

Kazakhstan Infrastructure Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Kazakhstan is facing strong economic headwinds from falling oil prices and a devaluing currency. Nevertheless, infrastructure investment is viewed as part of the long-term plan to diversify the economy and holds significant long-term potential, especially in the rail and energy industries. The government is also pledging significant funds towards residential construction for 2016-2020.

Latest Updates And Structural Trends

Growth in the construction industry will average 5.8% over our 10-year forecast to 2025, with the possibility for this to improve towards the end of this period.

President Nazarbayev announced USD5bn in additional funding from the SWF and pension fund, with much of it allocated to affordable housing construction.

Residential building starts grew 18.9% y-o-y in 2015, while investment in house building in tenge terms grew 17.2% in 2015, pointing to the fact that economic headwinds are yet to filter down through the economy, while government spending provides buoyancy.

Having downgraded our forecasts for the Kazakh tenge and oil price in 2016, we have also downgraded our forecast for real GDP growth to 1.0% from 1.6% previously.

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