

# South Korea Infrastructure Report Q2 2016

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## Abstracts

**BMI View:** We have downgraded our growth forecast for South Korea's construction sector on the back of new mortgage rules from early 2016, which will dampen the residential construction market from 2016 onwards. With a struggling non-residential building sector, it is the infrastructure sector, and notably the energy and utilities sub-sector, which will boost South Korea's overall construction industry growth into weak but positive territory.

### Latest Updates And Structural Trends

We expect a slight expansion in South Korea's construction sector of 1.41% in real terms for 2016, down from 1.98% over 2015. For 2017, we maintain our growth forecast of 1.32%. Overall construction industry growth in South Korea will remain in positive territory over our forecast period to 2025, despite being in the low 1-1.5% real growth bracket.

With negative growth rates in the non-residential building sector and weak long-term growth in the residential building sector, overall building industry real growth will remain in negative territory over our forecast period 2016-2025.

We downgraded residential building real growth rates this quarter on the back of new amortised loan rules and tougher lending rules to take effect in 2016. In addition, the lack of significant income increase, an ageing population and an increasing oversupply of new homes provide a weak long-term picture for the residential building sector.

## Contents

BMI Industry View

Latest Updates And Structural Trends

Table: Infrastructure - Construction Industry Forecasts (South Korea 2015-2021)

Table: Infrastructure Risk Reward Index (South Korea)

SWOT

Infrastructure SWOT

Industry Forecast

Construction And Infrastructure Forecast Scenario

Table: Construction And Infrastructure Industry Data (South Korea 2015-2025)

Transport Infrastructure - Outlook And Overview

Latest Updates

Table: Transport Infrastructure Industry Data (South Korea 2015-2025)

Structural Trends

Roads

Railway

Airports

Ports

Table: Key Projects: Transport

Energy And Utilities Infrastructure - Outlook And Overview

Latest Updates

Table: Energy And Utilities Infrastructure Data (South Korea 2015-2025)

Thermal Sources Maintain Dominance

Renewables Outlook Clouded By Cheaper Alternatives

Transmission

Table: Key Projects: Energy & Utilities

Residential/Non-Residential Building - Outlook And Overview

Latest Updates

Table: Residential and Non-Residential Building Industry Data (South Korea 2015-2025)

Table: Key Projects: Construction And Social Infrastructure

Industry Risk Reward Ratings

South Korea - Infrastructure Risk/Reward Index

Rewards

Risks

APAC Infrastructure RRI: Affirming A Benign 2016 Outlook

Table: Asia Risk/Reward Index

Market Overview

Competitive Landscape

Table: EQS Data

Company Profile

Hyundai Engineering and Construction

Doosan Heavy Industries & Construction

GS Engineering & Construction

Samsung C&T

Methodology

Industry Forecast Methodology

Sector-Specific Methodology

Risk/Reward Index Methodology

Sector-Specific Methodology

Table: Infrastructure Risk/Reward Index Indicators

Table: Weighting Of Indicators

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