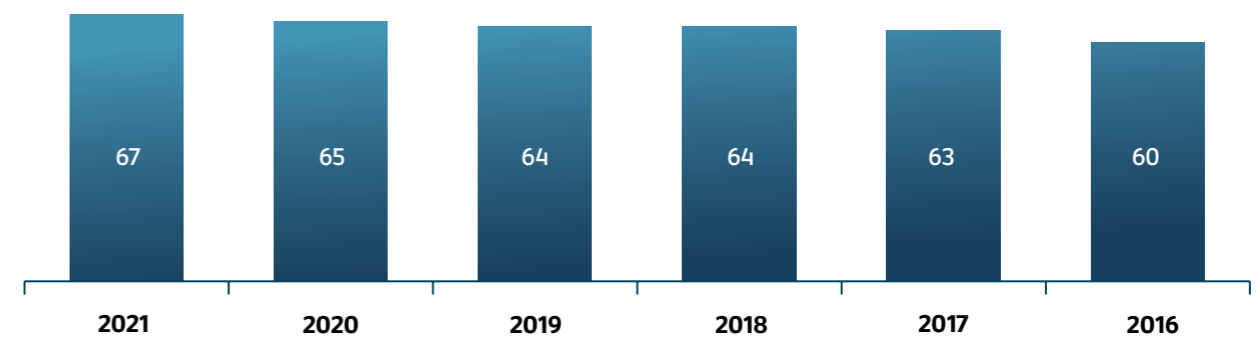
Priority Industrial Sectors

Metals and Fabricated Metals

Global Metals and Fabricated Metals Market Size - Billion Dollars

- Primary aluminium demand is expected to reach **119.5 million tons** by 2030, an increase of **33.3 million tons** compared to **86.2 million tons** in 2020.
- In terms of value, the aluminium market is expected to reach **\$242 billion** by 2027, up from \$164 billion in 2019, with a compound annual growth rate of **5.7%**.
- The production of primary aluminium in GCC countries has seen a slight increase over the past six years, with a compound annual growth rate of **2.5%**.

Global Aluminium Production Volume  
Million Metric Tons





# 6.5

## Priority Industrial Sectors

### Metals and Fabricated Metals

- Approximately **95%** of (Qatar Aluminium) products are exported to Asia, Europe, and North America.
- Fabricated metals have seen significant growth from 2016 to 2021, with a compound annual growth rate of **6%**, rising from **QAR 3 billion** in 2016 to **QAR 4.5 billion** in 2021.
- About **75%** of this growth in demand is expected to come from the transportation (**35%**), electricity (**16%**), construction (**14%**), and packaging and wrapping (**10%**) sectors combined.
- The transportation sector will experience the fastest growth in absolute demand for aluminium in the coming years. Consumption from this sector will grow by **11.8 million tons**, increasing from **19.9 million tons** in 2020 to **31.7 million tons** in 2030, with **33%** of this growth coming from China, **22%** from North America, and **19%** from Europe.



# 6.6

Priority Industrial Sectors

Construction Materials

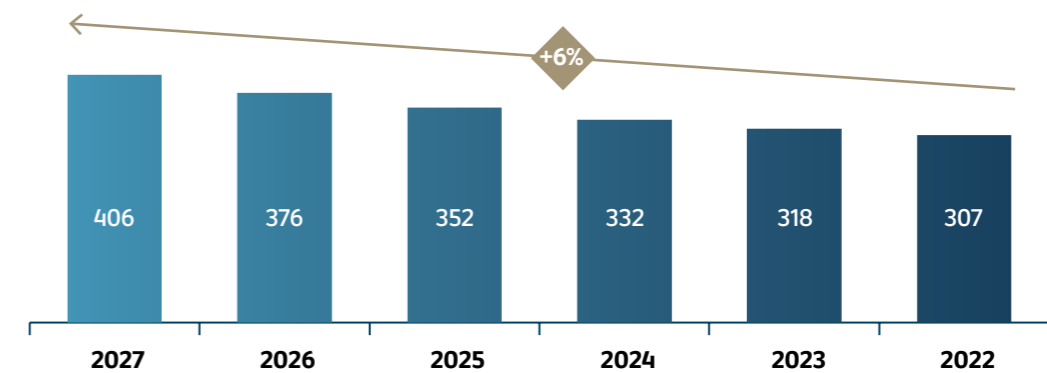
The Current Situation in Qatar

216 Factories

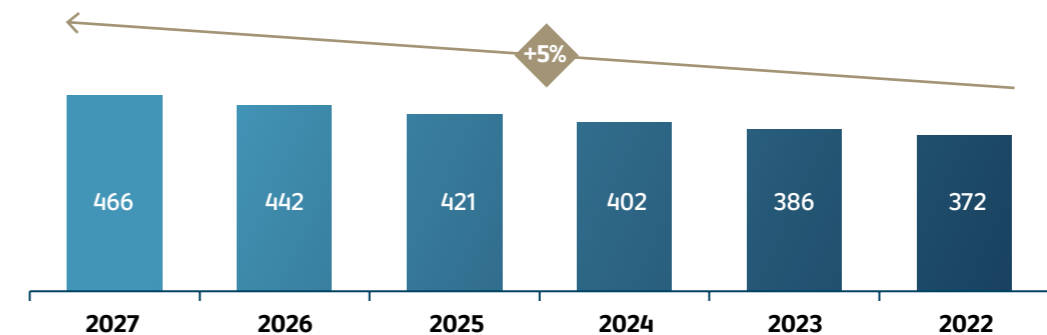
3.6 Billion QAR Investment



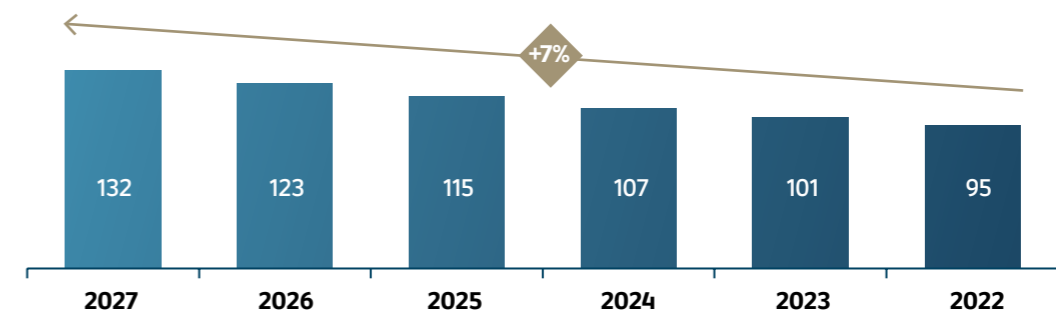
Global Glass Market Size - Billion Dollars



Global Cement Market Size - Billion Dollars



Global Ceramics Market Size - Billion Dollars

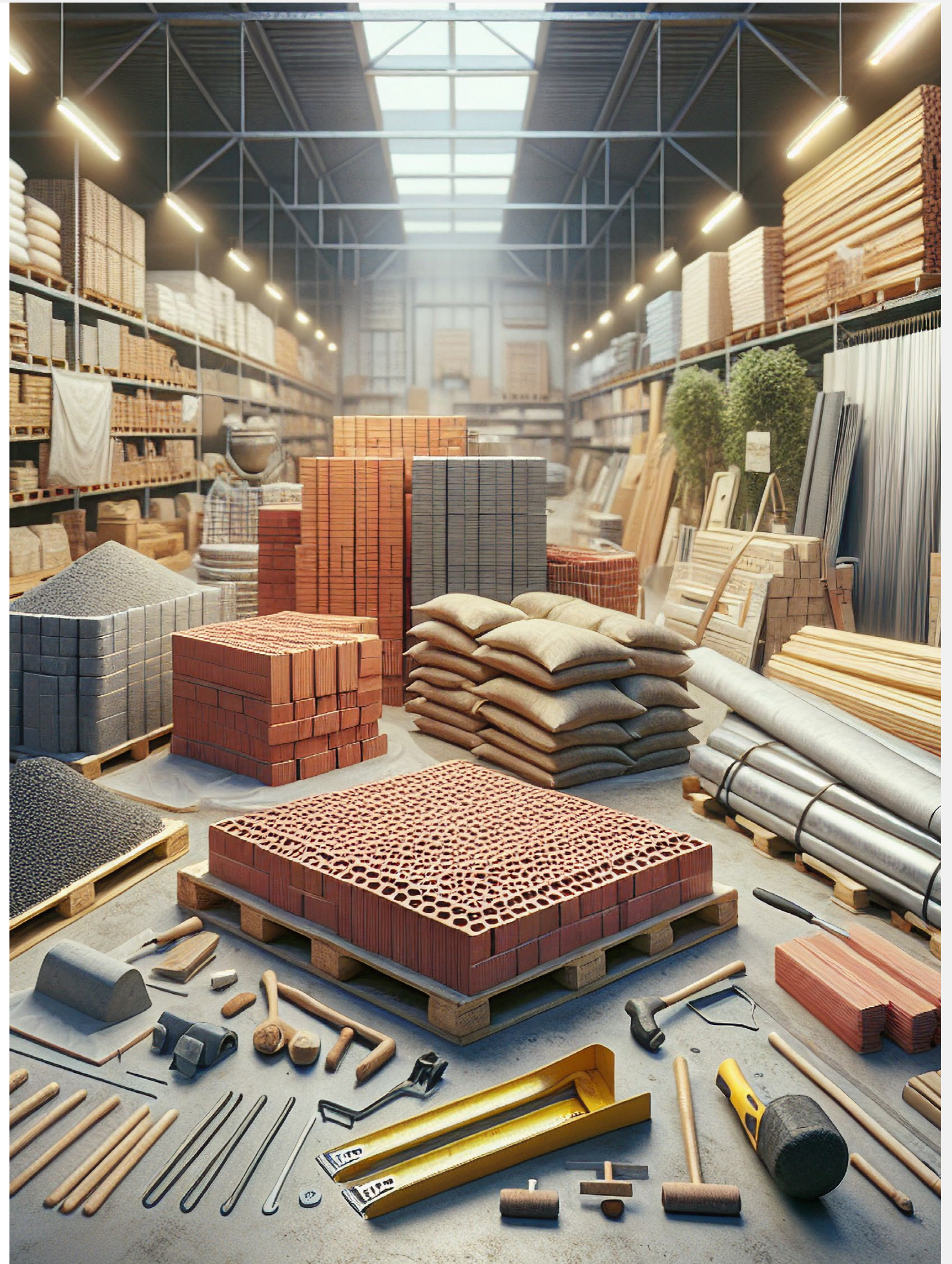


# 6.6

## Priority Industrial Sectors

### Construction Materials

- The manufacturing industry is considered a strategic sub-sector, with Qatar focusing on improving productivity in the construction sector and reducing the number of low-skilled workers. This goal can be achieved through manufactured construction.
- Manufactured structures encourage advancements in construction processes through mechanisation and automation. There are several benefits from industrial structures, such as increased labour productivity, replacing labour-intensive processes with machinery, fast tracking of construction rates, faster commissioning of new projects, cost reduction, and the use of augmented reality and virtual reality, as well as overall quality improvement.
- Manufactured structures are important in construction, as technology is changing how we design, manufacture, and assemble. By 2035, it is expected that the majority of buildings will be constructed using manufactured structures. The manufacturing industry and construction are converging, benefiting from the manufacturing industry's experience in large-scale production and building design, and offering highly advanced products.



# 07

## Programmes & Initiatives



#	Programme	Initiative	Project
O1	<b>Industrial Clusters</b>	<p>Aluminium Industries</p> <hr/> <p>Plastic products based on PE and PVC</p> <hr/> <p>Specialized pharmaceutical and medical products</p> <hr/> <p>Advanced food and beverage industries</p> <hr/> <p>Supporting industries for the oil and gas production sector</p>	<ul style="list-style-type: none"> <li>Cluster and Infrastructure Development</li> <li>Preparing investment opportunities</li> <li>Promoting and attracting investors</li> </ul>
O2	<b>The Fourth Industrial Revolution</b>	Increased adoption of Fourth Industrial Revolution tools and applications in factories	<ul style="list-style-type: none"> <li>Assessing capability of factory transformation SIRI.</li> <li>Preparation of Investment opportunities</li> </ul>
O3	<b>Development of Government Operations</b>	Simplifying and reducing processing time and costs related to government procedures.	<ul style="list-style-type: none"> <li>Developing industrial service platforms</li> <li>Organizing communication with the private sector</li> <li>Service level agreements</li> <li>Simplifying environmental impact review</li> <li>List of approved service providers</li> <li>Standardizing industrial zone administrations</li> </ul>
O4	<b>Financing &amp; Investment</b>	Attracting & supporting private industrial investments	<ul style="list-style-type: none"> <li>Facilitating factory financing programs</li> <li>Adopting crowd funding programs</li> <li>Establishing a rent-to-own program</li> <li>Connecting investors with manufacturers</li> <li>Reducing feasibility study costs</li> <li>Activating the economic return program</li> </ul>

#	Programme	Initiative	Project
O5	<b>Local Content</b>	Enhancing local value and strengthening industrial links	<ul style="list-style-type: none"> <li>Expanding the framework agreements program</li> <li>Encouraging the employment of Qataris in the private sector</li> <li>Activating national added value</li> <li>Establishing a national quality program</li> </ul>
O6	<b>Workforce Development</b>	Enhancing a highly skilled local workforce and creating attractive job opportunities	<ul style="list-style-type: none"> <li>Aligning curricula with industry requirements</li> <li>Facilitating employment processes in the industry</li> <li>Regulating recruitment restrictions from abroad</li> </ul>
O7	<b>Research, Development, and Innovation</b>	<p>Enhancing collaboration in research, development, and innovation (RDI)</p> <hr/> <p>Promoting entrepreneurship and technology transfer</p>	<ul style="list-style-type: none"> <li>Updating the scientific research strategy</li> <li>Enhancing government-industry-university projects</li> <li>Connecting industry with the research and education sector</li> <li>Facilitating funding for industrial entrepreneurship</li> <li>Industrial sabbatical program for academics</li> </ul>
O8	<b>International Trade</b>	Facilitate growth of industrial exports	<ul style="list-style-type: none"> <li>Facilitating trade procedures</li> <li>Independent agency for export promotion</li> <li>Improving free trade agreements</li> <li>Monitoring industrial shipping rates</li> <li>Program for developing exporting companies</li> </ul>
O9	<b>Environmental Sustainability</b>	Enhance sustainable manufacturing and circular economy policies	<ul style="list-style-type: none"> <li>Value chains for the circular economy</li> <li>Preparing investment opportunities in sustainability</li> <li>Establishing incentives for sustainability practices</li> </ul>



# 08

## Governance

# 8

## Governance

## Supporting Partners

### 01 Government Partners

- Ministries in Qatar
- Other specialist organizations like Planning, Statistics and Customs

### 02 Funding Partners

- QDB
- Qatari Commercial Banks
- Privately Owned Companies
- Funding

### 03 International Partners

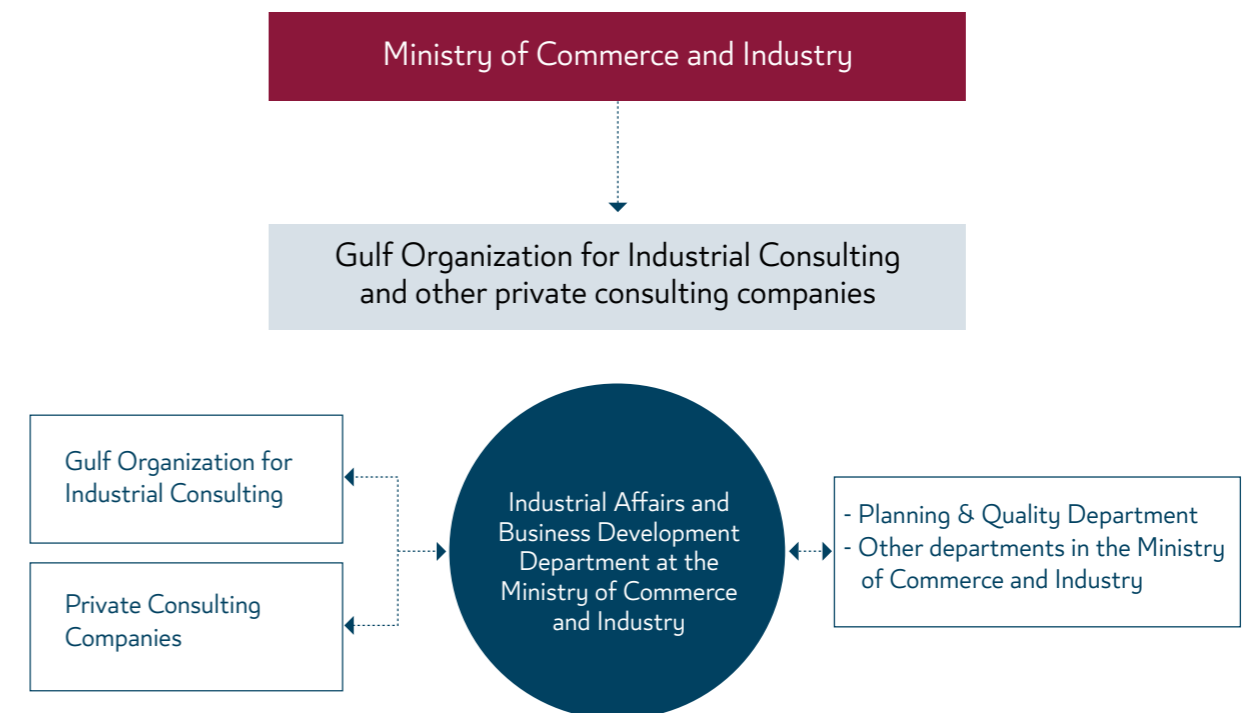
- Secretariat General of the Gulf Cooperation Council
- International organizations such as the United Nations Industrial Development Organization and the World Trade Center

### 04 Knowledge Partners

- Qatar Research, Development and Innovation Council
- Qatar University
- Universities in Qatar Foundation
- Research centers in Qatar Foundation

# 8

## Governance



You can download the electronic version of the Qatar National  
Strategy for the Manufacturing Industries by scanning the QR code





وزارة التجارة والصناعة  
Ministry of Commerce and Industry  
دولة قطر • State of Qatar



# Qatar National Manufacturing Strategy

2030-2024

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