

United Arab Emirates Infrastructure Report Q2 2016

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Abstracts

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BMI View: Commercial construction and transport infrastructure will draw in significant investment over the first half of our forecast period, in the run up to the World Expo 2020. Dubai will continue as the outperformer, while Abu Dhabi's exposure to low oil prices continues to dent private investor sentiment. Government investment in the sector as a whole will remain robust.

Forecast & Industry Developments

The construction industry remains resilient in the face of low oil prices, with Dubai's planned projects in real estate and energy infrastructure progressing well. Abu Dhabi has been more exposed to the commodities downturn, given its economy's reliance on the sector, but still boasts the largest infrastructure investment programme in the UAE. We forecast 6.6% growth in 2016.

Growth will slow over the second half of our forecast period, as after 2020 there will not be sufficient projects under way to keep growth as robust. We forecast average annual growth of 3.2% between 2020-2025.

Big-ticket projects and underpinning our forecasts for robust growth over the short term include the USD32bn expansion project at Al Maktoum International Airport at Dubai World Central and the USD20bn nuclear power plant.

Significant real estate projects continue to move forward, a positive sign developers are willing to commit capital to projects.

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