



Country Analysis Brief: Qatar

Last Updated: October 20, 2025

The U.S. Energy Information Administration (EIA), the statistical and analytical agency within the U.S. Department of Energy (DOE), prepared this report. By law, our data, analyses, and forecasts are independent of approval by any other officer or employee of the U.S. Government. The views in this report do not represent those of DOE or any other federal agencies.

Overview

Table 1. Qatar's energy overview, 2023

	Crude oil and other					Other	Total
	petroleum liquids	Natural gas	Coal	Nuclear	Hydro	renewables	
Primary energy consumption (quads) 2023 ^a	0.5	1.9	--	--		<0.1	2.4
Primary energy consumption (percentage)	22.3%	77.7%	--	--		0.1%	100.0%
Primary energy production (quads) 2023 ^a	3.2	6.7	--	--		<0.1	10.0
Primary energy production (percentage)	32.5%	67.5%	--	--		<0.1%	100.0%
Electricity generation (terawatthours)	--	54.4	--	--	--	1.9	56.4
Electricity generation (percentage)	--	96.4%	--	--	--	3.6%	100.0%

Data source: U.S. Energy Information Administration

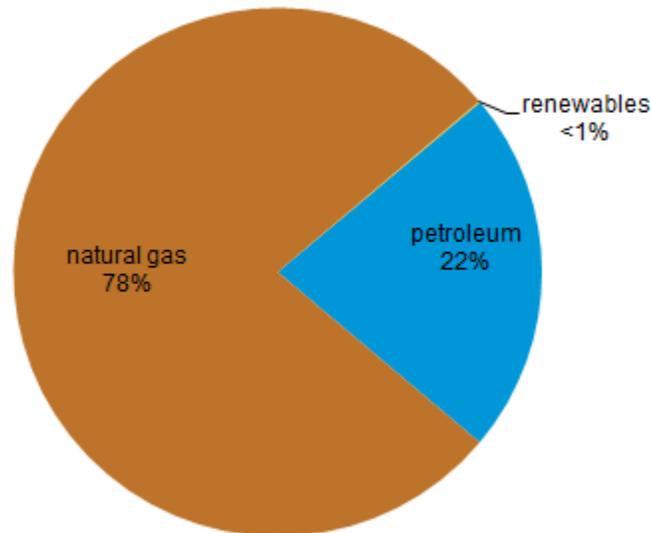
Note: Quads=quadrillion British thermal units; -- signifies not applicable

^a Qatar consumes and produces only solar and biomass/waste energy from renewable energy sources.

- The energy industry plays a major role in Qatar's economy. Qatar's earnings from its hydrocarbon sector accounted for 83% of total government revenues in 2023, according to the International Monetary Fund. However, hydrocarbon export revenues declined from \$115 billion in 2022 to \$85 billion in 2023 because of lower oil and natural gas prices,¹ and some analysts expect this trend continued into 2024 because of lower hydrocarbon prices.² Qatar's National Vision 2030 aims to shift the country's economy away from oil and natural gas. The Third National Development Strategy sets specific targets to achieve that policy goal by 2030, such as reaching average annual economic growth of 4% and diversifying the economic base to bolster Qatar's non-energy sectors and knowledge-based industries.³
- One of OPEC's longest-standing members, Qatar left the organization in January 2019 to shift resources and investment from oil production to natural gas and liquefied natural gas (LNG) infrastructure projects.⁴ Qatar expects to nearly double its LNG export capacity and increase the supply of petroleum liquids by 2030.
- Qatar was the world's sixth-largest dry natural gas producer and the third-largest natural gas exporter in 2024.⁵ Qatar's high natural gas output yields significant volumes of valuable petroleum liquid byproducts, such as lease condensates and hydrocarbon gas liquids (HGLs). Qatar is also at the forefront of gas-to-liquids (GTL) production, and is home to the world's largest GTL facility.⁶
- Qatar's economy reached a peak annual consumption of 2.4 quadrillion British thermal units (quads) of primary energy in 2023, up from 2.1 quads in 2022. Qatar is a major hub for international air travel and a key exporter of oil, natural gas, petrochemicals, and fertilizer.⁷

Natural gas and oil accounted for virtually all of Qatar's total primary energy consumption, with renewable energy accounting for less than 1% of the total (Table 1 and Figure 1).⁸

Figure 1. Qatar's primary energy consumption, 2023



Data source: U.S. Energy Information Administration, International Energy Statistics
 Note: Numbers may not add to 100% because of independent rounding.

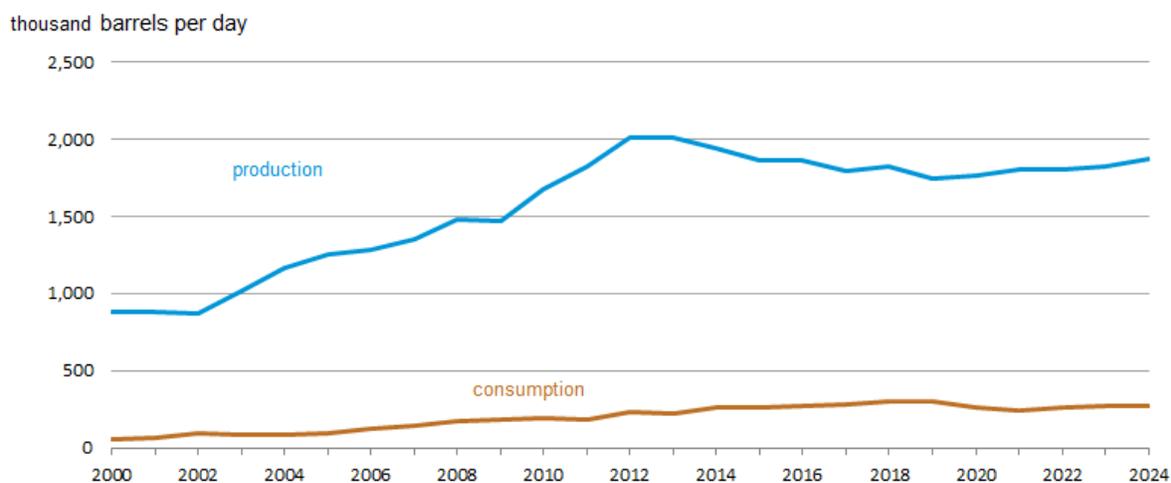
Petroleum and Other Liquids

- Qatar's total petroleum and other liquids production, which includes lease condensates and HGLs, rose from 1.7 million barrels per day (b/d) in 2019 to 1.9 million b/d in 2024 (Figure 2). Because Qatar's oil fields are all mature, crude oil production declined from its peak of 852,000 b/d in 2008 to around 600,000 b/d in 2022 before rising to 615,000 b/d.⁹ Oil production declined because of natural decline rates and low oil demand following the COVID-19 pandemic. Recent oil recovery projects at Qatar's mature Al-Shaheen field slightly raised production in 2023 and 2024.¹⁰ In addition to crude oil, which makes up 33% of its total liquids production, Qatar produces a significant amount of condensates from natural gas fields (38% of liquids supply) and HGLs that are removed from raw natural gas supply (20%). The remainder of its liquids supply is from the direct conversion of natural gas-to-oil products at its gas-to-liquids (GTL) plants and from refining gain (7%).
- Because decline rates at Qatar's crude oil fields are high, QatarEnergy is using enhanced oil recovery (EOR) in redevelopment projects to sustain production capacity by slowing the rate of decline.¹¹ The Al-Shaheen field, Qatar's largest crude oil field, is undergoing a third expansion that QatarEnergy expects will raise production by an additional 100,000 b/d by 2027.¹² A second redevelopment project at the Bul Hanine field is also underway and could add 60,000 b/d by 2028 to offset production declines (Table 2).¹³ Other EOR projects are ongoing at the onshore Dukhan oil field and the offshore Idd-El Shargi field (Figure 3).¹⁴
- We expect noncrude oil liquids production to increase in the next few years. The North Field natural gas expansion projects are slated to come online in 2026, and by 2030 they will add at

least 380,000 b/d of condensate and about 300,000 b/d of ethane and other HGLs production (Table 3).¹⁵

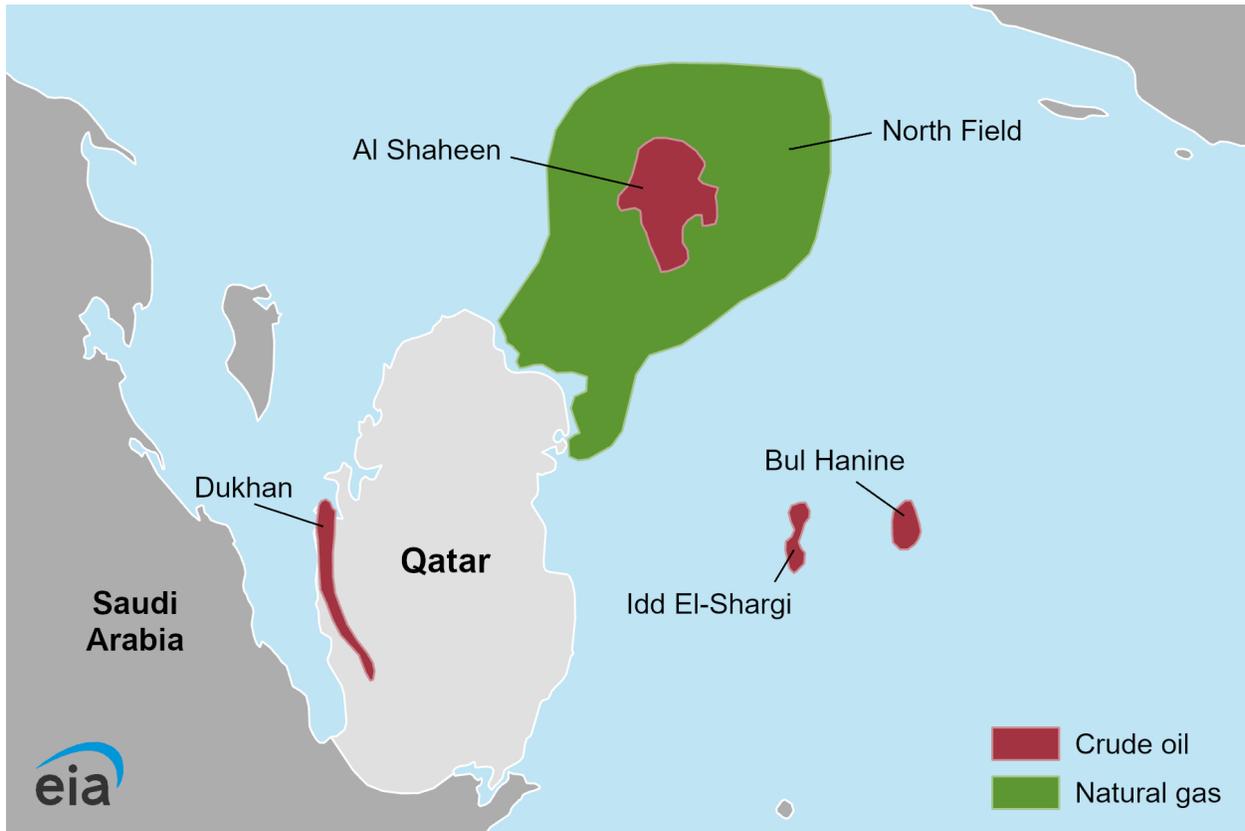
- After hitting a COVID-19-induced low of less than 240,000 b/d in 2021, Qatar’s oil consumption reached about 270,000 b/d in 2024¹⁶ due to construction of several major industrial projects and a growing use of transportation fuels such as gasoline and jet fuel.¹⁷
- Qatar uses noncrude oil liquid fuels, mostly ethane, as fuel at its domestic petrochemical plants. It has three ethane crackers (facilities that can process ethane into ethylene and other chemicals) in operation. A large ethane cracker is also under construction at Ras Laffan, which will almost double ethylene processing capacity by the end of 2026.¹⁸ This new facility will receive ethane from the North Field natural gas expansion projects.
- In 2025, Qatar had the capacity to process 80,000 b/d of crude oil and 363,000 b/d of condensates in its two oil refineries (Table 4). After QatarEnergy completed an upgrade to the Mesaieed refinery in 2020, all of Qatar’s refineries were able to produce low-sulfur diesel.¹⁹ Currently, no additional expansions are planned.
- In addition to its refineries, Qatar has the world’s largest capacity of GTL facilities, which directly convert natural gas to petroleum products.²⁰ Its two GTL facilities can convert natural gas to 174,000 b/d of petroleum products and 120,000 b/d of hydrocarbon gas liquids such as ethane and propane.²¹

Figure 2. Qatar total petroleum and other liquids supply and consumption



Data source: U.S. Energy Information Administration, International Energy Statistics

Figure 3. Map of Qatar's major oil and natural gas fields (September 2025)



Source: U.S. Energy Information Administration; National Energy Technology Laboratory, Global Oil and Gas Infrastructure Features Database; and World Bank

Table 2. Qatar's crude oil projects, 2025

Project name	Crude oil production capacity (thousand b/d)	Start date	Notes
Al Shaheen Phase 3 Development (Ruya Development)	100	2027	Several EOR development phases intended to bring field capacity back to 300,000 b/d. ²²
Bul Hanine Field Redevelopment Phase 2	60	2028	Redevelopment intended to sustain output for 25 years from the new wells. ²³
Total	160		

Data source: Fitch Solutions, *Middle East Economic Survey*, International Energy Agency

Note: b/d=barrels per day; EOR=enhanced oil recovery

Table 3. Qatar's noncrude oil liquids projects, 2025

Project name	Condensate production capacity (thousand b/d)	LPG production capacity (thousand b/d)	Ethane production capacity (thousand b/d)	Announced start date
QatarGas North Field East Expansion Project	260	128	76	Mid-2026 ²⁴
QatarGas North Field South Expansion Project	122	61	34	2027 ²⁵
Total	412	206	144	

Data source: *Middle East Economic Survey*, Reuters, Offshore Technology

Note: b/d=barrels per day, LPG=liquefied petroleum gas

Table 4. Qatar's oil refining capacity, 2025

Refinery	Owners	Capacity (thousand barrels per day [b/d])	Notes
Crude oil and condensate refineries			
Umm Said / Mesaieed	QatarEnergy ²⁶	137	80,000 b/d crude oil distillation unit processing crude oil from the Dukhan oil field and 57,000 b/d condensate splitter processing condensates from the North Field.
Laffan Refinery	QatarEnergy 72%; TotalEnergies 10%; ExxonMobil 10%; Cosmo Oil 5.5%; and Mitsui 2.5% ²⁷	306	Condensate splitter processing condensates from the North Field; QatarEnergy merged Laffan Refinery 1 and Laffan Refinery 2 into one company in February 2023.
Total		443	
Gas-to-liquids (GTL) refineries			
Oryx GTL plant	QatarEnergy 51%, Sasol 49% ²⁸	34	
Pearl GTL plant	Shell ²⁹	140	Also produces 120,000 b/d of HGLs
Total		174	

Data source: Fitch Solutions, Argus Media group, *Middle East Economic Survey*, QatarEnergy LNG, Sasol, QatarEnergy, Offshore Technology

Note: HGL=hydrocarbon gas liquids

Natural Gas

- Qatar's vast natural gas reserves are primarily in the giant offshore North Gas Field (also known as South Pars on the Iranian side of the Persian Gulf). QatarEnergy claims that North Field's recoverable natural gas reserves are 900 trillion cubic feet (Tcf), which makes it the largest non-associated gas field in the world.³⁰
- Qatar's natural gas production far exceeds its domestic demand, and over the past two decades, it became an important global LNG exporter (see energy trade section). Although Qatar's natural gas production grew 15% per year between 2004 and 2014, output growth slowed considerably to an annual average of less than 1% growth after 2014 because many existing field wells reached maturity by that time and no major new projects came online until the Barzan natural gas plant in 2022 (Figure 4).³¹
- Qatar's long-term goal is to sustain current natural gas production levels from the southern part of the North Field to maintain the high utilization rates of existing LNG export terminals. The

North Field Production Sustainability project has three phases that involve bolstering the natural gas pressure and installing new offshore platforms and compression facilities. QatarEnergy expects to complete the project by 2032.³²

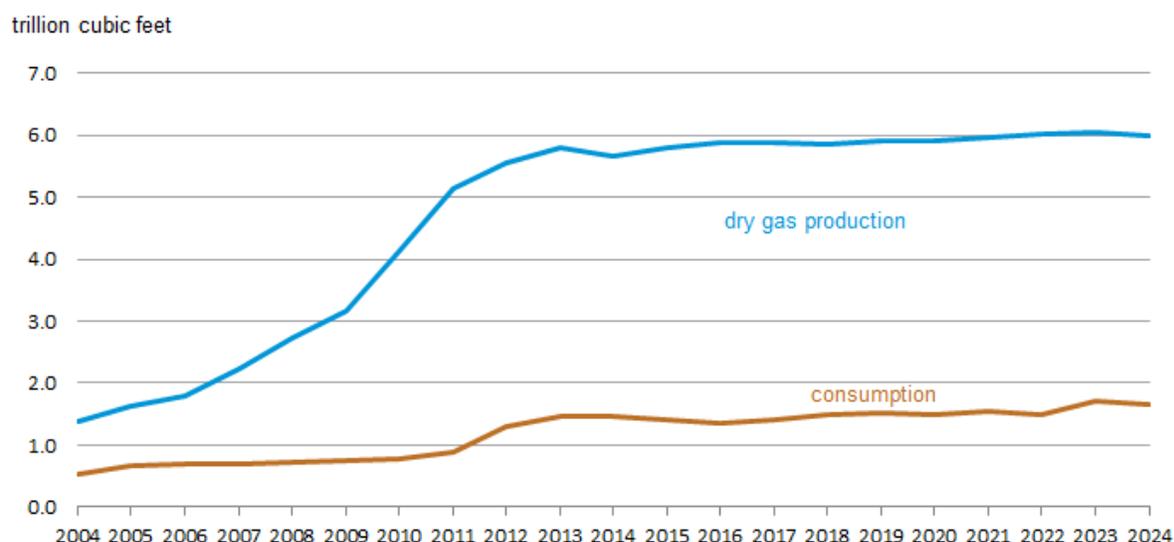
- In addition, three large natural gas production and liquefaction projects are under development and slated to come online starting in 2026 (Table 5). The North Field East, North Field South, and North Field West are part of the North Field expansion development that may offset some of the declines from mature fields and raise Qatar’s natural gas production. Output from these projects will supply three new LNG export terminals, which have a combined capacity of 3.1 trillion cubic feet per year (Tcf/y) (Table 5). As part of the government’s plans to reduce the North Field project’s carbon dioxide (CO₂) emissions, Qatar plans to install a carbon capture and storage system on the North Field East and North Field South projects that will capture up to 3.2 million metric tons of CO₂ per year.³³ Overall, QatarEnergy pledged to secure 11 million tons of CO₂ emissions per year through carbon capture and storage technology, mostly from LNG export facilities, by 2035.³⁴
- Qatar’s dry natural gas consumption increased from 1.5 Tcf in 2022 to 1.7 Tcf in 2024 (Figure 5)³⁵ due to increased natural gas usage in domestic power plants, water desalination plants, and the industrial sector, including petrochemicals. Several infrastructure projects—such as new LNG terminals, an ammonia plant, and a petrochemical facility—will likely raise natural gas demand during the next few years, and new solar generation is expected to offset some natural gas use in the electric power sector.³⁶

Table 5. Qatar’s planned liquefaction terminals

Project name	Owners	Nameplate capacity (billion cubic feet per year)	Target start year
Projects under development			
North Field East Expansion Project, Trains 1–4 ³⁷	QatarEnergy 75%; Exxon- Mobil 6.3%; TotalEnergies 6.3%; Shell 6.3%; Eni 3.1%; ConocoPhillips 3.1%	1,536	Mid-2026
North Field South Expansion Project, Trains 1–2 ³⁸	QatarEnergy 75%; TotalEnergies 9.4%; Shell 9.4%; ConocoPhillips 6.3%	768	2028
North Field West Expansion Project ³⁹	QatarEnergy	768	2030
Total		3,072	

Data source: International Gas Union, *2025 World LNG Report*, *Middle East Economic Survey*, QatarEnergy, Reuters

Figure 4. Qatar's natural gas production and consumption



 Data source: U.S. Energy Information Administration, *International Energy Statistics*

Electricity

- Qatar's electric power generation capacity was 11.4 gigawatts (GW) in 2023, an increase of almost 30% since 2013. However, the country's net electricity generation rose at a faster pace, more than 60%, in the same time period, as the capacity factor or utilization level of new generation rose (Figure 5).⁴⁰ In 2023, Qatar generated 56 terawatt-hours (TWh) of net electricity, virtually all from natural gas.⁴¹ High population growth, industrial and petrochemical growth, new water desalination projects, hotter summer temperatures, and highly subsidized electricity prices raised electricity consumption over the past decade.⁴²
- Natural gas dominates Qatar's electricity generation mix and will likely remain the most used fuel source. A consortium of Asian companies are constructing a high-efficiency 2.4-GW natural gas-fired power plant, Facility E, at Ras Abu Fontas near Doha to replace an older, less efficient plant. Qatar expects full capacity of Facility E to come online by 2029 and to supply electricity to a new adjacent desalination plant.⁴³
- At the same time, the Qatari government plans to increase utility-scale renewable energy capacity, primarily solar power, to 4 GW by 2030 to diversify the country's fuel sources, to raise the share of renewable energy to 18% of electricity production, and to reduce CO₂ emissions.⁴⁴ Qatar installed its first utility-scale solar power project in 2022.⁴⁵ Two more large-scale solar power projects with a total capacity of 875 megawatts (MW) came online in April 2025,⁴⁶ and Qatar plans to add another 2 GW of solar capacity by 2029 (Table 6). As more solar power enters operation in the next few years, it will likely displace some of natural gas's share of power generation.

Figure 5. Qatar's net electricity generation and capacity

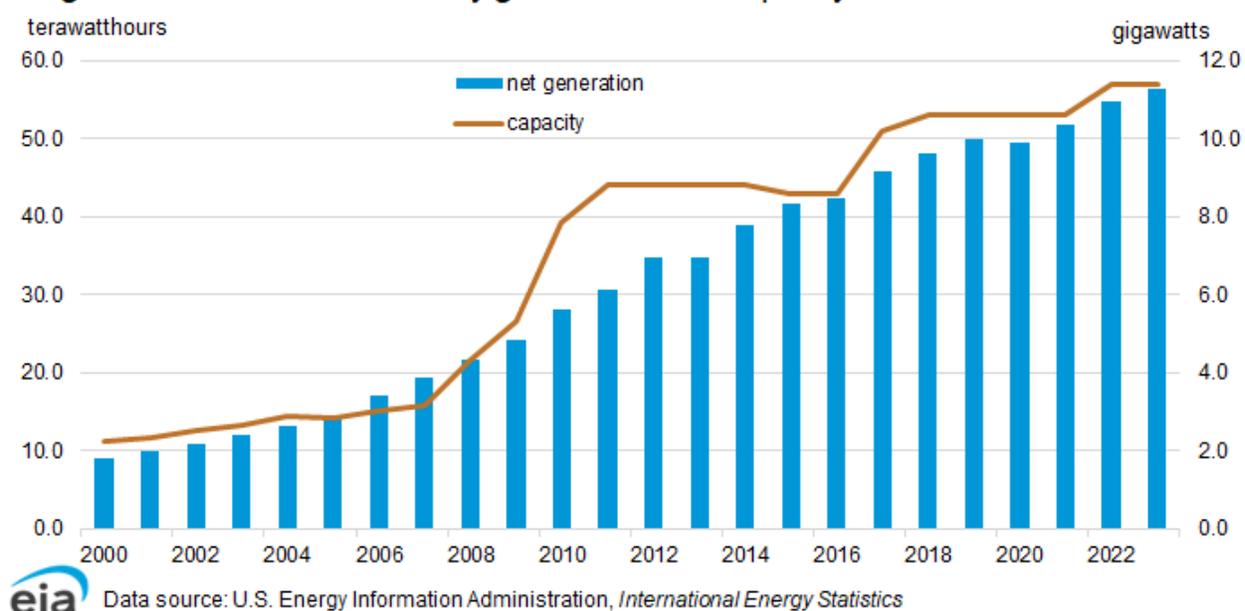


Table 6. Major solar projects in Qatar, 2025

Project name	Operator or project investor	Capacity (megawatts)	Start date	Notes
Al Kharsaah Phase 1	QatarEnergy Renewable Solutions (60%), Marubeni Corp. (20.4%), and TotalEnergies (19.6%)	400	June 2022 ⁴⁷	Kahramaa, the state-owned electric and utility provider of Qatar, holds a 25-year power purchase agreement.
Al Kharsaah Phase 2	(same as Phase 1)	400	October 2022 ⁴⁸	
Ras Laffan	QatarEnergy	458	April 2025 ⁴⁹	Serves the Ras Laffan LNG facility.
Mesaieed	QatarEnergy	417	April 2025 ⁵⁰	Serves the Mesaieed industrial city.

Dukhan solar project	QatarEnergy	2,000	2029 ⁵¹
Total		3,675	

Data source: *Middle East Economic Survey*, Fitch Solutions, Qatar Tribune, TotalEnergies, QatarEnergy

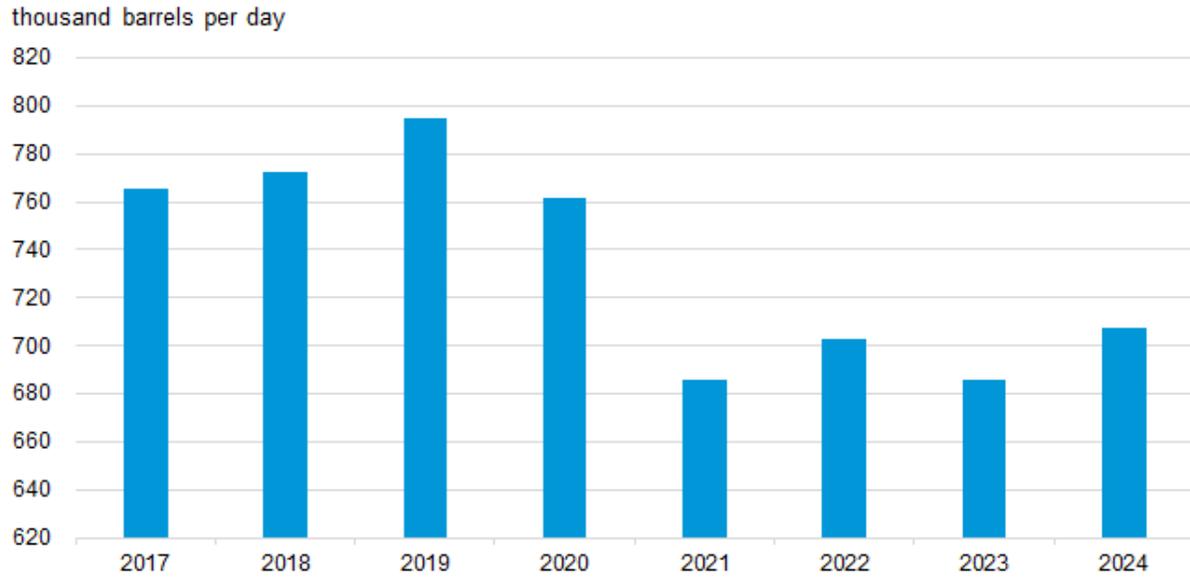
Note: LNG=liquefied natural gas

Energy Trade

Petroleum and other liquids

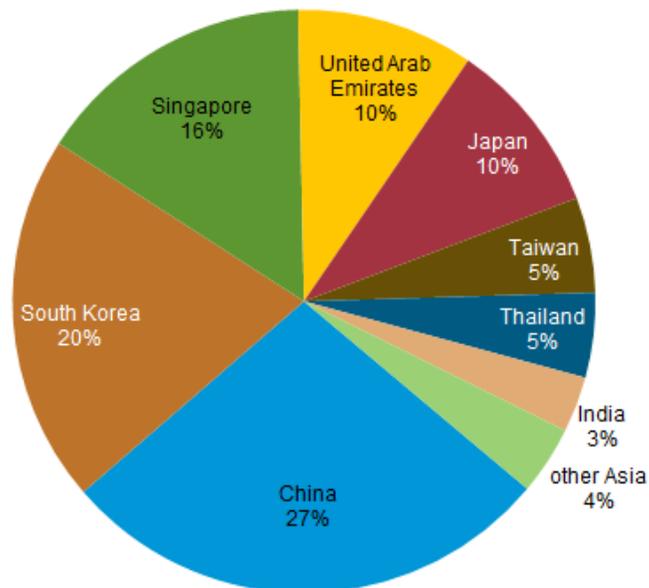
- Qatar does not import any crude oil or condensates and only occasionally imports petroleum products because the country's oil production and refining sectors more than meet domestic demand.
- Qatar shipped most of its crude oil and condensates exports to Asia and smaller amounts to the United Arab Emirates (Figure 7).⁵² Qatar is one of the world's key exporters of lease condensates, particularly to Asian markets that have significant condensate splitter capacity.⁵³ Crude oil and condensate exports have remained around 700,000 b/d since 2021, down from around 800,000 million b/d in 2019 (Figure 6).⁵⁴ Oil exports have slowed as Qatar faces competition from other oil exporting countries to markets in Asia.
- Qatar's exports of petroleum products were an estimated 805,000 b/d in 2024—largely flat since 2018—most of which went to Asia. Liquefied petroleum gas (LPG) accounted for close to half of total petroleum product exports, and naphtha made up nearly one-third of the petroleum product exports.⁵⁵ Qatar has an abundance of lighter-grade liquid fuels that are from natural gas fields and liquid fuels that are produced in condensate splitters. Because most of Qatar's domestic demand is in middle distillates—gasoline, diesel, and jet fuel—most of its LPG and naphtha are exported (Figures 8 and 9).⁵⁶

Figure 6. Qatar's crude oil and condensate exports



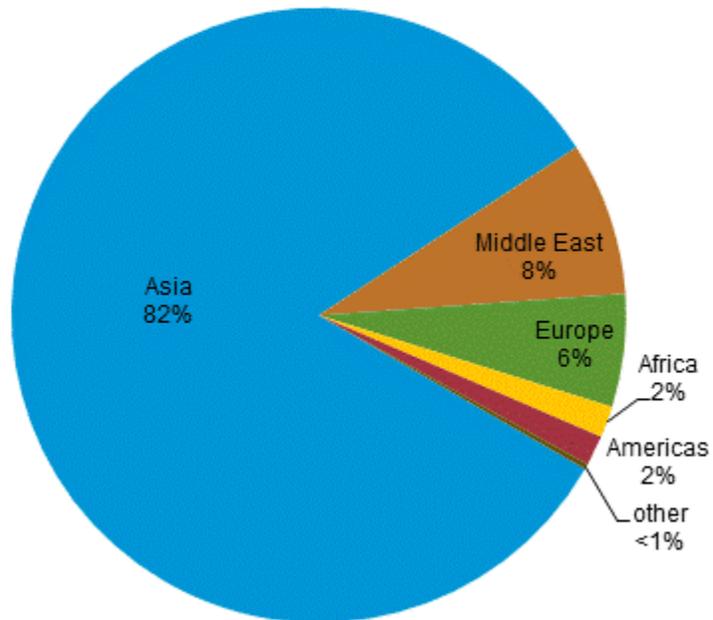
Data source: Vortexa (accessed August 2025)

Figure 7. Qatar's crude oil and condensate exports by destination, 2024



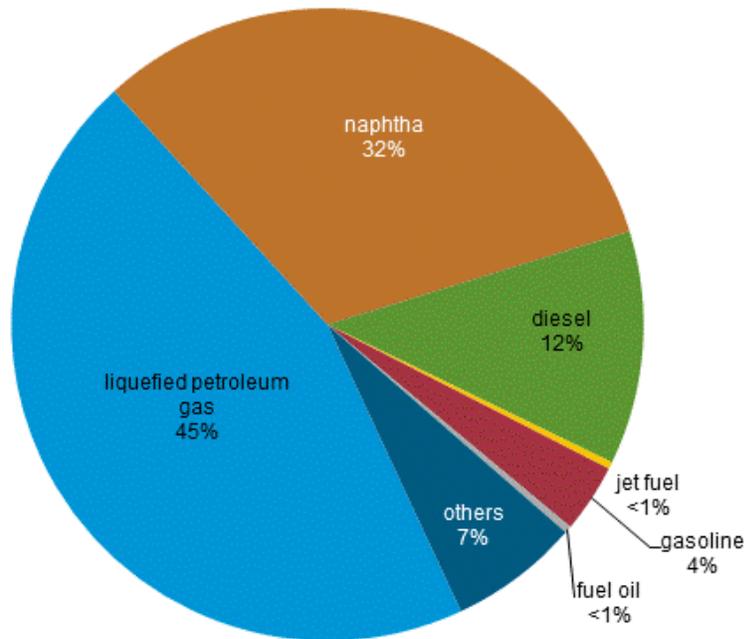
Data source: Vortexa (accessed August 2025)
 Note: Numbers may not total 100% because of individual rounding.

Figure 8. Qatar's petroleum product exports by region, 2024



Data source: Vortexa (accessed August 2025)
 Note: Numbers may not total 100% because of individual rounding.

Figure 9. Qatar's petroleum product exports by type, 2024

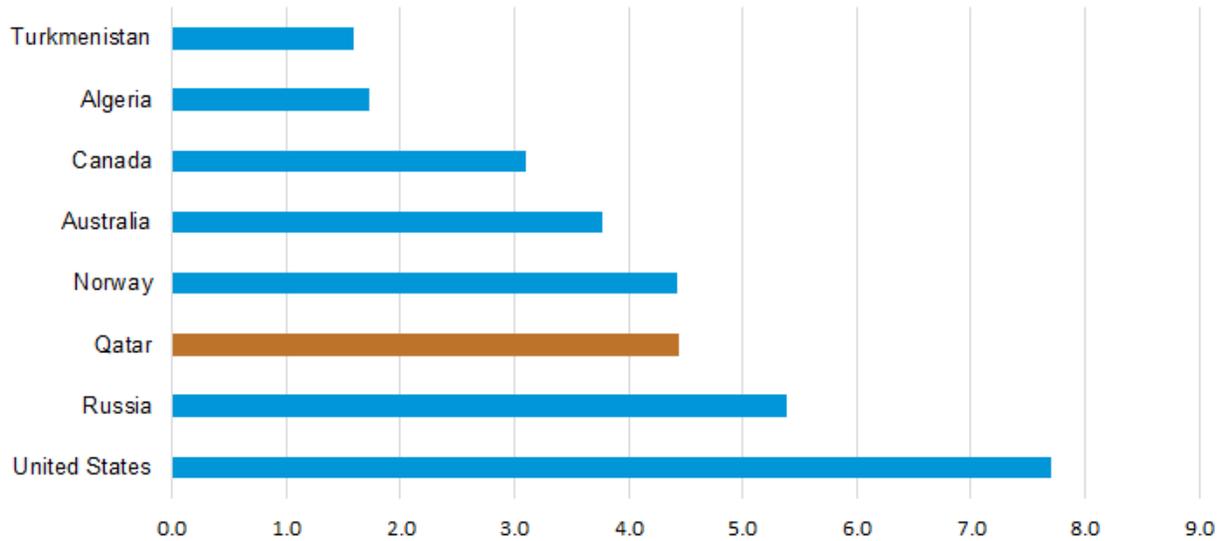


Data source: Vortexa (accessed August 2025)
 Note: Numbers may not total 100% because of individual rounding.

Natural gas

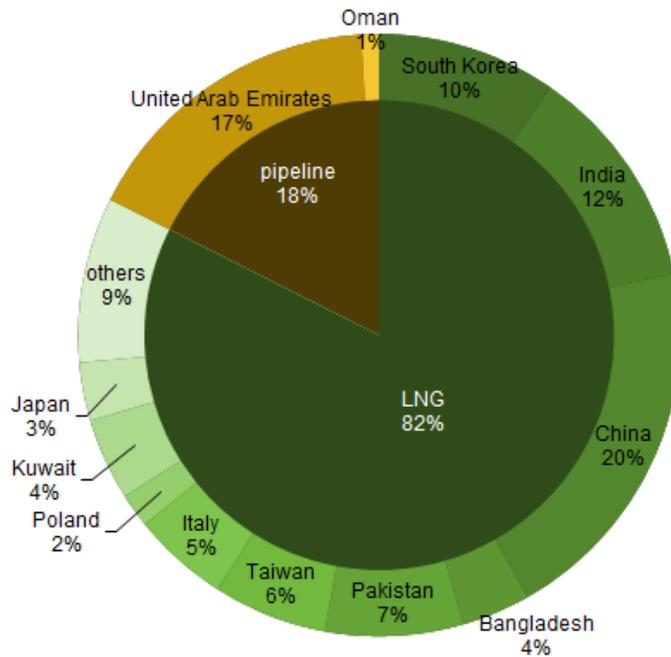
- Qatar was the third-largest natural gas exporter⁵⁷ (by pipeline and LNG combined) and the second-largest LNG exporter⁵⁸ in the world in 2024, according to data from the Energy Institute (Figure 10). Qatar accounted for nearly 20% of global LNG exports.
- Based on preliminary data, we estimate that Qatar exported 4.4 Tcf of natural gas in 2024, of which nearly 0.8 Tcf was transported through the Dolphin Pipeline⁵⁹ to the United Arab Emirates and Oman, with the remaining 3.6 Tcf shipped as LNG, mostly to markets in Asia and Europe (Figures 11 and 12).⁶⁰ LNG exports will likely increase as new liquefaction terminals go into operation in 2026.
- Europe imported more LNG from Qatar in 2022 than in 2021 to replace pipeline natural gas imports from Russia. Europe's LNG imports from Qatar fell again between 2022 and 2024 as the continent's natural gas demand declined and [the United States accounted for a higher share of Europe's LNG imports](#).⁶¹ In addition, [shipping disruptions around the Bab al-Mandeb Strait and the Red Sea in 2024](#) prompted Qatar to divert many cargoes away from Europe to markets in Asia (Figure 13).⁶²
- QatarEnergy is seeking long-term buyers for contracts linked to its new LNG export projects. Since 2022, Qatar has signed several natural gas supply agreements with Asian offtakers and several international oil companies for its planned terminals. Europe is slated to import some of the contracted volume, but most is destined for Asia.⁶³
- Qatar had the world's third-largest LNG exporting capacity behind the United States and Australia as of the end of 2024.⁶⁴ QatarEnergy LNG (formerly QatarGas)⁶⁵ operates 14 export trains with a total nameplate capacity of 3.7 Tcf/y. Qatar's capacity will nearly double to 6.8 Tcf/y after additional LNG trains linked to the North Field expansion projects enter commercial service by 2030.⁶⁶
- Although Qatar faces competition from other countries developing new LNG export projects, its low breakeven cost for production and ability to serve both Asian and European markets are likely to continue to drive LNG exports.⁶⁷

Figure 10. Largest natural gas exporters, 2024
trillion cubic feet



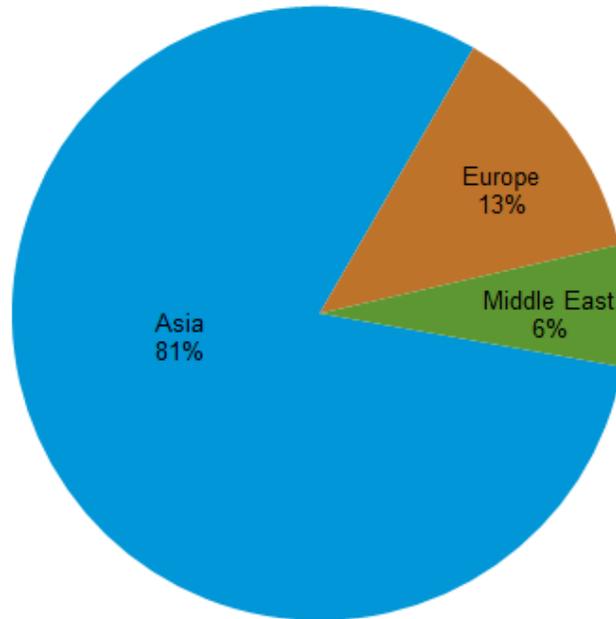
eia Data source: U.S. Energy Information Administration, Natural Gas Data; Energy Institute, *Statistical Review of World Energy 2025*

Figure 11. Qatar's natural gas exports by type and destination, 2024



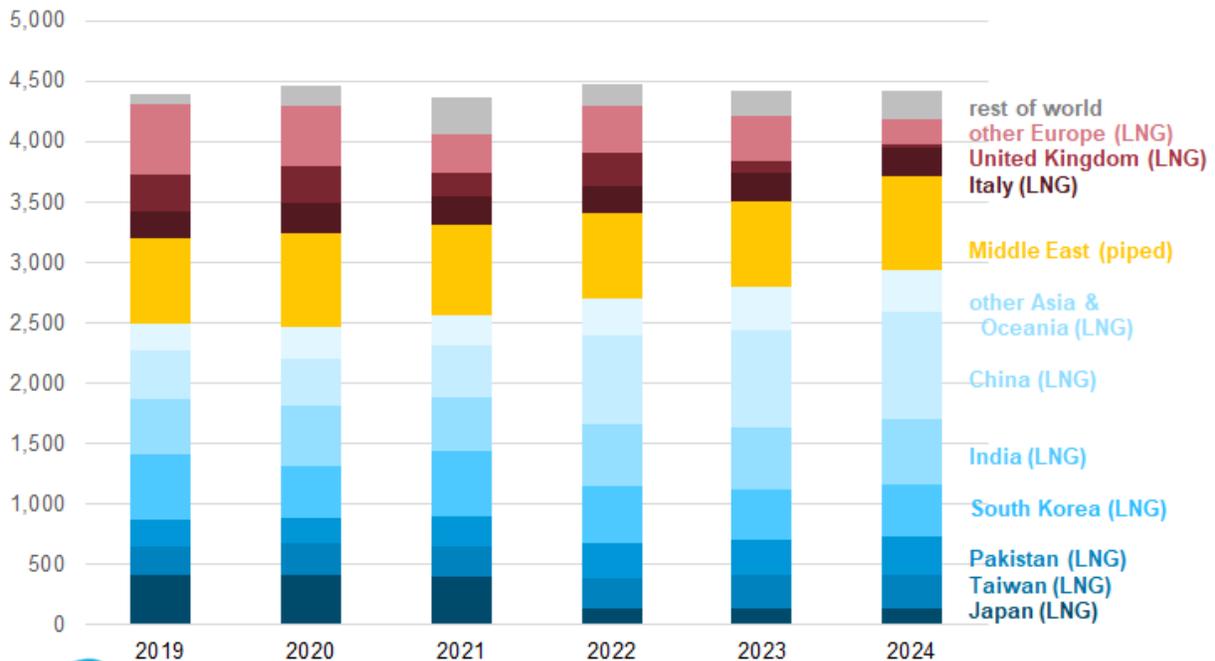
eia Data source: U.S. Energy Information Administration, *International Energy Statistics*
Note: Total may not equal 100% because of independent rounding. LNG=liquefied natural gas

Figure 12. Qatar's liquefied natural gas exports by region, 2024



eia Data source: U.S. Energy Information Administration, *International Energy Statistics*
 Note: Total may not equal 100% because of independent rounding.

Figure 13. Natural gas exports from Qatar by region, 2019–2024
 billion cubic feet per year



eia Data source: U.S. Energy Information Administration, *International Energy Statistics*
 Note: LNG=liquefied natural gas

Electricity

- As a member of the Gulf Cooperation Council Interconnection Authority (GCCIA), which interconnects the electricity grids of its six member countries in the region,⁶⁸ Qatar trades small amounts of electricity with its neighbors. The transmission line connecting Qatar's grid to the main GCCIA line has a capacity of 1,200 megawatts (MW).⁶⁹ To enable further regional electricity trade, the GCCIA plans to expand interconnection capacity with Kuwait and the United Arab Emirates and to build direct interconnection to Oman's and Iraq's grids.⁷⁰

-
- ¹ International Monetary Fund, [Qatar, Staff Report For The 2024 Article IV Consultation](#), February 11, 2025, pages 36–37.
- ² *Middle East Economic Survey*, “Qatar Records Fourth Consecutive Budget Surplus For 2024,” February 7, 2025.
- ³ International Monetary Fund, [Qatar, Staff Report For The 2024 Article IV Consultation](#), February 11, 2025, pages 4–5; State of Qatar, Council of Ministers Secretariat General, [Third Qatar National Development Strategy 2024-2030](#) (accessed August 2025).
- ⁴ *Middle East Economic Survey*, “Qatar Shines Spotlight On Opec Divisions As It Ends 57-Year Membership,” December 7, 2018; Eric Knecht, “[Gas-focused Qatar to exit OPEC in swipe at Saudi influence](#),” *Reuters*, December 3, 2018.
- ⁵ U.S. Energy Information Administration, International Energy Statistics; Energy Institute, *Statistical Review of World Energy 2024*, June 2024.
- ⁶ Shell, Projects and Sites, [Pearl GTL](#) (accessed May 2025).
- ⁷ *Middle East Economic Survey*, “Qatar Launches Construction On \$1.2bn Blue Ammonia Plant For 2026 Start-Up,” November 29, 2024, and “Qatar Plans To Be Top Global Fertilizer Exporter With New 6.4mn t/y Plant,” September 6, 2024; The Peninsula Qatar, “[Qatar positions itself as global logistics and aviation hub](#),” February 16, 2025.
- ⁸ U.S. Energy Information Administration, International Energy Statistics.
- ⁹ U.S. Energy Information Administration, *Short-Term Energy Outlook*, September 2025; International Energy Statistics.
- ¹⁰ *Middle East Economic Survey*, “Qatar Crude Output Tops 600,000 b/d For First Time Since 2018,” November 1, 2024.
- ¹¹ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, pages 13–15; Energy Intelligence, World Crude Oil Database, Qatar (updated May 29, 2024).
- ¹² Energy Intelligence, World Crude Oil Database, Qatar: Al-Shaheen (updated May 29, 2024); Doha News, “[China bags Ruya expansion contract in Qatar](#),” March 10, 2025.
- ¹³ International Energy Agency, Oil 2025, page 138; Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 15.
- ¹⁴ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 15; *Middle East Economic Survey*, “Qatar Crude Output Tops 600,000 b/d For First Time Since 2018,” November 1, 2024.
- ¹⁵ *Middle East Economic Survey*, “Qatar Selects TotalEnergies As First Partner For NFS Expansion,” September 30, 2022.
- ¹⁶ U.S. Energy Information Administration, International Energy Statistics.
- ¹⁷ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 24.
- ¹⁸ *Middle East Economic Survey*, “QP, Exxon Ramp Up Barzan Gas Output,” July 9, 2021; *Middle East Economic Survey*, “Qatar Takes FID On Huge Petrochemicals Complex,” January 13, 2023; ChevronPhillips Chemical, “[QatarEnergy, CPChem celebrate construction start for Ras Laffan Petrochemicals Project](#),” February 19, 2024.
- ¹⁹ *Middle East Economic Survey*, “Qatar’s Diesel All Euro 5 After Hydrotreater Upgrade,” October 2, 2020; Argus Media, “[QP’s Mesaieed refinery begins producing ULSD](#),” September 27, 2020.
- ²⁰ Shell, [What We Do, Oil and natural gas, Gas-to-liquids](#) (accessed August 2025); Reuters, “[South Africa picks Russia’s Gazprombank as PetroSA refinery partner](#),” December 11, 2023; QatarEnergy, [What We Do, Refining](#) (accessed August 2025).
- ²¹ Shell, Projects and Sites, [Pearl GTL](#) (accessed May 2025); Sasol, Media Releases, [Oryx GTL Inauguration](#), June 6, 2006.
- ²² *Middle East Economic Survey*, “Qatar Crude Output Tops 600,000 b/d For First Time Since 2018,” November 1, 2024; Energy Intelligence, World Crude Oil Database, Qatar: Al-Shaheen (updated May 29, 2024).
- ²³ International Energy Agency, Oil 2025, page 138; Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 15.
- ²⁴ Reuters, “[Qatar’s North Field East gas expansion to begin output in mid-2026](#),” May 20, 2025; *Middle East Economic Survey*, “Qatar Selects TotalEnergies As First Partner For NFS Expansion,” September 30, 2022; Offshore Technology, Analysis, Projects, [North Field East Project](#), Qatar, July 26, 2022; Energy Institute, *Statistical Review of World Energy 2025* used for conversion rates for ethane and liquefied petroleum gas.

- ²⁵ *Middle East Economic Survey*, “Qatar Selects TotalEnergies As First Partner For NFS Expansion,” September 30, 2022; *Middle East Economic Survey*, “Qatar Records First Deficit Since 2021,” June 13, 2025.
- ²⁶ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 21; Argus Media group, “QP’s Mesaieed refinery begins producing ULSD,” September 27, 2020; *Middle East Economic Survey*, “Qatar Inks Long-Term Naphtha Export Deals,” July 5, 2024, and “Qatar Petchems To Benefit From QP’s Upstream Ambition,” January 11, 2019.
- ²⁷ QatarEnergy LNG, [Operations, Laffan Refinery](#) (accessed July 2025); *Middle East Economic Survey*, “Qatar Inks Long-Term Naphtha Export Deals,” July 5, 2024.
- ²⁸ Sasol, [Oryx GTL inauguration](#), June 6, 2006; QatarEnergy, [What We Do, Refining](#) (accessed July 2025).
- ²⁹ *Middle East Economic Survey*, “Qatar Signs 10-Year Naphtha Deal With Marubeni,” September 29, 2023; Offshore Technology, “[Pearl Gas-to-Liquids Project, Ras Laffan](#),” October 6, 2006, QatarEnergy, [Annual Review 2023](#), page 23.
- ³⁰ QatarEnergy, [What We Do, Exploration and Production](#) (accessed August 2025).
- ³¹ *Middle East Economic Survey*, “Qatar Plans To Export Barzan Gas Volumes,” August 30, 2024.
- ³² QatarEnergy LNG, [The Pioneer, Issue 166, December 2024](#), page 31; Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 19; *Middle East Economic Survey*, “Qatar’s NFPS Ensures Legacy LNG Facilities Maintain Capacity,” July 18, 2025.
- ³³ *Middle East Economic Survey*, “Qatar Launches Construction On \$1.2bn Blue Ammonia Plant For 2026 Start-Up,” November 29, 2024, and “QatarEnergy Concludes NFS Partner Selection With Conoco,” November 4, 2022; Reuters, “[Qatar’s LNG production capacity to reach 126 mln T a year by 2027, says Emir](#),” February 22, 2022; Offshore Technology, [North Field East Project, Qatar](#), July 26, 2022; Technip, [QatarEnergy North Field East \(NFE\)](#) (accessed August 2025).
- ³⁴ QatarEnergy, Sustainability, [Climate Change and Environmental Action](#) (accessed July 2025).
- ³⁵ U.S. Energy Information Administration, International Energy Statistics (updated data to be published in late 2025).
- ³⁶ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, pages 27–28; *Middle East Economic Survey*, “Qatar Plans To Export Barzan Gas Volumes,” August 30, 2024, and “QP, Exxon Ramp Up Barzan Gas Output,” July 9, 2021.
- ³⁷ *Middle East Economic Survey*, “QatarEnergy Concludes NFS Partner Selection With Conoco,” November 4, 2022; *Middle East Economic Survey*, “Qatar Records First Deficit Since 2021,” June 13, 2025; Reuters, “[Qatar’s North Field East gas expansion to begin output in mid-2026](#),” May 20, 2025; International Gas Union, World LNG Report 2025, page 121.
- ³⁸ *Middle East Economic Survey*, “QatarEnergy Concludes NFS Partner Selection With Conoco,” November 4, 2022, and “Qatar Records First Deficit Since 2021,” June 13, 2025.
- ³⁹ *Middle East Economic Survey*, “Qatar Records First Deficit Since 2021,” June 13, 2025, and “Qatar’s NFPS Ensures Legacy LNG Facilities Maintain Capacity,” July 18, 2025; QatarEnergy, News Details, “[H.E. Minister Saad Sherida Al-Kaabi announces raising Qatar’s LNG production capacity to 142 MTPA before the end of 2030](#),” February 25, 2024.
- ⁴⁰ U.S. Energy Information Administration, International Energy Statistics.
- ⁴¹ U.S. Energy Information Administration, International Energy Statistics.
- ⁴² AP News, “[EXPLAINER: World Cup host Qatar relies on desalination](#),” November 10, 2022; ACCIONA, “[ACCIONA completes final tests at Umm Al Houli Expansion SWRO desalination plant](#),” March 29, 2021; Fitch Solutions, *Qatar Power Report*, Q4 2022, page 11, and Q3 2025, pages 14, 33; Reuters, “[Explainer: Global fossil fuel subsidies on the rise despite calls for phase-out](#),” November 23, 2023; World Bank Group, Data, [Population growth \(annual %\) – Qatar](#) (accessed July 2025); World Bank Group, [Climate Change Knowledge Portal, Qatar](#) (accessed August 2025).
- ⁴³ Qatar Water and Electricity Company, [Facility E](#) (accessed August 2025); Zawya, “[Qatar signs \\$3.7bln deal for Ras Abu Fontas IWPP](#),” May 12, 2025; Sumitomo Corporation, News Release, “[Commencement of Independent Water and Power Project in Qatar, Including Long-term Power and Water Sale Agreement with Qatar General Electricity and Water Corporation](#),” November 26, 2024.
- ⁴⁴ Qatar General Electricity and Water Corporation (KAHRAMAA), [Renewable Energy](#) (accessed July 2025); QatarEnergy, [Sustainability Report 2023](#), page 46.
- ⁴⁵ *Middle East Economic Survey*, “Qatar Inaugurates Al Kharsaah Solar PV Plant,” October 21, 2022.
- ⁴⁶ *Middle East Economic Survey*, “Qatar Adds 875 MW Solar,” April 25, 2025.
- ⁴⁷ *Middle East Economic Survey*, “Qatar Inaugurates Al Kharsaah Solar PV Plant,” October 21, 2022; Fitch Solutions, *Qatar Power & Renewables Report*, Q3 2025, page 9; TotalEnergies, [Al Kharsaah: A Pioneering Solar Power Plant in Qatar](#) (accessed August 2025).

- ⁴⁸ *Middle East Economic Survey*, “Qatar Inaugurates Al Kharsaah Solar PV Plant,” October 21, 2022; Fitch Solutions, *Qatar Power & Renewables Report*, Q3 2025, page 9; TotalEnergies, [Al Kharsaah: A Pioneering Solar Power Plant in Qatar](#) (accessed August 2025).
- ⁴⁹ *Middle East Economic Survey*, “Qatar Adds 875 MW Solar,” April 25, 2025; QatarTribune, “[Qatar’s solar energy projects: Green energy in the heart of desert](#),” July 29, 2025.
- ⁵⁰ *Middle East Economic Survey*, “Qatar Adds 875 MW Solar,” April 25, 2025; QatarTribune, “[Qatar’s solar energy projects: Green energy in the heart of desert](#),” July 29, 2025.
- ⁵¹ Qatar Tribune, “[QatarEnergy leverages national expertise to construct, operate and maintain solar power plants: Al Kaabi](#),” April 28, 2025; QatarEnergy, News Details, “[QatarEnergy to more than double Qatar’s solar power production capacity with a new 2,000 megawatt facility](#),” September 1, 2024.
- ⁵² Vortexa (data accessed August 2025).
- ⁵³ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, page 30.
- ⁵⁴ Vortexa (data accessed August 2025).
- ⁵⁵ Vortexa (data accessed August 2025).
- ⁵⁶ Fitch Solutions, Qatar Oil and Gas Report Q3 2025, pages 23–24 and 31–32.
- ⁵⁷ U.S. Energy Information Administration, [Natural Gas data](#); Energy Institute, *Statistical Review of World Energy 2025*.
- ⁵⁸ Energy Institute, *Statistical Review of World Energy 2025*.
- ⁵⁹ U.S. Energy Information Administration analysis based on preliminary data.
- ⁶⁰ U.S. Energy Information Administration, International Energy Statistics (updated data to be published in late 2025) and analysis.
- ⁶¹ U.S. Energy Information Administration, Natural Gas, [U.S. Natural Gas Exports and Re-Exports by Country](#) (accessed August 2025); U.S. Energy Information Administration, Today in Energy, “[Less natural gas consumption in Europe is keeping storage full](#),” July 23, 2024, and “[The United States remained the largest liquefied natural gas supplier to Europe in 2023](#),” February 29, 2024.
- ⁶² U.S. Energy Information Administration, Today in Energy, “[Red Sea disruptions increase oil flows around Cape of Good Hope](#),” June 11, 2024, and “[About one-fifth of global liquefied natural gas trade flows through the Strait of Hormuz](#),” June 24, 2025.
- ⁶³ *Middle East Economic Survey*, “Qatar Faces LNG Marketing Challenge in 2025,” January 17, 2025 and “Qatar Doubles Down on Threat to EU LNG Supply,” August 1, 2025; Energy Intelligence, “QatarEnergy Looks to Asian Buyers for New Offtake Deals,” June 17, 2025; Reuters, “[Qatar seals 27-year LNG deal with China as competition heats up](#),” November 21, 2022.
- ⁶⁴ International Group of Liquefied Natural Gas Importers, GIIGNL Annual Report 2025, pages 32–37.
- ⁶⁵ Reuters, “[Qatargas changes name to QatarEnergy LNG](#),” September 14, 2023.
- ⁶⁶ Rystad Energy, Upstream Analytics, “Qatar’s rapid LNG expansion to boost global supply, push down prices,” August 26, 2025.
- ⁶⁷ Rystad Energy, Upstream Analytics, “Qatar’s rapid LNG expansion to boost global supply, push down prices,” August 26, 2025.
- ⁶⁸ [Gulf Cooperation Council Interconnection Authority](#)
- ⁶⁹ King Abdullah Petroleum Studies and Research Center (KAPSARC), [The Costs and Gains of Coordinating Electricity Generation in the Gulf Cooperation Council Utilizing the Interconnector](#), page 13, June 10, 2018; Qatar General Electricity and Water Corporation (KAHRAMAA), [Electricity Sector](#) (accessed May 2025); Fitch Solutions, *Qatar Power & Renewables Report*, Q3 2025, page 14.
- ⁷⁰ Gulf Cooperation Council Interconnection Authority, The GCC Interconnection, [Projects Under Construction](#) (accessed September 2025); [Our Plans](#) (accessed September 2025).