

Thailand Infrastructure Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Large public infrastructure projects, especially in transport and energy sectors, will be the key drivers of growth in Thailand's construction industry over the next few years. Meanwhile, soaring tourist arrivals and favourable economic environment will sustain positive trends in the residential/non-residential construction segment. We maintain our cautious longer-term forecasts due to the fragile political situation and skilled labour force shortages.

Latest Updates And Structural Trends

Supported by large public investment and favourable interest rates, growth in Thailand's construction sector will remain notable over the near-term, expanding by 5.5% y-o-y in 2016 and 3.3% y-o-y in 2017.

According to Thailand's National Economic and Social Development Board, the country's construction sector, especially the public segment, maintained robust growth in Q216. The sector expanded 7.5% q-oq, with public construction sector increasing 15.5% (y-o-y), while the private construction declined by 2.1% y-o-y in value terms.

Thailand's construction industry will benefit from heightened private investment in the rail sector. With the government having recently awarded a contract for the Red Line project, approved two Bangkok rail projects and put two high-speed rail projects under the PPP fast-track plan, rail will be a major driver of growth.

In June 2016, Airports of Thailand (AoT) revealed its plans to spend THB194bn

(USD5.5bn) over the next 15 years expanding its airports. The total cost of the scheme has been inflated from the previously planned THB140bn (USD3.97bn), largely due to a revision in the expansion at Bangkok's Don Muang International Airport, according to AoT President Nitinai Sirismatthakarn.

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