

Hungary Infrastructure Report Q3 2016

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Abstracts

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BMI View: Hungary's construction sector growth will continue to be backed mainly by EU funds; in the transport infrastructure industry, road and rail projects will benefit mostly, while in the energy and utilities infrastructure industry, the power plants and transmission grids as well as the oil and gas pipeline subsector will experience higher growth. Residential building industry will grow substantially due to high disposable household income, as a result of an improving economic performance, decreasing unemployment rate and low inflation. The construction industry will expand 1.9% y-o-y in 2016, with an average annual real growth of 2.9% over 2016-2025.

Latest Updates And Structural Trends

Civil engineering projects have been the primary drivers of the construction sector rebound, with road and railway projects in particular, driving the civil engineering growth. However, in January and February 2016, the volume of construction output decreased 20.1% and 19.2% y-o-y, respectively, the construction of buildings also declined by 12.6% and 8.6% y-o-y, respectively as well as civil engineering works by 28.5% y-o-y in January and by 35.4% y-o-y in February. In 2015, the figures were positive, as the volume of construction output increased 3.0% y-o-y, the construction of buildings increased 4.8% y-o-y and civil engineering works 1.6% y-o-y (Hungarian Central Statistical Office, 2016).

According to Hungarian news agency MTI, the government and the European Commission reached a political agreement, significant for the country, in a dispute over road construction tenders, Cabinet Chief János Lázár stated on April 8, 2016 (Budapest Business Journal, 2016).

Hungary is able to draw EUR40mn of EIB road development loan directly and the remaining EUR100mn can be received in two tranches after the clarification of contract details and conditions, as Ágnes Hornung, Hungarian Economy Ministry state secretary, stated on March 8, 2016 (Budapest Business Journal, 2016).

As announced on March 29, 2016, the bank CIB Group anticipates further recovery on the Hungarian property market due to favorable investment environment and several state incentives, such as a VAT rate cut and new home purchase subsidies for families with children (CSOK) (Budapest Business Journal, 2016).

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