

Saudi Arabia Infrastructure Report Q1 2016

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Abstracts

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BMI View: Saudi Arabia's infrastructure and construction sectors will offer scale and growth opportunities over our 10-year forecast period to 2024, although we note the impact on the private sector of lower oil prices. We expect government investment in affordable housing and infrastructure to remain robust, although note the government will begin moves to lessen the pressure being placed on the country's substantial fiscal buffers.

Forecast:

The drop in oil prices will drag on growth in the residential and non-residential sector, which has had a knock-on effect on our construction industry forecasts for 2016. We now see real growth in the construction sector of 6.5% y-o-y.

We expect a rationalisation of fiscal expenditure over the long-term, which will see growth in the construction sector begin to slow. We do not expect the cancellation of any major projects, rather, some secondary projects or those being developed over a long timeframe will be delayed. The push back on the date for nuclear power is a prime example.

With many of the major projects under development being awarded over the past four years - the majority of which will be completed by 2018, the latter half of our 10-year forecast period will see the residential and non-residential sector overtake infrastructure as the main driver of growth.

Contents

BMI Industry View

Table: Infrastructure - Construction Industry Forecasts (Saudi Arabia 2014-2020)

Table: Infrastructure Risk Reward Index (Saudi Arabia)

SWOT

Industry Forecast

Construction And Infrastructure Forecast Scenario

Table: Construction And Infrastructure Industry Data (Saudi Arabia 2014-2024)

Transport Infrastructure - Outlook And Overview

Table: Transport Infrastructure Industry Data (Saudi Arabia 2014-2024)

Table: Transport Projects

Energy And Utilities Infrastructure - Outlook And Overview

Table: Energy And Utilities Infrastructure Industry Data (Saudi Arabia 2014-2024)

Table: Energy & Utilities Projects

Residential/Non-Residential Building - Outlook And Overview

Table: Residential And Non-Residential Building Industry Data (Saudi Arabia 2014-2024)

Table: Residential and Non-Residential Building Projects

Industry Risk Reward Ratings

Saudi Arabia – Infrastructure Risk/Reward Index

Rewards

Risks

Middle East- MENA Infrastructure RRI: Old Risks, New Rewards

Table: MENA RRI Table

Market Overview

Competitive Landscape

Table: Company Financials Table

Company Profile

Al Rajhi Construction Group

Saudi Binladin Group

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Infrastructure Risk/Reward Index Indicators

Table: Weighting Of Indicators

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