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 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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>LPI Score</th>
<th>Infrastructure</th>
<th>Logistics competence</th>
<th>Customs</th>
<th>Int’l shipments</th>
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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

**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

**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

**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

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

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

USD M ~200 p.a.

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1. Size of market opportunity
Qatar recently signed a landmark open skies 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.