

Construction in Egypt Market 2020 Share, Trend, Segmentation and Forecast

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Synopsis

In real terms, the Egyptian construction industry registered positive growth during the review period (2011–2015) and is expected to continue to expand over the forecast period (2020–2020), with investments in residential, infrastructure, and energy and utilities construction projects. Forecast-period growth will be driven by government efforts to develop the country's rail and road infrastructure and meet its energy targets by 2022.

The growing number of public-private partnership (PPP) projects and the increasing pace of foreign investment will also drive industry growth over the forecast period. In July 2020, the government signed 20 economic agreements with the Chinese government. The agreements, worth EGP111.7 billion (US\$15.0 billion), will include investments in the country's housing, transport and energy sectors.

Government flagship programs such as the October Oasis, Sustainable Development Strategy 2030, Local Development for Upper Egypt governorates and development of Cairo Metro Line 6 projects, are expected to support industry growth over the forecast period.

In real terms, the industry's output value recorded a compound annual growth rate (CAGR) of 5.32% during the review period, and is expected to register a forecast-period CAGR of 8.24%.

Summary

Timetric's Construction in Egypt – Key Trends and Opportunities to 2020 report provides detailed



market analysis, information and insights into the Egyptian construction industry including:

- The Egyptian construction industry's growth prospects by market, project type and construction activity
- Analysis of equipment, material and service costs for each project type in Egypt
- Critical insight into the impact of industry trends and issues, and the risks and opportunities they present to participants in the Egyptian construction industry
- Profiles of the leading operators in the Egyptian construction industry
- Data highlights of the largest construction projects in Egypt

Scope

This report provides a comprehensive analysis of the construction industry in Egypt. It provides:

- Historical (2011-2015) and forecast (2020-2020) valuations of the construction industry in Egypt using construction output and value-add methods
- Segmentation by sector (commercial, industrial, infrastructure, energy and utilities, institutional and residential) and by project type
- Breakdown of values within each project type, by type of activity (new construction, repair and maintenance, refurbishment and demolition) and by type of cost (materials, equipment and services)
- Analysis of key construction industry issues, including regulation, cost management, funding and pricing
- Detailed profiles of the leading construction companies in Egypt

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Key points to buy

- Identify and evaluate market opportunities using Timetric's standardized valuation and forecasting methodologies.
- Assess market growth potential at a micro-level with over 600 time-series data forecasts.
- Understand the latest industry and market trends.
- Formulate and validate strategy using Timetric's critical and actionable insight.
- Assess business risks, including cost, regulatory and competitive pressures.
- Evaluate competitive risk and success factors.

Key Highlights

- In March 2015, the government announced plans to build a new capital city to the east of Cairo near the Red Sea, in an aim to promote economic growth. The project was suspended temporarily following lack of consensus on the project's tenure and cost. However, the government re-announced the commencement of the project in February 2020. The new capital city will include 1.1 million housing units, 663 healthcare facilities, 700 kindergartens, 40,000 hotel rooms, 1,250 religious buildings, and retail malls on a 1.8 million m² area, theme parks and an airport.

- Egypt's strategic geographical location and availability of cheap and competitive workforce is increasing the pace of foreign direct investment (FDI) in the country. According to the United Nations Conference on Trade and Development (UNCTAD)'s 2015 World Investment Report, the oil sector represented the highest recipient of FDI with a share of 71.7% during 2014–2015, followed by the construction and manufacturing sectors with 2.2% and 2.0% shares respectively.
- In a bid to minimize traffic congestion in Cairo, the Egyptian Ministry of Transport announced plans to construct Cairo Metro Line 6. Accordingly, the Ministry of Transport signed a memorandum of understanding (MOU) with the China Railway Construction Corporation worth EGP26.1 billion (US\$3.5 billion) in December 2015. The 30km-long metro line project will connect northern Al-Khosos and the southern suburb of Maadi.
- In 2015, the government signed a MoU with Rosatom State Atomic Energy Corporation of Russia to construct a nuclear power station in El Dabaa region. With a total investment of EGP186.2 billion (US\$25.0 billion), the plant will be developed with a capacity to generate 4,800MW of electricity. The plant is expected to be completed in 2022.
- The government is accelerating the pace of investment under the public-private partnership (PPP) model. In February 2020, the Egyptian Ministry of Housing signed four PPP contracts with major real estate companies which include Mountain View-Sisban Holding alliance, Arabia Group and Palm Hills. The total value of these PPP projects is EGP200.0 billion (US\$26.8 billion) and includes developments such as the Mountain View iCity residential project in the New Cairo city which will cover a 2.1km² area with 18,000 housing units, and a resort.

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Norah Trent

Wise Guy Consultants Pvt. Ltd.

+1 (339) 368 6938 (US)/+91 841 198 5042 (IND)

[email us here](#)

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