



Business Opportunity Report: **Qatar's Food Security**

Prepared by the US-Qatar Business Council

Washington, DC
March 2021





Lulu Hypermarket Trading Co. W.L.L., the fastest growing retail chain, has developed a pre-eminent position in the retail sector in the State of Qatar, providing a unique shopping experience to its valued customers by addressing their daily needs under one roof. Lulu's operations in Qatar started in the year 2000 with its first venture at Al Saad on Al Rayyan Road. Over the years, Lulu Hypermarkets have become synonymous with excellence in the fields of retailing, import and distribution of fresh/frozen foodstuff, and consumer staple goods.

Lulu Hypermarket possesses a diverse portfolio of Hypermarkets, Supermarkets, Department Stores, Express Stores, Shopping Malls and Lulu Webstore. Currently, Lulu Hypermarket Qatar has 14 state-of-the-art stores and a Shopping Mall scattered over various strategic locations across Qatar. The Group also has a comprehensive network of Export Distribution Centers and Sourcing Offices in 24 countries including the USA, UK, Italy and Spain, to cater to the regular requirements of U.S., British, and European brands of products across all Lulu stores.

The bout of pandemic has been a challenging time for retailers globally, and Lulu's supply chains were under pressure. Like Healthcare Workers, retail staff were also on the forefront of helping the community with abundant supply of essential food, consumer goods and hygiene products like masks and sanitizers. As a major retailer, Lulu stores had the twin challenge of keeping its staff and customers safe. They were the pioneers in implementing the social distancing and hygiene protocol, universal masking policy, and transparent protective shields at checkout to protect their staff and customers.



Mr. William Grant, the Former Chargé d'Affaires of the U.S. Embassy to the State of Qatar is inaugurating the Discover America Festival at the Opening Ceremony held on Thursday, the 24th of October, 2019 at Lulu Hypermarket, Al Messila branch, Doha. Distinguished guests from the US Commercial Service, American Chamber of Commerce, USDA Office of Agricultural Affairs, American Women's Association, American School and senior officials including Dr. Mohamed Althaf, Director from Lulu Hypermarket, and many other dignitaries from various American organizations operating in Qatar were present.

Understanding customers' health, safety, and wellness as the company's first priority, Lulu Hypermarket has raised awareness of safety for customers and the general public with a massive campaign named "Your Health is in your Hands" through its official website, social media, newspapers and signages, on the necessity of maintaining reasonable distance, sanitizing or washing the hands, minimal family presence at the store for shopping, and temporary suspension of the best practice of reusable bags. They have also introduced dedicated checkouts to support elderly and vulnerable shoppers and healthcare workers. Further, a protective screen has been installed at checkouts in order to safeguard both the customers and staff. They have also established pop up stores within 24 hours at various industrial areas that were in lockdown.

Lulu Hypermarket has taken proactive measures to ensure food security during the crisis by chartering cargo flights, deepening the storage of essentials, and enhancing our e-commerce capability. In an effort to speed up its online grocery delivery amidst the current pandemic crisis, Lulu Hypermarkets have introduced faster and more convenient ways for shoppers to get their grocery products and lifestyle essentials delivered through two services: 'Express Delivery' for a same-day delivery and 'Click and Collect' for a store pick-up service through its online shopping platform.

The Group is now working closely with Qatar's farming community to energize the 'Farm to Store' program by sharing the data analytics, in a bid to increase the availability and minimize the logistic challenges. They are also in the process of co-manufacturing in Qatar and will be producing a majority of the private labels in close partnership with the manufacturers in Qatar.

Lulu is the winner of the 'Sustainability Award 2019' organized by the Gulf Organization for Research & Development (GORD), in appreciation of their long-standing and continued efforts towards sustainability. They have also won the 'Corporate Social Responsibility Award' in the Category: 'The Best Company in the Private Sector' in the 7th CSR Awards ceremony entitled "Social Responsibility between Ethical Commitment and Achieving Profitability" held in Doha in 2020.



Inaugural Ceremony of Discover America Festival held in 2019 at Lulu Hypermarket, Al Messila branch, Doha



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About the Council

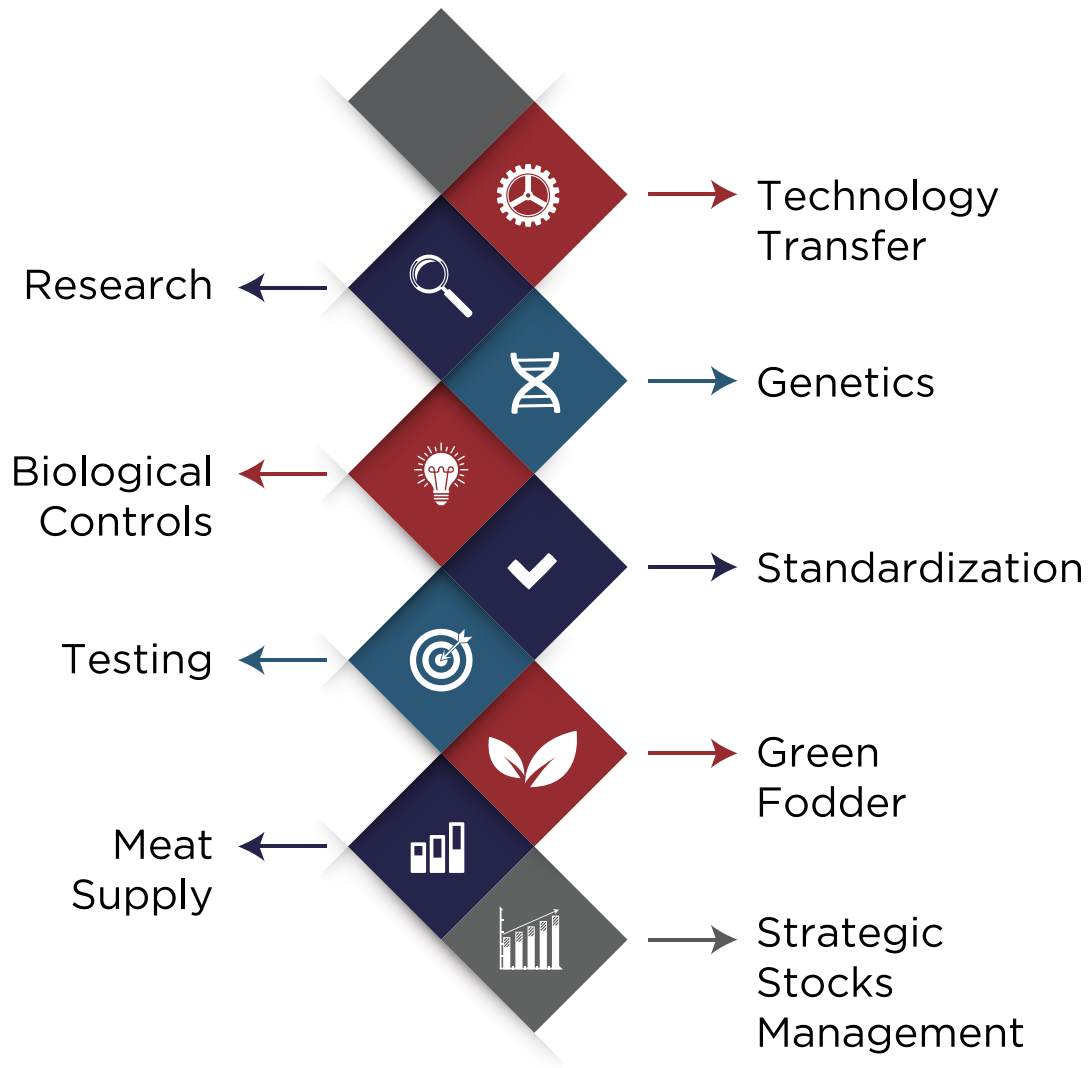
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The Council envisions a seamless relationship between the US and Qatar; a permanent partnership built on a foundation of mutual interests and strong business, cultural, and security relations. The Council is the leading organization dedicated exclusively to enhancing the bilateral commercial relationship between the US and Qatar.

The Council offers business advisory services, consultancy services, and coordinates trade missions for US and Qatari companies to facilitate bilateral business. The Council utilizes various vehicles to highlight Qatari happenings and engage stakeholders, including partnerships, events, and articles.

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Key Business Opportunities



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The US-Qatar Business Council (USQBC) envisions a seamless relationship between the US and Qatar; a permanent partnership built on a foundation of mutual interests and strong strategic, business, cultural, and security relations. USQBC is the leading organization dedicated exclusively to enhancing the bilateral relationship between the US and Qatar.

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- Partner Identification & Introduction
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The US-Qatar Business Council is the authorized entity for the authentication & certification of US export and commercial documents bound for the State of Qatar.



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US-Qatar Business Council

Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

Featuring His Excellency Eng. Abdulla bin Abdulaziz bin Turki Al Subaie Qatar's Minister of Municipality & Environment

On May 19th 2020, the US-Qatar Business Council (USQBC) hosted a virtual video panel discussion, "Qatar's Vision for Sustainable Food Security: Environmental Considerations, Innovations, and Business Opportunities."

The event featured His Excellency Eng. Abdulla bin Abdulaziz bin Turki Al Subaie, Qatar's Minister of Municipality and Environment, in addition to other distinguished government and private sector officials. USQBC President Ambassador Anne Patterson delivered opening remarks and USQBC Managing Director Mr. Mohammed Barakat moderated the panel discussion. The event was attended by over 50 senior company representatives from both the United States and Qatar.



Bio:

His Excellency the Minister was appointed Minister of Municipality and Environment in November 2018.

His Excellency the Minister is the Managing Director of Qatar Railways Company since March 2011. In his capacity as Managing Director, HE was responsible for providing overall leadership and direction in developing Qatar's Rail industry in line with the Qatar National Vision 2030 for comprehensive national development.

In January 2017, HE was appointed as the Chief Executive Officer of Qatar Rail in addition to his role as the Managing Director. HE previously was the Group Chief Executive Officer of Barwa, Qatar's leading Real Estate Development and Investment holding Group from April 2011 until May 2014. Prior to joining Barwa, HE was the Chief Executive Officer of Smeet, an affiliate of Qatari Diar Group, serving the company since its formation in 2008 until March 2011.

HE has held various leadership and senior project management positions from 1996 to 2008 with The Qatar General Electricity & Water Corporation (KAHRAMAA), where he has managed multibillion dollar infrastructure projects.

Education

HE the Minister of Municipality and Environment holds a Masters in Business Administration and Bachelors in Electrical Engineering from Qatar University.

Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

USQBC: How would you describe Qatar's food security journey thus far?

HE Eng. Abdulla bin Abdulaziz bin Turki Al

Subaie: We've had a very unique experience and journey for food security; especially post-blockade. Essentially overnight we had to ensure the continuity of the food supply to the country's population and ensure we have a resilient supply chain. During this time, we worked in two different streams. First, we established a committee to ensure the continuity of supply through whatever means. Second, the committee looked at the medium and long range plans to harness and strengthen food security for the State of Qatar. After the first six months of the blockade, the committee arrived at the **Qatar National Food Security Strategy that has four main pillars: international trade & logistics, enabling domestic markets, domestic self-sufficiency, and strategic reserves.**

Below these four pillars there are many initiatives and projects that are on-going, upcoming, or have already been achieved. We've made some major strides already towards achieving Qatar's food security.

We have almost doubled our local production capacity from our agriculture sector. We used to have a 15% capacity, now we've reached 30%, and we are heading to the target of 70% three years down the road. Similarly, before the blockade we had less than 20% self-sufficiency of dairy products, but now we are completely self-sufficient.

For red meat, we've increased our capacity by almost 60% and have increased our green

fodder capacity by almost 30% so far. We're also working on our strategic stock facility on the port of Hamad to stock wheat, rice, edible oil, and sugar which will be sufficient for two years for the whole State of Qatar. We've also diversified our international business with many countries with different supply rules to ensure and strengthen our imported food security.

At the market level we have recently established a company called Mahaseel which works as an intermediary to guarantee the purchase of all crops from farmers at a certain price. This will ensure that all their output production can be marketed on the local market at a fair and reasonable price.



Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

USQBC: In what ways do you foresee American companies helping Qatar achieve its food security goals?

HE Eng. Abdulla bin Abdulaziz bin Turki Al Subaie: We always cherish the US-Qatar relationship and we've already had a number of talks about the possible cooperation or opportunities for US businesses.

One of Qatar's foremost challenges is water scarcity. We are conscious that we need to always adapt to the latest technologies in relation to water preservation, especially in the agriculture sector. Right now, we are highly reliant on groundwater and we do not see that as being sustainable. Because of our climate, we are also utilizing greenhouse farming and are interested in using the newest technologies.

We would certainly welcome US investors with technological abilities in these two areas specifically.

We would also be interested in increasing our efficiency of local production through tools and technology and I see many opportunities for companies to have good business here. Technology transfer, research, genetics, biological controls, etc., are all areas where we'd see ripe opportunities for collaboration. From a

more commercial perspective, I also see great opportunities in supplying of green fodder and frozen meats to Qatar.

One of the most important upcoming opportunities that I would point to would be in relation to the strategic stock facility at Hamad Port which will be finished by the end of the year. The facility is huge and we believe that the private sector needs to use that facility as a hub for stocking goods and/or supply the Qatar market and larger region. This would be a great opportunity to work with the local private sector to operate and manage these strategic stock facilities.



Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

USQBC: How did the blockade of Qatar prepare the country for difficulties associated with the Covid-19 pandemic?

HE Eng. Abdulla bin Abdulaziz bin Turki Al

Subaie: We definitely learned the hard way because we had been subjected to a real scenario of crisis during the blockade which helped us learn a lot. Since then we developed a lot of strategies and plans to deal with the crisis. Because of this experience, we have been one of the least affected by Covid-19 in terms of food security.

We already had all the plans, communications, strategies, strategic stocks, and supply chain in place at the onset of the pandemic. It was easy for us to respond effectively and smoothly. No one even noticed that there is any kind of shortage or any issue with food security.

USQBC: There are many organizations that are facilitating investments in Qatar including Qatar Free Zones Authority and Hamad Port, among others. How well aligned are these entities in pursuit of Qatar's food security ambitions?

HE Eng. Abdulla bin Abdulaziz bin Turki Al

Subaie: We have many alignments between strategies and plans of these entities. The strategic stock facility at Hamad Port is very autonomous and will become the main hub and gateway for trade between Qatar and the rest of the world. For the Free Zones, there are on-going discussions with different interested investors where they are looking to establish food processing plants inside. We also have

programs with the Free Zones to reduce all food wastage as well. We're also aligning our strategy with the Hamad International Airport and their air cargo capacity. We have a large fleet of airplanes and we can be a hub for transiting foodstuffs, especially during a crisis, for both Qatar and the rest of the world. All of these plans are well integrated and aligned together.

USQBC: How will the increases in local production of food products and/or input capacity affect demand for imports from international sources?

HE Eng. Abdulla bin Abdulaziz bin Turki Al

Subaie: Of course, part of our food security strategy is to enhance and increase the capacity of local production. With that in mind, even while improving our domestic capacity, we understand the need to maintain commercial relations with our partners everywhere. That's a key part of our strategy. **Food security doesn't mean if you're self-sufficient; you're secure.** We also need to prepare for a scenario where we need to switch from local production to international partnerships. We see this happening especially with fresh food. Local production will not supersede the commercial relationships and partnerships with our allies. We can keep these relations intact and very flexible so we can scale up or down as needed. We'd also look at other opportunities where it will complement that kind of relationship; for instance, a commercial agreement complemented by technology transfer.

Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

USQBC: What are some of the ways that Qatar is seeking to achieve its food security in an environmentally friendly and sustainable way?

HE Eng. Abdulla bin Abdulaziz bin Turki Al Subaie: We believe in environmental preservation, and one of the four main pillars of the Qatar National Vision 2030 is environmental sustainability.

A lot of our initiatives have been pursued within this domain, and the most important one is the FIFA World Cup 2022. It will be the first World Cup with carbon neutral targets and there will be many initiatives associated with this to cut or offset emissions. We have many on-going environmental initiatives in oil & gas, green buildings, transportation, among others. For example, in oil & gas, we're making a large push to reduce emissions from flaring and have a massive 800MW solar power plant project in the works. For green buildings, we're ensuring the Lusail City is being built with very strict environmental considerations in both the buildings themselves and their construction. When it comes to transport, we have had a big transformation from private transportation towards public transportation which includes converting buses to electric-powered.



USQBC: Earlier you mentioned that Qatar uses greenhouses for cultivation. Can you describe Qatar's capacity in this regard?

HE Eng. Abdulla bin Abdulaziz bin Turki Al Subaie: We have been using greenhouses for nine months with varying ventilation techniques. Due to the heat of our summers, greenhouses aren't cooled for three months. If we want to grow crops, we need to have these greenhouses cooled, but that will consume a lot of energy in a very short period of time.

We are always looking at improving efficiency, especially for energy and water usage.

We are hoping some of our renewable energy initiatives will complement our greenhouse plans. This is the same for our desalination projects too.



Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

USQBC: Outside of agricultural cultivation, Qatar has access to fisheries. What projects are available for fish farming?

HE Eng. Abdulla bin Abdulaziz bin Turki Al Subaie: Two years back we floated a tender for fish farming that was awarded to an investor as part of a PPP project. We allocated a space offshore to farm fish which have the greatest domestic demand in Qatar. Now we are just entering the first phase of production and we expect within the next few months that this fish farm will have a capacity of 2000 tons a year. In the next few months, there will be two fish farming licenses which will also be floated to the private sector.



Qatar's Vision for Sustainable Food Security

A Virtual Briefing Presented by the US-Qatar Business Council

USQBC: What opportunities are there for technical assistance in food safety and quality control of food products?

HE Eng. Abdulla bin Abdulaziz bin Turki Al

Subaie: We are managing the controls of food security through two different ministries. At the Ministry of Municipality and Environment, we are managing food safety and protection for the local market. The Ministry of Public Health sets the standards for food safety and certification for both domestically produced and imported food. I think this is a very important part that needs to be very transparent to the customer, especially for the food ingredients and labeling.

Not only is it important for the customer to understand the nutritional value of the food, but also how it was grown and/or processed. What does organic mean? What does halal mean? These areas must be related, and we must increase our capacity in this area. There is a great scope for developing these standards to ensure there is full and standardized information given to the final consumer.

By doing so, we will help change the behaviors of the consumer to be healthier and nutrition conscious.

USQBC: What is the best way that US investors can explore opportunities in Qatar's food security environment?

HE Eng. Abdulla bin Abdulaziz bin Turki Al

Subaie: One of the best channels is through the Qatar Chamber of Commerce because most of our projects are offered to the private sector. The Chamber is always aware of what is to come and interested parties can connect with local businessmen for joint-ventures or whatever kind of partnership is needed for a particular tender.

I would also recommend keeping an eye on the website of the Ministry of Municipality & Environment for any announcements of new ventures or upcoming tenders. We usually hold workshops and seminars with different international partners within our food security program and the Chamber of Commerce. These workshops always have discussions over details of projects and opportunities for commercial transactions in relation to exports, imports, investments, and PPPs. It's worth mentioning that during these workshops we can identify key businesses in Qatar working in these sectors. We can then match interested investors with our local businesses and they can pursue opportunities together.



A Part of Lulu Hypermarket

Y International USA Inc.

Lulu established its presence in the U.S. in November 2016 with a state-of-the-art export distribution center named Y International USA Inc. at Lyndhurst in New Jersey, the 'Garden State' of the United States. This center has been a major source of support for Qatar during all logistic challenges and crises by ensuring food security, price control, and availability.

The full-blown subsidiary sprawling over 75,000 Sq. Ft. is designed to initiate procurement, consolidation & export of food, non-food, chilled and frozen, 'free from' range, low fat, low cholesterol, and organic products on a regular basis to their more than 202 retail stores across the world. This facility has spacious storage units and advanced machinery to process and handle Dry Food, Non-Food, Frozen, and Perishable Food products of U.S. origin with a well-established system for value addition by date coding and labeling for different countries, translation of labels, halal and relevant certifications.

Y International USA currently employs 96 staff and provides better perks, benefits and growth opportunities. Lulu Group has been promoting U.S. products for a long time, has built up a substantial clientele, and is doing remarkable business. Currently, the group has a large import business from the U.S., and with the launching of its own export distribution center in New Jersey, the turnover has increased considerably.



Y International USA Team - New Jersey - USA



Dr. Mohamed Althaf, Director of Lulu Group International and Mr. Scott Matthew Weber, Regional Manager of Y International USA Inc. on their visit to one of their partner farms - Bifulcos Farms in Pitsgrove, New Jersey, USA



Y International Export Distribution Center, NJ, USA



Y International USA Inc. is a part of LuLu Hypermarket Qatar.

Y International USA Inc., is specialized in the sourcing and exporting of USA Food and Non Food to its group owned Retail/Wholesale business spread across the World.

Y International USA Inc.
(A Part of LuLu Hypermarket Qatar)
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New Jersey, 07071-3608

Current State of Food Security

Qatar has been steadily increasing its food and beverage imports since 2007. In 2018, the value of food and beverages imported into the country was QR 11.98 billion¹. The United States makes up roughly one quarter of those food/beverage imports².

Due to the harsh climate, Qatar imports roughly 70% of its food needs. The agricultural trade deficit for the country is approximately QR 4.38 billion (\$1.2 billion)³. However, Qatar is attempting to become fully self-sustaining for food, which it has done with poultry and dairy products.

Qatar is also increasing its strategic stock capacity. Umm Shahreem, a 500,000 square meter storage facility at Hamad Port stores rice, wheat, edible oil, sugar, condensed milk, and livestock feed. In 2018, Qatar imported \$147 million worth of rice, \$52.6 million of wheat, \$99.7 million of edible oils, \$64.7 million of sugar, \$95.5 million of condensed milk, and \$29 million of livestock feed⁴.

Given Qatar's desert climate, water scarcity is a continuous challenge in the country's efforts to become food secure. Today, Qatar is mainly reliant on its groundwater, and reserves are believed to be about 2.5 billion cubic meters in size. The country is pulling about 100 million cubic meters of water from their reserves per year⁵.

Qatar is using greenhouses across the country to control temperature and humidity that is suitable to grow produce; some of these vegetables include tomatoes, eggplants, cucumbers, and mushrooms⁶. These state-of-the-art hydroponic grow houses use 90% less water than traditional agriculture styles. The Ministry of Municipality and Environment is supporting this manner of farming with a \$2.75-\$3.3 million program that will provide 140 farms with free greenhouses⁷.

Qatar is pushing to become sustainable in energy usage as well. In January 2020, Qatar signed a deal to build an 800-megawatt solar panel field. This solar field is scheduled to be operational in 2021 and will be at its max capacity, supplying 10% of the nation's power, by mid-2022. This is the first project of its kind in the country, with more to eventually follow⁸.

¹ <https://www.statista.com/statistics/731884/qatar-food-and-beverage-import-value/>

² <http://www.dohafamily.com/Winter-2015/Where-does-our-food-come-from-An-insight-into-Qatars-food-industry/>

³ <https://www.ecomena.org/food-security-qatar/>

⁴ https://oec.world/en/visualize/tree_map/hs92/import/qat/all/show/2018/

⁵ <https://www.al-monitor.com/pulse/originals/2019/08/qatar-agriculture-water-environmental-concerns.html>

⁶ <https://www.youtube.com/watch?v=MVoSakOsd9c>

⁷ <https://www.al-monitor.com/pulse/originals/2019/08/qatar-agriculture-water-environmental-concerns.html>

⁸ <https://www.ft.com/content/3a1e143a-3b6e-11ea-b232-000f4477fbca>

Current State of Food Security

Impact of the Blockade

On June 5th 2017, Saudi Arabia, the United Arab Emirates, Bahrain and Egypt cut diplomatic ties, ceased all trade, and imposed a blockade on Qatar. Despite the blockade coming to an end with the signing of the Al-Ula agreement in January 2021, the blockade had longlasting effects on Qatar's food security. According to Qatar's Ministry of Commerce and Industry, Qatar was importing 90% of its food prior to the initiation of the blockade in 2017. Of the fruits and vegetables consumed in Qatar, not even 10% were produced in the country⁹. Furthermore, Qatar had most of its dairy products imported from Saudi Arabia, approximately 400 tons of milk and yogurt imported every day¹⁰.

However, Qatar took quick action to counter the blockade. In the following days and weeks, Qatar's hundreds of cargo ships and planes traveled to India, Iran, Morocco, Oman and Turkey to gather essential food and supplies to prevent shortages. With its only land border with Saudi Arabia closed, Qatar relied heavily on Qatar Airways, especially their 13 Boeing 777Fs and two Boeing 747-8Fs that made up the Qatar Airways cargo division at the time¹¹.

Since this transition to becoming more self-sufficient in food production, Qatar has seen an increase of 400% in agriculture, fish, animal and dairy production. This equals a fresh food trade volume of nearly \$2.75 billion. Qatar is on its way to becoming fully self-sufficient in vegetable production and has already reached that goal in poultry and dairy¹².



⁹ <https://www.aljazeera.com/programmes/newsfeed/2020/06/qatar-food-security-boost-post-blockade-200609125035243.html>

¹⁰ <https://www.reuters.com/article/us-gulf-qatar-cows/qatar-builds-dairy-industry-in-desert-as-it-defies-arab-boycott-idUSKBN1DT2E9>

¹¹ <https://blog.flight-report.com/qatar-airways-and-the-blockade/>

¹² <https://www.thepeninsulaqatar.com/article/13/03/2019/Food-production-in-Qatar-grows-by-400-since-2017>

Qatar's Food Security Plan

Qatar's Ministry of Municipality and Environment has built a four-pillar interdependent food security strategy. These four pillars have a total of 13 initiatives that should ensure Qatar's food system is more secure against potential future supply shocks, with six of the initiatives deemed as priorities. This strategy breaks down as follows (Priority initiatives are in red text)¹³:

A. International Trade and Logistics

1. Geographically diversify trade partners for critical commodities to reduce Qatar's exposure to external factors by having 3-5 partners per critical commodity
2. Proactively put in place contingency plans to limit impact of trade shocks or other exogenous disruptions

B. Domestic Self-Sufficiency

1. Increase vegetable production by establishing a hydroponics greenhouse cluster to reach 70% self-sufficiency on greenhouse vegetables (e.g., tomatoes, pepper, cucumber, squash, lettuce)
2. Cap production of fresh milk and poultry to 100% self-sufficiency by discontinuing tenders and redirecting capacity to other purposes (shifting poultry surplus to egg production)
3. Expand and improve production capacity for red meat (fattening units and breeding farms for sheep and goat) and fisheries (fish farms)
4. Reduce ground water-based fodder production by switching to Treated Sewage Effluent



¹³ <http://www.mme.gov.qa/pdocs/cview?siteID=2&docID=19772&year=2020>

Qatar's Food Security Plan

C. Strategic Reserves

1. Increase potable water reserves as an insurance against potential crisis scenarios, balancing risk-exposure and 'insurance' cost
2. Reduce net depletion of the Aquifer by optimizing water usage in agriculture
3. Leverage the private sector to store a broad range of products to act as a permanent short-term buffer against shocks to the system
4. Put in place strategic reserves of perishables and select non-perishables as an insurance against potential trade and production disruptions

D. Domestic Markets

1. Streamline the domestic go-to-market model (farmgate to retail) to ensure transparency in the price setting process and assist farmers in improving their productivity and quality of produce
2. Establish integrated food waste program, including collection and treatment / alternative usage of organic waste D2
3. Optimize and simplify the governance of food standards in Qatar, to monitor food safety in the country and supervise quality certification more effectively



The strategy goes well beyond this outline. For a full look of the strategy in its entirety, visit the link: <http://www.mme.gov.qa/pdocs/cview?siteID=2&docID=19772&year=2020>

Key Projects

Water Desalination Projects

Developing a sustainable and secure source of clean, potable water has risen to become a primary goal of Qatar going forward. To overcome this problem, Qatar completed the construction of two water desalination facilities Ras Abu Fontas A2 and Ras Abu Fontas A3 in 2015 and 2016, respectively.

Ras Abu Fontas A2 Seawater Desalination Plant was constructed by Mitsubishi Corporation and Toyo Thai Corporation, and is being operated by Qatar Electricity and Water Company (KAHRAMAA). By using multiple-stage flash technology, the facility has a potable water production capacity of 36 million imperial gallons per day, or 10% of the country's water production¹⁴. Ras Abu Fontas A3 is Qatar's first Seawater Reverse Osmosis plant. Mitsubishi contracted Acciona Agua to design and construct the \$467 million plant, and then operate it over the first ten years. This reverse osmosis plant also has a capacity of 36 million imperial gallons per day, equaling the supply for one million people¹⁵.



¹⁴ <https://www.water-technology.net/projects/ras-abu-fontas-raf-a2-seawater-desalination-plant/>

¹⁵ <https://www.desalination.biz/news/0/Qatars-first-big-seawater-RO-plant-is-nearly-complete/8683/>

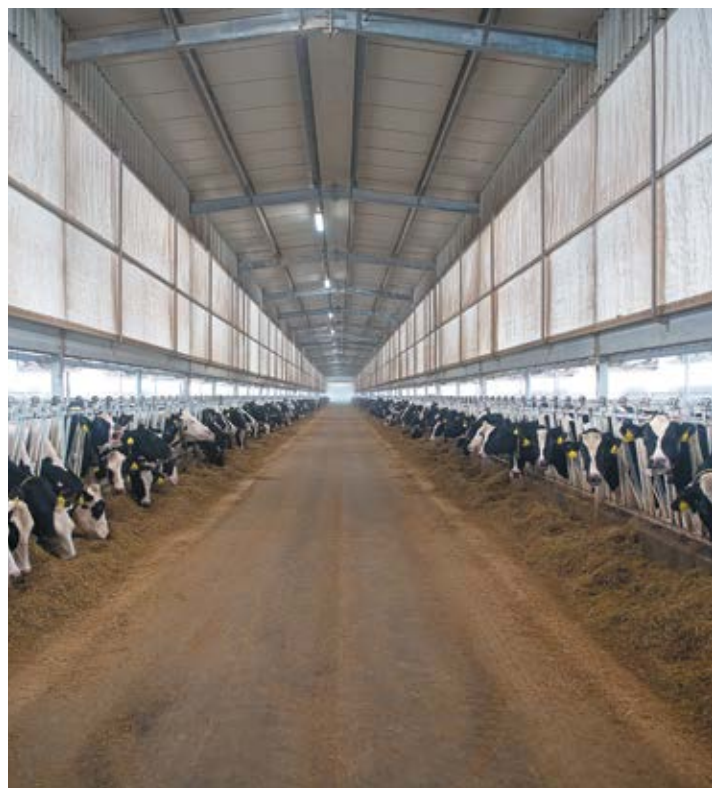
Key Projects

Combined Water and Power Production

Umm Al-Houl Combined Cycle Power Plant is part of Qatar's biggest water and power project. The power plant supplies 2.52GW of electricity and 136 million imperial gallons of water per day to 2.5 million homes in the area. This is compared to the combined 72 million imperial gallons per day from the Ras Abu Fontas A2 and A3 water desalination facilities. Umm Al-Houl produces 60 million imperial gallons per day through reverse osmosis and 76 million through multiple-stage flash technology¹⁶.

Dairy Production

Baladna, established in 2014, is now Qatar's largest dairy company. In the days immediately following the blockade, Baladna imported 4,000 cows to help with the country's dairy needs. Since then, their number of cows has grown to approximately 18,000 strong. Each cow needs about 185 gallons of water per day just for misting, another use for the water from the desalination plants. Having so many cows has made Qatar self-sufficient in dairy¹⁷.



¹⁶ <https://www.power-technology.com/projects/umm-al-houl-combined-cycle-power-plant/>

¹⁷ <https://www.chathamhouse.org/expert/comment/how-qatar-s-food-system-has-adapted-blockade>

National Food Security Program

Qatar established the National Food Security Program (NFSP) in 2012 to encourage local food production, which will lead to scientific and technological development in agricultural enhancement. The goal of NFSP is for Qatar to produce 60% of its own food by 2024. The NFSP introduces the best methods for growing crops in such an arid environment, while also being economically efficient. It emphasizes peak usage of scarce freshwater as it will have minimal impact on the environment as possible.

The NFSP aims to have 3,000 domestic farms. To help reach that number, Hassad Food established the IKTEFA initiative, which helps local farms with financial aid and expertise to help make their crops commercially viable¹⁸.



¹⁸ <https://oxfordbusinessgroup.com/news/qatar's-government-pushes-food-sustainability-agenda>

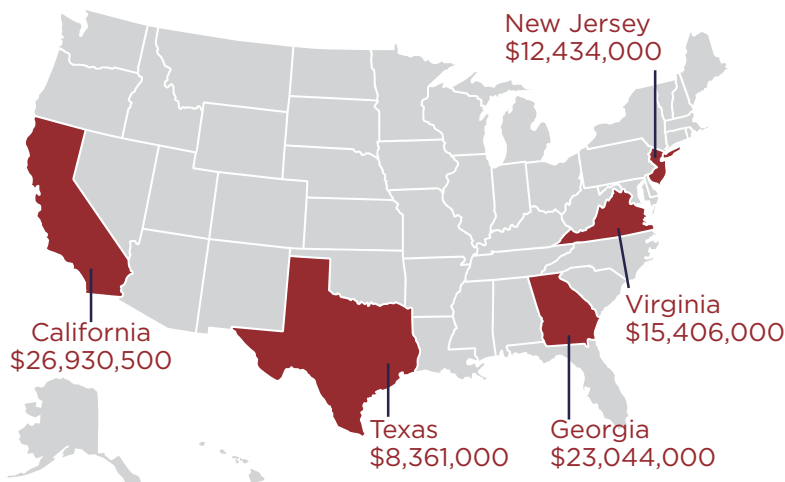
Food Imports and Exports

Where Does Qatar Import Food From?

Even though Qatar is attempting to become more self-sufficient in its food sector, it still has a long way to go. It has made large leaps, now being 80% self-sufficient in vegetables and fully sufficient in its dairy and poultry needs. Qatar's agricultural, fish, animal, and dairy production have increased by 400% since the blockade¹⁹.

Qatar and the U.S. already have a strong partnership in food security programs, and Qatar represents a very important food export destination for U.S. farmers and food producers. In the year 2019, the U.S. exported over \$141 million worth of food related products including coffee, fish, oils, and vegetables up from \$133 million in 2018²⁰.

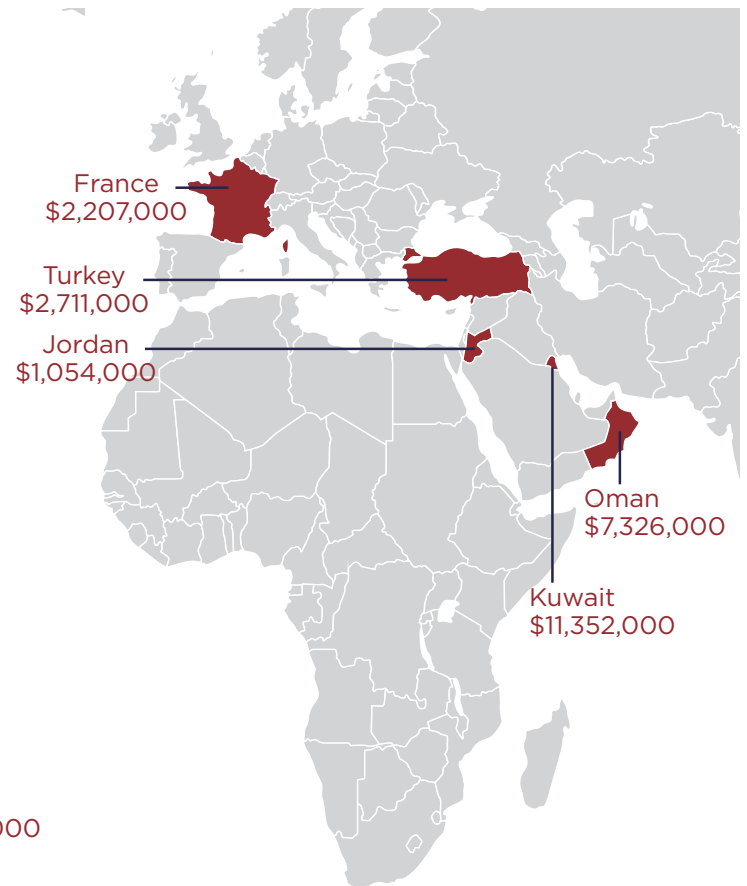
In 2019, the top five states to export food to Qatar were²¹:



Where Does Qatar Export Food To?

Qatar is still in the early stages of building a food sector that can produce enough for the country. Therefore, Qatar's export numbers are much smaller than its import numbers for food products.

The top five destinations for Qatari food exports are²²:



¹⁸ <https://oxfordbusinessgroup.com/news/qatar-s-government-pushes-food-sustainability-agenda>

¹⁹ <https://www.thepeninsulaqatar.com/article/13/03/2019/Food-production-in-Qatar-grows-by-400-since-2017>

²⁰ <https://ustr.gov/countries-regions/europe-middle-east/middle-east/north-africa/qatar>

²¹ <https://www.census.gov/foreign-trade/data/index.html>

²² https://wits.worldbank.org/CountryProfile/en/Country/QAT/Year/2018/TradeFlow/Export/Partner/all/Product/16-24_FoodProd

Key Organizations and Executives

Ministry of Municipality and Environment

The Ministry of Municipality and Environment (MME) is a service Ministry directly related to the general public and is equipped to meet the many requirements of the public's daily life. The Ministry fulfills its mission and mandates through contribution by its subsidiary departments, municipalities and centers, as well as leading and supporting the rapid development of the State of Qatar. This is in line with the Qatar National Vision 2030 which aims to place the country among developed countries based upon pillars of human development, economic social, and environmental development

Leadership: HE Eng. Abdulla bin Abdulaziz bin Turki Al-Subaie, Minister of Municipality and Environment

Qatar Airways

Established in 1997, Qatar Airways is one of the youngest global airlines to serve all six continents and is also the world's fastest-growing airline. Qatar Airways connects to more than 160 destinations every day.

Leadership: HE Akbar Al Baker, Group CEO

Hassad Food

Hassad Food was established in 2008 with the aim of attaining food self-sufficiency for Qatar. It is an investment arm of the Qatar Investment Authority with a primary focus on the field of agriculture. Hassad Food helps support the needs of Qatar's growing economy, while at the same time realizing profitable and sustainable business objectives.

Leadership: Mohamed Badr Hashem Al-Sada, CEO

Key Organizations and Executives

Ashghal

Established in 2004, Ashghal is the Public Works Authority of Qatar. Ashghal is an autonomous body to design, deliver and manage all infrastructure related projects as well as public amenities of the State. Ashghal is responsible for the construction and maintenance of local roads, drainage systems, highways and public buildings like mosques, schools, hospitals, health centers, parks, etc.

Leadership: Saad Ahmed Ibrahim Al Mohannadi, President

KAHRAMAA (Qatar General Electricity and Water Corporation)

Established in 2000, KAHRAMAA is the sole transmission and distribution system owner and operator for the electricity and water sector in Qatar. It buys, distributes, and sells electricity. By 2030, it aims to set global benchmarks in performance, innovation, environmental sustainability, and social responsibility.

Leadership: Essa bin Hilal Al-Kuwari, President

Qatar Chamber of Commerce and Industry

Established in 1963 by virtue of the Law No (4), Qatar Chamber of Commerce & Industry (QCCI) is one of the oldest chambers in the GCC countries. Its main role is to organise business interests and represent the Qatari private sector locally and globally as well as support the country's economic actors and productivity.

Leadership: HE Sheikh Khalifa bin Jassim bin Mohammed Al-Thani, Chairman

Key Organizations and Executives

Widam Food

Widam Food is a company with 95% Qatari shareholders that exclusively handles the government subsidization of Australian meat to the Qatari market. It also supports the market by importing other types of meat on a non-exclusive basis.

Leadership: Mohammed Badr Al Sada, Chairman of the Board

Lulu Group International

Lulu Hypermarket is the retail division of the multidimensional and multinational Lulu Group International, an Indian-owned multinational conglomerate that operates hypermarkets and retail companies. Today, Lulu symbolizes quality retailing with 192 stores in total including 13 in Qatar.

Leadership: Mohamed Althaf, Director, Lulu Group Qatar

Carrefour

Carrefour was launched in Qatar in 1999, and today it operates five hypermarkets and five supermarkets employing over 1,800 people. Carrefour operates different store formats to meet the growing needs of its diversified customer base. In line with the brand's commitment to provide the widest range of quality products and value for money, Carrefour offers an unrivalled choice of more than 30,000 food and non-food products.

Leadership: Laurent Hausknecht, Country Manager - Qatar

Key Organizations and Executives

Qatar Green Building Council

Aiming to increase awareness and knowledge of green building practices, the Qatar Green Building Council builds capacity of industry professionals through ongoing professional development and research. Their efforts to build and engage an active membership body and network of stakeholders to champion the Green Building movement also extends to support the adoption, legislation, and implementation of green building practice and standards.

Leadership: HE Mr. Issa bin Mohammed Al-Mohannadi, Chairman

AGRICO

AGRICO is a private local Qatari Agricultural Development Company that was founded on the principle of sustainable long-term agricultural production with an eye on the national target of achieving food security. AGRICO aims to achieve this through combining local innovation, international expertise and the best available technology in the world.

Leadership: Nasser Ahmed al-Khalaf, Managing Director

Qatarat Agricultural Development Company (QADCO)

QADCO is one of the leading agricultural companies in the State of Qatar and is a fully-owned subsidiary of Specialized International Services company. QADCO works to provide a wide range of agricultural solutions with modern scientific methods to Qatari farmers as well as working to provide agricultural inputs like seeds, fertilizers, pesticides and modern equipment and agricultural tools. The company enhances the productivity of farms and achieves the highest productivity possible. QADCO has more than three productive farms with a total area of 8 Million square meters and marketing outlets for agricultural inputs and agricultural tools.

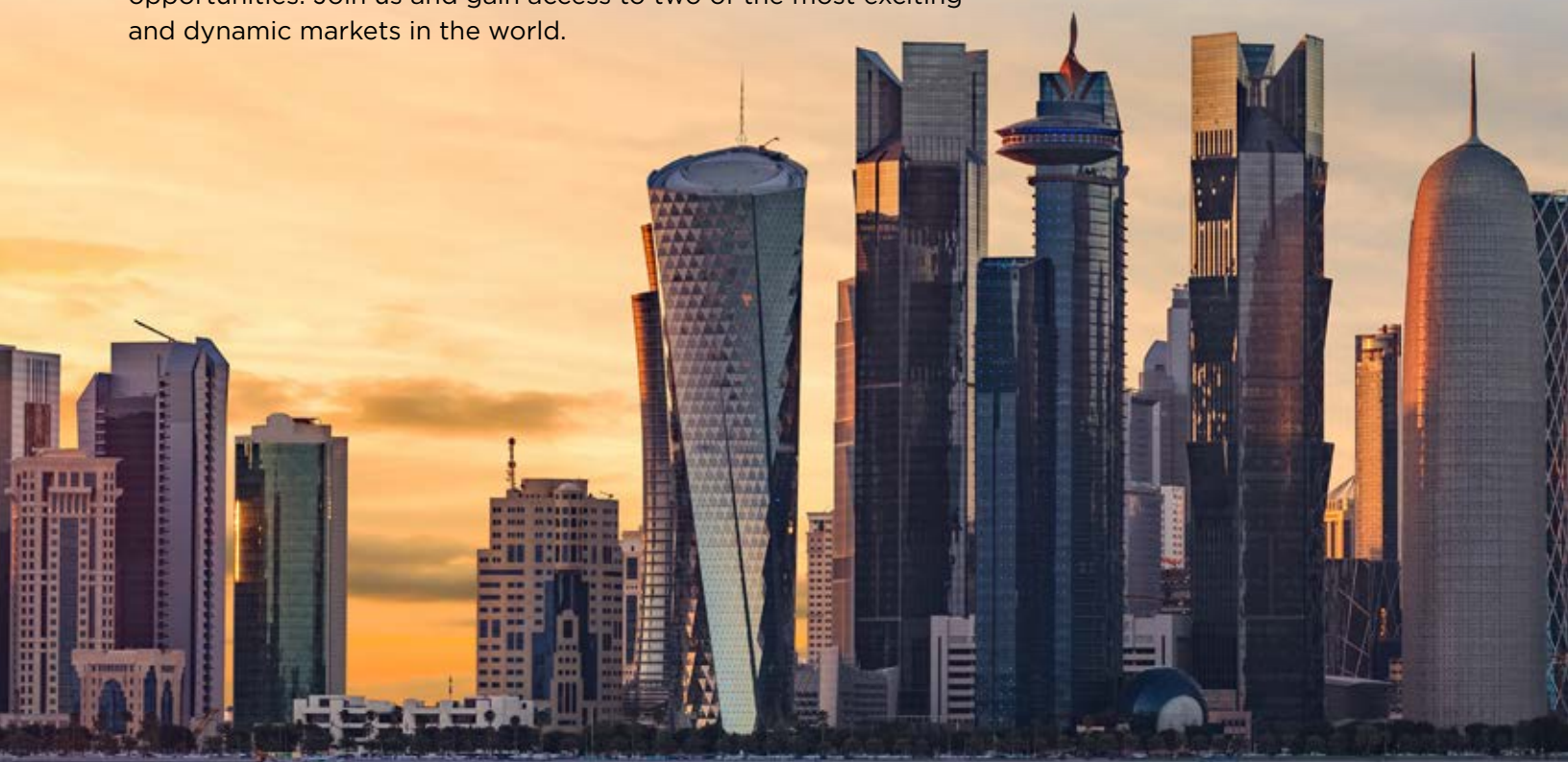
Leadership: Thawab Al-Kuwari, General Manager

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