

# Philippines Infrastructure Report Q3 2016

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## Abstracts

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**BMI View:** The outlook for Philippines' construction sector remains positive, but the presidential election will weight on construction activity, which has led us to downgrade our forecast for the construction sector in 2016 - with growth now expected to be 7.5%.

### Latest Updates And Structural Trends

Our outlook for Philippines' construction industry remains positive and we forecast real growth of 7.5% and 8.9% in 2016 and 2017 respectively. The presidential election poses downside risks to our outlook as it will result in project delays and could lead to a review or even cancellation of planned and ongoing development projects. The victory of Mar Roxas, Grace Poe and Miriam Defensor-Santiago would most likely bring continuity in terms of PPP projects, whereas that of Jejomar Binay and Rodrigo Duterte would bring change.

The approval by the House of Representatives of the Bill 6331, known as the PPP Act, which will institutionalise and strengthen the PPPs, bodes well for the long-term growth of the construction sector by providing greater investor protection and incentives.

The bid submission deadline for five regional airport projects and the Davao seaport project was rescheduled from March 28 to an unspecified date. The postponements pose downside risks to these projects as it is not clear whether they will remain a priority for the new administration.

We expect water infrastructure will outperform in 2016 and 2017, with the Philippines-based Maynilad Water Services' allocation of more than USD120mn

to expand its wastewater treatment capacity and sewerage coverage in the country in 2016, illustrating the trend.

We believe the residential sector construction will be supported by strong structural growth fundamentals for housing a large and young growing population and rising middle income class, while continuous expansion of the tourism industry, coupled with efforts by the government to reinvigorate its gaming and leisure industry, will support the non-residential sector.

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