



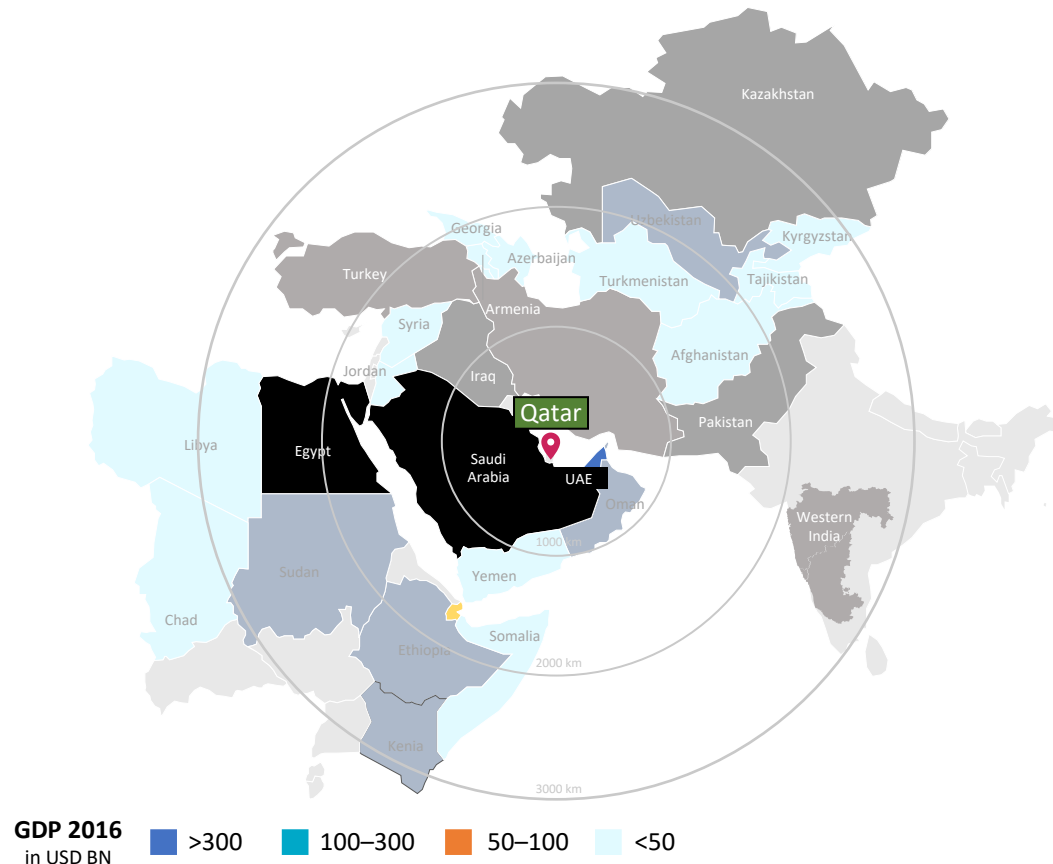
# NO BETTER PLACE, NO BETTER TIME

Discover QATAR FREE ZONES



# Logistics

# Qatar is positioned in the heart of the Gulf Region with 25 economies located within 3,000 km



- **Tremendous markets and economic power within reach of <3,000 km**
  - >2BN people
  - >6TN USD in combined GDP
- **India and Pakistan** offer large populations and domestic markets
- Qatar is well positioned to serve **Iran** and help **Iraq** with rebuild activities
- Even markets like **Turkey** and **CIS** countries (Uzbekistan, Kazakhstan, etc.) are not beyond reach and offer **industries with potential for logistics**
- In the long-term, **KSA** is another potential market so serve
  - currently it is **not accessible**
- Excellent access to the **Eastern Africa** market

Note: 3,000 km is a range that a typical wide-body cargo plane can fly with a full load without refueling

# Qatar is well positioned in the global logistics performance index, especially featuring modern logistics infrastructure

Logistics Performance Index (LPI) – Positioning of Qatar against selected countries 2018, 5 = highest score and 1 = lowest score

Rank	Country	LPI Score	Evaluation criteria					
			Infrastructure	Logistics competence	Customs	Int'l shipments	Track and trace	Timeliness
1	Germany	4.2	4.4	4.3	4.1	3.9	4.2	4.4
...								
10.	UAE	4.0	4.0	3.9	3.6	3.9	4.0	4.4
...								
<b>30.</b>	<b>Qatar</b>	<b>3.5</b>	<b>3.4</b>	<b>3.4</b>	<b>3.0</b>	<b>3.8</b>	<b>3.6</b>	<b>3.7</b>
...								
43.	Oman	3.2	3.2	3.1	2.9	3.3	3.0	3.8
44.	India	3.2	2.9	3.1	3.0	3.2	3.3	3.5
...								
47.	Turkey	3.2	3.2	3.1	2.7	3.1	3.2	3.6
...								
55.	Saudi Arabia	3.0	3.1	2.9	2.7	3.0	3.2	3.3
...								
64.	Iran	2.9	2.8	2.8	2.6	2.8	2.8	3.4
...								
122.	Pakistan	2.2	2.2	2.6	2.1	2.6	2.3	2.7
...								
147.	Iraq	2.2	2.0	1.9	1.8	2.3	2.2	2.7

Source: The World Bank

# There are numerous opportunities for international logistics players to enter Qatar's logistics market



## FREIGHT FORWARDING FOR IMPORT/EXPORT

- Qatar imports machinery, electronic equipment, metal products etc. in large quantities to support its diversification strategy
- This, together with increasing importance of industrial exports, offers an opportunity to serve manufacturers in Mesaieed Industrial City and in Ras Laffan



## COLD CHAIN CONTRACT LOGISTICS SERVICES

- Growing Qatar population fuels food imports; recent blockade by other GCC states re-imposed the importance of self-sufficiency in food supply for Qatar
- Large-scale cold chain facilities and respective network to serve Doha food market is yet to be established



## HIGH-PROTECTION STORAGE FOR VALUABLE GOODS

- Qatar imports of precious metals amounted to \$1.4 BN in 2016
- Provision of professional secure storage and handling



## WORLD CUP FREIGHT FORWARDING AND PROJECT LOGISTICS

- Multi-billion investments in preparation for World Cup 2022
- Over 1.5 million tourists are expected to visit WC2022
- Significant demand for freight forwarding and logistics services both prior to and during WC construction



## DISTRIBUTION NETWORK FOR E-COMMERCE

- Qatar's online B2C market is expected to grow at a compound annual rate of 17% over the next years
- It remains fairly fragmented, with mostly local players operating DCs and conducting pick-ups and deliveries

# International logistics player can access a \$1.5 billion Market



## Servicing the local logistics market in Qatar

### Service

Local logistics services within Qatar

### Value chain part

Courier, Express & Parcel (CEP), Contract logistics (CL), Freight Forwarding (FF), Warehousing (WH)

### Drivers

National Vision 2030, import/export growth, eCommerce growth

Size of market opportunity<sup>1</sup>

**USD M ~ 800 p.a.**



## Providing regional logistics/trans-shipment services

### Service

Regional hub for trans-shipment services

### Trade routes

IND-IRN, IND-IRQ, PAK-TUR, IRN-TUR, IRN-UAE, IRQ-UAE, PAK-Other, IRN-Other

### Commodities

(Precious-) metals, metal products, transport./industrial equipment, chemicals/pharma, textiles

Size of market opportunity<sup>1</sup>

**USD M ~ 450 p.a.**



## Value-added services for selected industries

### Service

Value adding contract logistics services

### Countries

Iran, Pakistan and Western India

### Industries

Industrials/Manufacturing, Automotive, Health Care/Pharma and Electronics

Size of market opportunity<sup>1</sup>

**USD M ~200 p.a.**



# **Qatar recently signed a landmark open skies agreement**

Qatar recently signed a landmark agreement with the EU, allowing all air carriers from the 28 European Union member states and Qatar unlimited and unrestricted access to their respective territories