

Central America Infrastructure Report Q1 2016

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Abstracts

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BMI View: We forecast an average of 2.1% real growth for the six construction industries of Central America in 2016. The decline from our forecast for 2015 - 4.4% - is mainly due to a steep drop-off in Panama as it concludes expansion of the Panama Canal and a normalisation of a housing boom in Nicaragua. The region will still offer significant opportunities: the transport sector will see strong growth as development funds target regional integration and Panama will recover by 2018 as increased public spending funds a strong project pipeline.

Latest Updates And Structural Trends

El Salvador's construction industry is poised to benefit from an influx of capital from regional development banks and a US aid agency. We have downgraded our forecast for 2015 to a still positive, but muted 1.3%. However, we expect development agency backed projects to pick up steam in 2016 and forecast the construction industry to grow at 4.6% annually from 2016 to 2019.

Honduras is also gaining support from development banks and is set to end its construction industry recession in 2016. Although projects in the country have suffered from delays in the past, our optimism for the industry is supported by a number of high-value projects which have already reached financial close and are set to break ground early in 2016.

Contents

BMI Industry View

Table: Central America Construction Industry Real Growth

SWOT

Infrastructure SWOT

Industry Forecast

Panama - Infrastructure Spending To Continue Post Canal Expansion

Table: Panama 10 Year Construction Industry Forecast

El Salvador - Development Funding Poised To Boost Industry

Table: El Salvador 10 Year Construction Industry Forecast

Nicaragua - Boom To Slow In Coming Quarters

Table: Construction And Infrastructure Industry Data (Nicaragua 2014-2024)

Guatemala - Corruption Continues To Beset Sector

Table: Guatemala 10 Year Construction Industry Forecast

Honduras - Construction Industry Set To Recover In 2016

Table: Construction And Infrastructure Industry Data (Honduras 2014-2024)

Costa Rica - Delays And Muted Investment Drag On Construction

Table: Costa Rica 10 Year Construction Industry Forecast

Industry Risk/Reward Index

Industry Risk Reward Ratings

Table: Central America Risk Reward Index

Latin America - LatAm Infrastructure RRI: Ambitious Plans Will See Limited Realisation

Table: Latin America Infrastructure Risk/Reward Index

Market Overview

Competitive Landscape

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Infrastructure Risk/Reward Index Indicators

Table: Weighting Of Indicators

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