

Kazakhstan Infrastructure Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Construction sector growth in Kazakhstan is set to accelerate in the coming years, as the sector continues to display resilience in the face of a lacklustre, yet gradually improving, economic situation. Our optimistic view is underpinned by the government's willingness to finance infrastructure projects with deficit spending in the context of its economic diversification plan. We expect the residential building and transport subsectors in particular to emerge as key growth engines within Kazakhstan's wider construction industry, as the government seeks to mollify a restive populace with affordable housing programmes and Chinese investment breathes life into cross-border road and rail projects.

Latest Updates And Structural Trends

We have left our construction sector growth forecast unchanged for Q4. We expect growth to average 4.5% in 2016, and to subsequently accelerate over the next five years, with annualized average growth of 5.7%.

We forecast oil prices to recover gradually in the coming years, from an average of USD46.5 per bbl in 2016 to USD71 per bbl by 2020. As oil is the primary source of government revenue, we expect the government's fiscal deficit to ease and an uptick in economic growth, conditions which augur well for increased investment in Kazakhstan's infrastructure sector.

Residential building starts grew 18% y-o-y in the first six months of 2016; concurrently, President Nazarbayev announced in February that he intended to allocate USD1bn to the construction of affordable housing, which underpins our view that the residential sector will outperform in the coming years.

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