

Yemen Infrastructure Report Q3 2016

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Abstracts

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BMI View: The ongoing security 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 2017-2018, when only volatile and muted recovery can begin.

Latest Updates And Structural Trends

A resolution to the conflict in Yemen is still far off, but progress is being made which may result in a deescalation of the fighting, at least temporarily. Over the long term we highlight the absence of a financially viable Yemeni state unless substantial overseas support is forthcoming.

We maintain a pessimistic view of 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. We forecast a deep economic recession until 2019.

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.

Contents

BMI Industry View

Latest Updates And Structural Trends

Table: Infrastructure - Construction Industry Forecasts (Yemen 2015-2025)

Risk/Reward Index

Table: Infrastructure Risk Reward Index (Yemen)

SWOT

Infrastructure SWOT

Industry Forecast

Construction And Infrastructure Forecast Scenario

Construction And Infrastructure Forecast Scenario

Latest Updates

Table: Construction And Infrastructure Industry Data (Yemen 2015-2025)

Structural Trends

Transport Infrastructure - Outlook And Overview

Industry Forecast Scenario

Latest Updates

Structural Trends

Top Five Major Projects - Transport

Table: Yemen: Key Transport Projects

Energy And Utilities Infrastructure - Outlook And Overview

Industry Forecast Scenario

Latest Updates

Structural Trends

Major Projects Table - Energy & Utilities

Table: Major Projects - Energy And Utilities

Residential/NonResidential Building - Outlook And Overview

Industry Forecast Scenario

Latest Updates

Structural Trends

Industry Risk Reward Ratings

Yemen Infrastructure Risk/Reward Index

Rewards

Risks

MENA Infrastructure RRI: Oil Prices And Security Remain Key Risks

Table: MENA RRI

Market Overview

Competitive Landscape

Company Profile

Al-Rehab Engineering

HAWK International

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Infrastructure Risk/Reward Index Indicators

Table: Weighting Of Indicators

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