

Oman Infrastructure Report Q3 2016

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Abstracts

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BMI View: A number of sectors are expected to show healthy growth in Oman's construction industry, with transport infrastructure in particular expected to make strong gains over the medium term. The country's flagship railway network project will attract major investment and the road network is subject to ongoing improvement and expansion projects. Likewise, rising demand for electricity and water will also ensure continued investment in new utilities capacity, particularly as the government proceeds with plans to enhance the use of public-private partnerships. Residential and non-residential construction is also expected to post positive growth, supported by a growing tourism industry and popular support for various social infrastructure projects. We do note, however, that falling oil revenues have the potential to disrupt project timelines.

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Oman's construction industry is expected to see real growth in value of 3.4% in 2016, to USD5.7bn. Although a relatively small market compared to others in the region (such as Saudi Arabia and the United Arab Emirates), Oman's construction sector benefits from high levels of government support and construction accounts for a significant portion of GDP.

Improving the country's transport sector remains a key focus of the Omani administration. Transport and Communications Minister Ahmed bin Mohammed bin Salim Al Futaisi noted in a May 2016 report that, as well as investing billions in physical infrastructure, Oman is also liberalising the investment side to allow private sector involvement in transport and logistics, with an aim to improving competition and driving modernisation.

In residential and non-residential construction, the development of Oman's tourism industry is a major driver of growth. Oman has identified 14 areas in the country to be developed as tourism destinations over the next 25 years and the Ministry of Tourism expects some USD35bn to be invested in the tourism sector - up to 80% of which will come from private investors.

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