

Cameroon Infrastructure Report Q4 2016

<https://marketpublishers.com/r/CDB85BAC024EN.html>

Date: September 2016

Pages: 35

Price: US\$ 1,295.00 (Single User License)

ID: CDB85BAC024EN

Abstracts

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BMI View: Cameroon's construction industry will record strong growth throughout our forecast period as the government directs substantial expenditure towards tackling its infrastructure deficit and foreign direct investment flows into the market. Upgrades to transport and power infrastructure will be the key drivers of growth during this period as Cameroon works to improve the overall ease of doing business in the country. Posing a downside risk to our outlook are potential threats to political stability, which could see investors becoming more cautious when operating in the market.

Forecast & Industry Developments

We are maintaining our forecast for 9.4% real growth in 2016. The market will record robust growth over the first half of our forecast period between 2016 and 2025, expanding at an annual average of 8.8% in real terms and making it the second-fastest growing infrastructure market in Sub-Saharan Africa (SSA) after Ethiopia.

Over our full 10-year forecast period up to 2020 we project industry growth to average 8% in real terms. Nominal industry value is expected to rise from an estimated USD1.9bn in 2015 to USD6.1bn in 2025, keeping Cameroon as one of the smaller infrastructure markets in West Africa.

Cameroon boasts one of the more developed public-private partnership frameworks in SSA and continues to draw in foreign direct investment from a range of international firms, most notably from France, Italy and China.

Improvements to overall logistics will provide the largest boost to growth,

particularly efforts to harness the country's hydropower potential and work under way at the new USD850mn Kribi Port. Increased activity in the non-residential sector is also supporting our positive outlook, with Cameroon's hosting of the Africa Cup of Nations in 2019 providing opportunities in commercial construction.

Political risk presents a downside risk to our forecast and is a chief deterrent to operating in the market. Concern stems from the political vacuum that would be left in the wake of incumbent president Paul Biya's unplanned departure from office and the growing presence of Nigeria terrorist group Boko Haram in the country.

Contents

BMI Industry View

Table: Five-Year Forecast Scenario (Cameroon 2016-2020)

Table: Infrastructure Risk/Reward Index (Cameroon 2016)

SWOT

Industry Forecast

Construction And Infrastructure Forecast Scenario

Table: 10-Year Forecast Scenario (Cameroon 2016-2025)

Table: Cameroon - Major Power Projects By Value (USDmn)

Industry Risk Reward Ratings

Cameroon - Infrastructure Risk/Reward Index

Rewards

Risks

SSA Infrastructure RRI: Volatile Markets Highlight Regional Risks

Table: SSA RRI

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Infrastructure Risk/Reward Index Indicators

Table: Weighting Of Indicators

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