

Taiwan Infrastructure Q2 2011

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Abstracts

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BMI View: New historical data show that real growth for Taiwan's construction industry was 11.3% in 2010, with Q410 achieving real growth of 5.2% year-on-year (y-o-y). This suggests that the stimulus measures initiated in 2008 are beginning to wane and we continue to expect a slowdown in the construction industry over the medium term. However, recent announcements by the Taiwanese government – US\$1.5bn on renewable energy investment and probable relaxation in laws barring Chinese participation in port projects – present upside potential to our forecast.

Key developments contributing to forecasts included:

In December 2010, the Taiwanese government has announced plans to invest TWD45bn (US\$1.47bn) in renewable energy technology over the next five years, highlighting its commitment to the growth of the renewables sector. While these initiatives have resulted in only few tangible outcomes for the renewable sector, we believe that the ongoing support from the government, highlighted by this latest investment plan, will likely attract interest from investors and boost growth in the energy and utilities infrastructure sector.

In January 2011, Taiwanese authorities announced that they would permit Chinese investors – barring restrictions – to participate in build-operate-transfer (BOT) projects at Taiwan's ports. This relaxation in regulations – to take place in late 2011 – is another sign of China and Taiwan's growing closeness in the maritime sector, and is opening up infrastructure opportunities for companies from both sides.

In January 2011, construction of the TWD7.5bn (US\$258mn) Kinmen Bridge connecting Kinmen Island and Lieyu in Taiwan was officially launched, KHL Group reported. The bridge will measure 5.4km in length and 15m in width and will be the world's longest sea crossing bridge. It is scheduled to be completed in 2016.

BMI anticipates Taiwan's economy will face strong macroeconomic headwinds that will stymie growth across the economic spectrum. The slowdown in exports (which accounts for 65% of Taiwan's GDP), the cooling of property prices and more subdued investment sentiment caused by deteriorating global conditions will have a moderating impact on construction industry growth, which we forecast to decelerate to 6.3% y-o-y in 2011. However, after this, we expect the value of the construction sector to remain at these levels, averaging real growth of 6.4% per annum between 2012 and 2015.

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