

Canada Infrastructure Report Q4 2016

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Abstracts

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BMI View: The Canadian construction industry will recover from 2016 as the Liberal government spends big on infrastructure projects in a bid to stimulate the economy. However, we revised down our forecast for this year slightly due to subdued private investment and a slow start to stimulus programmes.

Latest Updates And Structural Trends

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

However, due to the 2016 Budget coming up short of campaign promises on tangible new infrastructure spending, a weak Q116 and a data revision by Statistics Canada we have 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 contraction 3.7% in 2015, the construction industry will bounce back and post 2.2% real growth in 2016 and average 2.8% annually over the four-year term of the Liberal government 2016-2019.

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'.

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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