

Ukraine Infrastructure Report Q4 2016

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Abstracts

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BMI View: The construction industry in Ukraine continues to face an unsettled outlook. While the country has a substantial infrastructure deficit, which has been exacerbated by the ongoing conflict in the east, the lack of public spending capacity and significant risks to private investment means little growth will be realised in the construction sector. Ukraine will remain heavily reliant on the provision of regional funding to drive forward transport and energy projects as the government contends with the falling value of the local currency as well as high rates of inflation, which mean there is little no public investment available for infrastructure.

Latest Updates And Structural Trends

Ukraine's economy is expected to remain sluggish in 2016 as the escalation in conflict derails a rebound in industrial production. The resurgence in the conflict poses a significant downside risk to our current forecasts for the infrastructure sector: not only will existing infrastructure sustain further damage, but vital and already restricted government resources will now be further curtailed.

The solar power sector may be one of the few bright spots in Ukraine's construction market. In July 2016 the government announced plans to develop the uninhabitable land around Chernobyl into a large-scale solar farm totalling 4GW. The European Bank for Reconstruction and Development (EBRD) is reportedly considering providing funding for the project in which two US investment firms and four Canadian energy companies are also reportedly expressing an interest.

The EBRD is also a major source of financing for transport projects in Ukraine,

including road and rail projects which will support some growth in value over the medium term. Overall however, this growth will not be sufficient to keep Ukraine's construction industry in positive territory and following limited growth of 1% in 2016 we expect to see further market contractions over our forecast period to 2025.

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