

# Germany Infrastructure Report Q4 2016

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## Abstracts

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**BMI View:** Despite strengthening external headwinds, Germany's economy demonstrates resilience, driven by robust private consumption trends. This bodes particularly well for the residential construction sector, which will lead to expansion in the construction industry over the next few years. Over the longer term, the industry will benefit from Germany's ongoing transition to a green energy economy as well as considerable investment in the rail sector.

### Latest Updates And Structural Trends

Despite external headwinds facing the German economy, we maintain our positive forecasts for the country's construction industry over the next few years. We project the total value of the industry to increase by 1.8% y-o-y in 2016 and 1.4% y-o-y in 2017. However, we keep our relatively subdued longer-term outlook, mostly on account of limited government funding allocated to infrastructure projects.

After several consecutive years of declines, Germany's transport infrastructure industry is set to rebound in 2016, recording a 3.6% y-o-y growth in real terms. Industry expansion will be driven primarily by the railways sector, with smaller contributions coming from roads & bridges as well as airports sectors. During 2016-2025, the industry is forecast to average an unimpressive 1.7% growth rate, with the upside risk coming from plans for greater state investment in this area.

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