

France Infrastructure Report Q3 2016

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Abstracts

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BMI View: The construction industry should return to growth in 2016, with 0.80% real growth after years of strong contraction. Nevertheless, growth will remain weak over the next few years as a weak domestic economic environment and ongoing policy and regulatory uncertainty are undermining investor confidence and we expect to see limited gains in terms of fixed capital formation.

Forecasts And Latest Updates

Weaknesses in France's labour market - in terms of unemployment and lack of competitiveness - support our modest outlook over the country's construction industry.

Our outlook for the residential and non-residential construction sector in France remains subdued. Following severe contractions over the past four years, we expect to see modest but positive growth from 2016 onwards. However, annual expansion will remain in the low single digits throughout the forecast period to 2025, with few catalysts in place for stronger growth.

Transport infrastructure remains the strongest sector in France's construction market, with annual average growth of 3.0% expected throughout the forecast period to 2025. Railway and metro projects attract the majority of the investment in the sector. Notably, construction of the first phase of the EUR25bn (USD28.42bn) Grand Paris orbital express metro network in France officially started in June 2016.

France's energy and utilities infrastructure sector is expected to record minimal

growth in 2016, and grow moderately thereafter. We have slightly increased our growth outlook for the sector this quarter on the back of our Power team's increasingly optimistic view on opportunities within the solar and wind power sectors. Improved regulatory clarity, strong government support and ambitious targets for nonhydropower renewable is seeing increased industry uptake prompting us to revise upwards our energy and utilities growth forecast.

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