

Czech Republic Infrastructure Report Q4 2016

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Abstracts

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BMI View: The Czech construction industry is expected to expand 5.95% y-o-y in 2016, slightly higher than the already strong figures of 2015. This year, the main growth drivers are expected to be the non-residential and transport sectors. The latter through the rail and roads sub-sectors, are still enjoying EU-driven investment. The residential and non-residential building industry will be another bright spot in 2016 as robust Czech economy and high household disposable income increase housing demand.

Latest Updates And Structural Trends

Following the years of recession after 2008 financial crisis, the Czech construction sector was and still is a symbol of the country's economic resurgence. In 2015, the sector grew 5.26% y-o-y and it is expected to expand by a similar growth rate in 2016. Increasing household consumption, low inflation and unemployment in combination with higher investment activity, facilitated growth acceleration in the economy, which started in 2013.

The Czech residential and non-residential building industry will grow moderately over our 10-year forecast period to 2025. This is mainly due to the increasing growth in the non-residential sector at least until 2020 as a result of the growing office space and industrial real estate. Furthermore, due to the domestic economic growth and increased housing demand, residential prices increased in 2015 and in Q116, which is another indication of growth in the residential industry. The residential and nonresidential sector is expected to grow 3.4% annually between 2016 and 2025, on average.

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