

South Korea Infrastructure Report Q3 2016

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Abstracts

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BMI View: We maintain our growth forecast for South Korea's construction sector, noting the infrastructure sector, with the energy and utilities sub-sector in particular, will provide limited support to growth. However, this will be insufficient to offset the declines in the residential construction market due to the implementation of new mortgage rules from early 2016 and high levels of household debt, which will limit demand for residential property.

Latest Updates And Structural Trends

We expect South Korea's construction sector to expand slightly, growing by 1.41% in 2016 and 1.32% in 2017, supported by government investment in infrastructure and continued building in the run-up to the 2018 Pyeongchang Winter Olympics.

Overall building industry growth will remain in negative territory over our forecast period from 2016-2025 due to negative growth rates in the non-residential building sector and weak long-term growth in the residential building sector.

Increasing amounts of household debt as a result of loose monetary policy will curtail demand for new housing. Furthermore, stagnant wages and high levels of youth unemployment suggest the demand for residential property is unlikely to rise. In addition to an ageing population, the implementation of new amortised loan rules and an increasing oversupply of new homes provide a weak long-term picture for the residential building sector.

The government has maintained its commitment to investing in the infrastructure

sector and growth in this sector will help counter declines in the building industry and ensure the country's overall construction industry growth remains in positive territory. In particular, the energy and utilities sector is set to outperform the rest of the sub-sectors due to growth in the power plants and transmission grids infrastructure sector.

Despite the continued focus on thermal projects, there are large opportunities in the nuclear infrastructure sector in South Korea in future. The need to replace old reactors, growing energy demand, the costcompetitiveness of nuclear and efforts to reduce greenhouse gas emissions will see more nuclear plants coming online in South Korea. The nuclear projects, which are high cost, will drive forward infrastructure spending, along with thermal power projects.

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