

Chile Infrastructure Report Q3 2016

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Abstracts

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BMI View: A robust project pipeline across energy, water, transport, residential and social infrastructure supports our highly positive outlook for Chile's construction sector, in 2016 and throughout the ten-year forecast period to 2025. The government is highly supportive of construction sector growth and has created an open investment environment via the extensive use of public-private partnerships (PPPs), particularly in the transport sector, and healthy access to project financing. While some downside risk is presented by falling revenues from key exports, private consumption and fixed capital investment are expected to remain in positive territory moving forward.

Latest Updates And Structural Trends

The government is committed to improving housing infrastructure, with 25,000 new residential units due to be built across the country. In the non-residential sector, a large number of hospitals and smaller health facilities are planned or under construction under the ongoing plan to invest USD4bn in the country's healthcare system - although we do note projects have been subject to extensive delays.

Roads continue to take the bulk of investment in the transport infrastructure segment. PPPs and concessions are used extensively in the transport sector and the already expansive project pipeline will receive a further boost from April 2016 launch of a USD1.4bn investment plan to improve roads in 12 regions of the country in the next five years.

Rising household and industrial consumption will ensure investment continues into Chile's power infrastructure. As well as new thermal power plants under

development, we are also seeing extensive investment into renewables, particularly wind and solar power. The outlook is less positive for hydropower, where major projects continue to face public opposition.

Overall the large number of projects across the industry mean that we expect to see steady growth in construction industry value in the coming years. Following growth of 3.6% in 2016, we forecast annual average growth of 3.5% between 2017 and 2025, with construction industry value expected to reach USD40.6bn by the end of the current forecast period

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