

Qatar Shipping Report Q1 2016

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Abstracts

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BMI View: Provided Qatar's New Doha Port, officially named as Hamad Port in 2015, opens as scheduled in 2016, we expect to see continued robust growth in both box throughput (at 14.4%) and overall tonnage (30.0%). Although the new port is aimed to increase both box and tonnage volumes, it should be noted that growth figures in 2016 will be a slight drop when compared with 2015 figures as the port finds its feet.

Healthy real GDP growth, a strong Qatari consumer and Qatar's relative protection from fluctuating oil prices compared to other Gulf states, all provide upside risk for the country's shipping sector. Growth at Hamad Port will slow slightly in 2016 when compared to the 2015 growth levels at the Port of Doha, with gross tonnage reaching 1.29mn tonnes and box throughput reaching 612,923. Despite this decrease in growth, we forecast strong real GDP growth of 5.9% in 2016, albeit again a slight drop from the 2015 6.6% growth level. Headwinds in the global economy contribute to the 2016 lag, but we also foresee a drop in real export growth from 2.20% in 2016 to 1.70% by 2019. Qatar will need to work hard to maintain exports over this time, but should have a boost beyond our medium-term forecast when the 2022 FIFA World Cup occurs.

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