

Uganda Infrastructure Report Q3 2016

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Abstracts

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BMI View: Uganda's construction sector is forecast to expand by 7.7% in real terms over our full forecast period, with investment flows into bringing Uganda's oil reserves online a major driver of growth, along with improvements to overall logistics capacity. Additional revenue from oil exports when the first reserves are brought online will help to ease the pressure on Uganda's fiscal deficit, which has come under further strain as infrastructure spending reaches a record high.

Latest Updates And Structural Trends

We forecast the industry to expand 7.1% in real terms in 2016 and 7.7% over our forecast period up to 2025. Around USD11bn has been earmarked for the development of the country's infrastructure over the next 10 years through public and private investment.

Nominal industry value is expected to almost triple over our forecast period, from an estimated USD3.2bn in 2015 to USD9.2bn in 2025.

Oil reserves are forecast to come online in 2020, which will provide the government with additional revenue to funnel into infrastructure. Oil infrastructure itself, as well as the build of the oil industry, will be a major driver of growth.

The small size of the Ugandan construction market will weigh on the rewards on offer for investors, given the risks in exposure to a market without significant and long-term opportunities that come with larger markets.

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