

Construction in Russia Market 2018 Trend, Segmentation and Opportunities Forecast To 2022

Construction in Russia Market 2018 Analysis, Opportunities and Forecast to 2022

PUNE , INDIA, April 25, 2018 /EINPresswire.com/ -- Synopsis

Construction activity in Russia was weak during the review period (2013–2017), as a result of depressed economic conditions, low oil prices and sanctions imposed by Western countries following Russia's involvement in the Ukrainian crisis. Public expenditure cuts implemented by the government, coupled with weak investor confidence, led to reduced infrastructure construction activity.

The industry is expected to recover over the forecast period (2018–2022), however, and register positive growth supported by the government's effort to revitalize economic growth through investments in residential, transport and energy infrastructure projects.

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Preparations for the Fifa World Cup in Russia in June 2018 have helped to support the retail, and leisure and hospitality building categories. The government estimates that over 2.0 million tourists will visit the country during the event.

Downside risks to the forecast remain pertinent: the economy is vulnerable to fluctuations in oil prices and western sanctions are expected to remain in place for some time. Nevertheless, improving global and domestic economic conditions are expected to support the industry's expansion.

In real terms, the industry's output value is expected to post a forecast-period CAGR of 2.66% in 2022, compared to -3.06% during the review period.

Summary

[Construction in Russia](#) – Key Trends and Opportunities to 2022 report provides detailed market analysis, information and insights into the Russian construction industry, including:

- The Russian construction industry's growth prospects by market, project type and construction activity
- Critical insight into the impact of industry trends and issues, as well as an analysis of key risks and opportunities in the Russian construction industry
- Analysis of the mega-project pipeline, focusing on development stages and participants, in addition to listings of major projects in the pipeline.

Scope

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

- Historical (2013-2017) and forecast (2018-2022) valuations of the construction industry in Russia, featuring details of key growth drivers.
- Segmentation by sector (commercial, industrial, infrastructure, energy and utilities, institutional and

residential) and by sub-sector

- Analysis of the mega-project pipeline, including breakdowns by development stage across all sectors, and projected spending on projects in the existing pipeline.
- Listings of major projects, in addition to details of leading contractors and consultants

Reasons 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

- Timetric expects the infrastructure construction market output to record a forecast-period CAGR of 7.98% in nominal terms, supported by the government's effort to develop the country's transport infrastructure. In December 2017, Russian Railways (RZD) announced plans to invest RUB580.0 billion (US\$9.7 billion) in 2018 to upgrade and expand the country's rail network. Furthermore, RZD plans to allocate RUB672.9 billion (US\$11.1 billion) and RUB591.2 billion (US\$9.7 billion) for the development of various rail infrastructure projects in 2019 and 2020 respectively.
- In September 2017, the government approved the strategy for the development of automotive exports until 2025. Under the new strategy, the government aims to increase the country's automotive industry exports to RUB285.8 billion (US\$4.9 billion) by 2025. This is expected to include the manufacturing of 240,000 cars every year until 2025 which in turn will support the industrial construction market over the forecast period.
- Timetric expects the residential construction market to retain its leading position over the forecast period, with a share of 37.4% of the industry's total value in 2022. In December 2017, the government allocated RUB600.0 billion (US\$10.3 billion) until 2022 as subsidized mortgage loans to young families. According to the projections of the Agency for Housing Mortgage Lending, the government's initiative is expected to provide housing loans at low interest rates to over 600,000 families, which is in turn expected to drive the construction of new housing units on a 13.0 million m2 area by 2022.
- In line with the increasing demand for electricity, in June 2017 the Government of the Krasnoyarsk region launched the Electric Power Industry Development Program. This involves a total investment of RUB8.2 billion (US\$140.0 million) and includes the construction of five substations and the reconstruction of two substations, transmission lines facilities and power grid facilities in Krasnoyarsk. Upon its successful completion in 2022, this program will generate 40.0MW of energy.
- The total construction project pipeline in Russia, as tracked by the Construction Intelligence Center (CIC), including all mega projects with a value above US\$25 million, stands at RUB89.2 trillion (US\$1.5 trillion). The pipeline, which includes all projects from pre-planning to execution, is skewed to late-stage projects, with 58.0% of the pipeline value being in projects in the pre-execution and execution stages as of April 2018.

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