

# Qatari Agri-food Imports

August 2, 2023

**Manitoba** 



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# QATAR

## Overview

Qatar's population has more than quadrupled since 2000 and its local demand for agri-food products continues to grow. Although Qatar has made large capital investments to increase their domestic production of agri-food products, they rely on imports to address their increasing consumption needs. Some of the products Qatar imports include cereals, dairy, meat, fruits, and vegetables.

While Qatar's agri-food suppliers are quite diverse, they have shared their interest in diversifying their source of imports even further. Canada ranks 38<sup>th</sup> as a Qatar supplier and exported a total value of \$128 million for the 2018 to 2022 period. Manitoba exported a total of \$3.8 million of agri-food products in the same period, with wheat accounting for 90 per cent of the total exports.

## Key Demographics and Economic Indicators<sup>1</sup>

**Country name:** State of Qatar

**Head of State:** Tamim bin Hamad Al Thani

**Head of Government:** Khalid bin Khalifa bin Abdulaziz Al Thani

**Government Type:** Unitary authoritarian parliamentary semi-constitutional monarchy

**Capital:** Doha

**Legislature:** Consultative Assembly

**Location:** Qatar is a country in Western Asia. It occupies the Qatar Peninsula on the northeastern coast of the Arabian Peninsula in the Middle East and shares its sole land border with Saudi Arabia to the south, with the rest of its territory surrounded by the Persian Gulf. The Gulf of Bahrain, an inlet of the Persian Gulf, separates Qatar from nearby Bahrain.

**Population:** 2,795,484 (2020 estimate)

**Economic indicators:** Qatar has the world's 55<sup>th</sup> largest economy by nominal GDP (\$221 billion).

**GDP growth:** 1.6 per cent (2021)<sup>2</sup>

**GDP per capita:** \$82,877 (2022 estimate)

**GDP per capita rank:** 5<sup>th</sup> (nominal, 2022 estimate)

**Inflation:** 4.96 per cent (2022)<sup>3</sup>

## Top Imports from All Over the World

Qatar agri-food imports have grown at 4.21 per cent (CAGR<sup>4</sup>) 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, live horses, 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 "saloona," 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.

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<sup>1</sup> Wikipedia.org

<sup>2</sup> GDP growth -Qatar | Data (worldbank.org)

<sup>3</sup> Qatar- Inflation rate 2028 | Statista

<sup>4</sup> Compound Annual Growth Rate

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

Source: Global Trade tracker – June 2023

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

## Supply Chain Dynamics<sup>5</sup>

Supply chain flows in Qatar are stable, with policies, procedures, and technologies in place to guarantee its integrity. Qatar is well-positioned for trade. The country has superior air cargo capabilities, with Qatar Airways Cargo being a global leader. In addition to its air cargo capacities and internationally impressive storage capabilities, Qatar has established diversified sea routes to continue linking the country to worldwide markets. There is always the option and capacity to shift sea-bound traffic onto air cargo capacity, and vice versa, should the need arise.

In 2017, Qatar launched the Strategic Food Security Facilities (SFSF) in Umm Al Houl. Partnering with industry leaders from Germany, Italy, and Switzerland, this Hamad Port project consists of storage facilities, silos, reservoirs, and facilities for the processing, manufacturing, and refining of rice, sugar, and edible oils. Qatar has also established storage facilities for 22 identified food and non-food items to last for at least six months and up to a number of years. Taken together, food, medical and other supplies are secured for the foreseeable future. The country also monitors quality and prices for those products, guarding against inflation or monopolistic practices.

The country's transportation and retailing infrastructure is well developed and there are no significant issues hindering distribution. Cold chain systems are well developed, so there are no issues with the distribution or retailing of chilled or frozen products. Supermarkets and hypermarkets are the dominant distribution channels for foods, with consumers shopping in comfortable air-conditioned venues. Modern grocery retailers are generally located in shopping malls.

## Canada-Qatar Trade Relations

In 2020, Qatar was Canada's 3rd largest merchandise trade partner in the Gulf Region, and 11<sup>th</sup> most important partner in the Middle East and North Africa (MENA) with a bilateral merchandise trade total of \$196.2 million. Canada's merchandise exports to Qatar in 2020 were valued at \$113.5 million, and included mineral ores, aircraft and parts, machinery, cereals, and scientific instruments. Canada's 2020 merchandise imports from Qatar, valued at \$82.7 million, included mineral fuels and oils, aluminum, fertilizers, chemical products, and mineral ores.

More than 9,000 Canadians live in Qatar, working within Canadian and Qatari companies and institutions. This dynamic expatriate community is very active and boosts mutual economic relationships and interests. Canada and Qatar are directly linked through commercial flights, with four direct flights per week between Montreal and Doha and three direct flights per week between Toronto and Doha.

The import duty for most processed food products is a flat five per cent ad valorem. There are no import duties for live animals, fresh fruits and vegetables, seafood, grains, flours, tea, sugar, spices, and seeds for planting. As a GCC<sup>6</sup> country, Qatar applies the Unified Customs Law. This includes the imposition of a five per cent tariff on the cost, insurance, and freight values of products such as textiles, apparel, and travel goods.

Qatar has no import quotas. Non-tariff barriers, however, arise occasionally. As an example, the sale of pork and alcohol remains heavily regulated, and sales are restricted to only one distribution point in all of Qatar, which is managed by the Qatar Distribution Company (QDC). The government introduced a so-called sin tax in Jan. 2019 that includes a 100 per cent tax on pork, as well as a 50 per cent tax on soft drinks, as it is increasingly concerned over the impact of rising obesity rates on health care costs.

As part of the GCC Customs Union, Qatar works with other member states toward unifying custom standards and conformity assessment regimes. Nonetheless, each member state is applying its own existing standards until a uniform GCC standard is set.

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<sup>5</sup> Qatar's Supply Chains and Logistic Systems | HBKU

<sup>6</sup> Gulf Cooperation Council

## Market Access Regulations

The Supreme Council of Health is the competent body that oversees food and agricultural import regulations. Their objective is for imported food to be safe, hygienic, and compliant with international standards and GCC regulations and fit for human consumption. Food imports must follow strict guidelines of authenticity and certification from their country of origin.

Meanwhile, the Port Health and Food Control Section monitors the standards and safety of food imports into Qatar. Its functions include periodic inspections, testing and sampling for spoilage and chemical and microbiological contamination at four designated entry ports throughout Qatar. The Hamad Port project, just outside of Doha, was designed to meet the significant growth of imports into the country.

Labelling and marking requirements are compulsory for any products exported to Qatar. Labels must either be in Arabic only, or bilingual with Arabic as the second language. Labels must be applied prior to transportation. Production and expiration dates are required to be on all “original” food labels.

## Prospects and opportunities

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.

During the 2018 to 2022 period, Manitoba exported wheat, honey, peas, and kidney beans to Qatar, valued \$3.8 million. Manitoba may consider expanding its market share in those markets and/or entering other agri-food markets that have shown high growth in the last few years. Table 3 shows a list of Qatar’s selected agri-food imports by category and their growth in value from 2018 to 2022. For example, poultry and poultry products account for 6.9 per cent of the total imports in value for the 2018 to 2022 period and show solid market growth at 13.4 per cent CAGR. In 2022, Qatar imported 111,000 tonnes of poultry products valued at \$444.5 million, almost doubling the imports from previous year.

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,<sup>7</sup> as population continues to grow. Wheat imports have also seen an increased 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 2018 to 2022 period. Currently, Manitoba accounts for one per cent of this market.

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. As Manitoba companies are looking for other markets outside CUSMA partners, Qatar may be considered as option.

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<sup>7</sup> Euromonitor, Staples Foods in Qatar – February 2023

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 %
<b>Total agri-food products</b>	<b>22,133,267,286</b>	<b>100.00</b>	<b>4,474,472,461</b>	<b>4,308,838,163</b>	<b>4,223,512,549</b>	<b>3,850,094,534</b>	<b>5,276,349,579</b>	<b>4.21</b>
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. The Netherlands was the main supplier of processed potatoes, with 46 per cent of the total import value. Canada ranked in ninth place, accounting for 1.5 per cent in value of those imports for 2022. Although there is no record of Manitoba exports of processed potatoes to Qatar, the growth in imports signals an opportunity to be considered for future years.

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 2022, Canada was Qatar's third largest supplier of chickpeas, valued at \$0.5 million and a CAGR of 45.2 per cent for the same 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, also signaling opportunities for Manitoba.

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. Canada was the main supplier of green peas to Qatar in 2022, accounting for over 13 per cent in value of total imports.

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.



## Key contact organizations

### **The Embassy of Canada to Qatar**

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Doha, Qatar

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**Fax:** 011-974 4419 9035

**Email:** [dohatd@international.gc.ca](mailto:dohatd@international.gc.ca)

## List of importers

### **Broadway International Agency**

Industrial Area, Street No. 52, Zone 91, Building No. 94  
P.O.Box 201820

Doha, Qatar

**Tel:** 011-974 44 11 60 77

**Fax:** 011-974 44 11 60 22

Broadway International Agency - Qatar

### **Quality International Fruits and Vegetables W.L.L.**

P.O.Box 9130

Doha, Qatar

**Tel.:** 011-974 44 21 28 68

**Fax:** 011-974 44 27 72 61

[qualitygroupintl.com](http://qualitygroupintl.com)

### **Qatar national Import & Export**

P.O.Box 490

Doha, Qatar

**Tel:** 011-974 40 33 90 00

**Fax:** 011-974 40 33 91 99

[qnie.com](http://qnie.com)

### **Paris Food International W.L.L.**

Industrial Area, Street number 39

Doha, Qatar

**Tel:** 011-974 44 21 54 54

**Fax:** 011-974 44 21 50 96

<https://www.parisarabia.com.qa>

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<https://cwf.ca/research/publications/north-america-brief-07-rail-mergers-u-s-product-labelling/>

### Others:

Catsnet

Euromonitor

Global Trade Tracker

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