

Hungary Infrastructure Report Q4 2016

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Abstracts

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BMI View: Currently, there is an attempt for rebuilding Hungary's construction sector. An increase in new homes built and in the number of building permits issued in H116 has led to a boom in construction sentiment following the 25.3% decline y-o-y in the volume of construction output over the same period, primarily caused by the completion of works performed from EU funds at end-2015. The residential building industry and the railways and power plants and transmission grids sub-sectors will be the only growth drivers over this year. The construction industry will contract 14.5% y-o-y in 2016, with an average annual real growth of 1.4% 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. In June 2016, the volume of construction output decreased 16.2% y-o-y, the construction of buildings rose by 7.4% y-o-y as a result of the increase in industrial construction, while in contrast civil engineering works declined by 36.8% y-o-y due to the completion of works performed from EU funds at end-2015 (Hungarian Central Statistical Office, 2016).

In Hungary, road projects worth more than EUR200mn awarded to several local companies in June 2016.

The Hungarian government will allocate HUF790bn to railway projects.

As announced in mid-June 2016, Attila Aszódi, government commissioner responsible for the upgrade of Paks nuclear plant, stated the building permit for

the two new blocks could be issued by 2018, the new blocks are expected to go online in 2025 and 2026, while Paks could receive an environmental certificate within 2016 (Budapest Business Journal, 2016).

As announced on July 13 2016, the value of commercial real estate transactions in Hungary in H116 tripled compared to H115, exceeding EUR910mn, which is more than 2015 s total (JLL, 2016).

The demand for quality space remained robust on the industrial real estate market in Q216 in Hungary, mostly driven by renewals, but occupiers are still restricted by the low amount of available space suitable for their needs (Cushman & Wakefield, 2016).

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