

# United Kingdom Infrastructure Report Q4 2016

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## Abstracts

Includes 3 FREE quarterly updates

**BMI View:** The Brexit vote in the short term will have a negative impact on the construction sector, most acutely felt in the residential and non-residential building sector. Infrastructure should be insulated from a downturn in the economy as budgetary allocations have been made, but over the longer term projects are vulnerable to revisions to government spending and further delays.

### Latest Updates And Structural Trends

Our core scenario following the Brexit vote now sees growth in the UK construction sector slowing to 1% in 2016 and 0.4% in 2017. The non-residential building sector is highly likely to be the hardest hit following the Brexit vote, in particular commercial and industrial real estate.

Should our upside scenario following the Brexit vote play out, we would expect the momentum gained from the quick transition of power within the Conservative party to the premiership of Theresa May, would be used to make decisions on major infrastructure projects and announce reforms to the house building sector to increase output.

The core of our downside scenario following the Brexit vote, is an extended period of economic contraction. We have cut our GDP forecasts for the UK, but should the economy falter then it could undermine the fundamentally strong demand picture in the housing market. Furthermore, non-residential building would see an even greater pull back in investment and the attraction of UK infrastructure assets to private investors would be eroded.

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