

Saudi Arabia Infrastructure Report Q3 2016

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Abstracts

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BMI View: Despite slowing public investment, Saudi Arabia's infrastructure and construction sectors are expected to remain in positive territory. A strong project pipeline will drive healthy growth over the medium term, particularly in transport and energy infrastructure sectors. Large-scale development of social housing projects will also stimulate growth in residential construction, though this sector will likely remain the underperformer in light of the lack of investment incentives. Some downside risk stems from falling oil revenues which could lead to project delays and cancellations.

Latest Updates And Structural Trends

The residential and non-residential construction sector has received a boost with the recent announcement of a USD20bn project to build 100,000 homes in a new town called Dahiyat al-Fursan. Several other new towns are currently under development, supported by government commitments to expanding social housing availability in the country.

Rising electricity demands and an attempt to diversify the power mix mean Saudi Arabia will continue to invest in new power capacity, focusing on natural-gas fired power and to a lesser extent solar power.

In the transport sector, the privatisation of several airports will stimulate some investment over the medium term, while the government remains focused on expanding rail networks and improving domestic and cross-border road connections.

Overall we expect to see 6.5% growth in total construction sector value in 2016,

based on the progression of a number of key projects such as the Riyadh metro and the Sadara Industrial Complex. Over the remainder of the forecast period, growth is expected to slow as the government streamlines public infrastructure expenditure in the wake of falling oil revenues.

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