

Slovenia Infrastructure Report 2016

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Abstracts

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BMI View: After five years of industry contraction, the construction sector is once again growing since 2014, along with the economic recovery of the country. A slowly recovering economy, lower unemployment and rising consumer confidence will provide a moderate increase for residential and non-residential construction. While Slovenia's transport sector dominates the country's infrastructure industry, we highlight the rising importance of gas interconnector projects in the energy and utilities sub-sector as some of the most important infrastructure projects going forward. These will receive EU funding related to diversifying energy sources and limiting Russian gas dependence.

We expect the Slovenian construction industry will grow moderately over the forecast period to 2025, at an average annual rate of 5.03%. As for the construction subsector mix, there will be very little change in dominance over our forecast period to 2025. Residential and non-residential construction will continue to represent roughly 57-58% of total construction industry value; transport infrastructure about 31%; and energy and utilities about 11%.

Transport will contribute around 73% to total infrastructure value, with roads and bridges dominating transport spending. Energy and utilities will contribute 27% to infrastructure value over this period. Within the Energy and Utilities, we note water infrastructure, which has accounted for at least half of Slovenia's energy sector value for many years, will begin to lose some of this long-held dominance to the power plants, transmission grids and oil and gas pipelines subsectors, as they receive EU funding related to diversifying energy sources and limiting Russian gas dependence. This will notably be the case through gas interconnector projects.

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