

Qatar Infrastructure Report Q3 2016

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Abstracts

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BMI View: The hosting of the FIFA World Cup 2022 is driving significant investment into the construction industry as Qatar develops major stadiums, improves on its existing transport network to facilitate movement across the country, and increases overall hotel capacity. The government's efforts to diversify its economy away from the hydrocarbons sector is also spurring industry growth, as it directs attention towards the development of knowledge-based sectors.

Forecast & Latest Updates

We are maintaining our forecasts for 13.9% real growth in 2016 and annual average growth of 11.9% in real terms over the next five years up to 2020. Over our full 10-year forecast period we project industry expansion of 10.2% in real terms. Nominal industry value is set to rise from an estimated USD14bn in 2015 to USD50.2bn in 2025.

The non-residential sector will record the highest growth, spurred by the development of stadiums and hotels as the country readies itself to host the FIFA World Cup 2022. While allegations of workers' abuse related to this preparation persist, our Operational Risk team regards the claims as mostly damaging to the country's reputation, and therefore anticipates little risk to the planned construction around the major sporting event.

While the budget balance is forecasted to go into the red in 2016, our Country Risk team expect it to recover in 2017, with infrastructure development and the government's efforts to diversify the economy shielding it from the subdued commodities outlook.

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