

China Infrastructure Report Q3 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: While China's construction sector will continue to slow over the coming years, this will not cause a sharp collapse in large-scale spending on projects, with the government relying on investment in infrastructure to prop up growth rates. Railways, airports and water infrastructure will remain the key drivers of growth supported by the 13th Five-Year Plan.

Latest Updates And Structural Trends

We forecast China's construction sector to grow by an annual average of 4.2% between 2016 and 2025 in real terms, a significant slowdown from the 11.6% registered between 2006 and 2015.

Railways infrastructure will record strongest growth in 2016, reaching 8% as railway projects are gaining traction. Airports also remain high on the government's agenda, which is reflected in our bullish airports infrastructure value forecasts.

Growth in China's energy and utilities sector will be driven by coal-fired power plants and water infrastructure. While the pipeline of coal-fired power plants in China remains substantial, it will slowly decrease over the long term. This progressive decrease will be due to policy changes by the government to curb the excessive build-up of coal-fired power generation, and gas price reforms. Water infrastructure will register strongest growth over our five-year forecast period, with many projects gaining traction.

We maintain our view that strengthening of property prices will not be

sustainable over the long term and oversupply issues, tightening credit conditions and property tax reforms will eventually weigh on residential construction.

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