

Infrastructure in South Africa Market Snapshot Analysis by 2020

Infrastructure in South Africa Market to Witness Exponential Growth By 2020

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Synopsis

The report provides a detailed look into the infrastructure sector in South Africa, including analysis of the state of the current infrastructure, the regulatory and financing landscapes, and the major projects in the construction pipeline.

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The report covers all key infrastructure sectors: roads, railways, electricity and power, water and sewerage, communication, and airports and ports.

Summary

Infrastructure expenditure in South Africa is forecast to increase over the 2017–2020 period. According to Infrastructure Intelligence Center (IIC), the infrastructure construction market's value rose from ZAR152.5 billion (US\$11.1 billion) in 2010 to ZAR222.3 billion (US\$16.1 billion) in 2015, and is projected to reach ZAR335.3 billion (US\$24.3 billion) by 2020 in nominal value terms. This is based on the assumption that a number of major infrastructure projects will proceed as planned, including the 5,000MW Upington Solar Power Park project, the Gautrain Commuter Expansion, the Gauteng Freeway Improvement: Phase II Bulk Distribution System, the Port of Ngqura Manganese Export Terminal Expansion and the Johannesburg–Durban High-Speed Rail Link. However, there are policy and political uncertainties that will weigh on investor confidence and could result in projects being delayed.

Scope

A concise analysis of the administrative, economic and political context for [infrastructure in South Africa](#).

An in-depth assessment of the current state of infrastructure in South Africa, including roads, railways, electricity and power, water and sewerage, communications, airports and ports.

A focus on main political and financial institutions involved in the infrastructure market, as well as the competitive and regulatory environment.

For each infrastructure sector, an explanation of the key drivers of growth in new investment and an analysis of the project pipeline, with a detailed look at the prospects for major projects and the companies that have secured contracts.

Reasons to Buy

- Assess the current state of South Africa infrastructure, and the main drivers of investment, including the key institutions and financing methods.
- Investigate forecasts and gain an understanding of key trends in each of the main infrastructure sectors.
- Analyze the main project participants operating in each sector, to better understand the competitive

environment.

- Identify top projects by sector, development stage and start date, to inform expansion strategy.

Key Highlights

Report is currently tracking 96 strategic infrastructure construction projects in South Africa at all stages of development, from announcement to execution. These projects have a total investment value of US\$117.9 billion.

The electricity and power sector accounts for the largest share of the project pipeline, with a total project value of US\$90.2 billion. This is followed by railway infrastructure projects with a pipeline of US\$11.1 billion. The pipeline for road infrastructure projects values US\$6.5 billion, and for water and sewerage infrastructure it stands at US\$5.9 billion. For airports and other infrastructure, the total pipeline stands at US\$4.1 billion.

In the 2015–2016 World Economic Forum Global Competitiveness Report, South Africa ranked 59th out of 140 countries in terms of the overall quality of its infrastructure. The country was positioned ahead of other major African countries, with Nigeria ranked 133, Egypt 114 and Algeria 101.

In the 2016 Medium-Term Budget Statement (MTBS), Finance Minister Pravin Gordhan announced that the government would continue to invest in economic infrastructure in line with the National Development Plan (NDP). Over 2016–2019 the government will spend ZAR987.4 billion (US\$71.6 billion) in constructing and modernizing infrastructure. Of the total, ZAR334 billion (US\$24.2 billion) will be invested in transport and logistics, ZAR243 billion (US\$17.6 billion) in energy, and ZAR137 billion (US\$9.9 billion) in water and sanitation.

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Norah Trent

wiseguyreports

+1 646 845 9349 / +44 208 133 9349

email us here

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