

South Korea Infrastructure Report Q1 2016

Date: November 4, 2015

Pages: 89

Price: **US\$ 1,295.00**

Publisher: BMI RESEARCH

Report type: Strategic Report

Delivery: Download

ID: SB642200271EN

Leaflet:

Includes 3 FREE quarterly updates

BMI View: We downgraded our growth forecast for South Korea's construction sector on the back of a weaker export outlook weighing on non-residential construction. The residential building segment remains a bright spot, supported by favourable credit conditions and housing policies, which will provide some respite over the next two quarters.

We expect a slight expansion in South Korea's construction sector of 0.4% in real terms, down from 1.1% previously, over 2015. For 2016, we maintain our growth forecast of 1.35%.

We believe weakening exports due to a lack of demand for South Korea's manufactured products will continue to weigh on non-residential buildings. High household debt and wavering economic sentiment is dampening consumption spending on goods domestically.

Our full-year 2015 forecast is still higher than the growth registered by the sector in H115 as we expect residential buildings and civil engineering to provide some respite, amid the decline in non-residential construction.

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