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South Africa Infrastructure Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We have downgraded our construction industry real growth forecasts for 2016, which is now 2.8% y-o-y. Business sentiment will continue to remain low, seeing a poor outlook for the non-residential building sector, which has previously been a bright-spot. Rail and renewable energy infrastructure projects remain our favoured sectors, along with low-cost housing.

Latest Updates An Structural Trends

We have lowered our real growth forecast for South Africa's construction sector as the downside risks we highlighted last quarter have taken hold. We now forecast real growth of 2.8% in 2016, average annual growth of 2.8% over the next five years and 3% over our 10-year forecast period.

The ongoing power crisis, strikes by unionised workers, the slowdown in the Chinese economy and macroeconomic headwinds such as the increasingly hawkish stance of the South African Reserve Bank (SARB), will continue to drag on economic sentiment - hitting the non-residential sector in particular. We forecast average annual real growth in the residential and non-residential sector of 2.4% over the next ten years.

Rail, port and IPP projects (renewables and thermal) will drive our infrastructure forecasts, which average 3.6% over the next ten years.

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