

# China Infrastructure Report Q4 2015

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## Abstracts

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**BMI View:** China's construction sector is undergoing a structural slowdown as the country shifts from an investment driven model, which focused on fiscal stimulus measures targeting the infrastructure sector. Opportunities remain substantial, however, 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.

### Key Trends And Developments

China's construction sector will grow by an annual average of 4.7% between 2015 and 2019, a marked slowdown relative to the 9.3% registered 2010-2014. We have long held the view the sector will see an inevitable slowdown as Beijing steers the economy towards more consumption-led growth, as opposed to an investment driven one.

We believe the slowdown in China's construction sector will continue to largely be led by the real estate segment and with FAI into the sector seeing a consistent slowdown in growth rates over the past two years.

We believe efforts by the government to use monetary and fiscal stimulus measures targeted at the infrastructure sector to prop up economic growth will not be sustainable. Despite also looking to attract private sector investment, we expect such efforts to have a limited impact on the sector's growth

Despite the slowdown, China will remain an attractive market, with the government's Belt and Road initiative, providing a boost to the transport segment. We also see opportunities in the railway sector and expect continued

investment in the sector during 2015.

We believe reforms are also a long-term positive for the sector and significant progress on reforms in the railway segment will bode well for the segment.

Such reforms will take years to gain traction due to three key factors: the time taken for private participation reforms to mature and be fully implemented, the general unattractiveness of infrastructure assets in China due to their elevated levels of leverage and the economic viability of the infrastructure projects on offer to the private sector.

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