

South Korea Infrastructure Report Q1 2016

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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.

BMI Industry View

Table: Infrastructure - Construction Industry Forecasts (South Korea 2014-2020)

Table: Infrastructure Risk Reward Index (South Korea)

SWOT

Infrastructure SWOT

Industry Forecast

Construction And Infrastructure Forecast Scenario

Table: Construction And Infrastructure Industry Data (South Korea 2014-2024)

Transport Infrastructure - Outlook And Overview

Table: Transport Infrastructure Industry Data (South Korea 2014-2024)

Table: Competitiveness Of South Korea's Infrastructure

Roads

Railway

Airports

Ports

Table: Key Projects: Transport

Energy And Utilities Infrastructure - Outlook And Overview

Table: Energy And Utilities Infrastructure Data (South Korea 2014-2024)

Thermal Sources Maintain Dominance

Table: Marubeni, Mitsubishi Heavy Industries - Orders Awarded In South Korea On March 22 2012

Renewables Outlook Clouded By Cheaper Alternatives

Power Consumption To Grow

Transmission

Table: Key Projects: Energy & Utilities

Residential/Non-Residential Building - Outlook And Overview

Table: Residential and Non-Residential Building Industry Data (South Korea 2014-2024)

Table: Key Projects: Construction And Social Infrastructure

Industry Risk Reward Ratings

South Korea - Infrastructure Risk/Reward Index

Rewards

Risks

Asia Pacific Infrastructure RRI: Developed Markets Increasingly At Risk

Table: Asia Risk/Reward Index

Market Overview

Competitive Landscape

Table: EQS Data

Company Profile

Hyundai Engineering and Construction

Doosan Heavy Industries & Construction

GS Engineering & Construction

Samsung C&T

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Infrastructure Risk/Reward Index Indicators

Table: Weighting Of Indicators

[Skip to top](#)

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