

Bulgaria Infrastructure Report Q4 2016

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Abstracts

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BMI View: The Bulgarian construction industry is expected to contract 1.7% y-o-y in 2016. Infrastructure construction will be the largest market in the country's construction industry, expanding 2.8% y-o-y in 2016 and accounting for 59.0% of its total value. The development of the country's road and railway network with the support of EU funds will continue. Tourism sector will remain a substantial growth driver, while the limited demand and the scarcity of developments in the pipeline in the non-residential building sector will drag downwards the entire residential and non-residential building industry as it is anticipated to contribute about three quarters to the latter sector's total value this year.

Latest Updates And Structural Trends

Driven by transport infrastructure projects, we forecast Bulgaria's construction industry will grow by an average of 1.6% over 2016-2025.

Bulgaria remains highly dependent on EU funding for infrastructure projects, particularly in the transport sector. As such, slow EU recovery will limit the speed of Bulgaria's transport infrastructure growth.

Improved absorption of EU structural funding will be supported by public investment projects to a certain extent.

World Bank will provide loans worth EUR550mn to Bulgaria for the next six years in order to support financial stability, strengthen electricity sector and improve energy efficiency.

We do not expect investment in renewable energy infrastructure to increase given the Bulgarian government decided to terminate incentives for new renewable energy capacity in March 2015.

The outlook for the residential sector is not positive, especially from 2019 onwards. The housing market remains weak following a collapse in prices since 2008 and the high levels of indebtedness will act as a headwind to future investment.

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