

Ecuador Infrastructure Report Q2 2016

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Abstracts

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BMI View: Ecuador's infrastructure development will slow considerably over the next five years as the country faces the widest budget deficit in decades, mainly due to the sustained low oil price. The government's push for PPPs will be critical to maintaining growth in the construction industry, particularly in the transport sector where there is a sizeable project pipeline.

Latest Updates And Structural Trends

After a considerable slowdown in Ecuador's construction industry growth in 2015, we expect growth to remain moderate over the coming years. We forecast an average of 3.8% real growth between 2016 and 2020, compared to the 9.7% between 2010 and 2014.

Falling oil prices will have a detrimental impact on the government's capacity to spend in infrastructure development, particularly for projects in the planning stage. Our Oil & Gas team forecasts Brent to average USD58/bbl over the next five years.

High urbanisation rates have increased demand for infrastructure in Ecuador - particularly transport and utilities infrastructure, as well as housing. However, weaknesses in the country's business environment will continue to present risks and cap growth. Chief among these will be financing.

Ecuador's government plans to build four PPP infrastructure projects in the country. The government is implementing regulations and laws to drive the PPP plan, including ports and highway projects. The schemes, which are expected to

cost about USD1.5bn, could be developed on a build-operate-transfer basis.

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