MARCH
2023

F2F HEALTH MATTERS

MIDDLE EAST & EGYPT

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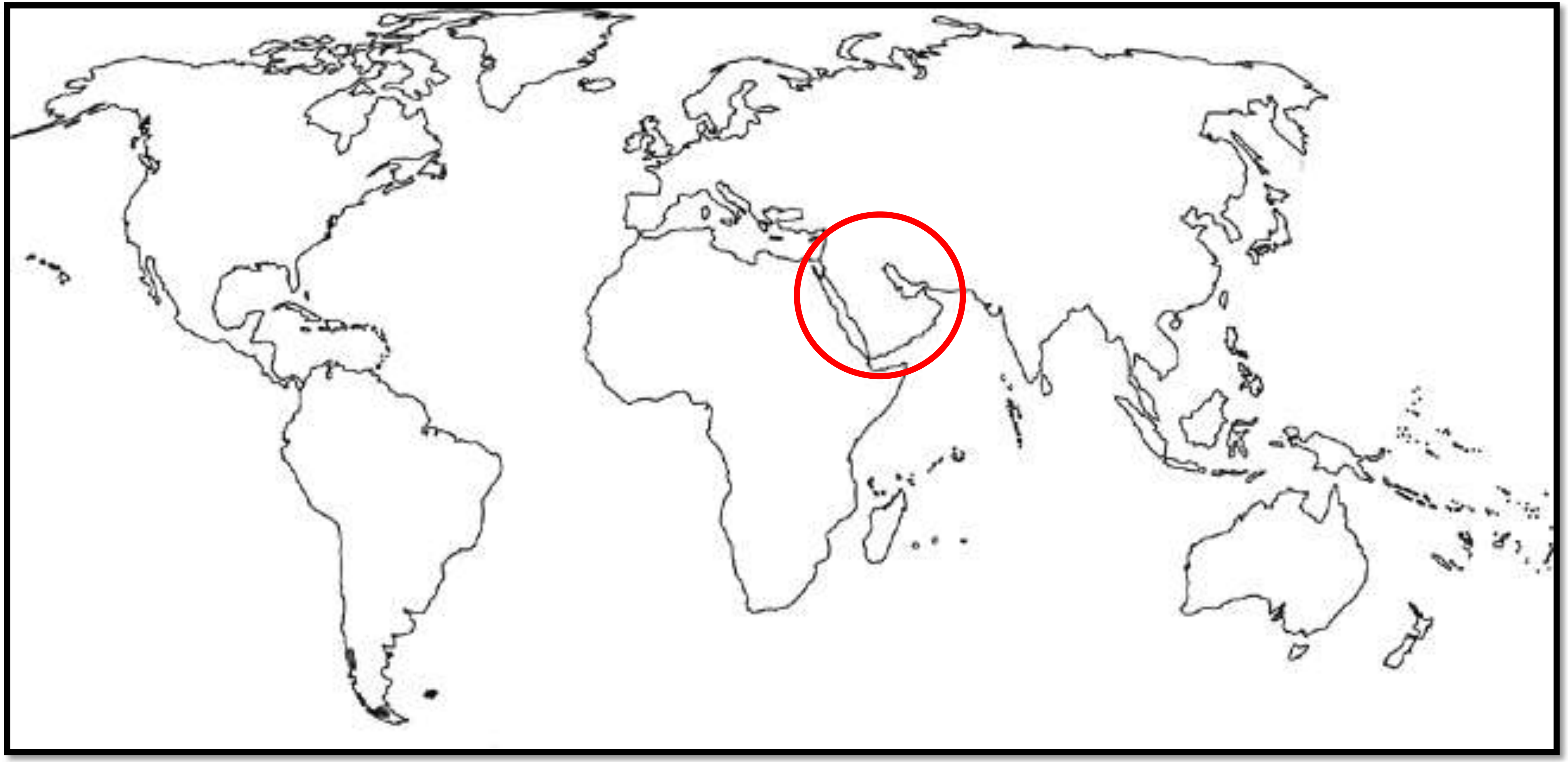
Overview of Middle East Region

Overview of Middle East Region

HERE IS THE WORLD…



Overview of Middle East, Levant & North Africa Region

With a strong market of 218 Million consumers, the Middle East, Levant & North Africa Region should really be considered by different companies. Below an overview of each country:

GCC Countries

United Arab Emirates
Population: 10,1 M

Qatar
Population: 2,9 M

Kingdom of Saudi Arabia
Population: 35,8 M

Bahrain
Population: 1,8M

Oman
Population: 5,3 Mio

Kuwait
Population: 4,3 Mio

Levant & North Africa

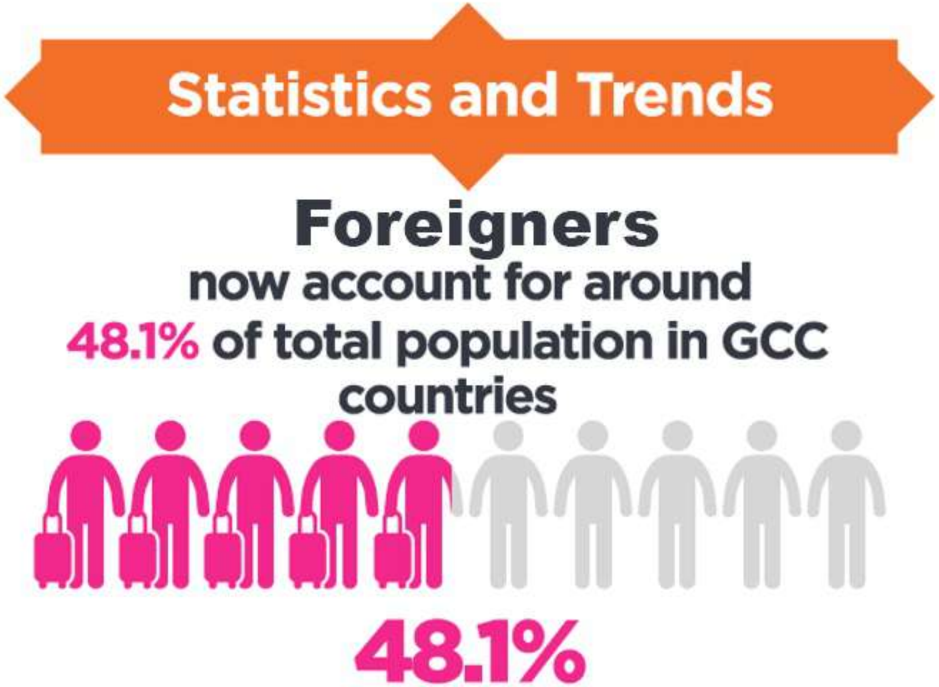
Egypt
Population: 105,8 Mio

Iraq
Population: 41,8M

Jordan
Population: 10,3 M

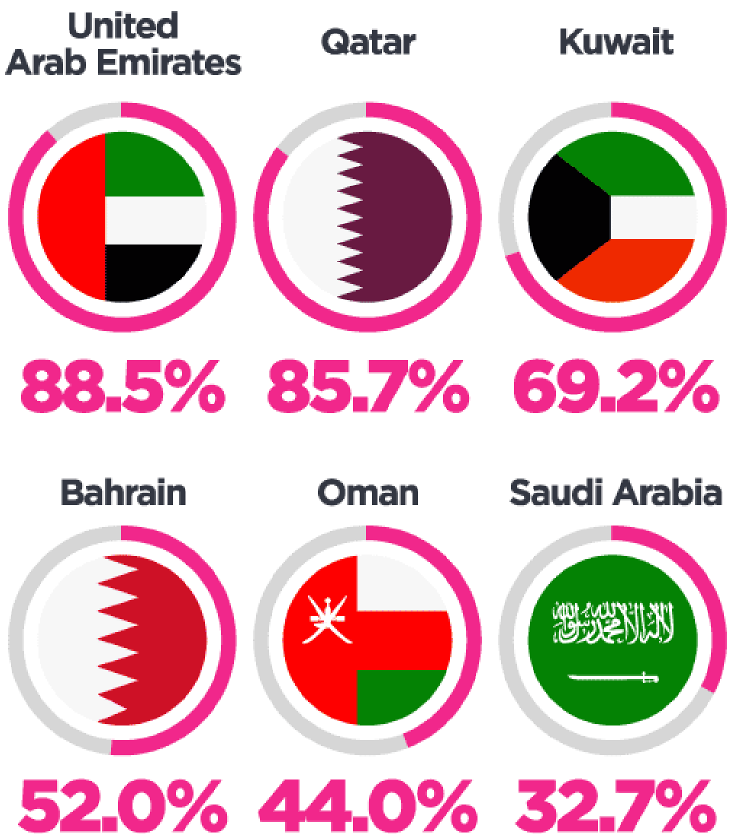
Lebanon
Population 6,7 M

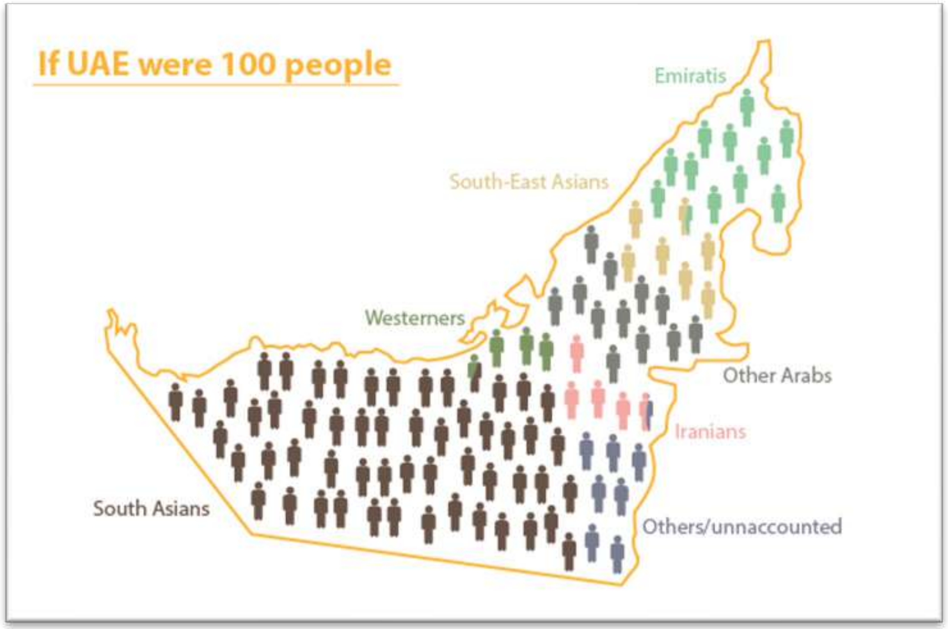
Overview of Middle East Region



Overview of Middle East Region - Diversity Challenge

Estimated Number of Foreigners of total population





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Export Pulse

OFFICE IN FRANCE AND THE MIDDLE EAST

OUR LEADERSHIP TEAM

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Strategy 1

- 360° Strategic Diagnostic
- Road Map Strategy
- Elaboration of Key Performance Indicators
- Investor Search
- M&A / External Growth

Sales Opportunity Management Program 2

- Lead & Opportunity Management Guide
- Digital & Communication Transformation
- Sales Forecast
- Implementing Sales Key Performance Indicators

Soft Skills Training & Coaching 3

- Intercultural / Diversity / Inclusion
- Leadership / Team Building
- Change Management
- Individual & Collective Coaching
- Middle East & Egypt Training Modules for Expatriates
- Organizer & Animator of International Growth Accelerator Program

International Growth Accelerator 4

- Country Prioritization for Export Growth
- Sales Entry Market
- Support for International Tenders
- International Test on Offer
- Externalized Export Services
- International Incubation / Payroll services
- Recruitment Services
- Middle-East / Egypt Expertise

Sales & Marketing 5

- Market Study
- Mystery Shopping & Customer Survey
- Distributor, End-User & Partner Search
- Event Organization & Exhibition Support
- Commercial Development & Follow-up
- Local and Regional Franchise Development
- Test on offer

Company Setup 6

- Business Setup Advice
- Company Setup in the Middle East (Mainland and Free Zone in selected countries)
- Sponsor Search
- Offices, Warehousing, and Industrial Rental

Distribution & Supply Chain 7

- Administrative support for governmental permits
- Logistic and Storage Facilities
- Inventory and Order Management

Financial Services 8

- Business Plan
- Feasibility Study
- Accounting and Auditing
- Bank Account Opening

HR Management 9

- Immigration, Visa & PRO Services
- Payroll Solution & Incubation Services
- HR / Recruitment & Executive Search
- Employment Contract Assistance

Legal Services 10

- Product & Trademark Registration
- Debt Collection & Dispute Resolution
- Legal Support
- Drafting Distribution Agreement

AGRO IN THE MIDDLE EAST

MIDDLE EAST : AGRICULTURE

During the projection period of 2022–2027, the MENA region's agriculture market is anticipated to register a **CAGR of 5.7%.**
The COVID-19 epidemic encouraged people to **eat more nutritious diets**, which raised the region's intake of **cereals and fruits**. Yet, the COVID-19 pandemic's limits on human migration have led to a **lack of farm workers, particularly for high-value crops.**

The Middle East and North Africa region, which stretches from Iran to Morocco, is made up of 14 low- and middle-income countries or territories. Almost 120 million of the 296 million people who live in the region's rural communities.

Almost 84 million of them, including those who depend on fishing and cattle, **depend on agriculture**. The region has a surface size of **1100 million hectares with various environmental types**.

While irrigated areas are farmed all year round, **rainfed crops are planted during the wetter winter season**. **Wheat, barley, legumes, olives, grapes, fruit, and vegetables are the primary crops grown using rainwater.**

Throughout the summer, a wide variety of subtropical crops, including fruits and vegetables, are also cultivated under irrigation.

Source: https://www.mordorintelligence.com/

MIDDLE EAST: AGRI-FOOD

As arable land and water become more scarce, the **MENA region's high and expanding reliance on overseas markets for essential staple foods is a major source of concern.**

The production of crops that require a lot of water, such wheat and green fodder, **has been prohibited by the governments of several nations in an effort to save water.**

The MENA region is experiencing an **increase in food demand**, mostly due to two major factors**: population expansion and rising earnings.** The Food and Agriculture Organization (FAO) claims that even in nations where land reforms are formally being implemented, many people continue to hang onto their dispersed holdings without any rationalization or consolidation mechanisms in place.

Only in areas where larger operators have been able to acquire smaller farms have there been significant improvements. It is well known that restructuring land holdings is a requirement for the introduction of **technologies that would, over time, conserve soil and water resources.**

Hence, it is anticipated that the region's agriculture sector will be driven by the effective use of **agricultural resources**, **new technology**, and **supportive policies** over the course of the forecast period. (2023-2028)

MIDDLE EAST: AGRI-FOOD

Undernourishment, poverty, low agricultural production in the face of **limited natural resources**, and **reliance on food imports constitute the biggest issues** with regard to food security in the area. Countries in the region are pursuing a number of steps to increase output in an effort to combat the **region's growing reliance on imports**. By doing so, they are able to solve food insecurity to some extent.

For instance, a political blockade in **Qatar** was advantageous for the country's food security as the Ministry of Economics and Commerce (MEC) announced the "National Product" of the "Made in Qatar" program in collaboration with shopping centers and major retail outlets. In order to make it easier for customers to get these products, **producers are growing fruits and vegetables in greenhouses and selling them as goods with the slogan "National Product" clearly displayed.**

The production of fruits and vegetables in North Africa also increased significantly in 2019 compared to 2017, reaching 35.09 million tons of fruits and 34.62 million tons of vegetables. Consequently, **agricultural productivity in the MENA region is mostly driven by the desire to achieve food self-sufficiency.**

MIDDLE EAST: AGRI-FOOD

Due to **three main factors**, the countries of the Persian Gulf (United Arab Emirates, Saudi Arabia, Qatar, Kuwait, Oman, Bahrain) still rely heavily on imports to meet their food needs:

1. Unfavorable natural conditions (lack of water, scarcity of arable land, high temperatures);
2. Population growth, coupled with a relative improvement in living standards and changing eating habits;
3. Until recently, agriculture and the agri-food in those countries were largely undeveloped.

Since the **diplomatic crisis in Qatar** (the breakdown of trade and political relations between Qatar and Saudi Arabia, the Emirates, Egypt, and Bahrain) as well as the **Covid crisis** and the **Russian-Ukrainian war**, the quest for **independence** from food imports, which distinguishes all of the Near and Middle Eastern nations, has **taken on increased importance**. The countries in the region are **promoting domestic agricultural and agri-food production** in an effort to **achieve food self-sufficiency** and are favoring local processing of raw materials over imports of completed goods.

Abra- Ham agreements (calming relations between Israel, the United Arab Emirates, and Bahrain), a strong demographic growth (+ 2 M inhabitants in Egypt every year), the development of tourism (World Expo in Dubai in 2021; opening of Saudi Arabia to tourism, World Cup 2022 in Qatar, COP28), and the needs are real.

MIDDLE EAST: AGRI-FOOD – REGULATION

Members of the Gulf Cooperation Council (GCC) : Saudi Arabia, United Arab Emirates, Qatar along with Bahrain, Oman &Kuwait.

These nations share a **common external tariff** and a **customs union**. Standards are established for many categories of food goods in these nations by the **Gulf Standardization Organization** (GSO).

Together with the regional **SASO standards** established by the Saudi Standards, Metrology and Quality Organization and the standards established by the SFDA, Saudi Food and Drug Administration, Saudi Arabia also follows this unified regulation. In addition to **GSO standards**, the United Arab Emirates also uses so-called **ESMA standards** produced by the Emirates Administration for Standardization and Metrology.

EGYPT.

As of 2022, all imports of meat, poultry, and derivatives as well as milk and dairy products must be accompanied by a **halal certificate** issued by **an organization recognized** by the General Organization for Veterinary Services (GOVS), an agency under the Egyptian Ministry of Agriculture.

UAE FOCUS

AGRI-FOOD IN THE UAE : GENERAL MARKET ANALYSIS

Analysis of the UAE Agricultural Market

The United Arab Emirates' agricultural sector is anticipated to grow at a CAGR of 5.2% over the projection period. (2023-2028)

The United Arab Emirates is the most promising agricultural market in the GCC due to its high per capita food consumption. Although the United Arab Emirates produces a fair amount of cereal, its agricultural output is not entirely self-sufficient. United Arab Emirates remains reliant on food imports.

The United Arab Emirates produced only 15,978 metric tons of cereal in 2020, according to FAO, a relatively small amount. Similar to this, in 2020 vegetable output totaled 233,009 Metric ton while fruit production came to 361,471 Metric ton. Also, the **area dedicated to organic farming in the nation has expanded by 15%**, from 4,687 hectares in 2017 to 5,419 hectares in 2020, according to FiBL Statistics (Research Institute of Organic Agriculture).

This is a result of government **backing and rising organic product demand**, which is one of the factors driving the growth of the nation's agriculture industry. Fruit and vegetable output is increasing as a result of the government giving it priority.

In this area, **hydroponics is becoming more popular because it uses less water and has no need for soil or land.** The development of agriculture in the United Arab Emirates is being fueled by all of these reasons.

AGRI-FOOD IN THE UAE : MARKET ANALYSIS

AGRICULTURAL EQUIPMENT

Animals raised in the UAE are used to provide milk, eggs, and chicken. Only 15% of cattle (mostly cull cows) and 2% of goats and sheep are employed for meat production. All feed for animals is imported.

As part of their efforts to improve food security, the authorities encourage private investment. French businesses can learn in cutting-edge methods and market their expertise.


10%


8%


7%

IAA EQUIPMENT

High interest in innovations that stimulate a move upmarket, improve logistics, or increase the value of local production. Strong interest in technology that minimize electricity or water use.

Possibilities for interacting with machines and humans (intelligent detection systems, track and trace, employee safety with prevention of risks of crossing, embedded systems with sensors for temperature, air quality, humidity, light, etc.).


30%


8%


8%

AGRI-FOOD IN THE UAE : MARKET ANALYSIS

DAIRY PRODUCTS

France ranks sixth among suppliers, considerably behind Saudi Arabia (PDM: 40%), the Netherlands (10%), and Denmark (6%), with USD 32 million in dairy exports to the UAE in 2020. In the UAE, French cheeses are regarded well (the brands of major industrial groups are very well known). Although though AOCs are not widely consumed, specialty cheeses are nonetheless valued.

Novel dairy products, such as those with added protein or vitamins, are becoming more and more well-liked.


40%


10%


6%

FRUITS

The total volume of fruit sales increased by 4% in 2021 to reach 448 000 tonnes. The category with the highest performance in 2021 will be potatoes, with sales up 5% overall to 37 000 tonnes.

In terms of fruit suppliers (global), France ranks 23rd in 2020. She primarily exports potatoes (9 570 tonnes, pour une valeur de 11 M USD).


22%


13%


13%

AGRI-FOOD IN THE UAE : MARKET ANALYSIS

WINE

All alcohol is imported because alcohol manufacture is not allowed in the UAE. France controls 47% of the PDM's value, making it the top exporter of wine to the UAE.

Wines with well-known appellations or grape varietals (Merlot, Malbec, Chardonnay, etc.) are frequently consumed. Bordeaux exports, and notably the rosé category, are increasing (the only segment of French exports with a positive growth dynamic).

47 %

13%

9%

NON-ALCOHOLIC DRINKS

The market for non-alcoholic beverages is significant in the EAU, with local manufacturing focused on sodas, fruit-based beverages, and table wines. In 2020, imports will total 270 million dollars, with 16 million coming from France.

The trend is toward innovation and differentiation with non-additive, non-sugar-added products that offer unique designs and "detox" beverages.

24%

9%

8%

AGRI-FOOD IN THE UAE : MARKET TRENDS

Industry Trends And Developments

By 2025, the average household in the UAE is predicted to spend 13.0% less on food than it did in 2009—a decline from 18.5%.

While being a low portion of overall household spending, food consumption is high in absolute terms, reaching AED7,710 (USD2,100) per person per year in 2025 due to high consumer earnings in the UAE.

Meat and poultry make up the greatest component of UAE food expenditures, accounting for close to 25% of all food expenditures in 2025.

Due to rising price sensitivity and a surge in demand for organic rice, UAE consumers are prioritizing staples more and more (the most important staple in the UAE).

Although meat and chicken continue to be the most popular animal-based forms of protein for UAE consumers, expenditure on fish and fish products will increase more quickly due to consumers' desire to vary their diets and the growing perception that fish and seafood are healthier than meat.

AGRI-FOOD IN THE UAE : MARKET TRENDS

Growing Crop Production Signaling Agriculture's Stable Development

Dates are one of the main crops in the United Arab Emirates. According to the Food and Agriculture Organization of the United Nations (FAO), **dates lead agricultural production**, amounting to 312,657 metric tons in 2020. Despite various unfavorable soil and climatic factors, production of various crops in the UAE is increasing due to various government initiatives, such as free cultivation, 50% reduction in the cost of crop protection, veterinary services, and fertilizers at 50% of their cost.

Import of Major Cereals

According to ITC Trade Map, **the import of cereals was valued at USD 1,189.3 million in 2020**, an increase from the USD 1,080.3 million recorded in 2019.
As the country seeks to enhance its food security amid the disruption of supply chains caused by the COVID-19 pandemic, an **agricultural trading platform to connect Indian farmers with food companies in the United Arab Emirates was established in 2020.**

The Dubai Multi Commodities Centre's platform, named Agriota and developed with India's CropData Technology, **enables trading in cereals, pulses, oilseeds, fruits, vegetables, spices, and condiments.** According to ITC Trade Map, **India is the dominant supplier of cereals** to the United Arab Emirates and held a 35.8% share in total imports in 2020.

Source: Fitch Solutions

AGRI-FOOD IN THE UAE : MARKET FORECAST

Food

In 2023, analysts predict that the **UAE's food spending growth would slow to 5.8% y-o-y**, in part due to easing inflationary pressures. The entire amount spent will now be AED81.1bn.

Analysts predict that during the next five years, food spending would increase on average by 4.9% y-o-y, reaching AED91.2 billion in 2026. **Our forecast for high growth in food sales is supported by factors such as robust population growth, increasing health consciousness, and convenience demand.**

Sugar and sugar-related goods are predicted to be the food category with the quickest growth. During the course of our forecast period, spending in this category is anticipated to rise by a **solid annual average of 9.3% y-o-y.**

Source: Fitch Solutions

AGRI-FOOD IN THE UAE : MARKET FORECAST

Drink

In 2023, analysts expect spending on alcoholic beverages **to increase by 5.1% year over year to AED302mn.** Spending on alcoholic beverages is predicted to increase between 2022 and 2026 by an average of **5.3% annually, reaching AED347.0mn in 2026.**

In 2023, alcohol consumption is expected to increase by 1.7% to 75.1 million liters. The consumption of alcoholic beverages is predicted to rise by an average annual growth rate of 1.2% y-o-y over our medium-term prediction period, reaching 76.8 million liters in 2026. **By 2026, wine consumption will expand at the quickest rate, at 3.1% per year.**

In 2023, analysts anticipate a **2.1% year-over-year increase in non-alcoholic beverage spending, bringing the total to AED16.3 billion.** The predicted average annual growth rate for non-alcoholic beverage spending over the medium term is 2.0%.
Spending will amount AED17.1 billion as a result in 2026.
Mineral or spring waters are anticipated to be the best-performing non-alcoholic beverage category, with spending on these goods rising by a solid annual average of 13.8% during our forecast period.

Source: Fitch Solutions

AGRI-FOOD IN THE UAE : SWOT

Strengths

- The business climate in the UAE is one of the best in the region for attracting investors.
- **With a strong hypermarket section, the mass grocery retail (MGR) industry has seen tremendous investment in recent years.**
- In comparison to regional norms, consumer spending power is high.

Weaknesses

- To meet domestic demand, the UAE significantly depends on imports of food and beverages.
- Although having a sizeable population by Gulf region standards, the UAE discourages investors looking for long-term gains in the mass market.
- **There are relatively few opportunities for foreign merchants to enter the supermarket or hypermarket segments.**

Opportunities

- **The UAE places a high priority on halal production, food security, and self-sufficiency, which has led to significant investment in tech-enabled food production.**
- **The demand for more nutrient-dense, low-calorie food and drink options is rising as a result of the nation's more prominent health trend.**
- Consumers in the UAE are becoming more interested in meat and dairy substitutes made from plants.
- The resurgence of the tourism industry will be further aided by the normalization of international travel and the UAE's standing as a secure tourist destination, with positive spillover benefits for the food and beverage industry.

Threats

- Although it will start to slow down over the course of 2023, the average consumer price inflation has prevented a full rebound in private spending.
- **The demand for various kinds of sugary soft drinks could decline as a result of the extension of the "sugar tax."**
- Gulf Cooperation Council (GCC) investor perceptions may be impacted negatively by regional tensions, which would hurt the Emirati economy.
- **Household Cost of Living Increase (Institution of a TVA, Tax on Corporations in 2023) and 2.5% Inflation Taxes in 2021.**

Source: Fitch Solutions

AGRI-FOOD IN THE UAE : EXHIBITION

SHOW/EXHIBITION	ABOUT THE SHOW	DATE	VENUE
THE RESTAURANT SHOW 2023	Café & Restaurant Show in Dubai. Build, Design, Equipment & Technology	May 2023	Dubai Festival Arena by InterContinental
EXPOCULINAIRE 2023	Food & Equipment Expo for Chefs, Pastry Chefs, Bakers, HORECA Professionals	29 to 31.05.2023	Sharjah Expo Centre Sharjah
HALAL EXPO DUBAI 2023	Halal Expo Dubai is the leading business platform for the Middle East Halal industry, where you will meet the key personnel from Halal Industry	Sept 2023	Dubai Crown Plaza Dubai - Deira
SEAFOOD EXPO	International Exhibition on Seafood, Seafood Processing, Packaging, Distribution Technolog. & Equipment Supplies	Sept 2023	Dubai Radisson Blu Deira Creek Convention Hall

Source: Events Eye

AGRI-FOOD IN THE UAE : EXHIBITION

SHOW/EXHIBITION	ABOUT THE SHOW	DATE	VENUE
AGRA ME	Trade Exhibition showcasing the latest advances to improve agriculture and irrigation; animal husbandry and poultry farming; floriculture and horticulture; plus fisheries and aquaculture in the Middle East region	09 & 10.10.2023	Dubai World Trade Centre
AGROFARM MIDDLE EAST	AgroFarm is a international trade fair for animal production and caters to all species in animal farming along every step of the value chain	09 & 10.10.2023	Dubai World Trade Centre
GULFOOD MANUFACTURING	The biggest food and beverage process industry event for the Middle East & Africa	07 & 09.11.2023	Dubai World Trade Centre
MIDDLE EAST ORGANIC & NATURAL PRODUCTS	Middle East Natural & Organic Products Expo	12 & 14.12.2023	Dubai World Trade Centre

AGRI-FOOD IN THE UAE : EXHIBITION

1-General Analysis | 2- Market Analysis | 3- Market Trends | 4- Market Forecast | 5-SWOT | **6-Exhibition**

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  - Knowledge & coaching oriented course

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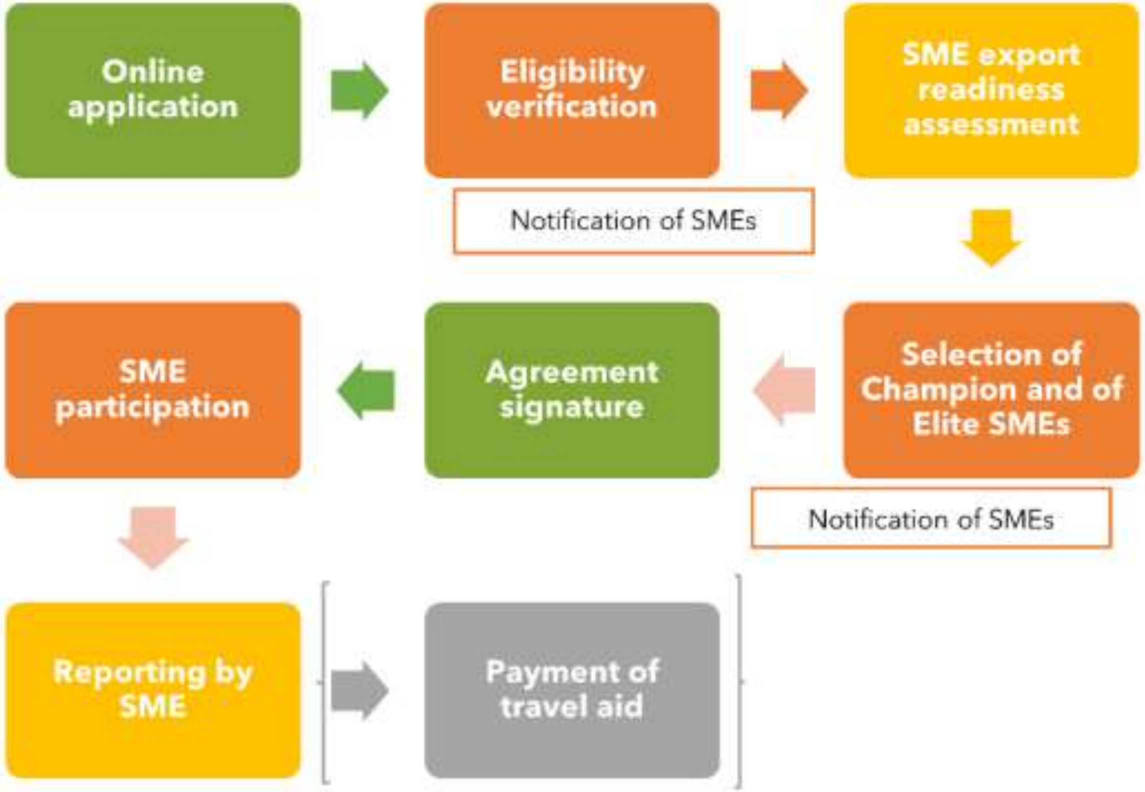
CALL OPENS: Spring 2023



Thank you for your attention!

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F2F HEALTH MATTERS

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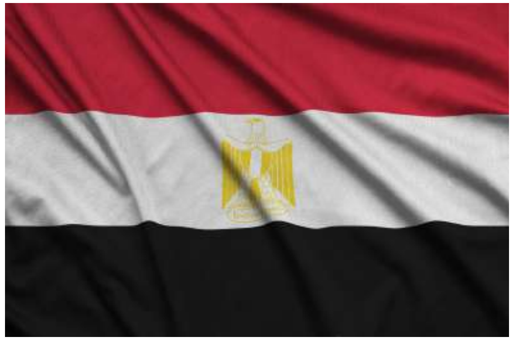
Q&A – 5 minutes break

MIDDLE EAST & EGYPT : AGRI-FOOD

1-Egypt 2- Bahrain 3- Oman 4- Qatar 5-Kuwait 6-Saudi Arabia

Agricultural Market Analysis in Egypt



The Egyptian market for agriculture is anticipated to grow at a CAGR of 3.2% during the forecast period.(2023-2028)

An important part of the **Egyptian economy is agriculture**. It contributed **11.83% of the nation's gross domestic product** (GDP) and **28% of all employment in 2021**. According to the Minister of Planning and Economic Development, Egypt wants to boost the agricultural sector's contribution to the country's GDP to **12%** and increase agricultural **output by 30% by 2024.**

The 2020-2023 Agricultural Innovation Project is run by the Ministry of Agriculture and Land Reclamation (MALR) (AIP). **The program seeks to advance technological ideas to address a number of problems in agriculture**, including **inadequate post-harvest facilities**, **inadequate marketing infrastructure**, and **ineffective farming practices** that reduce farm output and food production.

Sugar beet, sugarcane, wheat, maize, rice, tomato, potato, onion, orange, grapes, and dates are a few of the important crops farmed in Egypt. According to the Food and Agricultural Organization, **sugarcane would be the most important crop produced in the nation in 2020**. The nation seeks to meet the product's quality requirements and take advantage of lucrative sales prospects in both the home and export markets by implementing a variety of business strategies.

Source: https://www.mordorintelligence.com/

MIDDLE EAST & EGYPT : AGRI-FOOD

Fruit and vegetable production is dominated by Egypt.

In the region, Egypt produces the most fruits and vegetables, closely followed by Iran. For the climatic conditions of the MENA region, fruits and vegetables are the best crops to grow. Instead of growing water-intensive cereal crops, **the countries in the region prioritize growing higher value crops like fruit and vegetables cultivated in greenhouses.**

Egypt produced **15,524,952 metric tons of primary fruits and 15,419,841 metric tons of primary vegetables in 2019,** according to FAO. Fruit and vegetables are another important export from Egypt to the EU. Potatoes, grapes, dates, melons, bananas, sugarcane, eggplants, and potatoes are among the major fruits and vegetables grown in the area. **Oranges** had the highest yield of all fruits, at **3 million tons.**

Tomatoes had the largest production among vegetables in 2019 with 6.7 million tons, followed by **onions with 3 million tons**. Thus, during the forecast period, the country's whole agricultural industry is likely to be driven by the production of fruits and vegetables.

MIDDLE EAST & EGYPT : AGRI-FOOD

Agricultural Market Analysis in Bahrain

Bahrain's agricultural sector is anticipated to experience a CAGR of 1.9% over the projection period (2022-2027).

Owing to **COVID-19's** limits on movement and challenges with importing and exporting agricultural products, **which affect the entire supply chain, including farmers, brokers, and transport firms,** there has been a labor shortage in the agriculture sector. Furthermore, the COVID-19 epidemic caused the **suspension of a significant training program for farmers**.

Bahrain is known for its high temperatures, **little amount of arable land, water shortage, and rising groundwater salinity,** all of which limit the quantity of crops that can be cultivated there. The national government is concentrating on stepping up **financing for livestock and agriculture in order to draw international investment for agricultural projects and meet local demand.**

Increasing consumption, advanced technologies, and low water requirements for horticulture are the main drivers for the growth of the market studied. Bahrain has negligible production of cereals and other agricultural products, **which contributes to high food imports to meet the local demand.** Water constraints and unavailability of agricultural land are the major constraints for crop production in Bahrain.

Source: https://www.mordorintelligence.com/

MIDDLE EAST & EGYPT : AGRI-FOOD

1-Egypt | 2- Bahrain | 3- Oman | 4- Qatar | 5-Kuwait | 6-Saudi Arabia

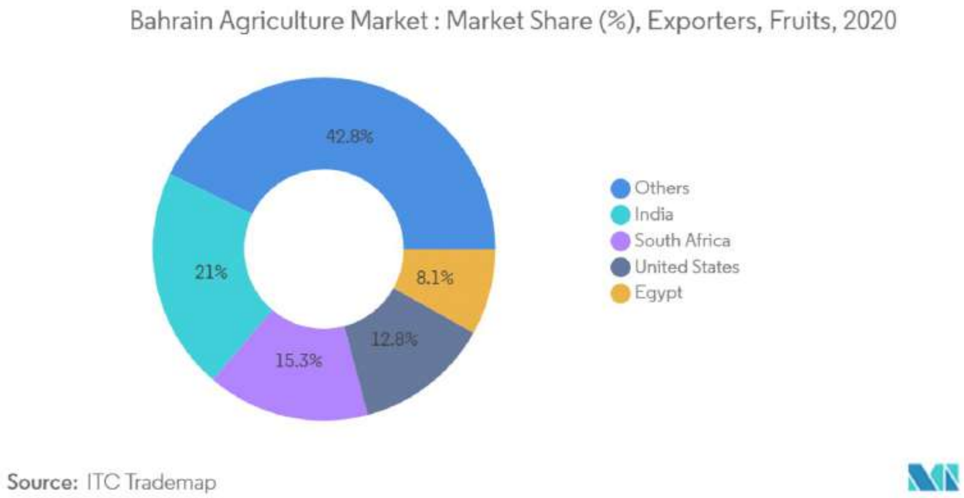
Effort by the government to increase domestic production

Horticulture is the newest development in agricultural production, and it has increased output and transformed the state of agriculture from a few years ago. Alternative farming methods like **hydroponic and aquaponic farming have several benefits**, particularly when used in **arid regions** like Bahrain.

Dates, figs, mangos, pomegranates, melons, papayas, water turnips, potatoes, and tomatoes are the main crops farmed, and they also produce poultry and dairy goods for the local market.

The National Initiative for Agricultural Development (NIAD) is engaged in several initiatives that **expand green space, assist agricultural manufacturing enterprises, help agricultural workers, and increase agricultural competence through education and training.**

In the project, the authority is collaborating with businesses from the public and private sectors to raise the money needed for the Agricultural and Marine Resources Project to build a factory in *Hoorat A'ali* with a focus on the production and packaging of Bahraini dates.



MIDDLE EAST & EGYPT : AGRI-FOOD

1-Egypt | 2- Bahrain | 3- Oman | 4- Qatar | 5-Kuwait | 6-Saudi Arabia

Analysis of the Oman Agricultural Market

During the forecast period, the Omani agricultural market is anticipated to grow at a CAGR of 2.4%. (2023-2028)

A few variables influencing the expansion of the nation's market include the **rise in the adoption of cutting-edge farming technologies and favorable government policies promoting local crop production.** **Oman imports the fruits, vegetables, and cereals needed to meet domestic demand**. Thus, the nation encourages its farmers to use cutting-edge farming techniques in order to achieve self-sufficiency in agricultural products and reduce import dependency.

Dates, vegetables, and fruits make up most of the agricultural output in Oman; other products are grown in smaller quantities. According to data from the *World Bank*, **Oman's total agricultural land area in 2020 was estimated to be 1.4 million hectares, or 4.7% of the country's total land area.** Coastal areas also cultivate fruits including papaya and bananas, whose production in 2020 was 5,840 tons and 18,447 tons, respectively. In recent years, Oman has also boosted the output of wheat, sorghum, and barley.

Additionally, the government launched few **programs to support private sector production**, including updates to regulations, low-interest loans, support for domestic production, and marketing campaigns to increase the visibility of locally produced goods.

Source: https://www.mordorintelligence.com/

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1-Egypt | 2- Bahrain | 3- Oman | 4- Qatar | 5-Kuwait | 6-Saudi Arabia

Government policies of the country to reduce import dependency

Some of the reasons propelling the market expansion in the nation include the rise in the adoption of cutting-edge farming technologies and favorable government policies promoting local crop production. **The government offers loans to customers willing to finance greenhouses, modern irrigation systems, agricultural tractors, agricultural nurseries, date factories, and any other project or service within the agricultural sector in the country**. These factors are increasing the agricultural contribution to the GDP of the country.

Well established Retail networks are supporting growth of agriculture in the country

The Omani retail industry is characterized by strong consumer demand, robust economic growth, distinct demographic factors, and a high-end technology system that ensures better customer service and efficient customer checks. **The increasing presence of major retailers and supermarkets and their aggressive import strategies** result in better access to many fruits and vegetables for the Omani population at comparatively cheaper rates. For instance, in 2017, **Lulu Hypermarkets alone imported 65 ton of vegetables and bananas to Oman to increase the availability of agricultural produce in the local markets**.

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Analysis of the Qatari Agricultural Market

Throughout the projection period, it is expected that the Qatari agriculture market will grow at a CAGR of 6.3%.

Since local vegetable production climbed from about 66,000 metric tons to over 103,000 metric tons, resulting in a 41 percent self-sufficiency rate, **Qatar achieved several of the policy's objectives in 2021,** the Ministry of Municipality stated, as reported by Qatar News Agency. **Local vegetable self-sufficiency is projected to reach 70% by 2023.**

Local dates are currently 86% self-sufficient, and by 2023, that figure is projected to increase to 95%.
The majority of Qatar's domestic cereal needs are imported. Some of the top countries that export cereals to Qatar are **Brazil, the United States, India, and Australia.**

With its "**Support Vegetable Value Chain**" project, which aims to provide **200 summer vegetable farmers** with the necessary agricultural inputs such as fertilizers, pesticides, and drip irrigation networks, Qatar Charity will have distributed and installed dozens of solar-powered irrigation units for internally displaced farmers in northern Syria by the year 2023.

The project also intends to deliver agricultural advice on **how to increase vegetable output at the lowest possible cost**, give farmers remunerative earnings, and supply vegetables at the lowest possible rates on the market.
As a result, the country's market is expanding as a result of a variety of factors, including an increase in **the adoption of new farming technologies, favorable government policies promoting domestic crop production, as well as a very active local supply system.**

Source: https://www.mordorintelligence.com/

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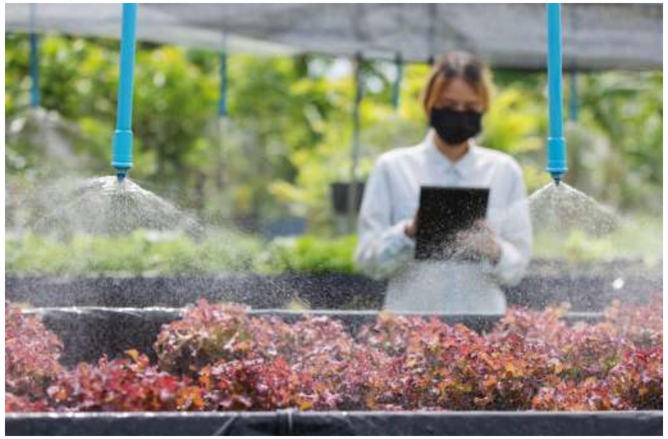
Increase in Adoption of High Technology Farming Practices

Little rainfall and high heat define Qatar's climate. Despite these obstacles, the nation has made great strides in the last few years by **implementing sustainable and intelligent agriculture techniques like aquaponics, smart irrigation, and hydroponics** that have enhanced the quality of fruits and vegetables and the best possible utilization of arable land.



Qatar's national agricultural project, which was built using an aquaponic system that combines aquaculture and hydroponics, was made public in 2021.

To make the country self-sufficient in agricultural production, the nation will **implement more cutting-edge technologies and farming practices.** In 2021, the nation produced the highest volume of vegetables, with tomatoes coming in at 32,555.1 metric tons and covering an area of 191.5 hectares in greenhouses.

A new research initiative to improve greenhouse operations in Qatar is being launched by Carnegie Mellon University in Qatar, a partner institution of the Qatar Foundation. A National Priorities Research Program funding from the Qatar National Research Fund is used to finance the project. **On the other side, Oman in particular has started to receive Qatar's hydroponic agricultural technology.**

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Analysis of the Kuwaiti Agricultural Market

Kuwait has lengthy, sweltering summers and a dry desert climate. The soil in Kuwait is sandy with little organic matter and little moisture. Natural water supplies are few; **now, agriculture uses brackish groundwater and desalinated seawater.** The main challenges that Kuwait's agriculture **industry faces are the difficult weather conditions, water scarcity, and soil resources.**

In Kuwait, almost **90% of the land is deemed unsuitable for agriculture.** The agricultural regions of Kuwait are found in Al-Abdali in the north, Al-Sulaibiya in the middle, and Wafra in the south. In this region, there are 2,880 farms covering over 141 million square meters. Due to environmental and water resource restrictions, production in protected **greenhouses** and with additional irrigation is significantly reliant.

Family farming is not significant in Kuwait, and the majority of farms are not relied on for economical return nor as a key source of revenue. Most Kuwait's crops are vegetables, potatoes, and grains.

Due to its comparatively poor agricultural productivity and dependence on food imports from other nations, Kuwait has a high danger of food insecurity.

Source: https://www.trade.gov/

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Agricultural Market Analysis in Saudi Arabia

During the forecast period, the Saudi Arabian agricultural market is anticipated to grow at a CAGR of 4.9%. (2023-2028)

Saudi Arabia is the largest market for agricultural products in the GCC, and the country currently has a larger demand for agricultural products as a result **of changing consumer consumption habits and rising awareness**. The GDP of the nation is **53 billion SR from the agricultural sector per year.** The importance of agriculture in this area has increased as a result of the recent population growth.

Furthermore, the Saudi Arabian government is a strong proponent of measures that will help the regions agricultural. The Grain Silos and Flour Mills Organization, for instance, acquires and stores wheat, builds flour mills, and creates animal feed. **Additionally, the government sponsors research projects and provides land distribution and reclamation programs.**

Also, the population of Saudi Arabia now has **greater purchasing power and access to high-quality agricultural products thanks to rising income levels and the prevalence of superstores and hypermarkets**. The market is becoming **more competitive** as more of **these merchants implement methods**, such as optimal pricing strategies, to gain market share.

Source: https://www.mordorintelligence.com/

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Agricultural Industry Segments in Saudi Arabia

The sole source of water for Saudi Arabia's agriculture is winter precipitation. Wheat, sorghum, barley, millet, tomato, watermelon, eggplant, potato, cucumber, onions, date palm, citrus, grapes, and alfalfa are the main agricultural crops farmed. In Saudi Arabia, **agriculture has seen a significant transformation as enormous desert expanses have been turned into productive farmlands employing cutting-edge technology.**

The market is being driven by technological developments and an expansion in agricultural land.

The Saudi Arabian agriculture sector is seeing a good trend because of **technological advancements that boost output and caterer demand.** For instance, KSA launched a **smart farm project in 2022 that will serve the Saudi Arabian market with fresh agricultural produce**. Tamimi Markets, a Saudi grocery chain, and Mitsui & Co., a Japanese company, collaborated on this project.

أسواق التميمي
tamimi markets

MITSUI & CO.

These agricultural technological advancements will assist boost the **Saudi Arabian agriculture industry and raise farmer revenue**. Also, a lot of young businesses in the Saudi Arabian region are using a variety of technical innovations to advance the agriculture sector.


Q&A Session

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