

Economic Transformation in the GCC

One of the most striking features of economic transformation in the GCC region is the growth of the non-oil sector compared to the oil sector in terms of GDP contribution. Saudi Arabia and the UAE have largely spearheaded this transformation in the last few years.

Commentary

Bahrain, Growth of Oil and Non-Oil GDP in Real Terms (%), 2023 - 2024F



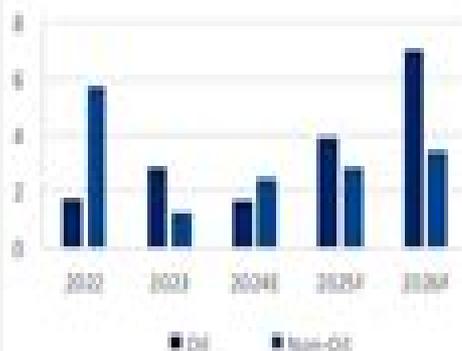
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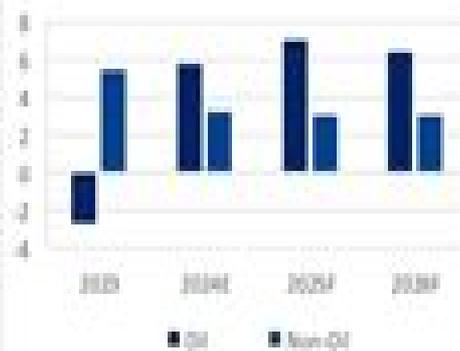
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Saudi Arabia, Growth of Oil and Non-Oil GDP in Real Terms (%), 2023 - 2024F



The UAE, Growth of Oil and Non-Oil GDP in Real Terms (%), 2023 - 2024F



- In the GCC countries, the momentum for non-oil growth has been quite strong in 2023.
- However, this was not enough to compensate for a downside in oil receipts. This has been most notable in Saudi Arabia and Kuwait where the highest contraction in real GDP was observed in 2023.
- On the other hand, in the UAE and Bahrain, construction and tourism sectors contributed to an overall strong non-oil performance. Furthermore, in UAE, increased migration and capital inflows from Russia, as per the World Bank, also contributed to a strong non-oil contribution.
- Oman and Qatar have managed modest growth in 2023 and 2024.

Gcc Market Overview And Economic Outlook 2017 A

Lei Huang



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