Qatar Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Qatar Freight and Logistics Market size is estimated at USD 9.37 billion in 2024, and is expected to reach USD 12.13 billion by 2029, growing at a CAGR of 5.30% during the forecast period (2024-2029).

Gradual economic recovery since 2021 contributed majorly by road freight transport market

- As one of the largest liquefied nitrogen gas (LNG) suppliers globally, the country has supported the growth of the logistics market. The market's growth can be attributed to new expansion plans as the country hosts the 2022 FIFA World Cup. The market is expected to be driven by expanding industrial activities, growing e-commerce and automotive sectors, upcoming infrastructure in the country, and continuous investments by the government to develop logistics infrastructure. In 2020, the transportation and storage sector had a GDP share contribution of around 4.1%, the highest from 2017-2022. The share contribution has reduced to 3% as of 2022.
- After the COVID-19 pandemic-induced lockdown, imports from neighboring countries stopped, and Qatar shifted its focus toward European and Asian countries to meet the import demand. Hence, its logistics sector grew despite the lockdown. However, the annual rate of change in vehicle sales in Qatar in 2020 decreased by approximately 19%. The annual growth rate of vehicle sales in 2013 was about 9.2%. The progressive plans of the Qatari government to develop the country into a new logistical and regional center have supported the growth of the country's logistics market during review period.
- In addition to building stadiums specifically to host World Cup matches, Qatar has been investing in modernizing its infrastructure. The goal of the country is to become a transport hub for a significant portion of the world. The country's top priorities are the development of airports, as well as a more extensive metropolitan network, along with upgraded roadways and emerging cities. In Qatar, World Cup-related infrastructure projects are currently valued at USD 300 billion.

Qatar Freight and Logistics Market Trends

Qatar's logistics areas project invested around USD 8 billion, accelerating growth in trade sector and transportation infrastructure

- Qatar's transportation market achieved a valuation of approximately USD 12 billion in 2022. The nation holds the second position in the region for its effective logistics services and ranks fifth among the GCC countries regarding port capacity. The contribution of about USD 9.9 billion to Qatar's GDP in 2022 from transportation and storage opens doors to various opportunities, including investment prospects.
- The Logistics Areas Project in the southern region of Qatar is expected to draw QAR 30 billion (USD 8.17 billion) in direct investments for development projects. The area is expected to be developed as a regional hub for investments and logistics services, boosting trade sector competition and actively encouraging the private sector to participate in the Qatar National Vision 2030. The project will also offer logistics services, such as assembly, processing, open storage spaces, storage facilities, exhibitions, shops, and commercial offices.
- Law No. (13), enacted in 2000, focuses on enhancing foreign direct investment (FDI) by allowing an increase in the share of FDI in project capital from 49% to 100% in several sectors. These sectors include agriculture, education, tourism, development, industry, health, and the exploitation of natural resources. In 2021, the Investment Promotion Agency Qatar (IPA Qatar) projected QAR 4 billion in FDI and the establishment of 1,100 new foreign commercial entities. In 2022, Qatar witnessed substantial investments in various industries, with approximately USD 200 billion. Additionally, significant funds were allocated to state-of-the-art metro systems (USD 35 billion), transportation and infrastructure (USD 11.4 billion), healthcare (USD 6.2 billion), and education (USD 5.2 billion).

Despite the decrease in production, diesel and petrol prices in Qatar have remained stable since June 2022

- Qatar's total petroleum and other liquids production declined slightly from its peak of more than 2 million barrels per day in 2019 to less than 1.9 million b/d in 2022. Qatar's crude oil production declined from its highest level of 852,000 b/d in 2008 to 616,000 b/d in 2022. In addition to crude oil, which makes up 33% of its total liquid production, Qatar produces a significant number of condensates from natural gas fields (38%) and HGLs that are removed from a raw natural gas supply (20%).
- From June 2022 to May 2023, diesel and super-grade petrol prices have remained stable, while premium petrol prices have fluctuated between QR 2.05 (USD 0.55) and QR 1.90 (USD 0.517) per liter. In 2021, Qatar Energy announced the construction of an LNG project in the country that would be the world's largest LNG project and increase the country's production capacity. Production is expected to begin in the fourth quarter of 2025, with a total capacity of 1.4 million barrels of oil equivalent per day.
- Qatar's estimated proven natural gas reserves were 843 trillion cubic feet as of December 2022. Qatar holds 11% of the world's proven natural gas reserves and almost 30% of the Middle East's reserves. With reserves of crude oil estimated at 25.2 billion barrels in January 2023, Qatar held the 6th largest reserves in the Middle East and the 14th largest in the world. The Barzan Natural Gas Project, which can process up to 511 billion cubic feet per year of natural gas, began operating in late 2022. Since 2022, high natural gas demand in Asia, global natural gas supply uncertainty because of Russia's full-scale invasion of Ukraine, and curtailed natural gas supply to Europe have created significant demand for LNG exports from new projects such as those in

Qatar.

Qatar Freight and Logistics Industry Overview

The Qatar Freight and Logistics Market is fragmented, with the top five companies occupying 10.95%. The major players in this market are Gulf Agency Company (GAC), Gulf Warehousing Company, Milaha Group, Nakilat Agency Company (NAC) - Nakilat and Qatar Airways Cargo (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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