

# Tanzania Infrastructure Report Q4 2016

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## Abstracts

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BMI View: Improvements to Tanzania's poor transport logistics network will be the main driver of construction industry growth throughout our 10-year forecast period, with interest in the country's nascent gas sector and the construction of the necessary export infrastructure expected only after 2020 owing to depressed commodity prices. The government will need to tackle allegations of corruption so as not to deter investors.

### Forecast & Industry Developments

We are maintaining our forecasts of 7.6% real growth for 2016 and annual average growth of 7.4% in real terms over our five-year forecast period up to 2020. The development of transport infrastructure, supported by international funding flows, will be the primarily driver of construction industry expansion, as the government works to improve the country's poor logistics profile and capitalise on its maritime access.

Over our full 10-year forecast period we project annual average growth of 8.4%. Nominal industry value is projected to rise from an estimated USD5.1bn in 2015 to USD15.3bn in 2025, keeping Tanzania as the second-largest construction market in East Africa, behind Ethiopia.

Persistently low commodity prices and an uncertain regulatory environment continue to deter investment into the country's nascent gas sector.

Increasing activity in non-residential construction - particularly industrial and commercial developments - supports our outlook for strong industry growth.

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