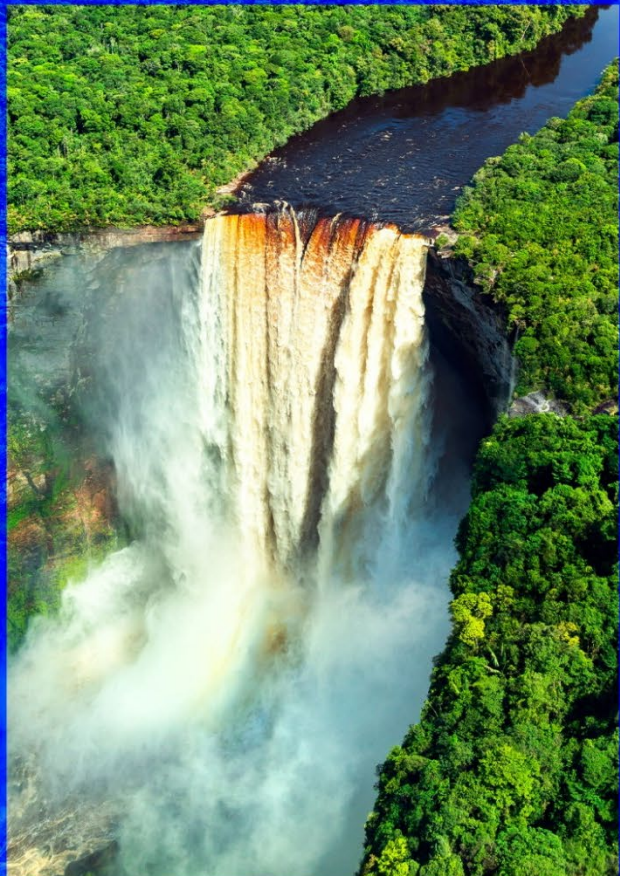




Infrastructure Outlook: Building Guyana's Future



Welcome

Welcome to Infrastructure Outlook: Building Guyana's Future

Guyana is at a pivotal moment in its history. Rapid economic growth, underpinned by the emergence of the oil and gas sector, is reshaping Guyana's development trajectory and creating new opportunities for investment, economic diversification, and long-term prosperity. To support this growth, substantial investment is being directed towards the infrastructure needed to connect communities, strengthen public services and improve quality of life.

This report explores the infrastructure projects and development initiatives that aim to shape Guyana's future. It brings together planned and ongoing investments across Transport; Water & Environment; Urban Development; Energy & Utilities; Digital Infrastructure; Tourism; and Social Infrastructure & Human Capital, providing a snapshot of the scale and breadth of activity underway across the country.

The analysis highlights that infrastructure can serve as a catalyst for growth and support economic expansion, while creating the foundations for long-term, inclusive development. From major transport corridors and energy projects to new hospitals, housing developments, water networks, and digital systems, investments are strengthening the country's infrastructure base while building capacity for continued growth and future demand.

Infrastructure planning and delivery typically play a critical role in supporting sustainable economic growth and development. The projects examined in this report offer insight into infrastructure and development priorities identified through publicly available sources, highlighting areas of activity that may shape Guyana's future economic and social development.



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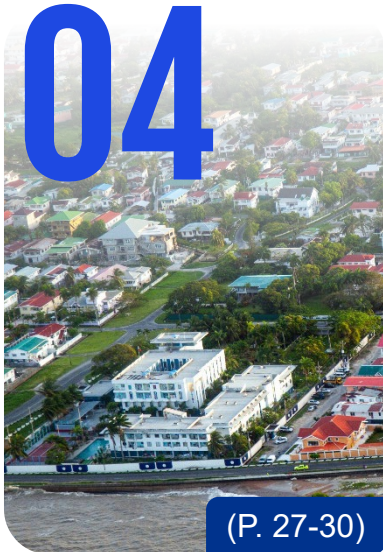
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Oil-led growth increased GDP from US\$5.17bn in 2019 to US\$27.1bn in 2025, while GDP per capita climbed from US\$6,200 to US\$27,000. The challenge is translating this progress into improved infrastructure, a skilled workforce, jobs and a more diversified, resilient private sector. Non-oil sectors also recorded strong growth in 2025, with construction and professional services among the main contributors. Maintaining this momentum likely depends on directing resource revenues into productive assets, workforce development and long-term economic capacity.

Guyana's infrastructure outlook

In the short to medium term, Guyana has an indicative US\$7.95bn infrastructure programme across key sectors, with a significant additional pipeline of projects envisioned. The programme has the potential to improve coastal and hinterland transport connectivity, expand access to essential services, enhance utility reliability while reducing costs, and support housing, tourism and commercial activity. The programme could further strengthen climate resilience and broaden service delivery in remote hinterland communities. As project values and delivery timelines are based on publicly available information, the pipeline should be regarded as indicative.

Potentially significant economic and social impact

Indicative regional output multipliers suggest the US\$7.95bn pipeline could support US\$12.66bn - US\$14.12bn of gross economic activity, about US\$1.59–US\$1.78 per US\$1 invested. This multiplier effect is key in smaller economies and requires local procurement and presence to reduce leakage from the economy. This is gross activity, not GDP or value added. It illustrates ripple effects through supply chains, jobs and household spending, plus productivity gains from better infrastructure. The strongest domestic benefits will arise where Guyanese firms and workers participate deeply in project delivery. Over time, reliable infrastructure can lower operating costs, expand market access and support broader private-sector growth.

*Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

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Strategic context: Building Guyana's future

2.1 Guyana's economic evolution (1 of 5)

Guyana is a small South American nation located on the northern coast of the continent, sharing borders with Venezuela, Brazil and Suriname while maintaining strong historical and economic ties to the Caribbean region. The country is endowed with abundant natural resources, including extensive forests, fertile agricultural land, significant mineral deposits such as gold and bauxite, and substantial offshore oil and gas reserves. Vast forests cover a large proportion of the country's land area, while population centres and economic activity remain concentrated primarily along the narrow coastal plain. Prior to the emergence of the petroleum sector, economic activity was driven by a diverse mix of industries including agriculture, mining, forestry, fishing and services.⁽¹⁾

A defining moment in Guyana's recent history occurred on 20th May 2015, when ExxonMobil announced a significant oil discovery at the Liza-1 well in the offshore Stabroek Block. Located approximately 120 miles (193 kilometres) offshore, the well encountered more than 295 feet (90 meters) of high-quality oil-bearing sandstone reservoirs and represented the country's first major offshore oil discovery.⁽²⁾ The Liza-1 discovery was subsequently followed by a series of additional discoveries within the Stabroek Block, helping to establish Guyana as one of the world's most significant emerging petroleum provinces.⁽¹⁾

Commercial oil production commenced on 20 December 2019 through the Liza Phase 1 development, less than five years after the initial discovery, marking Guyana's transition into an oil-producing nation.⁽³⁾ Since then, Guyana has experienced a period of exceptional economic growth, supported by rising investment, expanding infrastructure development, and increased fiscal capacity. These trends have helped reshape the country's economic landscape and created new opportunities for long-term national development.⁽⁴⁾



Sources: (1) [Guyana | World Bank Group](#) ; (2) [ExxonMobil, ExxonMobil Announces Significant Oil Discovery Offshore Guyana \(20 May 2015\)](#); (3) [ExxonMobil, ExxonMobil Begins Oil Production in Guyana \(20 December 2019\)](#); (4) [IMF World Economic Outlook Database; World Bank Macro Poverty Outlook for Guyana](#).

Strategic context: Building Guyana's future

Guyana's economic evolution, 2019–2025 (2 of 5)

Between 2019 and 2025, Guyana's macroeconomic profile changed markedly. GDP rose from US\$5.17 billion to US\$27.1 billion⁽¹⁾, while GDP per capita increased from c.US\$6,200 to c.US\$27,000.⁽²⁾ These shifts moved the country toward high-income status following oil commercialisation. Growth accelerated from 5.4% in 2019 to 43.5% in 2020 with a peak of 63.3% in 2022. Average annual growth over this period was approximately 32.7%, placing Guyana among the fastest-growing economies globally⁽³⁾.

Over the same period, inflation remained relatively contained, rising from 2.1% to 3.3%⁽⁴⁾, while unemployment declined from 13.2% to 12.0%⁽⁵⁾.

This points to gradual labour-market improvement, although employment remains an important policy consideration. Guyana's population increased from 0.84 million in 2019 to 1.00 million in 2025⁽⁶⁾, while the urban population share remained broadly stable at 26.4% in 2019 and 26.5% in 2025⁽⁷⁾.

This indicates that recent expansion has been driven principally by productivity, investment and the scaling up of the oil economy, rather than by demographic growth or urbanisation. Against this backdrop, the country is working to rapidly modernise its infrastructure to match its growing economic potential.

5.4% → 19.3%

Real GDP growth
2019–2025 ⁽³⁾

13.2% → 12%

Unemployment
rate
2019–2025 ⁽⁵⁾

0.8m → 1.0m

Population
2019–2025 ⁽⁶⁾

2.1% → 3.3%

Inflation, average
consumer prices
2019–2025 ⁽⁴⁾

Sources: (1) [World Economic Outlook \(April 2026\) - GDP, current prices](#); (2) [World Economic Outlook \(April 2026\) - GDP per capita, current prices](#); (3) [IMF World Economic Outlook Database](#); (4) [World Economic Outlook \(April 2026\) - Inflation rate, average consumer prices](#); (5) [World Bank Group](#); (6) [IMF population](#); (7) [UN](#)

Strategic context: Building Guyana's future

Guyana's economic evolution, 2019–2025 (3 of 5)



Fiscal Strength and Investment Momentum

Guyana's oil-led expansion has strengthened the country's external position and fiscal capacity. The current account moved from a significant deficit of (68.8%) of GDP in 2019 to a surplus of +12.9% in 2025⁽¹⁾ reflecting the significant impact of oil exports and a broader increase in external receipts.

Rapid economic growth has increased Guyana's ability to fund development and infrastructure investment, although government spending requirements have also grown significantly. The fiscal deficit widened from 2.5% of GDP to 5.4% of GDP⁽²⁾ as the government scaled up expenditure to support economic and infrastructure development. At the same time, general government gross debt fell from 34.2% to 28.6% of GDP⁽³⁾, reflecting a stronger debt position relative to the country's expanding economic base. Investment indicators highlight the scale of this transformation, with foreign direct investment inflows increasing from US\$1.7 billion to US\$8.4 billion.^{(4) (5)} Together, these trends demonstrate the significant capital investment underpinning Guyana's ongoing development trajectory.



Oil-Driven Economic Transformation

The transformation of Guyana's productive economy has been driven primarily by the rapid expansion of the petroleum sector. Average crude oil production increased from approximately 15,000 barrels per day in 2019⁽⁶⁾ to just under 830,000 barrels per day in 2025⁽⁷⁾, while installed production capacity grew from around 120,000 barrels per day to approximately 900,000 barrels per day^{(8) (9)}. Annual production rose from 427,000 barrels to approximately 261.3 million barrels over the same period⁽¹⁰⁾, supported by the expansion of offshore infrastructure from one producing floating, production, storage and offloading vessel (FPSO) to four.⁽¹¹⁾⁽¹²⁾

The impact on external trade has been profound: crude oil export earnings increased from US\$1.06 billion in 2020 to US\$17.80 billion in 2025⁽¹³⁾, while crude oil's share of total exports rose from 41.1% in 2020 to 88.4% in 2025.⁽¹⁴⁾ Taken together, these trends underscore the extent to which petroleum has reshaped Guyana's economic landscape, driving substantial increases in production, export earnings and investment within the economy.

Beyond its impact on production and exports, petroleum revenues have contributed to the growth of Guyana's Natural Resource Fund (NRF). Established in 2019, the NRF is designed to manage the country's natural resource wealth for the benefit of present and future generations of Guyanese while supporting sustainable development and national development priorities.⁽¹⁵⁾ The NRF balance reached approximately US\$3.25 billion at the end of 2025, reflecting the scale of petroleum revenues already accumulated by the Fund.⁽¹⁶⁾



Sources: (1) [IMF](#); (2) [IMF](#); (3) [IMF](#); (4) [Bank of Guyana Annual Report 2019](#); (5) [Bank of Guyana Annual Report 2025](#); (6) [EIA Country Analysis Brief: Guyana](#); (7) [Guyana Budget 2026](#); (8) [ExxonMobil Begins Oil Production in Guyana](#); (9) [ExxonMobil Guyana Begins Production at Fourth Offshore Guyana Project](#); (10) [Bank of Guyana](#); (11) [ExxonMobil Begins Oil Production in Guyana](#); (12) [ExxonMobil Guyana Begins Production at Fourth Offshore Guyana Project](#); (13) [Statistics Guyana](#); (14) [Statistics Guyana | Exports by Item Including Re-exports](#); (15) [Finance.gov: NRF act](#); (16) [Finance.gov: budget speech](#)

Strategic context: Building Guyana's future

Guyana's economic evolution, 2019–2025 (4 of 5)



Diversification Beyond Oil

Government reporting indicates that Guyana's non-oil economy expanded by 14.3% in 2025, supported by strong growth across agriculture, mining, construction and services. ⁽¹⁾ Construction grew by almost 30% during the year, while professional services increased by approximately 41%, demonstrating the breadth of economic activity accompanying petroleum-sector growth. ⁽²⁾ Although oil has transformed Guyana's economic structure, several non-oil sectors continue to play an important role in the economy and export base. Since the onset of commercial oil production in 2019, output from agriculture, forestry and fishing increased from approximately G\$190 billion (US\$908 million)* to G\$437 billion (US\$2.1 billion)* in 2025, ⁽³⁾ while gold remained Guyana's largest non-oil export, with export earnings rising from US\$876.6 million to US\$1.6 billion over the same period. ⁽⁴⁾ ⁽⁵⁾ ⁽⁶⁾ ⁽⁷⁾ Together, these sectors continue to support economic diversification beyond petroleum, even as their relative contribution has been eclipsed by the rapid expansion of crude oil exports. ⁽⁴⁾ ⁽⁵⁾



*Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD

[XE | GD to USD Exchange Rate](#)

Sources: (1) [Economy Grew by 19.3 Percent in 2025 - Department of Public Information](#); (2) [Massive Growth Recorded in Financial Construction - Guyana Times](#); (3) [Current Gross Domestic Product Guyana: 2006 to 2025 - Statistics Guyana](#); (4) [Bank of Guyana Annual Report 2019](#); (5) [Bank of Guyana Annual Report 2025](#); (6) [Guyana's 2019 Gold Declarations at 634,000 ozs - Department of Public Information](#); (7) [Guyana Misses 2025 Gold Target Demara Waves](#)

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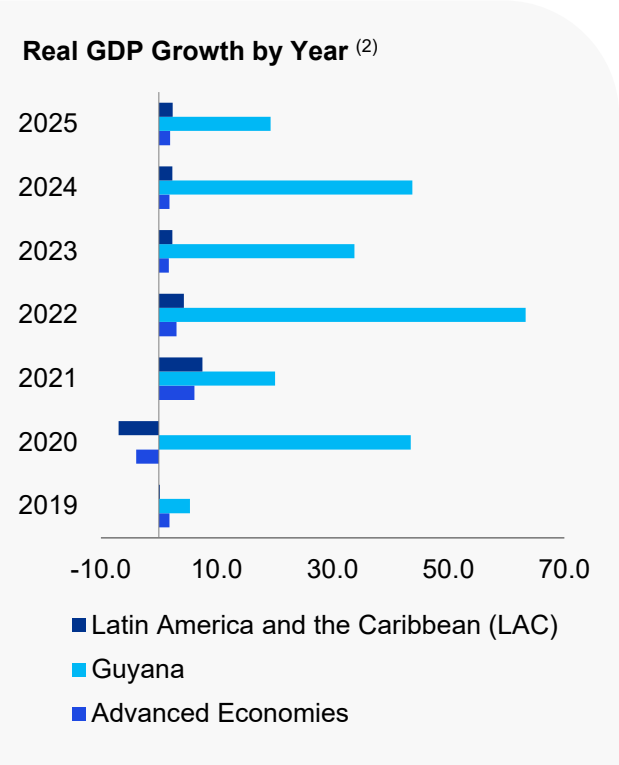
Guyana's economic evolution, 2019–2025 (5 of 5)

Outpacing Regional and Global Growth Trends

Guyana's economic performance reflects more than rapid output growth alone. According to the IMF, the country's economic transformation is "advancing strongly and broadening in scale", underpinned by expanding oil production, robust non-oil sector activity, and substantial public infrastructure investment. ⁽¹⁾

The breadth of these growth drivers suggests that economic expansion is becoming increasingly embedded across the wider economy rather than being confined to the petroleum sector. Looking ahead, the IMF expects continued improvements in infrastructure, productivity, and economic resilience to support sustained non-oil growth alongside ongoing expansion in oil production. ⁽¹⁾

In summary, while the growth premium is substantial, sustaining long-term development outcomes will depend on continued investment in infrastructure, productivity, and economic diversification alongside ongoing expansion in oil production. ⁽¹⁾



Sources: ⁽¹⁾ [Guyana: 2025 Article IV Consultation-Press Release; Staff Report; and Statement by the Executive Director for Guyana](#); ⁽²⁾ [IMF World Economic Outlook Database](#)

Strategic context: Building Guyana's future

2.2 Key Drivers of Guyana's Economy Today (1 of 2)

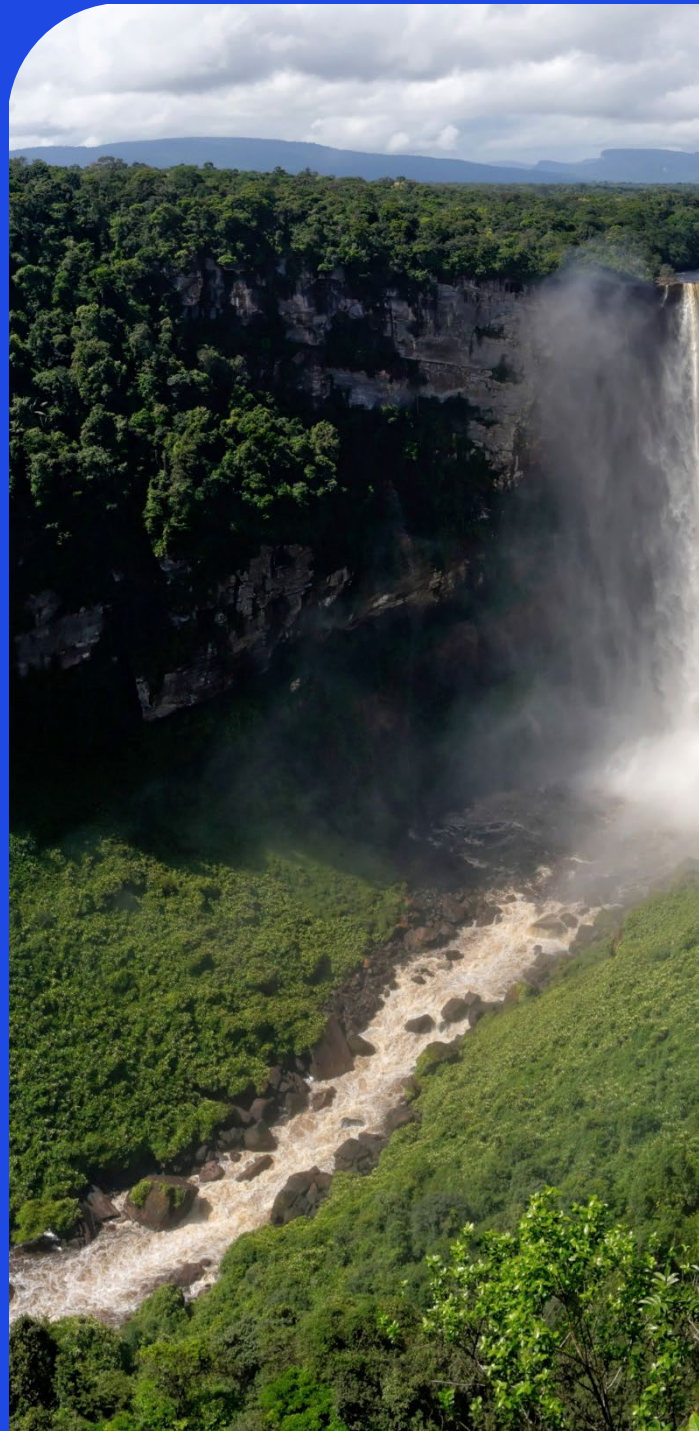
01 Energy-led expansion

Guyana's growth model is being reshaped by the speed and scale of offshore oil development. Production has moved from early-stage output to a globally significant upstream platform, with crude oil output reaching 261.3 million barrels in 2025 ⁽¹⁾ and average production just below 830,000 barrels per day across four active FPSOs. ⁽²⁾ ⁽³⁾

However, the energy base remains highly concentrated in petroleum: oil accounts for 99.9% of primary energy production and 96.7% of electricity generation. ⁽⁴⁾ The strategic priority is therefore to use oil strength to finance a more resilient, lower-cost, and diversified energy system.

02 Export-led growth

Guyana's trade position has been transformed by crude oil exports, moving the country from a smaller commodity exporter to a major surplus-generating economy. In 2025, total export receipts reached US\$20.1bn, while the merchandise trade surplus was US\$9.9bn⁽⁵⁾. Crude oil alone generated US\$17.8bn in export earnings, showing how dominant petroleum has become ⁽⁵⁾. At the same time, imports grew 50.2% year-on-year, indicating rising domestic demand and capital goods needs because of increased investment and construction.⁽⁵⁾



Sources: (1) [Bank of Guyana](#); (2) [Guyana Budget 2026](#); (3) [ExxonMobil News Release](#); (4) [EIA Country Analysis Brief for Guyana](#); (5) [Bank of Guyana Annual Report 2025](#)

Strategic context: Building Guyana's future

Key Drivers of Guyana's Economy Today (2 of 2)

03 Investment and capital inflows

Investment is accelerating as Guyana builds the infrastructure and productive capacity required to support oil-seeded growth. Public sector investment/capital expenditure reached G\$684.9bn / US\$3.3bn in 2025 ⁽¹⁾, while Foreign Direct Investment (FDI) inflows reached US\$8.4bn and private sector credit grew 18%.⁽²⁾ This points to a very broad capital build-out across public works, offshore energy, construction, and domestic financing channels. Consistent with the Government's focus on infrastructure development, economic diversification, and resilience, these investments are intended to support long-term growth across both the oil and non-oil economies.⁽¹⁾

04 Emerging Growth Sectors

Data on the secondary sectors show that growth is beginning to spread beyond oil, particularly into utilities, services, tourism, housing, and urban development.

Guyana's non-oil economy grew by 13.8% in the first half of 2025, with construction (29.9%), manufacturing (26.8%) and services (6.6%) all recording strong growth, highlighting the emergence of a broader economic base alongside the petroleum sector.⁽³⁾

Guyana's tourism sector has experienced strong long-term expansion since 2019. Visitor arrivals increased from approximately 313,000 in 2019 to a record 453,489 in 2025, representing growth of around 45% over the period.⁽⁴⁾ This increase has been accompanied by expanded tourism infrastructure, including the addition of 738 hotel rooms in 2025, reflecting rising investment in accommodation capacity to support growing visitor demand.⁽¹⁾

Publicly available purpose-of-visit data for 2019-2025 could not be identified. However, between 2018 and 2023, leisure travellers increased from 183,639 to 220,549 (+20%), while business travellers increased from 28,466 to 53,377 (+88%).^{(5) (6)} While leisure travel remained the largest visitor segment, business travel grew more rapidly, indicating that growth in arrivals has been supported by both tourism and business demand, likely driven primarily by the growing oil economy.^{(5) (6)}

Sources: (1) [Guyana budget 2026](#); (2) [Bank of Guyana Annual Report 2025](#); (3) [Mid-Year Report 2025: Guyana's economy records 7.5% growth in 1st half of 2025 - Guyana Times](#); (4) [DPI](#) (5) [Guyana Tourism Authority, reported in Business Guyana 2019](#) (6) [Department of Public Information \(2024\)](#)

Strategic context: Building Guyana's future

2.3 Infrastructure, Geography and Climate Resilience (1 of 2)

Guyana's infrastructure and development priorities are shaped by a unique combination of rapid economic growth, climate vulnerability and geographic scale. While much of the country's population and economic activity is concentrated in low-lying coastal regions, the country's vast hinterland and rainforest add a distinct dimension to infrastructure planning. At the same time, Guyana's extensive forest resources provide both environmental resilience and new economic opportunities, reinforcing the need to balance infrastructure development and sustainable resource management.

Approximately 85% of Guyana's territory is covered by forest, representing more than 18 million hectares of largely intact tropical rainforest. ^{(1) (2)} The scale of this landscape, combined with populations dispersed across remote interior communities, makes connectivity and access to services important considerations in long-term development planning. As a result, continued investment in transport, energy, telecommunications and social infrastructure remains an important component of development across Guyana's interior regions.

The preservation of these forest assets has also created a significant economic opportunity. Through its participation in international carbon markets, Guyana secured a landmark US\$750 million forest carbon credit transaction, with revenues being invested in community, regional and national development priorities. ⁽³⁾ This demonstrates how the country's natural capital can support economic development while reinforcing environmental stewardship.

Since first oil in 2019 ⁽⁴⁾ ongoing programmes to modernise more than 30 hinterland airstrips reflect the role of transport infrastructure in supporting access to healthcare, education, economic activity and public services across Guyana's interior regions. ⁽⁵⁾



Sources: (1) [Guyana Low Carbon Development Strategy \(LCDS\) 2030 Executive Summary](#); (2) [World Bank Forest Carbon Partnership Facility, Guyana Country Profile](#); (3) [LCDS 2030 October 2024 Update](#); (4) [ExxonMobil, ExxonMobil Begins Oil Production in Guyana \(20 December 2019\)](#); (5) [DPI, Govt advancing hinterland airstrip upgrades](#)

Strategic context: Building Guyana's future

Infrastructure, Geography and Climate Resilience (2 of 2)

Climate considerations are becoming an increasingly important factor in Guyana's development trajectory. The country's geographic characteristics, concentration of population and economic activity along the coast, and extensive natural environment create a unique profile. As economic growth accelerates and infrastructure investment expands, understanding these climate-related pressures is increasingly important to help ensure that development remains resilient, sustainable and responsive to regional needs.

Climate hazard vulnerability: Guyana faces high exposure to flooding and wildfire. Within the Global Facility for Disaster Reduction and Recovery⁽¹⁾ report, river flood, urban flood, coastal flood, and wildfire are all rated High risk, while extreme heat and tsunami are rated Medium risk.⁽¹⁾ This demonstrates that climate risk is not isolated to one hazard, but spans both water-related and other environmental threats.

Regional risk profile: Climate vulnerability is spatially uneven across Guyana, with coastal and more densely populated regions generally exhibiting higher levels of multi-hazard exposure and risk from flooding and other climate-related hazards. This highlights the importance of targeted regional resilience planning.⁽²⁾ This makes targeted regional resilience planning essential.

Precipitation: Rainfall patterns show material variability, which has direct implications for flood management, drainage, agriculture, and water resources. Annual precipitation peaked at 3,190.6mm in 2021 before falling to 2,260.7mm in 2024.⁽³⁾ This variability reinforces the need for flexible water and flood-risk planning. The World Bank highlights that roads in coastal regions are highly vulnerable to flooding and extreme weather, noting that the 2021 floods caused over US\$100 million in damage to the agriculture and transport sectors.⁽⁴⁾

Temperature change: Guyana is experiencing a warming trend, increasing exposure to heat stress and environmental pressure. Average mean surface air temperature change rose from 1.6°C in 2020 to 2.7°C in 2024.⁽⁵⁾ This points to a rising baseline of climate stress that should be integrated into infrastructure, health, and urban planning.

Land-cover pressure: Land-use dynamics are shifting as development accelerates. The Climate Altering Land Cover Index increased from 100.2 in 2018/2019 to 104.1 in 2022.⁽⁶⁾ This matters because Guyana's forests are a major carbon sink, so land-cover change must be monitored to protect long-term environmental resilience.



Sources: (1) [World Bank - Global Facility for Disaster Reduction and Recovery](#); (2) [National Disaster Preparedness Baseline Assessment: Guyana](#); (3) [World Bank - Climate Change Knowledge Portal](#); (4) [World Bank, Guyana to Enhance Transport Resilience and Safety](#) (5) [IMF - Macroeconomic Climate Indicators Dashboard](#); (6) [IMF - Macroeconomic Climate Indicators Dashboard](#)

03

Guyana's infrastructure outlook

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Guyana's infrastructure outlook

3.1 Planetary Wealth Perspective: Infrastructure as a Foundation for Long-Term Prosperity

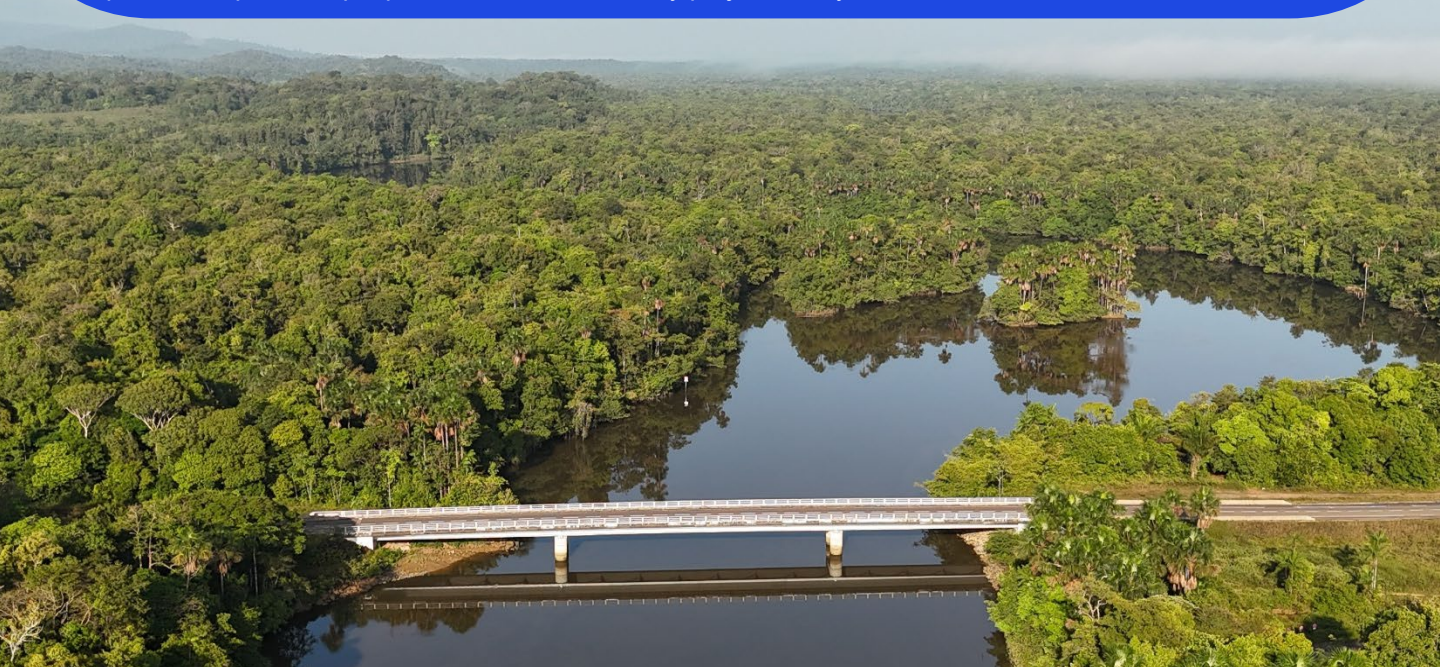
The Planetary Wealth Framework, which was featured in [KPMG Islands Group's recent report on economic sustainability](#) across its markets and is frequently cited by leading economist Professor Matthew Agarwala, suggests that long-term economic prosperity depends on building and maintaining a broad portfolio of capital assets, including physical, human, social, institutional, natural and knowledge capital. Viewed through this lens, Guyana's infrastructure programme can be seen not just as an investment in physical assets, but in the wider foundations that support productivity, resilience, service delivery, innovation and quality of life.

As Guyana's infrastructure network expands, the benefits may extend beyond the assets themselves. Improved connectivity, more reliable services, stronger institutions, enhanced skills and greater resilience to environmental and economic shocks have the potential to create lasting value across the economy and society.

Strengthening multiple forms of capital simultaneously is likely to result in increased productive capacity which in turn supports private sector growth, expanded opportunities and improved living standards. Consistent with the Planetary Wealth approach, the long-term value of infrastructure lies not only in the assets delivered today, but in the enduring economic, social and institutional benefits they enable for future generations.⁽¹⁾

Overview

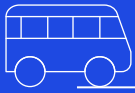
Rapid economic growth is increasing demand for transport, utilities, social and digital infrastructure, with priorities focused on improving connectivity, resilience and access across the coast and interior to support productivity, inclusion and long-term diversification. The following section provides a forward-looking view of Guyana's infrastructure pipeline and development priorities. The register is based primarily on the PPP/C Manifesto 2025⁽²⁾, supplemented by publicly available sources, and should be regarded as indicative, as projects may represent proposed or prospective investments and remain subject to change in scope, timing, funding, delivery and costs. The scale of investment envisioned represents a long-term transformation that is expected to span multiple political terms, with many projects likely to take more than a decade to deliver.



Sources: (1) [Beyond GDP: Sustainable Economic Growth in Island Economies](#), KPMG Islands Group and Bennett Institute for Innovation & Policy Acceleration, University of Sussex; (2) [PPP/C Manifesto 2025](#)

Guyana's infrastructure outlook

3.2 Infrastructure focus: Overview by sector (1 of 6)



Transport infrastructure

Transport infrastructure remains a major focus of Guyana's investment pipeline, reflecting its importance and role in supporting economic expansion and accommodating a rising demand for mobility and logistics.⁽¹⁾ Key projects commissioned in 2025 include the US\$260 million New Demerara River Bridge⁽²⁾, US\$133.8 million Ogle-Eccles Highway⁽³⁾, and *G\$11 billion (US\$52.8 million) Diamond-Buzz Bee Dam Four-Lane Highway^{(4)*; together, these investments have the potential to enhance connections between key economic corridors, ease transport bottlenecks, and support ongoing residential, commercial, and industrial development across the country.}



Water and drainage infrastructure

Available data indicates that investment is focused on strengthening coastal protection, flood management systems, drainage networks, and water control infrastructure, including the deployment of automated systems in low-lying areas.⁽¹⁾ The Hope Canal, completed in 2013, is one of Guyana's most significant flood-management projects. Constructed following the 2005 floods, it forms part of Guyana's efforts to reduce flood risk associated with the East Demerara Water Conservancy.⁽⁵⁾ These investments are being delivered in the context of increasing demand and legacy infrastructure constraints, which continue to influence overall system reliability and efficiency.⁽⁶⁾



Sources: (1) [Trade.gov – Guyana Infrastructure Sector \(published May 13, 2026\)](#); (2) [DPI – Demerara Harbour River Bridge](#); (3) [DPI – Ogle-Eccles Highway Opens](#); (4) [DPI – Diamond-Buzz Bee dam Four-Lane Highway](#); (5) [\\$349M Hope Canal bridge commissioned – Department of Public Information, Guyana](#); (6) [Guyana to Strengthen Coastal Resilience and Adaptation](#);

*Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Guyana's infrastructure outlook

Infrastructure focus: Overview by sector (2 of 6)



Urban infrastructure

Infrastructure investment is expanding across a range of sectors, including transport, utilities, housing, urban development and digital infrastructure, reflecting Guyana's broader efforts to modernise and enhance national infrastructure capacity.⁽¹⁾ As projects are advanced across these areas, infrastructure delivery is becoming increasingly integrated, supporting improved connectivity and access to essential services.⁽¹⁾

A notable example is Silica City, Guyana's planned smart city development along the Soesdyke-Linden Highway. Initial site works commenced in 2023, supported by a G\$2.1 billion (US\$10 million)* first-phase infrastructure investment. The development is intended to incorporate housing, utilities, transport links and public services, aiming to create Guyana's first fully sustainable and technologically advanced city.⁽²⁾

Collectively, these initiatives illustrate Guyana's continued focus on infrastructure and urban development which has the potential to support future growth and enhance the country's long-term development platform.^{(1) (2)}

Sources: (1) [Trade.gov – Guyana Infrastructure Sector \(published May 13\)](#); (2) [Silica City to become Guyana's first fully sustainable and technologically advanced city | Caribbean News Global](#)

*Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Guyana's infrastructure outlook

Infrastructure focus: Overview by sector (3 of 6)



Utilities

Utilities investment is expanding across power generation and transmission, gas infrastructure and water services, alongside industrial capacity in fabrication, materials production and logistics. ⁽¹⁾ Delivery is taking place amid uneven digital penetration and disparities between urban and rural areas. ⁽²⁾ Over the five-year horizon, planned investment may improve reliability and cost efficiency while supporting a more integrated industrial base. This includes efforts to diversify Guyana's energy mix through both gas-fired and renewable generation, with initiatives such as the proposed 165 MW Amaila Falls Hydropower Project, which is intended to provide low-carbon baseload power to the national grid. ⁽³⁾ The Wales Gas-to-Energy Project is a key example: the 300 MW development is intended to increase generation capacity and may contribute to improved reliability and lower electricity costs. Valued at US\$759 million, the project commenced with the construction-contract signing in December 2022 ⁽⁴⁾, remains under active construction in 2026 and targets first power by year-end. ⁽⁴⁾ ⁽⁵⁾



Digital

Guided by the Guyana Digital Strategy, investment in broadband, fibre networks, data infrastructure and e-government platforms is supporting public-sector transformation and is intended to improve efficiency, transparency and service delivery. ⁽¹⁾ Government-led digitalization initiatives are also extending connectivity and digital inclusion. ⁽²⁾ Over the medium term, these measures could strengthen the digital ecosystem, improve public services and expand participation in the digital economy. Expansion of Guyana's national fibre-optic backbone is a principal investment. Completion of the Bartica fiber connection in 2025 extended high-speed fibre broadband and 5G services to one of the country's principal hinterland communities. ⁽⁵⁾



Sources: (1) [Trade.gov – Guyana Infrastructure Sector \(published May 13, 2026\)](#); (2) [Guyana - Digital Economy](#); (3) [Gov't advances Amaila Falls Hydro Project, 26 February 2026](#); (4) [Contract signed for US\\$759M Wales natural gas plant – Department of Public Information, Guyana](#); (5) [Press Release: Wales Gas-to-Energy project advancing rapidly – Department of Public Information, Guyana](#); (6) [Guyana - Digital Economy](#)

Guyana's infrastructure outlook

Infrastructure focus: Overview by sector (4 of 6)



Tourism

Tourism investment covers hotels, eco-lodges and resorts, together with visitor infrastructure and air connectivity intended to improve access and the visitor experience. ⁽¹⁾

Development builds on Guyana's natural assets through sustainable rainforest, wildlife and eco-tourism offerings. Over the next five years, investment is expected to expand accommodation capacity and improve infrastructure quality, with the aim of positioning Guyana as a differentiated, high-value eco-tourism destination. This includes a Government-backed programme of proposed eco-lodge and resort developments across locations such as Mashabo, Bartica, Lethem, Orinduik, and the Vreed-en-Hoop and Stabroek waterfronts, intended to attract investment, create jobs and support sustainable tourism growth. ⁽²⁾

Business centre hotels are also springing up, a notable example being the Pegasus Suites and Corporate Centre. Completed in February 2023, the US\$100 million development added luxury accommodation, corporate offices and a 30,000 sq. ft. convention and exhibition facility, strengthening tourism and business-travel infrastructure in Georgetown ⁽³⁾.



Sources: (1) [Trade.gov – Guyana Infrastructure Sector \(published May 13, 2026\)](#); (2) [Moving ahead with new eco lodges resorts](#)
(3) [Pegasus Suites and Corporate Centre 30,000 sq ft exposition space completed - Stabroek News](#)

Guyana's infrastructure outlook

Infrastructure focus: Overview by sector (5 of 6)

Social Infrastructure & Human Capital

Guyana's social infrastructure and human-capital base is developing alongside rapid economic growth, with investment focused on education, healthcare and public services to support long-term development. ⁽¹⁾ As investment increases, priorities include widening access, improving service quality and strengthening institutional capacity so that human-capital outcomes remain aligned with the country's economic transformation and support inclusive growth.

Investment in education, healthcare and social services is central to workforce productivity and long-term economic resilience. ⁽¹⁾ As the economy expands, the development agenda appears to be placing greater emphasis on access, service quality and human-capital outcomes, particularly beyond the oil sector.



Education & Healthcare Systems

Investment is expanding education and healthcare access while improving service infrastructure and delivery. ⁽¹⁾ In the first half of 2025, government expenditure of GD\$52.9 billion (US\$253 million)* supported hospital construction, staff training and equipment upgrades ⁽²⁾, while the commissioning of the GD\$940.7 million (US\$4.5 million)* Christ Church Secondary School represented a further investment in education infrastructure ⁽³⁾. Geographic dispersion, connectivity constraints and climate-related risks continue to affect access in some regions; over the medium term, investment is intended to improve service reach and quality and support more inclusive outcomes.



Sources: (1) [World Bank, Guyana country overview \(2024/2025\)](#); (2) [Guyana Standard, government health expenditure](#); (3) [Ministry of Education, Christ Church Secondary School](#)

*Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Guyana's infrastructure outlook

Infrastructure focus: Overview by sector (6 of 6)



Urban & Social Inclusion

Rapid population growth and urbanisation are increasing demand for housing, education, healthcare and community services. ⁽¹⁾ Investment is therefore focused on expanding infrastructure and aligning service provision with population needs. Over the five-year horizon, this may contribute to improved living standards and more inclusive development.

Public services & Institutional capacity

Public-service delivery is being strengthened through improvements in administrative systems, service provision and institutional effectiveness. ⁽¹⁾ Because education and health outcomes depend on effective core services, continued emphasis is being placed on service quality and governance. Over the medium term, these measures may strengthen institutional capability and support more effective and inclusive delivery.

Sources: (1) [World Bank, Guyana country overview \(2024/2025\)](#)

Guyana's infrastructure outlook

3.3 Infrastructure Project Register: Methodology

A project register was developed using projects identified in the PPP/C Manifesto 2025⁽¹⁾, which was used as the primary source to establish Guyana’s prospective infrastructure pipeline. Projects were reviewed, consolidated, and set out across the following key sectors: Social Infrastructure, Transport, Energy & Utilities, Water & Environment and Digital.

Estimated project costs, delivery dates, and related project delivery information were compiled through desktop research, drawing on publicly available sources.

The register provides a consolidated estimated view of planned infrastructure investment and forms the basis for the subsequent high level economic analysis. Potential economic effects were assessed using sector-specific output multipliers and international benchmarks, providing a directional illustration of the gross economic activity that infrastructure investment could support.

Key limitation: Project values and timelines have only been included where publicly available information was identified. Consequently, the register should be viewed as an indicative representation of Guyana's infrastructure pipeline rather than a government capital plan, funded programme, or exhaustive inventory of all planned investments. Reported values, delivery dates and project details are derived from publicly available sources, have not been independently verified by KPMG, and may be subject to change. Where timing information was not publicly available, it has been recorded as N/A.

Infrastructure Project Value Summary	
Infrastructure sector	Reported value (US\$m, est.)
Social infrastructure	2,941.9
Transport infrastructure	2,783.2
Energy & utilities	2,059.0
Water & environment	166.8
Digital infrastructure	N/A
Total	7,951.1

Note: All figures are reported in USD \$'M.
Sources: (1) [PPP/C Manifesto 2025](#); and publicly available desktop research.



Guyana's infrastructure outlook

Social Infrastructure

For Guyanese citizens, investment in housing, healthcare, education and community facilities can improve access to essential services, create safer places to live and help people build the skills needed for better opportunities.

Social Infrastructure register			
Project name	Reported value (US\$m)	Date	Purpose
National homes programme ²	2,160.0*	2030	Expands access to affordable housing.
Silica City ³	392.2*	N/A	Creates a planned, climate-resilient urban center.
Modern healthcare facilities ^{4,5,6}	368.8*	N/A	Improves hospital capacity and regional access to healthcare through modern care facilities and specialist treatment centres.
Palmyra international stadium ⁷	17.8*	2023 - 2025	Provides a major national venue for sport and community events.
Electronic health records ⁸	3.3	2025 - 2025	Creates connected patient records for safer, faster care.
School infrastructure ¹	N/A	N/A	Expands safe, modern learning environments.
Regional SEN facilities ¹	N/A	N/A	Improves tailored education access for students with special needs.
Guyana Digital School ¹	N/A	N/A	Extends flexible digital learning nationwide.
Day / night care and ECDCs ¹	N/A	N/A	Expands reliable childcare for working families.
TVET modernisation ¹	N/A	N/A	Aligns technical training with workforce needs.
Regional technical centres ¹	N/A	N/A	Brings practical skills training closer to communities.
Regional health facilities ¹	N/A	N/A	Improves access to hospitals and clinics across regions.
Berbice / Essequibo nursing schools ¹	N/A	N/A	Builds the regional nursing workforce.
National EMS system ¹	N/A	N/A	Strengthens rapid, coordinated emergency medical response.
Telehealth sites ¹	N/A	N/A	Connects remote patients with specialist care.
AI healthcare systems ¹	N/A	N/A	Uses digital tools to support diagnosis and care delivery.
Community upgrades ¹	N/A	N/A	Improves shared community spaces and local services.
Elderly residential care facilities ¹	N/A	N/A	Expands safe, supported living for older adults.
Albion cricket academy ¹	N/A	N/A	Develops cricket talent and coaching capacity.
15,000-capacity indoor stadium ¹	N/A	N/A	Creates a large national indoor venue for sport and events.
High-performance athlete facility ¹	N/A	N/A	Supports elite training and athlete development.
Velodrome ¹	N/A	N/A	Creates a dedicated venue for cycling and competition.
Total	2,942.1	N/A	

* Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Guyana's infrastructure outlook

Transport

Improved transport can enhance connectivity, strengthen access to essential services, support the efficient movement of people and goods, and has the potential unlock new opportunities for economic and community development.

Transport register			
Project name	Reported value (US\$m)	Timing	Purpose
Palmyra to Moleson Creek highway ⁹	604.0	2025 - 2028 ^(9b)	Cuts travel time and unlocks Region Six growth.
Berbice deepwater port ¹⁰	285	N/A	Enables larger vessels and expands global trade.
Four-lane highway along EBD to CJIA ¹¹	252.0*	N/A	Eases airport-route congestion and improves access. <i>(The reported investment is assumed to relate solely to the Craig to Land of Canaan section)</i>
Farm-to-market roads ¹²	240.0*	N/A	Connects farms to markets and lowers transport costs.
Corentyne River bridge ¹³	236.0 ^(13a/b)	N/A	Links Guyana and Suriname to expand regional trade. <i>(Note: Value reflects the total project cost and does not adjust for any future cost-sharing arrangement with Suriname)</i>
Berbice River bridge ¹⁴	206	N/A	Improves crossing capacity and regional trade. <i>(Value based on the lowest of five bids received for the project)</i>
East Coast Demerara highway ¹⁵	192.0	2026	Reduces congestion and opens land for commerce.
Linden to Lethem highway ¹⁶ (Linden to Mabura section)	190.0	2026 - 2026 ^(16b)	Upgrades a strategic all-weather transport corridor towards Brazil.
Linden-Soesdyke / EBD-CJIA highways ¹⁷	161.0	2026 - 2026 ^(17b)	Improves safety and capacity on key inland corridors.
Community roads and streets ¹⁸	109.0*	2024 - 2024	Improves daily access and road safety in communities.
Building new port facilities at Charity, Parika, and Port Kaituma ¹⁹	73.5*	2023 - 2029 ^(19b) ^(19c)	Supports agricultural exports and river travel. <i>Parika (US\$50.5m), Charity (US\$4.2m), Port Kaituma + upgrades (US\$18.8m)</i>
Schoonord to Goshen road ²⁰	72.5*	2025 - 2030 ^(20b)	Creates a faster link and opens land for development. <i>(Schoonord to Crane section, indicative timeline)</i>
CJIA / Lethem / Rose Hall-Canje airports ²¹	60.0	2026 – 2027 ^(21b)	Expands air capacity, safety and regional connectivity.
Heavy-duty truck parking ²²	26.0*	N/A	Moves trucks off roads to ease congestion and damage.
Hinterland road network ²³	24.0*	N/A	Improves year-round access to remote communities.
Hinterland airstrips ²⁴	19.7*	N/A	Strengthens safe, reliable hinterland air access.
Urban parking ²⁵	13.0*	N/A	Adds organized parking and reduces roadside congestion.
Berbice and Demerara river dredging ²⁶	11.2	N/A	Improves vessel access, navigation and port efficiency.
Bridge at kurupukari and puruni ²⁷	6.0	2026 – 2027	Keeps the hinterland corridor open year-round.
Moleson Creek-Orealla-Siparuta road ²⁸	2.3*	2024 – 2024	Connects riverine communities to markets and services.
Georgetown mass transit ¹	N/A	N/A	Eases city congestion and improves urban connectivity.
Aviation school ¹	N/A	N/A	Builds local aviation skills and certification capacity.
Municipal airports at Lethem and Rose Hall/Canje ¹	N/A	N/A	Creates regional air gateways for trade and tourism.
East Bank Berbice-De Velde connectivity ¹	N/A	N/A	Improves regional connectivity and access between East Bank Berbice and De Velde.
Essequibo main road ¹	N/A	N/A	Expands road capacity as traffic and tourism grow.
Total	2,783.2	N/A	

* Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Guyana's infrastructure outlook

Energy & Utilities

Improved energy and utility infrastructure can increase reliability, strengthen access to essential services, support economic activity, and enhance quality of life.

Energy & Utilities register			
Project name	Reported value (US\$m)	Date	Purpose
Wales GtE project ²⁹	759.0	2026 - 2027 ^(29b)	Uses domestic gas to provide more reliable, lower-cost power.
Amaila Falls hydropower ³⁰	700.0	N/A	Adds renewable baseload power and diversifies generation.
National grid rebuild / smart grid ³¹	600.0	N/A	Improves grid reliability, control and future capacity.
Remote communities NGL energy ³²	N/A	2027 - 2027	Extends dependable energy access to remote communities.
NGL export terminal ³³	N/A	2026 - 2026	Enables storage and export of natural-gas liquids.
Solar power expansion ³⁴	N/A	N/A	Expands renewable generation and diversifies the power mix.
Wales GtE II plant ¹	N/A	N/A	Expands gas-based generation as electricity demand grows.
Berbice gas industrial complex ¹	N/A	N/A	Creates a gas-powered industrial base in Berbice.
Berbice industrial transport integration ¹	N/A	N/A	Connects Berbice industry to ports and transport corridors.
National fuel depot ¹	N/A	N/A	Strengthens national fuel storage and supply resilience.
Oil refining partnership ¹	N/A	N/A	Builds domestic refining capacity and reduces import dependence.
Total	2,059.0	N/A	

* Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Digital

The PPP/C's digital agenda includes a range of initiatives aimed at modernising public services, strengthening digital infrastructure, expanding technology-enabled public safety systems, and supporting innovation-driven industries. Key initiatives include the MyGuyana citizen portal, national e-ID system, sovereign AI cloud, integrated GIS infrastructure platform, Smart Country technologies, and the development of technology parks and innovation hubs. However, unlike transport, energy and utility infrastructure projects, publicly available information does not currently provide sufficient detail on capital costs, investment values or delivery budgets for these initiatives. As a result, a quantified digital infrastructure register has not been developed as part of this analysis.



Guyana's infrastructure outlook

Water & Environment

For Guyanese citizens, better drainage, clean-water and waste systems can reduce flooding and health risks, protect homes and communities, and provide more reliable essential services.

Water & Environment register			
Project name	Reported value (US\$m)	Date	Purpose
Regions 3 / 5 / 6 D&I networks ³⁵	110*	2024 - 2025	Improves drainage and irrigation for farms and flood resilience. <i>(Value reflects the Hope-like canal programme in Regions 3, 5 and 6, rather than the wider GYD 73.2 billion drainage and irrigation programme.)</i>
Hope / Diamond water treatment plants ³⁶	53.1	N/A	Expands access to treated, reliable drinking water. <i>(Value reflects the US\$53.1 million financing package)</i>
Waste cell ³⁷	2.7*	N/A	Provides safer containment for difficult waste streams.
Haags Bosch recycling centre ³⁸	1.0*(³⁸)	N/A	Diverts recyclable materials from landfill disposal. <i>(Value reflects the recycling centre component only (US\$1.0m) and excludes the associated hazardous waste cell.)</i>
National water infrastructure ¹	N/A	N/A	Expands reliable water supply and treatment nationwide.
Hinterland water access ¹	Linked to Above	N/A	Brings safer water access to remote communities.
Water loss reduction ¹	Linked to Above	N/A	Reduces leakage and improves water-system efficiency.
Countrywide waste management ¹	N/A	N/A	Creates more consistent collection and disposal services.
Regional landfill sites ¹	N/A	N/A	Provides safer regional disposal capacity.
Waste equipment rollout ¹	N/A	N/A	Improves collection, handling and maintenance capability.
Georgetown / national wastewater treatment ¹	N/A	N/A	Reduces pollution through modern wastewater treatment.
Waste recycling programme ¹	N/A	N/A	Keeps reusable materials in circulation and out of landfills.
Waste-to-energy proposals ¹	N/A	N/A	Converts suitable waste into useful energy.
Total	166.8	N/A	

* Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)



04

Estimating the scale of investment and long term economic and social impact

Contents

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[4.3 Positioning Guyana's Development Pipeline](#)

Estimating the scale of investment and long term economic and social impact

4.1 Economic Impact Assessment



Summary

This section assesses the potential economic and social impact of Guyana's infrastructure pipeline. Using output multipliers from comparator economies, the analysis estimates the total economic activity that could be supported through direct project expenditure and wider supply chain effects. Infrastructure investment has the potential to stimulate business activity, support employment and household incomes, and enhance connectivity and access to essential services across the country. As with all input-output based economic impact assessments, the results should be interpreted as indicative estimates rather than forecasts. The methodology assumes fixed relationships between industries, sufficient productive capacity to meet increased demand, and an immediate transmission of supply-chain effects throughout the economy. In practice, labour availability, construction capacity, import dependencies and project delivery timelines may influence the scale and timing of realised impacts.

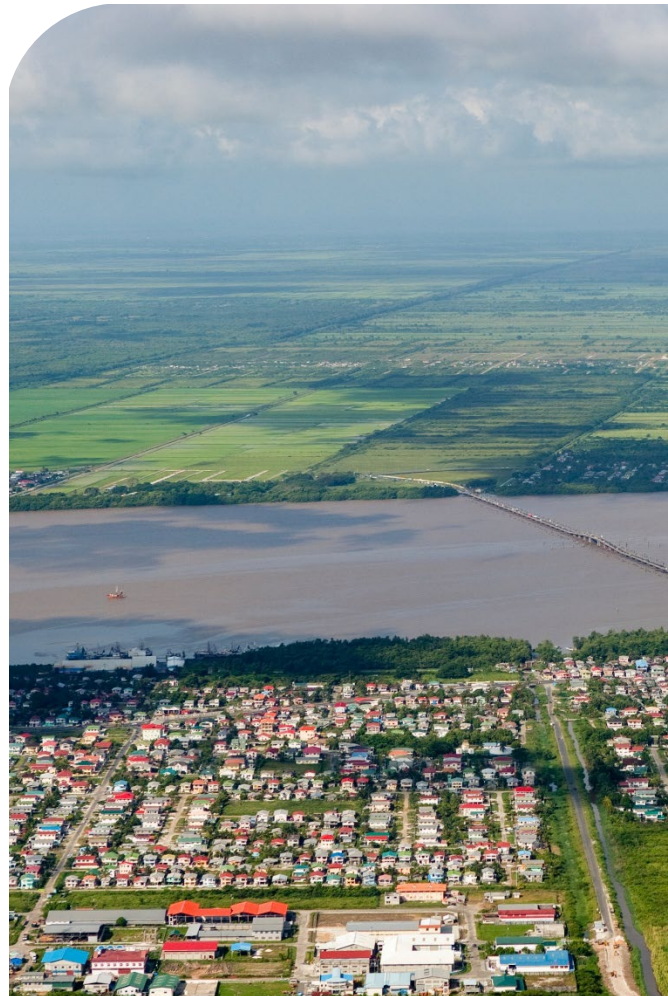


Methodology

To understand the potential economic impact associated with Guyana's infrastructure investment pipeline, a high-level multiplier-based economic impact assessment was undertaken. Infrastructure investment creates economic activity not only through the direct delivery of projects, but also through the demand generated across supply chains and supporting industries. Multiplier analysis provides a framework for assessing these broader economic linkages and estimates how investment in one sector can support activity elsewhere in the economy.

For this assessment, output multipliers were applied to the identified infrastructure investment pipeline. An output multiplier measures the total gross output generated by an initial investment, including direct project expenditure and indirect business-to-business purchases across supply chains. It therefore provides a broad measure of overall production supported by infrastructure spend, before deducting intermediate inputs.

Given the absence of publicly available Guyana-specific output multipliers, comparator-economy output multipliers for Peru and Colombia were utilised to provide an indicative range of potential gross output impacts. The comparator economies differ significantly from Guyana in economic structure, scale, trade composition and domestic supply-chain characteristics. Accordingly, resulting estimates should be viewed as illustrative only. The multiplier data was sourced from the OECD Inter-Country Input-Output (ICIO) Database.⁽¹⁾



Sources:

(1) [THE OECD INTER-COUNTRY INPUT-OUTPUT DATABASE 2025 EDITION](#)

Estimating the scale of investment and long term economic and social impact

4.2 Summary Of Indicative Output Impacts

As noted in the Methodology on the previous page, output multipliers for Peru and Colombia have been considered in lieu of output multiplier data being available for Guyana. If it is assumed that these multipliers could be broadly applicable to Guyana, the output multiplier values are estimated to be as follows:

Output Multiplier Indicative Assessment			
Infrastructure area	Estimated project value (US\$m)*	Peru: Output multiplier value (US\$m)	Colombia: Output multiplier value (US\$m)
Social Infrastructure	2,942.1	3,662.2	4,193.9
Transport	2,783.2	5,646.4	5,326.1
Energy & Utilities	2,059.0	3,115.3	4,295.0
Water & Environment	166.8	236.8	304.9
Digital Infrastructure	N/A	N/A	N/A
Overall total	7,951.1	12,660.6	14,119.8

Note: The values presented above represent the values discussed in the previous section.



Note: Output multipliers estimate gross economic activity, including intermediate purchases; they should not be interpreted as GDP or value added.

* Indicates that the value has been converted from Guyana Dollars (GYD) to United States Dollars (USD) – 1.00 GYD = 0.0048 USD
[XE | GD to USD Exchange Rate](#)

Summary of Indicative Output Impacts

As shown in the table, the identified US\$7,965.3m infrastructure pipeline could support estimated gross output of US\$12,660.6m using Peru multipliers and US\$14,119.8m using Colombia multipliers. This implies approximately US\$1.59–US\$1.78 of gross economic activity for every US\$1 invested. The results are indicative gross-output estimates, not GDP or value added.

For Guyana, this means that its major investments in roads, bridges, ports, airports, power generation and public infrastructure can potentially stimulate economic activity across multiple industries simultaneously. Construction of transport corridors, for example, creates direct demand for contractors, equipment suppliers and building materials, while improved connectivity can lower transport costs, improve access to markets, support tourism growth, unlock new housing and commercial developments, and strengthen links between coastal and hinterland communities.

The estimated multiplier effects therefore captures not only the immediate value generated through infrastructure construction, but also the wider economic activity supported by these investments. Workers spend their wages, businesses expand production to meet demand, and improved infrastructure can stimulate future private-sector investment. Although these estimates measure gross output rather than GDP or value added, they illustrate the potential scale of economic activity that Guyana’s infrastructure pipeline could support over the delivery period.

Estimating the scale of investment and long term economic and social impact

4.3 Positioning Guyana's Development Pipeline

The Inter-American Development Bank ("IDB") estimates that closing Guyana's resilient infrastructure gap through 2030 will require US\$9.4–US\$23.8 billion. Against this benchmark, the US\$7.95 billion project pipeline identified in this report represents approximately 85% of the lower-bound requirement and 33% of the upper-bound.⁽¹⁾ However, several projects within the pipeline do not yet have published cost estimates, meaning the total value of planned infrastructure investment may be materially understated and the gap could narrow as these projects are further developed.

The figures provide useful context but are not directly comparable. The published IDB estimate does not set out the underlying methodology; it is therefore not possible to assess the assumptions, costing approach, or composition of the investment range.

Notwithstanding these differences, both estimates point to the scale of infrastructure investment currently taking place in Guyana. The identified US\$7.95 billion pipeline demonstrates a significant commitment to expanding national infrastructure and supporting long-term economic development.

The benefits of this investment may extend beyond the direct value of the projects themselves, potentially supporting additional economic activity through supply chains, business growth, employment opportunities and broader productive capacity across the economy.

While the precise scale of Guyana's remaining infrastructure requirements remains uncertain, the current pipeline represents a substantial investment programme that has the potential to have far-reaching economic effects across multiple sectors.

Sources:

(1) [Guyana and the IDB Group: Partnering for Resilience \(2024\)](#)



05

Methodologies

Contents

5.1 Methodologies

Methodology: Infrastructure registers

5.1 Methodologies

From public commitments to a structured, sector-tagged project pipeline

01 Establish the source universe

Use of the PPP/C Manifesto 2025 as the primary project list, supplemented and corroborated through publicly available government and other sources.

02 Review and consolidate

Screen entries for infrastructure relevance, reconcile overlapping references and retain one consolidated project record.

03 Classify consistently

Tag each project to Social Infrastructure, Transport, Energy & Utilities, Water & Environment, or Digital.

04 Enrich and quantify

Add public cost, timing and delivery details where available; retain unquantified projects without assigning estimates.



Economic impact methodology: Output multiplier assessment

From project data to indicative output impacts

01 Project register

Publicly available project register and values taken from the PPP/C manifesto

02 Sector mapping

Classify expenditure by infrastructure type

03 Multiplier selection

Apply output multipliers from Peru and Colombia to each sector to provide indicative comparisons

Output multiplier approach

What it measures

Gross activity generated through supply chains, including intermediate purchases.



Comparator range

Peru and Colombia provide an indicative range of output impacts.



Output multipliers measure gross economic activity, including intermediate purchases, and should not be interpreted as GDP or value added.

Comparator-based reporting for Guyana



1 Project spend

2 Peru/Colombia output multiplier Direct + indirect gross output

3 Peru/Colombia output impact



Methodology: Project register references (1 of 2)

References correspond to the numbers shown beside project names in the infrastructure registers. The PPP/C Manifesto 2025 is used as the primary source universe; project values and dates are supplemented by the public sources below.

1. PPP/C Manifesto 2025 – [PPP/C, PPP/C Manifesto 2025: Forward Together for Better Guyana](#)
2. National homes programme - [News Room Guyana, PPP/C eyes prefab houses to achieve housing target](#)
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11. Four-lane highway along EBD to CJIA - [Kaieteur News, \\$52.5B in contracts awarded for construction of 4-lane highway from Craig to Land-of-Canaan;](#)
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- 13 a. Corentyne River bridge - [Guyana Times, Corentyne River Bridge legal, technical and financial matters](#)
- 13 b. Corentyne River bridge [‘Corentyne River bridge project | OilNOW](#)
14. Berbice River bridge - [Guyana Times, New Berbice River bridge construction expected to begin before year-end](#)
15. East Coast Demerara highway - [DPI, East Coast Demerara road expansion reaches 84% completion](#)
- 16 a. Linden to Lethem highway - [DPI, US\\$190m Linden-Mabura road progressing smoothly](#)
- 16 b. [DPI, A major milestone for Linden–Mabura Hill road project, races toward August 2026 completion](#)
- 17 a. Linden-Soesdyke / EBD-CJIA highways - [DPI, US\\$161m Soesdyke-Linden Highway upgrade reaches halfway mark](#)
- 17 b. [Kaieteur News, US\\$161M Soesdyke-Linden Highway project now 90 per cent complete](#)
18. Community roads and streets - [CHPA, Upgrading of community roads in Regions 2, 3, 4, 5, 6 and 10](#)
- 19 a. Charity, Parika and Port Kaituma port facilities - [Kaieteur News, New \\$10.5B Parika Port expected to be ready in 2029](#)
- 19 b. [DPI, Work to begin on \\$880M Charity wharf](#)
- 19 c. [DPI, \\$1.4B Port Kaituma stelling 85 per cent complete](#)

Methodology: Project register references (2 of 2)

References correspond to the numbers shown beside project names in the infrastructure registers. The PPP/C Manifesto 2025 is used as the primary source universe; project values and dates are supplemented by the public sources below.

20 a. Schoonord to Goshen road - [DPI, Schoonord to Crane four-lane highway to be commissioned soon](#)

20 b. [INews Guyana, PPP/C to construct new roads & bridges, improve community & hinterland infrastructure](#)

21 a. CJIA / Lethem / Rose Hall-Canje airports - [Mowlem Group, US\\$60m CJIA project](#)

21 b. [Mowlem Group, Mowlem to Construct Second Terminal at Cheddi Jagan International Airport, Guyana](#)

22. Heavy-duty truck parking - [Kaieteur News, Govt to spend G\\$5.4b to build truck parking facilities](#)

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24. Hinterland airstrips - [Kaieteur News, Govt invites bids for Lethem, Rose Hall airports](#)

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34. Solar power expansion - [DPI, Govt eyeing 100 MW renewable energy over next five years](#)

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36. Hope / Diamond water treatment plants - [Guyana Times, Diamond residents to benefit from modern water treatment plant](#)

37. Waste cell - [Guyana Times, Over \\$700M awarded in contracts for recycling centre, hazardous waste cell at Haags Bosch](#)

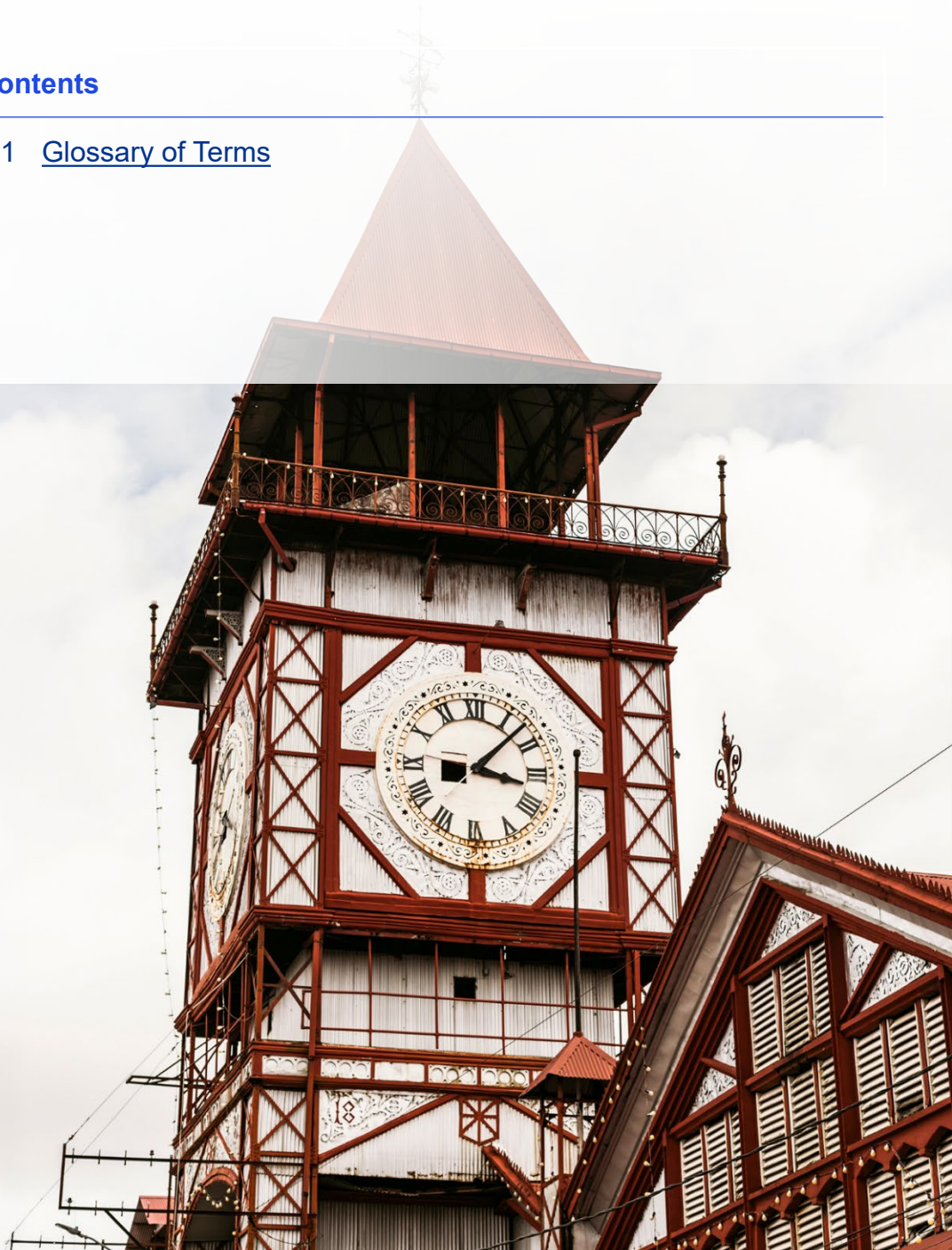
38. Haags Bosch recycling centre - [Guyana Times, Over \\$700M awarded in contracts for recycling centre, hazardous waste cell at Haags Bosch](#)

06

Appendices

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6.1 [Glossary of Terms](#)



Glossary of terms

A-G

CJIA (Cheddi Jagan International Airport) – Guyana's primary international airport.

Climate Resilience – Ability of infrastructure, communities and economic systems to withstand, adapt to and recover from climate risks.

Comparator Economy – Benchmark country used where Guyana-specific data is unavailable.

Current Account Balance – A country's transactions with the rest of the world, including trade, income and transfers.

Economic Impact Assessment – Analysis estimating the broader economic effects associated with investment.

Foreign Direct Investment (FDI) – Foreign investment into business or productive assets within a country.

GDP (Gross Domestic Product) – Total value of goods and services produced in an economy over a period.

GDP Per Capita – GDP divided by population; an indicator of average economic output or income per person.

I-T

Import Leakage – Project expenditure that leaves the domestic economy through imported goods and services.

Infrastructure Pipeline – Planned, proposed or announced infrastructure projects expected to be delivered over time.

Input-Output Analysis – Economic modelling that examines industry relationships and spending spillover effects.

Intermediate Consumption – Goods and services purchased and consumed during the production process.

Multiplier Analysis – Estimates how investments generate additional activity through supply-chain linkages.

Output Multiplier – Total gross economic activity generated throughout supply chains from an initial investment.

Project Register – Structured database of projects including scope, sector, value, timing and source.

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As with all input-output based economic impact assessments, the results should be interpreted as indicative estimates rather than forecasts. The methodology assumes fixed relationships between industries, sufficient productive capacity to meet increased demand, and an immediate transmission of supply-chain effects throughout the economy. In practice, labour availability, construction capacity, import dependencies and project delivery timelines may influence the scale and timing of programme impacts. Notwithstanding these limitations, input-output analysis remains a widely accepted approach for estimating the broader economic effects associated with investment and identifying the channels through which expenditure supports economic activity.

The infrastructure register information presented in this document is indicative only and should not be regarded as a comprehensive inventory of all existing, planned or proposed projects. Certain information has been obtained from publicly available and third-party sources, and it has not been independently audited or verified. References to future projects, expenditure, delivery dates and anticipated outcomes are forward-looking and subject to approvals, funding, procurement, policy decisions, market conditions, delivery capacity and other uncertainties. Actual outcomes may differ materially. Inclusion of a project does not indicate that it is approved, funded, committed, endorsed or likely to proceed. KPMG in Guyana is not endorsing any government, political party, policy position, programme or project.

Document Classification: KPMG Public