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Central America Infrastructure Report Q2 2015

https://marketpublishers.com/r/CD205AC9D18EN.html
Date: April 2015
Pages: 96
Price: US$ 1,295.00 (Single User License)
ID: CD205AC9D18EN

Abstracts

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BMI View: We currently forecast an average of 2.3% real growth in Central America's construction industry value for 2015, which is considerably higher than our regional average estimate for 2014 at 0.4%. We expect Honduras, El Salvador and Nicaragua's construction industries to return to positive growth in 2015 while Panama's will contract, as the completion of the Canal expansion nears its end.

We see high risks, small scale and limited growth opportunities across the region as a whole. A crucial factor underpinning our forecasts for infrastructure investments in future years is political and security risk. This is a particular concern in El Salvador, Honduras, and Guatemala where high levels of crime, homicide, violence, and insecurity exacerbate operational risks for companies willing to invest in those countries. As such, we believe that local and regional companies (especially Mexican and Brazilian), as well as Chinese players which have a stronger appetite for risk, are best placed to benefit from the opportunities on offer in the region. In this context, we also highlight Spanish companies which have an established presence in Central America.

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