

Malaysia Infrastructure Report Q3 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: We believe the real growth in Malaysia's construction sector will continue to moderate over the coming years, decelerating from an estimated 10.7% in 2015 to 7.8% in 2016 and 6.6% in 2017. Transport segment will remain the bright spot, driving overall growth.

Latest Updates And Structural Trends

The railways sector is forecast to be the fastest-growing infrastructure sub-sector in Malaysia, averaging 8.9% growth per annum between 2016 and 2020. This strong growth will be driven by several large-scale railway projects. Growth in the roads and bridges sector will also remain strong, averaging 8.6% between 2016 and 2020.

We forecast Malaysia's energy and utilities sector to grow by 6.9% in 2016 and at annual average of 5.1% between 2016 and 2025. The majority of Malaysia's electricity comes from thermal sources, with about 54% of total generation coming from gas-fired plants and we expect the power plants and transmission grids sub-sector to remain the main growth driver of Malaysia's energy and utilities infrastructure sector.

The residential and non-residential sector will see its growth slowing due to numerous internal and external headwinds. We maintain our view that while the high-end residential housing market is near saturation, a lack of affordable housing will provide opportunities in the residential sub-sector over the medium term.

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