

United Arab Emirates Infrastructure Report Q4 2015

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Abstracts

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BMI View: We upgraded our forecasts for growth in the UAE's construction sector for 2015 and up to the World Expo 2020 event in Dubai. Dubai will be the outperforming market, although we expect growth will remain healthy across the UAE, even with low 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.

We see real growth of 8.3% y-o-y in 2015 (up from 4.8% last quarter), and average annual growth over the 2015-2019 period at 7.2% (up from 5.8%).

Factors Driving Construction Industry Growth

Lower oil prices pose little threat to the UAE's construction industry outlook. Abu Dhabi has the largest infrastructure investment programme in the UAE, with the water and power sectors securing AED17.5bn (USD4.7bn) in government financing over the next five years. Following this, the housing and social infrastructure sectors secured AED12.7bn (USD3.4bn). Dubai and the Northern Emirates' fiscal position, which relies much less on oil revenue, will be buoyed by our expectation for growth in the nonhydrocarbons sectors of the economy.

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