

Japan Infrastructure Report Q4 2015

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Abstracts

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BMI View: The sluggish growth in construction and infrastructure growth in Japan is a sign the government's aggressive stimulus measures have already begun to wear off. This again underscores our long-held view that Japan's fiscal stimulus programme is not sustainable for the infrastructure sector and significant structural reforms are needed to restore competitiveness. To this end, a new market on the Tokyo Stock Exchange for infrastructure funds has the potential to boost private participation in the industry, while simultaneously taking pressure off government expenditure. Following a 1.6% contraction in 2014, we expect the construction industry to recover only slightly in 2015, with a forecast real growth rate of 0.8%.

Key Trends And Developments

The opening of a new market for infrastructure funds in Japan will boost the funding environment for domestic and regional infrastructure significantly. According to the Nikkei Asian Review, the Tokyo Stock Exchange (TSE) - a unit of the Japan Exchange Group (JXG) - opened as of April 2015. The market will target funds that invest in infrastructure projects such as renewable energy facilities, as well as airports and railways. The creation of such a market will allow investors to buy and sell funds listed on the exchange as shares and receive dividends based on the returns generated by the infrastructure.

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