

South Africa Infrastructure Report Q3 2016

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Abstracts

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BMI View: South Africa's construction market has entered into a period of subdued growth as macroeconomic and operational headwinds weigh on business confidence and limit productivity in the sector. We expect rail and renewable energy sectors to post the most solid performance, with improved freight logistics and a more stable power supply crucial to economic growth. Support will also stem from the continued implementation of the low-cost housing programme.

Forecast & Industry Developments

We are maintaining our forecast for 1.6% real growth over 2016 and annual average growth of 2.2% in real terms over the next five years up to 2020.

Nominal industry value will rise from an estimated USD11.2bn in 2015 to USD15.5bn in 2025, keeping it as one of the largest construction markets in Sub-Saharan Africa.

We expect rail investment plans to take shape over our forecast period, with parastatal Transnet in a solid financial position to execute its key projects and the government eager to overcome bottlenecks in the country's freight logistics network.

New and proposed policies extending the state's power into investment and land matters are eroding business confidence in the sector, which is already poor in light of the weakening rand and subdued commodities outlook.

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