



Qatar's National Manufacturing Strategy

**.....and Its Impact on the Infrastructure &
Real Estate Sectors**

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Foreword

As Qatar accelerates its journey toward economic diversification, **the manufacturing sector has emerged as a cornerstone of long-term resilience, competitiveness, and innovation.**

The National Manufacturing Strategy plays a pivotal role in translating this vision into action by identifying high-potential sectors, fostering advanced technologies, and empowering both private enterprise and national talent. Aligned with the broader objectives of the Third National Development Strategy and Qatar National Vision 2030, it charts a clear path toward a more dynamic, sustainable, and inclusive industrial future.



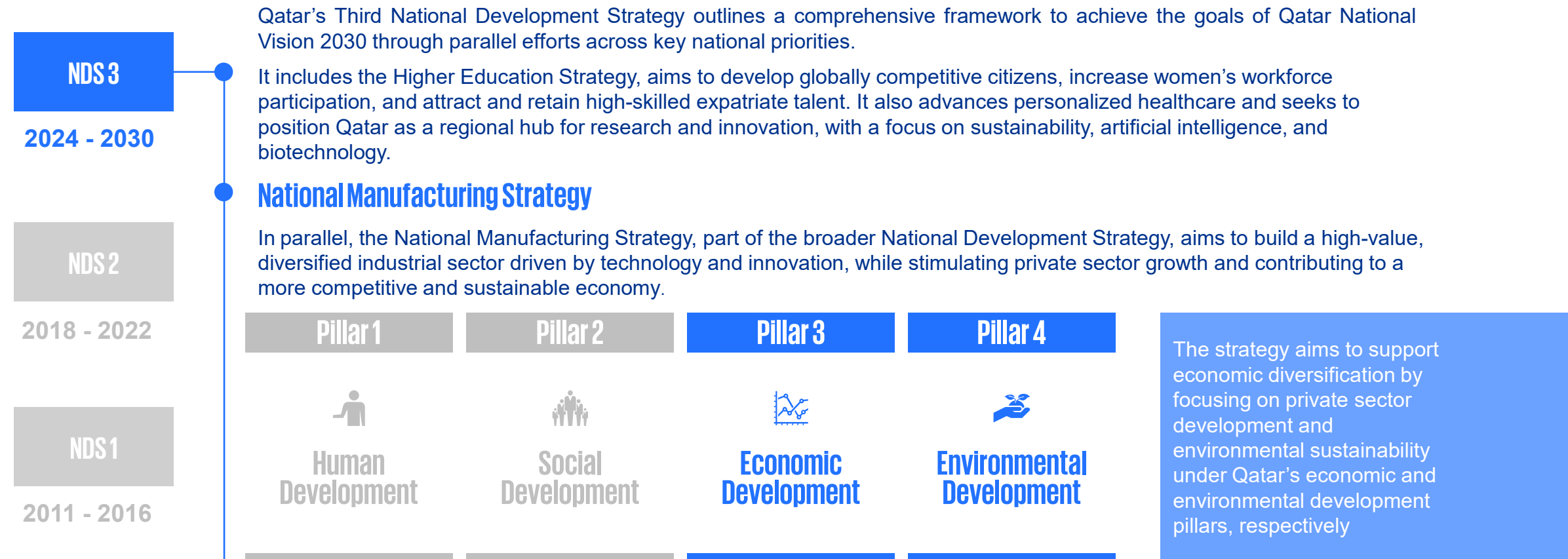
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Toward an Industrialized Future – Qatar’s National Manufacturing Strategy

Driving Progress: Qatar’s Three Phase National Development Strategy (NDS)



Source: Ministry of Commerce & Industry, Qatar National Manufacturing Strategy



An Overview of the Implementation Plan

Phased Implementation

The implementation of Qatar's National Manufacturing Strategy will be spearheaded by the Ministry of Commerce & Industry, with the support of other government entities and strategic partners in three phases

01



Quick Wins

- This phase focuses on quick-win projects that are low in cost and limited in scope
- These projects are designed for implementation within relatively short time frames
- Each project is intended to generate a clear and measurable impact within a specific area
- Such initiatives are prioritized at the start of the strategy to help catalyze long-term performance

02



Major Projects

- These are high-cost initiatives with impact across multiple activities and industrial sectors
- These projects are long-term in nature, with results that will take time to materialize
- The overall success of the strategy will largely depend on the outcomes of these projects
- These projects are expected to lay the foundation for future developments

03



Complementary Projects

- This phase is designed to be a continuation of the earlier stages of the strategy
- It will bring together any new projects introduced during the previous stages
- It will also serve to address and recover from delays in implementing original projects
- The phase ensures continuity and flexibility in achieving the overall strategic objectives

Source: Ministry of Commerce & Industry, Qatar National Manufacturing Strategy

Ready for Effective Execution

09	15	60
Programs	Initiatives	Projects
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 Programs	

Execution Partners

Lead

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



Strategy & Implementation Partners

وزارة العمل
Ministry of Labour
دولة قطر • State of Qatar



وزارة المواصلات
Ministry of Transport
دولة قطر • State of Qatar



Main Partners

وزارة البيئة والتغير المناخي
Ministry of Environment and Climate Change
دولة قطر • State of Qatar



Source: Ministry of Commerce & Industry, Qatar National Manufacturing Strategy



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Defined Strategic Goals



Source: Ministry of Commerce & Industry, Qatar National Manufacturing Strategy

Unlocking Economic Potential

Priority Industrial Sectors



Pharmaceuticals



Chemicals & Petrochemicals



Plastics



Food & Beverage



Metals & Fabricated Metals



Construction Materials

01 | Pharmaceuticals

- Enhances national health security through local production of essential medicines
- Offers high value-added potential and opportunities for skilled employment

02 | Plastics

- Utilizes petrochemical outputs to create high-demand consumer and industrial products
- Encourages innovation in packaging, construction, and manufacturing applications

03 | Metals & Fabricated Metals

- Facilitates infrastructure and industrial development through critical inputs
- Promotes higher value-added activities in metalworking and product assembly

04 | Chemicals & Petrochemicals

- Leverages Qatar's abundant hydrocarbon resources for downstream diversification
- Supports export growth and global competitiveness in industrial chemicals

05 | Food & Beverage

- Strengthens food security and reduces reliance on imports
- Supports small and medium sized enterprises development and local agri-food value chains

06 | Construction Materials

- Supports national infrastructure and real estate projects with local supply
- Reduces import dependence and stabilizes costs for major development plans

Source: Ministry of Commerce & Industry, Qatar National Manufacturing Strategy, KPMG Research & Analysis



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Ripple Effect – Expanding Industrial Strategy into the Built Environment (1/2)

As Qatar advances its National Manufacturing Strategy, the ripple effects will extend beyond industry, shaping the country's infrastructure and real estate landscape in critical ways.

Industrial Zone Expansion

- Increased manufacturing activity will drive demand for purpose-built industrial zones, logistics hubs, and warehousing facilities
- Developments such as Ras Bufontas and Umm Alhoul Free Zones are already attracting industrial and logistics tenants through their strategic locations, advanced infrastructure, and direct access to Hamad International Airport and Hamad Port

Real Estate Expansion

- Demand for accommodation, office space, and complementary developments such as retail and food and beverage outlets is likely to increase around emerging manufacturing clusters, supporting broader patterns of urban expansion
- Residential developments near the Industrial Area, such as Labor City, are already responding to the needs of the growing industrial workforce

Supportive Infrastructure Needs

- Growth in manufacturing will require robust transportation networks, utilities, sustainable, Eco-friendly, digital infrastructure to ensure seamless operations and connectivity
- Ongoing investments in Hamad Port and Ashghal's expressway program are enhancing logistical efficiency and supporting industrial mobility across the country

Strategic Land Use Planning

- Coordinated planning will be essential to balance industrial growth with sustainability, zoning efficiency, and urban livability
- The Qatar National Master Plan addresses this by guiding industrial development toward areas such as Mesaieed and Al Wakrah while preserving land use efficiency and environmental balance

As industrial activities grow, prioritizing sustainability is essential across manufacturing, infrastructure, and real estate sectors. This involves incorporating energy-efficient construction, eco-friendly logistics, and mindful land use, all while supporting Qatar's wider environmental objectives to promote growth that is sustainable both economically and ecologically.

Source: KPMG Research & Analysis



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Ripple Effect – Expanding Industrial Strategy into the Built Environment (2/2)

Qatar already has a well-established built environment, comprising extensive infrastructure and real estate developments distributed across various zones. Further expansion of these sectors is expected to generate significant trickle-down effects across other areas of the economy.

Built Environment Set to Benefit



Accommodation



Office



Retail and F&B



Transport



Construction Materials



Support Services

The evolution of these sectors has been shaped by a series of economic, geopolitical, and global events over the past decade, each influencing demand patterns and driving shifts in growth and investment across the broader landscape.

Blockade-Induced Disruption

- The 2017 blockade initially restricted economic activity and disrupted supply chains across key sectors.
- However, it also prompted a strategic pivot toward self-reliance, accelerating domestic investment and local sourcing, which gradually revitalized demand for accommodation, construction materials, and support services.

Recovery and Market Opening

- The lifting of the blockade in early 2021 re-opened regional trade routes and improved investor confidence, enabling a rebound in economic activity.
- This shift supported renewed investment in commercial real estate and economic and social infrastructure, while also reinforcing domestic value chains that had been strengthened during the period of economic isolation.

Pandemic Shock and World Cup Surge

- The COVID-19 pandemic temporarily disrupted economic activity and reduced demand across most sectors, leading to a period of stagnation and uncertainty.
- This was followed by a sharp recovery driven by the FIFA World Cup 2022, which significantly boosted demand for accommodation, office space, transport infrastructure, and consumer-facing sectors such as F&B and retail.

Slowdown & Strategic Revitalization

- Following the World Cup, demand in many of these sectors plateaued, reflecting the natural post-event slowdown in economic activity.
- However, the launch of the National Manufacturing Strategy is expected to reinvigorate momentum, with planned industrial expansion likely to drive renewed demand across sectors.

Source: KPMG Research & Analysis



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Key Takeaways

01 Strategic Anchor for Economic Diversification

The National Manufacturing Strategy serves as a central pillar within the Third National Development Strategy, reinforcing Qatar's broader diversification agenda by targeting high-value, innovation-driven industrial growth, and positioning manufacturing as a core engine for building long-term economic resilience

02 Balanced Implementation Approach

Combining short-term, low-cost quick-win projects with longer-term, high-impact investments reflects a dual-track strategy that builds early momentum, lays the groundwork for systemic transformation, manages risk, and sustains stakeholder engagement through visible progress

03 Empowered Execution Through Cohesive Partnerships

Effective implementation hinges not only on the right strategy but also on the right actors, with the emphasis on cohesive, capable partnerships reflecting the recognition that policy ambition must be matched by public and private institutional capacity to drive results at scale

04 Priority Sectors as Growth Catalysts

The targeted sectors are not only economically viable but are strategically selected to build competitive advantage by aligning with Qatar's natural strengths, while the increased focus on industrialization is expected to drive growth in the infrastructure and real estate sectors alongside the priority sectors outlined in the strategy

Source: KPMG Research & Analysis



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