

# Canada Infrastructure Report Q3 2016

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## Abstracts

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**BMI View:** The Canadian construction industry will recover in 2016 as the Liberal government spends big on infrastructure projects in a bid to stimulate the economy. However, we note downside risk to this forecast as the 2016 budget announced in March fell short of campaign promises.

### Latest Updates And Structural Trends

We expect a recovery in the Canada construction industry in 2016, driven primarily by heightened public investment in infrastructure.

However, on the back of the release of the 2016 Budget, which falls short of campaign promises on tangible new infrastructure spending, we reduced our 2016 growth forecast. We also highlight the likelihood of further reductions to lofty goals, which will place downside risk to our strong outlook for the sector.

Following an estimated contraction of 3.2% for 2015, the construction industry will bounce back and post 2.5% real growth in 2016 and average 2.1% annually over the four-year term of the Liberal government from 2016 to 2019. However, this is a reduction of our previous levels of 2.7% and 3.0% respectively.

Transport infrastructure - primarily rail - renewable energy and especially water infrastructure will outperform over the next four years as the liberals aim to stimulate the economy and incentivise 'green infrastructure'.

We also expect non-residential construction to benefit from increasing investment in a recovering manufacturing sector, which will now benefit from a

weakened Canadian dollar.

Infrastructure and non-residential will now be the major growth drivers for the construction industry over the next four years, offsetting a continued decline in capital expenditure in the extractive sector and a slowdown in homebuilding.

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