

Ukraine Infrastructure Report Q2 2016

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Abstracts

BMI View: We continue to hold a negative view of the Ukraine's infrastructure sector. Sustained pressure on public spending and a hostile foreign investment environment will continue to hamper new developments and the project pipeline remains slim, despite a growing infrastructure deficit. As such construction industry value is expected to record further contractions over the short term, before slowly returning to recovery over the latter stages of the forecast period. Some potential upsides include an influx of funding from regional bodies to aid infrastructure recovery, as well as the (much delayed) privatisation of key state owned assets.

Latest Updates And Structural Trends

Large sections of Ukraine's power network were affected by a cyber attack in late 2015, with attacks reportedly continuing through January 2016, resulting in widespread power outages. These attacks highlight the vulnerability of Ukraine's infrastructure network to cyber attacks and will likely prompt investment in greater cyber security.

Meanwhile, power disruptions to the annexed Crimea continue following the destruction of substations in late 2015. Russia is seeking to establish direct electricity grid links with the annexed region, vital as Crimea's existing power plants only cover 20% of demand.

The poor investment environment in Ukraine, exacerbated by ongoing conflict and political tensions, will continue to hamper growth in the infrastructure sector. We expect construction industry value to fall by 13.1% in 2016 followed by a further decline of 4.68% in 2017 before a tentative return to growth.

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