

Angola Infrastructure Report Q3 2016

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Abstracts

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BMI View: Construction industry growth will be sluggish over the short term as the weak commodities outlook weighs on the budget balance and hampers the government's ability to boost construction activity. We expect significant movement after 2020, in line with improved oil prices, which will provide the government with additional revenue to funnel into infrastructure projects as well as spur the development of oil infrastructure. Pervasive corruption and an inflexible labour policy will remain a drag on investor sentiment.

Latest Updates And Structural Trends

This quarter we are maintaining our forecast for 2.5% real growth in 2016 as the weak commodities outlook weighs on government revenues and diverts attention away from key infrastructure development.

Significant movement will be observed from 2020 as investment flows into infrastructure to support the oil industry, in line with the expected recovery in Brent Crude oil prices. We forecast industry expansion of 6.7% in real terms between 2020 and 2025. Overall our full 10-year forecast period up to 2025 the industry is projected to expand at an annual average rate of 5.3% in real terms. Nominal industry value will rise from an estimated USD9.2bn in 2015 to USD20.4bn in 2025. We note the positive move on the part of the government to move towards a more liberalised power sector, which would help to encourage private investment into the build of energy infrastructure.

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