

# Vietnam Infrastructure Report Q3 2016

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## Abstracts

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**BMI View:** We maintain our positive outlook for Vietnam's construction sector, which will continue to be supported by strong economic growth and regulatory changes. We forecast transport infrastructure to outperform in 2016, followed by the energy and utilities sub-sector. We also maintain our positive outlook on the residential and non-residential construction sector, supported by large FDI inflows and a strong project pipeline, which will register the strongest growth over the long term.

### Latest Updates And Structural Trends

The government's decision to select investors for 23 large-scale transport infrastructure PPP projects worth VND39.9trn (USD1.83bn) in 2016 poses upside risks to the transport infrastructure sector, which we forecast to grow at 7.1% in 2016.

We maintain our positive outlook for the residential and non-residential segments, which we forecast to grow at an annual average of 6.5% between 2016 and 2020. Real estate and manufacturing sectors will continue to be the key drivers of growth in the sector.

We forecast Vietnam's energy and utilities sector to grow at 5.9% in 2016, following the transport infrastructure sector. The growth will slow beyond 2016, averaging at 5% between 2016 and 2025.

Despite our positive outlook for Vietnam's infrastructure sector, we highlight that fiscal weakness poses major risks to construction growth. Consistent fiscal deficits in Vietnam as a result of a lack of spending prudence could undermine

much needed infrastructure development and weigh on economic growth.

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