

# Germany Infrastructure Report Q3 2016

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## Abstracts

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**BMI View:** Germany's solid economic performance continues to present upside risks to our construction industry forecasts over 2016 and 2017, although we note a lack of investment from the government and corporations means growth will trend lower over our 10-year forecast period. The rail infrastructure and renewables projects remain the market's bright spots.

### Latest Updates And Structural Trends

This quarter we maintained our forecast that Germany's construction sector will register healthy real growth rates of 1.8% and 1.4% in 2016 and 2017 respectively. Our longer-term outlook also remains stable, with the industry's annual growth rates averaging 1.3% between 2016 and 2025.

Germany's net transport infrastructure industry's value has been contracting for four consecutive years now, declining by another 1.9% y-o-y in 2015. While we forecast a strong recovery 2016, with the growth rate forecast at 3.1% y-o-y, the pace of expansion will decelerate gradually across our review period to 2025, averaging 1.7% growth per annum.

In March 2016, the German government outlined its plans to spend about EUR260bn over the next 15 years to upgrade its infrastructure. According to Reuters reports, around 70% of the funds will be allocated to transport infrastructure. Although the details of this plan are still being worked out, it poses a strong upside risks to our current growth projections.

In 2015, energy and utilities industry value registered 2.6% expansion in real

terms on account of strong performance in the power plants and transmission grids segment. Over our 10-year review period to 2025, we forecast the industry to register sustained, albeit slower real growth rates of 2.2% per annum.

Germany will launch two tenders in 2017 for offshore wind capacity totalling 2.92GW, according to draft plans published by the federal Ministry for Economic Affairs and Energy.

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