

Yemen Infrastructure Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: The declining security and political situation in Yemen has brought the economy to a virtual standstill. The ongoing civil war has put the precious hydrocarbons sector into meltdown, severely affecting public income. In an environment so hostile to investment, development and operations, we expect the construction sector to decline severely through to 2018, when a likely volatile recovery may begin.

Latest Updates And Structural Trends

We have further downgraded our growth outlook for the Yemeni construction and infrastructure industry this quarter -30.1% in 2015, -15.0% in 2016 and -6.9% in 2017. A slow and tentative recovery is expected thereafter.

The Yemeni hydrocarbons sector is at a virtual standstill, with pipelines and refineries under frequent attacks. In 2016 we expect the country to become a net oil importer.

While little if, any, infrastructure development is ongoing, Saudi Arabia announced plans in September to bypass the Hormuz Strait by building a water canal through Yemen to the Persian Gulf.

Significant reconstruction and the recommencement of delayed projects are a rare bright spot on the horizon, with Middle Eastern and Asian investors likely to lead the recovery.

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