

Yemen Infrastructure Report Q2 2016

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Abstracts

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BMI View: The ongoing war and political instability 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 remain deflated through to 2018, when a only volatile and muted recovery can begin.

Latest Updates And Structural Trends

We maintain a pessimistic view on construction industry growth, with an estimate for 2015 of -22.1% in 2015 and a forecast of about -6% in 2016, with only a modest base affected recovery expected from 2017-2018.

The Yemeni hydrocarbons sector is at a virtual standstill, with pipelines and refineries under frequent attacks. In 2017 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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