

Qatar Infrastructure Report Q1 2016

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Abstracts

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BMI View: Qatar is the fastest-growing construction and infrastructure market in the GCC and remains one of our favourite construction markets, buoyed by huge government investment, a stable business environment and growing consumer demand. The 2022 FIFA World Cup is a catalyst for growth, but Qatar's need to diversify its economy will mean the majority of major infrastructure projects would be needed, even with the event. The industry is navigating capacity constraints seemingly well, although we still believe wage and material price pressures will be a drag.

Key Trends And Developments

Oil prices are a minimal downside risk to our forecast, given Qatar is the least exposed out of the six Gulf Cooperation Council (GCC) economies to the drop in oil prices, and we do not expect government spending or consumer confidence to be impacted over coming quarters. The government has spoken of the need to control spending, but officials stated explicitly in late 2015 that economic development projects would not be impacted. Qatar's fiscal breakeven price is estimated to be around USD60 per barrel (bbl) according to the IMF, and even though BMI forecasts USD51/bbl in 2016, the share of the economy dependent upon the oil and gas sector is expected to continue to decline over the forecast period, somewhat ameliorating the risk of sustained lower prices for Qatar's oil and gas exports.

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