

# United Arab Emirates Infrastructure Report Q1 2016

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## Abstracts

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**BMI View:** The rewards on offer in the UAE's construction sector are significant - especially in the run-up to the Expo 2020 event in Dubai. Dubai will be the outperforming market, although we expect growth will remain healthy across the UAE, even with low oil prices. Government investment will be robust in infrastructure sectors, while the biggest risk stems from private investment in Abu Dhabi, which will be adversely affected by lower oil prices.

## Latest Updates And Structural Trends

Lower oil prices pose little threat to the UAE's construction industry outlook overall - we forecast real growth in 2016 of 6.6% in real terms y-o-y.

Abu Dhabi has the largest infrastructure investment programme in the UAE, but will also be the market most exposed to the fall in oil prices, given its economy's reliance on the sector. Dubai and the Northern Emirates' fiscal position, which relies much less on oil revenue, will be buoyed by our expectation for growth in the non-hydrocarbons sectors of the economy.

The residential and non-residential building outlook remains positive as measures to cool the market take effect. Numerous measures have been undertaken, such as rent caps and requirements of about 50% payment before property transfers occur, to prevent speculative buyers from overheating the residential market. Additionally, tax increases for Indian buyers should cool demand in the market.

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