

China Infrastructure Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: China's construction sector will continue to see a structural slowdown as the country shifts from an unsustainable investment driven model, to one that is more consumption-led. Opportunities remain substantial, given the country's large infrastructure deficit and ongoing reforms to spur private investment and improve regional connectivity through its One Belt One Road initiative.

Latest Updates And Structural Trends

We forecast China's construction sector to grow by an annual average of 4.3% between 2016 and 2020 in real terms, a significant slowdown from the 7.9% registered between 2011 and 2015.

The real estate sector will remain a key drag on growth, with FAI into the sector seeing a consistent slowdown in growth rates over the past two years. Growth of FAI into real estate was 3.4% for the period Jan-Oct 2015, showing significant weakness relative to the 12.4% registered over the same period last year.

MTR Corp's involvement in the Beijing Metro Line 16 public-private partnership (PPP) project, coupled with the new PPP regulations indicate a brighter outlook for private sector investment in China's railway sector. This will be crucial in supporting Beijing's ambitious railway development plans, which have largely been driven by state-owned entities that are increasingly mired in debt.

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