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South Africa Infrastructure Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: South Africa's construction sector has entered into a tepid period of growth as business sentiment has been heavily eroded, which we expect will lead to significant cuts to capital expenditure over 2016 and 2017. While South Africa will remain a choice investment desitination in SSA, the 2016 budget did little to alleviate concerns over a ratings downgrade, which will further drag on growth. Rail and renewable energy infrastructure projects remain our favoured sectors, along with low-cost housing.

Latest Updates And Structural Trends

Business sentiment is set to drag on growth heavily over 2016 and 2017. We now forecast just 1.6% real growth in the construction sector in 2016 as the economy slows on the back of reduced capital expenditure and a tighter consumer outlook.

We have taken our non-residential building forecasts into negative y-o-y real growth territory, as macroeconomic headwinds continue to drag; currency depreciation, sluggish economic growth, interest rate increases and mining sector divestments have been factored into our outlook.

Water infrastructure has seen its outlook improved, owing to the 2016 budget announcement, although we continue to see rail and IPP projects (renewables and thermal) driving our infrastructure forecasts? which average 3.4% over the next ten years.

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