

# Construction in Chile Market 2017–By Identifying the Key Market Segments Poised for Strong Growth in Future 2020

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WiseGuyReports published new report,  
titled “Construction in Chile”

## Synopsis

In real terms, the Chilean construction industry registered a growth rate of 2.8% in 2015. This was preceded by an annual growth rate of 1.6% in 2014, 3.2% in 2013, 7.0% in 2012 and 6.8% in 2011. Economic recovery, coupled with government investments in infrastructure, and residential construction, increased issuance of building permits and greater total surface area for construction contributed to growth. In addition, reconstruction projects after the catastrophic earthquake and tsunami in 2010 supported industry growth during the review period (2011–2015).

The country's construction industry will continue to expand in real terms over the forecast period (2016–2020) due to investments in transport infrastructure, energy and utilities, and affordable housing projects.

The government plans to invest CLP18.9 trillion (US\$28.0 billion) under the Infrastructure Master Plan to develop the country's infrastructure by 2021. Under the infrastructure plan, CLP2.0 trillion (US\$3.0 billion) will be invested to develop Chile's submarine fiber optic network between Aysén and Magallanes, and construct 20 wastewater treatment plants in the northern region by 2021.

In real terms, the Chilean construction industry is expected to increase from a compound annual growth rate (CAGR) of 3.64% during the review period to 4.29% over the forecast period.

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## Summary

Construction in Chile – Key Trends and Opportunities to 2020 report provides detailed market analysis, information and insights into the Chilean construction industry, including:

- The Chilean construction industry's growth prospects by market, project type and construction activity
- Analysis of equipment, material and service costs for each project type in Chile
- Critical insight into the impact of industry trends and issues, and the risks and opportunities they present to participants in the Chilean construction industry



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Construction in Chile

- Profiles of the leading operators in the Chilean construction industry
- Data highlights of the largest construction projects in Chile

## Scope

This report provides a comprehensive analysis of the construction industry in Chile. It provides:

- Historical (2011-2015) and forecast (2016-2020) valuations of the construction industry in Chile using construction output and value-add methods
- Segmentation by sector (commercial, industrial, infrastructure, energy and utilities, institutional and residential) and by project type
- Breakdown of values within each project type, by type of activity (new construction, repair and maintenance, refurbishment and demolition) and by type of cost (materials, equipment and services)
- Analysis of key construction industry issues, including regulation, cost management, funding and pricing
- Detailed profiles of the leading construction companies in Chile

## Key points to buy

- Identify and evaluate market opportunities using standardized valuation and forecasting methodologies.
- Assess market growth potential at a micro-level with over 600 time-series data forecasts.
- Understand the latest industry and market trends.
- Formulate and validate strategy using critical and actionable insight.
- Assess business risks, including cost, regulatory and competitive pressures.
- Evaluate competitive risk and success factors.

## Key Highlights

- The government is focused on the development of transport infrastructure to provide better connectivity for citizens and support overall economic development. Under the Infrastructure Master Plan 2014–2020, the government plans to invest CLP16 trillion (US\$28 billion) to develop road, rail and airports by 2020. The government's infrastructure investment is expected to support the infrastructure construction market over the forecast period.
- Under the Agenda Digital Imagina Chile 2013–2020 (Chile Digital Agenda 2013–2020), the government plans to increase internet access from 40% of the total population in 2015 to 80% by 2020. Accordingly, it plans to invest CLP14.8 trillion (US\$26.0 billion) to develop a fibre-based broadband network and long-term evolution (4G) network in the country by 2024. Over the forecast period, the government's plan to increase internet penetration to support economic growth and development is expected to drive growth in the energy and utilities construction market.
- The rising population has elevated demand for houses in the country. The government plans to bridge the gap between supply and demand for housing units by constructing houses under housing programs. In May 2016, the government announced that it planned to build 25,000 new houses under the Nuevo Programa de Integración Social y Territorial, the New Social Integration and Territorial Program by 2020.
- The government is developing and modernizing the country's transport network under the public-private partnership (PPP) model. Accordingly, in 2015, a consortium consisting of Aéroports de Paris, Vinci Airports and Astaldi announced plans to build and redevelop the Arturo Merino Benítez international airport in Santiago. Under this plan, the government aims to renovate and redesign existing terminals of Arturo Merino Benítez airport, and build 175,000m<sup>2</sup> new terminals with 37 aircraft stands by 2020.
- The government's commitment to provide quality service in healthcare and quality education is expected to support the institutional construction market over the forecast period. Accordingly, in the 2016 budget, the government allocated CLP117.4 billion (US\$173.5 million) for the

construction of primary schools. Additionally, the government plans to invest CLP45.6 billion (US\$67.4 million) to build 832,658 pre-kindergartens across the country by 2020.

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