AUSSEN WIRTSCHAFT BRANCHENREPORT KATAR

GESUNDHEITSWESEN – MED-TECH, INFRASTRUKTUR, SERVICES

MARKTEINTRITT UND STAATLICHE FÖRDERUNGEN
TRENDS UND CHANCEN FÜR ÖSTERREICHISCHE FIRMEN
VERANSTALTUNGEN UND MESSEN
KONTAKTE UND LINKS

AUSSENWIRTSCHAFTSCENTER DOHA
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Eine Information des
AußenwirtschaftsCenter DOHA

Wirtschaftsdelegierter
Mag. Andreas Stauber, MA
T +97440164771
E doha@wko.at
W AUSSENWIRTSCHAFT: Katar - WKO

f fb.com/aussenwirtschaft
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Herausgeber, Medieninhaber (Verleger) und Hersteller:
WIRTSCHAFTSKAMMER ÖSTERREICH / AUSSENWIRTSCHAFT AUSTRIA
Wiedner Hauptstraße 63, Postfach 150, 1045 Wien
Redaktion: AUSSENWIRTSCHAFTSCENTER DOHA, T +97440164771
E doha@wko.at, W AUSSENWIRTSCHAFT: Katar - WKO

EXECUTIVE SUMMARY

Qatar combines robust economic performance, driven by natural gas exports, with significant investments in healthcare and medical technology. With a growing population of 3.12 million, 88% of whom are expatriates, and a GDP per capita of USD 71,648 in 2024, the country is leveraging global energy demand and the forthcoming North Field expansion to sustain growth.

Qatar's healthcare sector has become increasingly significant. It is now ranked 18th globally in the Healthcare Quality Index in 2025. Guided by the National Strategy 2024–2030, Qatar is improving infrastructure and healthcare service delivery and addressing the challenges posed by chronic diseases. Qatar's medical device market is expected to reach USD 801.48 million by 2025, with a compound annual growth rate (CAGR) of 5.04% between 2025 and 2030. Meanwhile, the digital health sector in the Middle East, including Qatar, was valued at USD 5.96 billion in 2024 and is predicted to grow at a CAGR of 19.56 % between 2025 to 2033.

High-potential sectors include AI-driven diagnostics, surgical robotics, wearable health technology, biotechnology, cold chain logistics, smart hospital development, telemedicine, medical tourism and sustainable waste management. Upcoming projects, such as the expansion of the National Cancer Hospital and the construction of new psychiatric hospital and over 60 planned public healthcare centres, underscore Qatar's commitment to providing world-class healthcare.

For Austrian companies, local partnerships and joint ventures with Qatari distributors, healthcare providers, and government entities are recommended as the most effective way to enter the market. Participating in trade fairs such as Qatar Medicare provides direct networking opportunities. Establishing joint ventures in areas such as surgical robotics, biotech research and digital health platforms can help firms establish a long-term presence and credibility in the market.

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1 INTRODUCTION TO QATAR: SOCIETY, ECONOMY, POLITICS

1.1 Country Overview

Qatar, strategically located in the Gulf region, is renowned for its natural gas reserves. It is governed as a hereditary monarchy with a constitution. The Emir serves as both head of state and government. Despite modernization, governance remains centralized, with limited political participation.

1.2 Demographics and Human Capital

As of early 2025, Qatar's estimated population is 3.12 million, with about 88% being expatriates. The population grew by 7.3 % in 2024. The country has an urbanization rate of 96.6%, predominantly in Doha, the capital. The median age is 33.5 years. Qatar ranks 90th out of 174 countries on the World Bank's Human Capital Index, indicating ongoing challenges in education, health, and workforce integration, especially regarding gender equality. The nation is expanding social protection and promoting female and youth employment.

1.3 Economic Overview

1.3.1 GDP and Growth

GDP per capita was at USD 71,648 in 2024. The increased demand for gas due to Russia's war is also likely to have a positive impact on economic performance in the coming years, with an additional boost expected after completion of the North Field project in 2026/2027. It is expected that up to 15% of exports will go to Europe.

1.3.2 Investment and Business Climate

Qatar has implemented several business-friendly policies to attract foreign direct investment (FDI), such as:

- A legal system based on English common law in designated free zones.
- 100% foreign ownership allowed in multiple sectors.
- Full repatriation of profits in convertible currencies.

1.3.3 Credit Ratings and Economic Stability

Fitch Ratings (2024): Upgraded Qatar's credit rating to AA, with expectations of budget surpluses driven by increased LNG production and strategic investments.

Fitch Ratings (2025): Fitch Ratings affirmed Qatar's Long-Term Foreign-Currency Issuer Default Rating (IDR) at 'AA' with a Stable Outlook.

2 OVERVIEW OF QATAR'S HEALTHCARE SECTOR

2.1 Budget Allocation

Qatar has a developed healthcare system. According to the Peninsula report (January 12, 2025), Qatar ranked 18th globally in the Healthcare Quality Index for 2025, with a score of 73.4, improving from 22nd in 2024. This ranking reflects a comprehensive evaluation including medical workforce efficiency, availability of medical equipment, healthcare costs, and patient satisfaction.

In 2024, Qatar allocated 11% of its national budget (QAR 200.9 billion / USD 55.1 billion) to healthcare.

In 2025, Qatar allocated 10.5 % of its national budget (QAR 210.2 billion / USD 57.6 billion) to healthcare.

The National Strategy 2024 – 2030 focuses on:
- Health improvement of the population
- Efficiency and resilience of the health system
- Excellence in service delivery

2.2 Key Healthcare Metrics

A summary of key metrics in 2024 (latest available data):

Hospitals	10 private, 15 public		
Employment	Total workforce in the healthcare sector amounted to more than 50,000 healthcare workers in 2024		
Life Expectancy	**M** 80.63 years	**F** 83.10 years	
Childhood Immunisation Coverage (June 2024)	**BCG** 99% **HepBB** 98%	**HIB** 95% **MMR(MCV1)** 99%	**HepB3** 95% **Polio** 98%

2.3 Health Challenges

2.3.1 Rise in Non-Communicable Diseases (NCDs)

Chronic illnesses such as diabetes, obesity, and cardiovascular diseases are among the leading health concerns in Qatar. As of 2024, approximately 24.6% of adults aged 20-79 are living with diabetes, translating to around 409,300 cases. Obesity affects 33.4% of the adult population, while cardiovascular diseases account for 27% of all deaths in the country. In 2025, obesity affects 46.1% of adult women and 35.9% of adult men in Qatar. These conditions are influenced by factors such as diet, sedentary lifestyles, and genetic predispositions.

2.3.2 Smoking and Respiratory Diseases

Despite ongoing public health initiatives, smoking remains a significant health concern in Qatar. As of 2025, approximately 16.6% of adults aged 15 and older are current smokers, with a notable gender disparity: 22.8% of men and 2.2% of women report smoking. This prevalence contributes to an increased risk of lung diseases, cardiovascular conditions, and other smoking-related illnesses, thereby placing additional strain on the healthcare system.

2.3.3 Extreme Heat and Worker Health Risks

Qatar's climate is another health challenge, especially for outdoor workers. Long hours in high temperatures can lead to severe dehydration, heatstroke, and even organ failure. While government policies have improved working conditions, this remains a serious concern. One of the occupational safety measures was introduced June 1st, 2025, and prohibits outdoor work in Qatar between 10:00 am and 03:30 pm to protect workers from heat stress.

3 MEDICAL DEVICES AND TECHNOLOGY

3.1 Market Overview

Qatar's medical technology market has seen remarkable growth in recent years, driven by an increasing demand for healthcare services and a heightened public focus on health and wellness. Projections indicate that the market will reach approximately USD 801.48 million by 2025, with a compound annual growth rate (CAGR) of 5.04% between 2025 and 2030.
Source: Statista

Key drivers:

- Aging population
- Rising chronic diseases
- Technological advancements (AI diagnostics, robotics)
- Government initiatives supporting healthcare infrastructure

Market Segments:

- Dialysis Devices
- Long-Term Care Devices
- Connected Medical Devices

3.2 Digital Health

The Digital Health market refers to the use of technology to improve health and healthcare delivery. It includes the Digital Fitness & Well-Being, Online Doctor Consultation, and Digital Treatment & Care markets.
The digital health market in the Middle East, including Qatar, was valued at approximately USD 5.96 billion in 2024 and is expected to grow at a CAGR of 19.56% from 2025 to 2033.
Source: Grand View Research

3.3 Robotics & Smart Hospitals

The increasing focus on early disease detection and AI-powered diagnostics presents opportunities for Austrian firms specializing in radiology, pathology, and remote monitoring solutions.

Qatar is investing in robotic-assisted surgery an integrated OR technologies, areas where Austrian companies with expertise in high-precision surgical tools can contribute.

The Qatar Smart Hospitals Market (2025-2031) is projected to grow in the area of intelligent operating systems, supported by technologies such as IoT, 5G, and machine learning.

4 HEALTHCARE INFRASTRUCTURE

4.1 Public Sector

Qatar's healthcare sector has experienced significant growth and development, with substantial investments in both public and private healthcare facilities. In 2025, the public sector operates 15 hospitals and long-term care facilities, 35 primary healthcare centres, and 6 health and wellness centres, employing 29,960 public healthcare professionals.

4.2 Private Sector

The private sector complements this with 10 hospitals, 21-day surgery centres, 417 general and specialized health centres, 319 diagnostic centres, 140 clinics, 135 health and nursing agencies, and 1,251 primary healthcare units, employing 21,417 healthcare professionals. These advancements have contributed to an increase in the average life expectancy to 82.37 years, reflecting the nation's commitment to enhancing healthcare services and outcomes.
Sources: Qatar News Agency (QNA), Qatar's Healthcare Sector World-Class, April 2024

5 MEDICAL TOURISM

Qatar has also positioned itself as a destination for medical tourism, with several hospitals partnering with international companies to attract foreign patients. These partnerships facilitate patient coordination, travel, and accommodation, enhancing Qatar's appeal as a healthcare hub.

Key Hospitals Collaborating with International Partners:

- The View Hospital partners with Cedars-Sinai Medical Center (USA) to provide advanced services for international patients, including travel and accommodation support.
- Al-Ahli Hospital collaborates with MedicaTour, an international medical tourism platform, to expand its international patient base.
- Al-Wakra Hospital offers specialized medical services attracting patients from GCC countries.

Medical Specializations:

- **Cardiology and cardiothoracic surgery:** Qatar's advanced hospitals, cutting-edge technologies, and highly skilled cardiologists provide comprehensive cardiac care including minimally invasive and complex heart surgeries - attracting patients from neighbouring regions.
- **Cosmetic surgery:** Advanced procedures including rhinoplasty and liposuction.
- **Orthopedic surgery:** Specialized centres like Aspetar Orthopaedic and Sports Medicine Hospital are renowned for joint replacements and sports injury treatments.
- **Dental care:** Comprehensive services including dental implants and orthodontics.
- **Sports medicine:** Aspetar Hospital attracts international athletes for injury treatment and rehabilitation.
- **Precision medicine:** Qatar invests in advanced medical technologies, offering cutting-edge treatments for complex conditions.

Prices are said to be lower than in the U.S. or Europe. Importantly, waiting times are short, and care is often customized to the patient's cultural, dietary, and religious needs.
Source: medicaltourism.com 2025

6 MARKET ENTRY & OPPORTUNITIES

The main player in the medical sector in Qatar are the Ministry of Public Health (MoPH) with its departments and the Hamad Medical Corporation. All medical regulations, standards, and certifications are under their respective divisions under the MoPH. Other external stakeholders also include university hospitals and nongovernmental organisations; there are several associations for practitioners of various medicines, including dental and surgical.

Regulatory Revisions: In September 2025, Minister Al Mahmoud issued Decision No. (46) of 2025, which rescinded a previous decision, indicating ongoing regulatory adjustments within the MoPH.
Source: moph.gov.qa, 2025

6.1 Entry Strategies

Austrian companies planning to enter the Qatari healthcare market can consider the following approaches:

Direct export: Austrian manufacturers of medical equipment, pharmaceuticals, and digital health solutions can export their products to hospitals, clinics, and pharmacies in Qatar. However, they must comply with the Ministry of Public Health (MoPH) regulations to ensure proper registration, licensing, and compliance with local standards.

Local partnerships and joint ventures: Given the regulatory environment, forming partnerships with local distributors, healthcare providers, or government entities is often the most effective way to establish a presence. Advantage Austria is committed to helping Austrian companies find and connect with local partners.

Establishing a local presence: Setting up a branch office or a local subsidiary in Qatar can help companies gain better market access, strengthen relationships with key stakeholders, and navigate regulatory requirements more efficiently.

Participating in trade fairs and business delegations can also contribute to this process. Events such Qatar Medicare and Arab Health, as well as industry-focused delegations, provide valuable networking opportunities and a chance to showcase products and explore collaborations.

6.2 High-Potential Sectors

The following areas within Qatar's healthcare and medical technology sector are particularly open for investment and collaboration.

6.2.1 Medical Technology & Equipment

AI-Driven diagnostics & imaging: The increasing focus on early disease detection and AI-powered diagnostics presents opportunities for Austrian firms specializing in radiology, pathology, and remote monitoring solutions.

Surgical robotics & smart operating rooms (OR): Qatar is investing in robotic-assisted surgery and integrated OR technologies, areas where Austrian companies with expertise in high- precision surgical tools can contribute.

Wearable health tech & remote patient monitoring: With a growing demand for chronic disease management and home healthcare solutions, wearable medical devices and IoT- enabled health monitoring are emerging as key investment areas.

6.2.2 Biotechnology & Supply Chain Transformation

Biotech and pharmaceuticals: Investments in biotechnology and research are increasing in order to address prevalent challenges relating to chronic diseases. Austria's advances in genetics, stem cell research and biotechnology could contribute to collaborative research projects, clinical trials and the development of innovative, region-specific treatments.

Cold chain logistics: Qatar’s evolving pharmaceutical supply chain is creating opportunities for companies with expertise in cold chain management, biotech innovation and traceability solutions. The country is ensuring greater transparency in medication distribution by adopting global tracking systems with barcoding and serial coding. Austrian companies specializing in logistics, regulatory compliance and digital supply chain technologies are well placed to contribute to this transformation, helping to ensure that medicines are delivered efficiently and securely in accordance with international standards.

6.2.3 Healthcare Infrastructure and Smart Hospital Development

Qatar's ambitious plan to build 60 to 70 new healthcare centres over the next decade creates opportunities for collaboration in hospital design, construction, and management. Austrian firms specializing in smart hospital technology, sustainable healthcare facility planning, and integrated medical IT systems could contribute to creating world-class medical centres aligned with Qatar's healthcare vision.

6.2.4 Digital Health & Telemedicine

Qatar's telehealth sector is experiencing rapid growth, driven by digital platforms, mobile health applications, AI, and real-time data analytics that enhance patient engagement and outcomes. Remote monitoring tools allow healthcare providers to deliver timely interventions and personalized care. The telemedicine market is projected to reach USD 1.5 billion by 2033, with a CAGR of 17.9% between 2025 and 2033 (IMARC Group, 2024).

Austrian expertise in healthcare IT, electronic health records (EHR), telemedicine, and remote patient monitoring can support Qatar's digital healthcare transformation and improve service delivery. Given the increasing digitization of healthcare, solutions that enhance patient data security, compliance, and interoperability will also be in high demand.

6.2.5 Medical Tourism & Wellness

Qatar is establishing itself as a destination for medical tourism in the Middle East. It offers high-end healthcare services, wellness centres, rehabilitation programmes, post-surgery recovery and digital follow-up consultations. This is all supported by its medical infrastructure and strategic location.

Austrian firms can collaborate with Qatari institutions by providing specialised medical services, wellness technologies and patient care solutions, as well as advanced medical devices, surgical instruments and diagnostic imaging systems, thereby enhancing the country's premium healthcare offerings for international patients.
Source: rafhealthcareconsultancy.com

6.2.6 Sustainable Waste Management in Healthcare

Sustainability has become a key focus for Qatar's hospitals, requiring eco-friendly solutions for managing medical and general hospital waste. Austria's know-how in hospital waste management technologies and sustainable environmental solutions can help Qatar achieve its sustainability goals in the healthcare sector.

6.3 Upcoming Healthcare Projects and Medical Technology Advancements in Qatar

Enhancement of Qatar's National Cancer Hospital: Plans are in place to upgrade the National Cancer Hospital, aiming to provide state-of-the-art oncology services and improve patient care.

Establishment of a Psychiatric Hospital: Recognizing the importance of mental health, a new psychiatric hospital is being developed to offer comprehensive mental health services to the community.

Pharmaceutical supply chain transformation: A collaborative initiative between the GS1 Qatar Office, under Qatar Development Bank (QDB), and the Ministry of Public Health (MoPH) is set to improve Qatar's pharmaceutical supply chains. This project will implement a global system to regulate and track drug distribution using two-dimensional barcodes and serial coding for both locally produced and imported medications, enhancing the efficiency and safety of the pharmaceutical supply chain.

Inauguration of the Military Medical Hospital in Doha: Opened in 2024, this facility provides specialized medical services to military personnel, contributing to the nation's healthcare capabilities.

Expansion of Healthcare Centres by Ashghal: The Public Works Authority (Ashghal) has unveiled plans to construct 60 to 70 healthcare centres over the next decade. Currently, four centres in Muaither, Al Waab, Al Wajba, and Al Jamaa are progressing steadily, aiming to enhance primary healthcare accessibility across the country.

The following table shows an overview of further projects, including their status, value and location. If you would like to find out more about these projects, please feel free to get in touch.

Project	**Project Status**	**Project Value (US$ Mn)**	**Project Location**
Development of HMC National Mortuary & Medical Staff Buildings	Design	25	Doha, Hamad Medical Corporation
Zulal Elective Medical Centre	Tender for Construction	60	Doha
Expansion of Heart Hospital in HMC	Concept Stage	100	Doha, Hamad Medical Corporation
Renovation and Refurbishment of HMC Psychiatry Hospital in Al Muntaza	Construction	45	Qatar
British 5 Star Medical Centre at Qetaifan Island North	Design	70	Lusail, Qetaifan Island
Al Shamal Hospital	Concept Stage	350	Al Shamal
Building Renovation & Extension - HMC/TCS/595/2025	Construction	0,8	Doha
National Centre for Cancer Care and Research (NCCCR)	Design	350	Doha
New Mental Health & Psychiatry Hospital in Al Wakra	On Hold	150	Al Wakra, Al Wakra
Risk Mitigation Program at Rumailah Hospital	Construction	14	Doha, Hamad Medical City
Safety Improvement Works & Extension to Al Khor Hospital	Construction	27	Al Khor
Al Daayan Health District in Doha	Design	250	Al Daayen
Naval Base - Buildings & Infrastructure Works	Construction	850	Al Wakra, Al Wakra
QatarEnergy Wellness Centre in West Bay (Diagnostic & Treatment Center))	Tender for Construction	110	Doha, West Bay
Hamad General Hospital Safety Improvement RMP Main Package 1, 2 and 3	Tender for Construction	450	Doha, Hamad Medical Corporation
Al Waab Dialysis and Diabetes Center	Construction	55	Al Rayyan, Al Waab
Qetaifan Island North Lusail - Phase 2	Construction	530	Lusail, Qetaifan Island

7 REGULATORY ENVIRONMENT

Qatar's healthcare sector is governed by a comprehensive regulatory framework designed to ensure quality, compliance and patient safety. Companies considering market entry or collaboration should be aware of these regulations.

- Healthcare Services Law (No. 22 of 2021)
- Nursing regulations (QCHP)
- Medical device registration under Gulf Health Council standards
- Private health insurance mandated for residents and visitors

8 CONCLUSION

Qatar's healthcare market presents strong growth potential, driven by government investment, advanced infrastructure, and digital health adoption. Austrian companies have strategic opportunities across medical devices, pharmaceuticals, digital health, medical tourism, and biotech collaboration.

9 EVENTS AND TRADE FAIRS IN THE SECTOR

International Conference on Medical & Health Science (ICMHS)
Doha I 10-11 January 2026

10th Qatar Pediatric Emergency Medicine International Conference (QPEM 2026)
Doha I 16-18 January 2026

Qatar Health Congress-2026 (QHC)
Doha I 28-31 January 2026

Doctors of the Future Conference
Doha I 10-11 April 2026

Qatar International Medical Devices & Healthcare Exhibition & Conference "QMED"
Doha I 6-8 May 2026

Hospital Build 2026
Doha I 18-20 May 2026

Qatar Medicare
Doha I November 2026

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AUSSENWIRTSCHAFT AUSTRIA

AUSSENWIRTSCHAFTSCENTER DOHA
West Bay, Palm Tower B, Floor 33
PO Box 13190, Doha, Katar
T +974 4016 4771
E doha@wko.at
W wko.at/aussenwirtschaft/qa