

Global
Construction

20
25

A global forecast
for the construction
industry to 2025

Global Construction 2025

European International Contractors Group
Global Construction Forecasts
Florence – 17 April 2015



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A global forecast
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Global Construction 2025 is the
third in a series of major global studies of the
construction and engineering industry



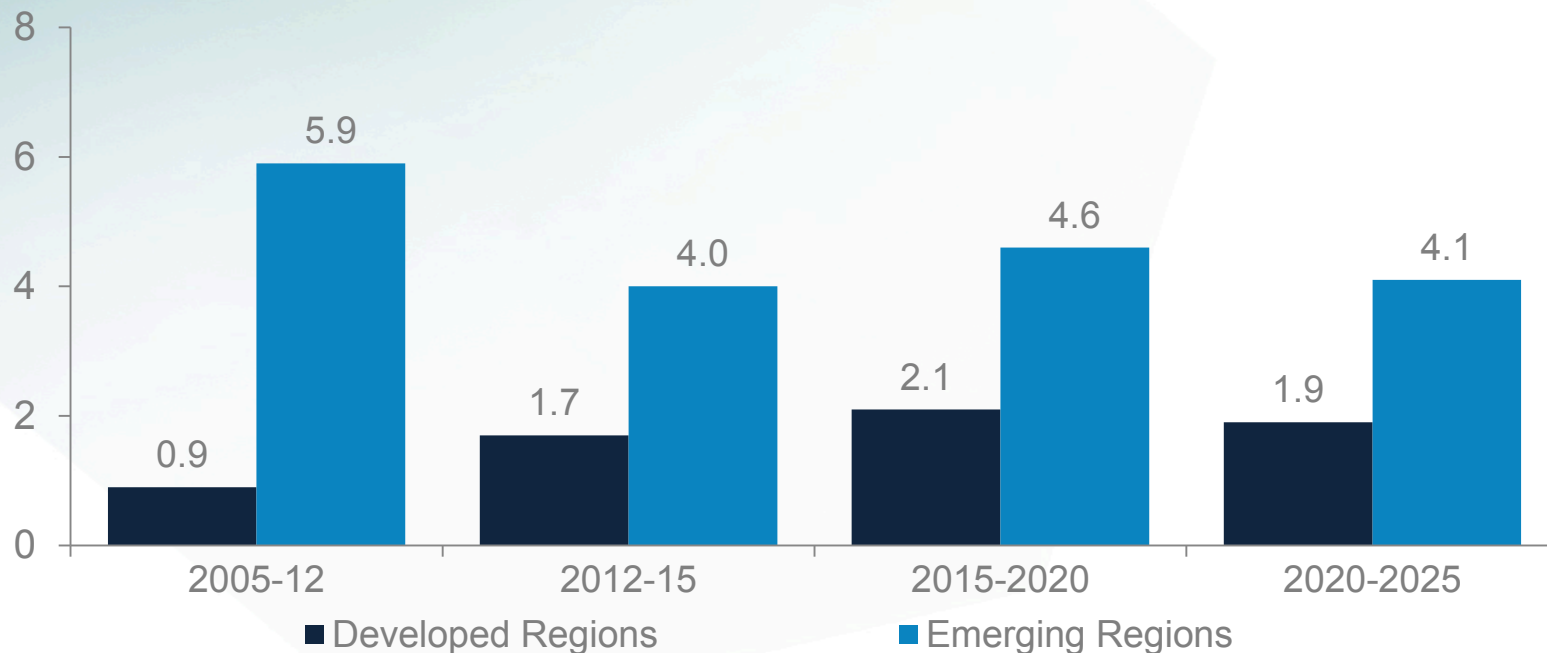
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Global Economic Outlook 2025



Medium term trends in GDP by global regions

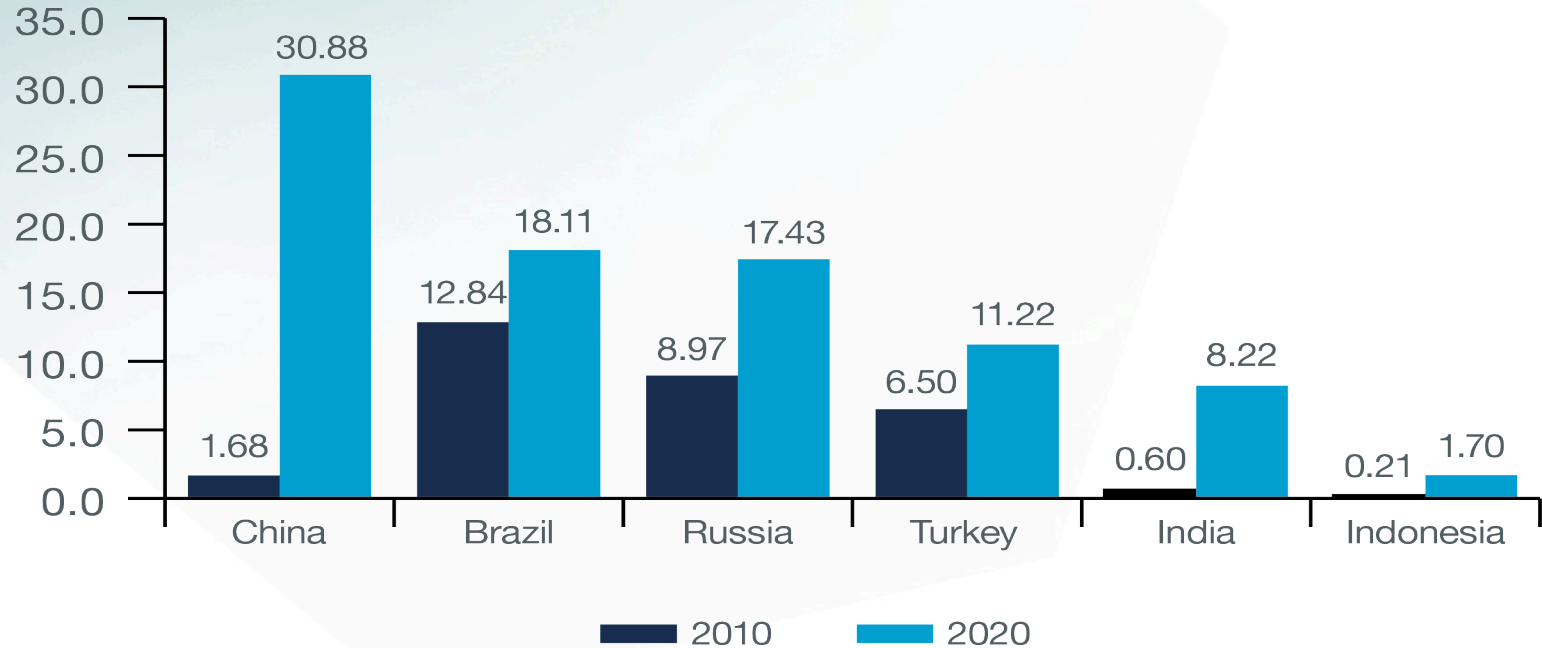
Average annual % Growth



Source: Oxford Economics and Haver Analytics
www.globalconstruction2025.com

Households with an income greater than US\$30,000

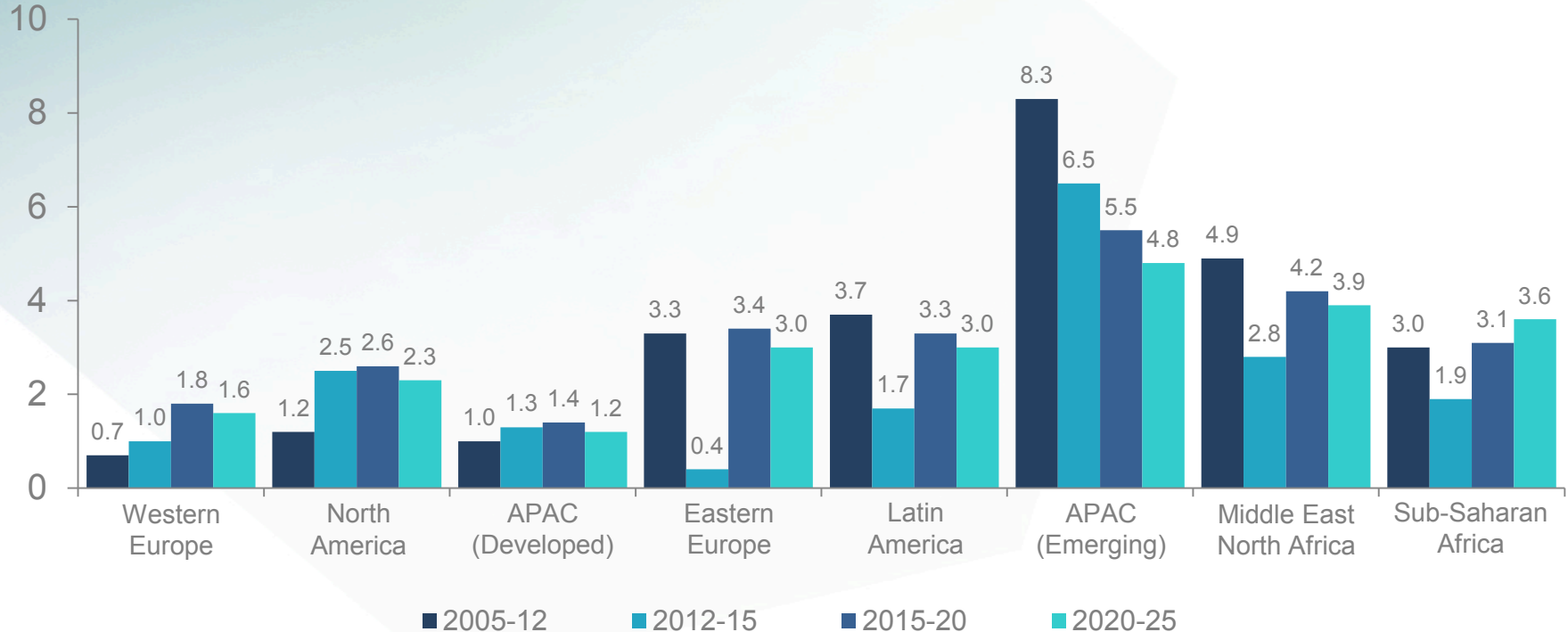
Millions of households



Source: Oxford Economics
www.globalconstruction2025.com

Regional GDP growth

Average annual % growth



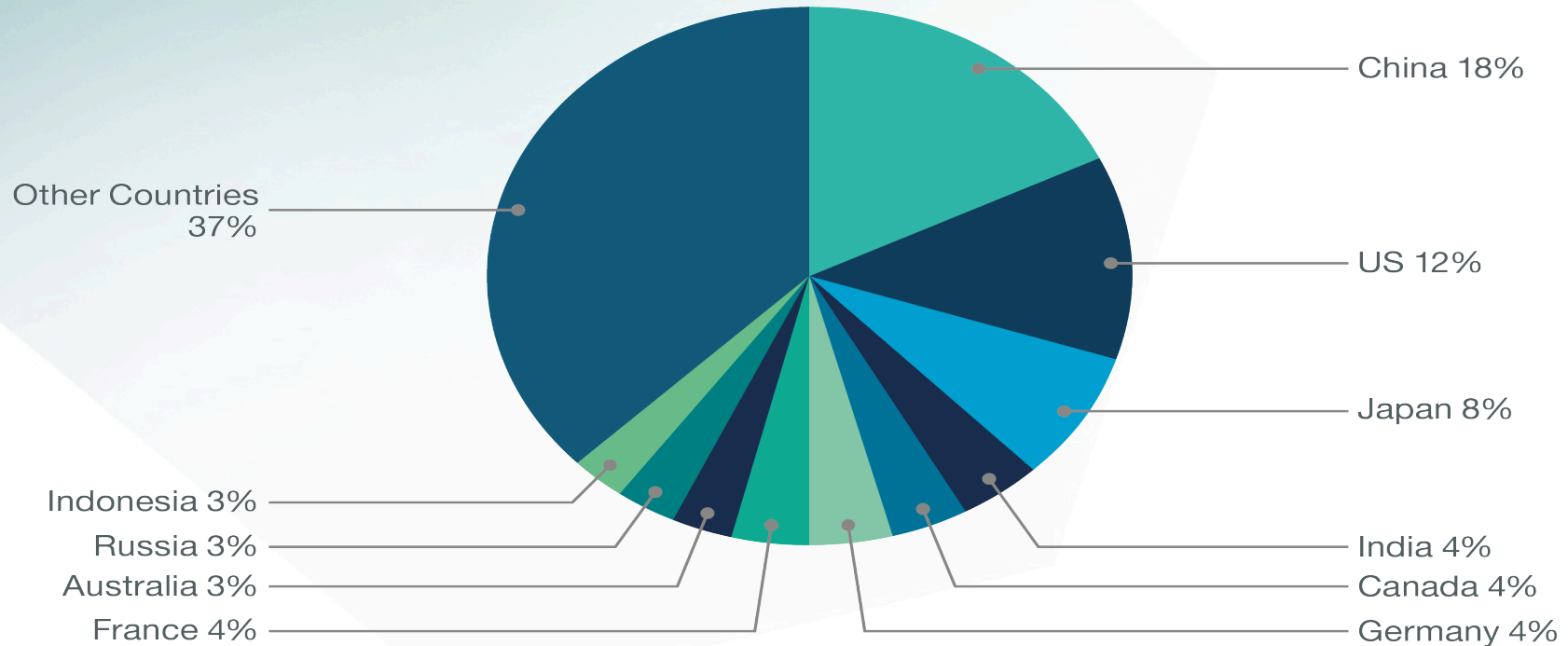
Source: Oxford Economics and Haver Analytics
www.globalconstruction2025.com

Global Construction Outlook 2025



2012 Global Construction Market: Country Split

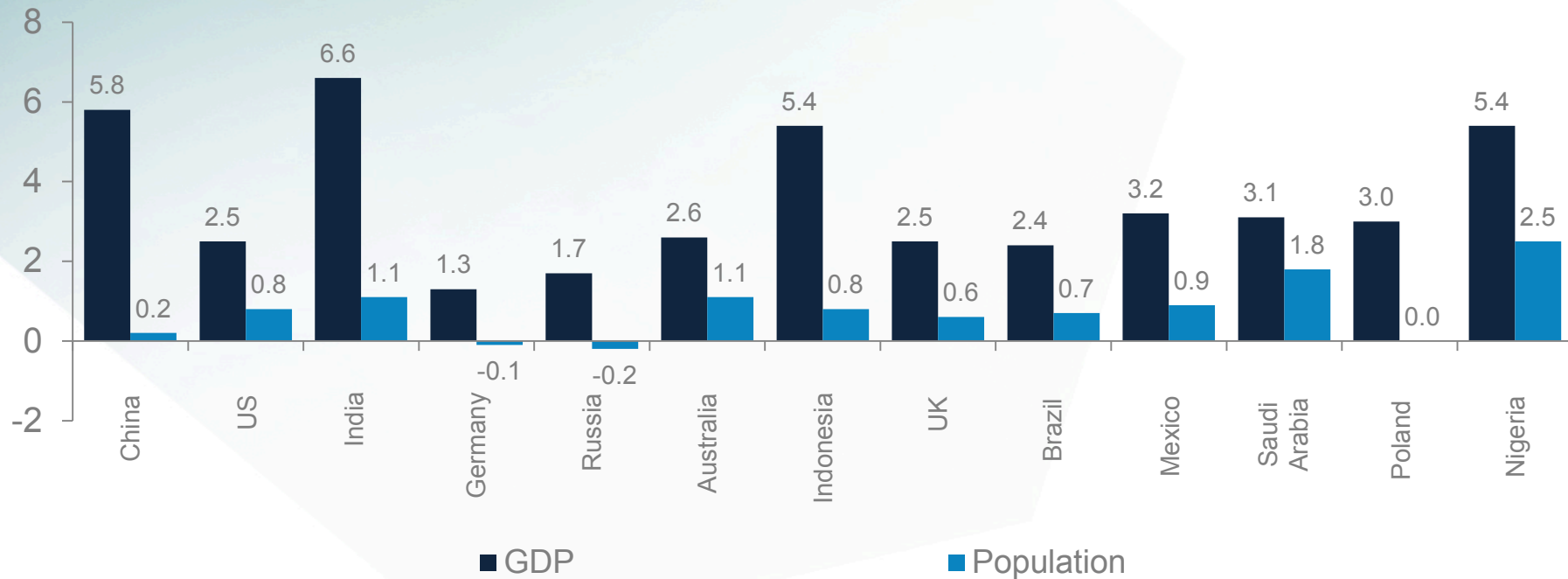
2012 prices and exchange rates (Total = US\$8,843bn)



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

GDP and population growth

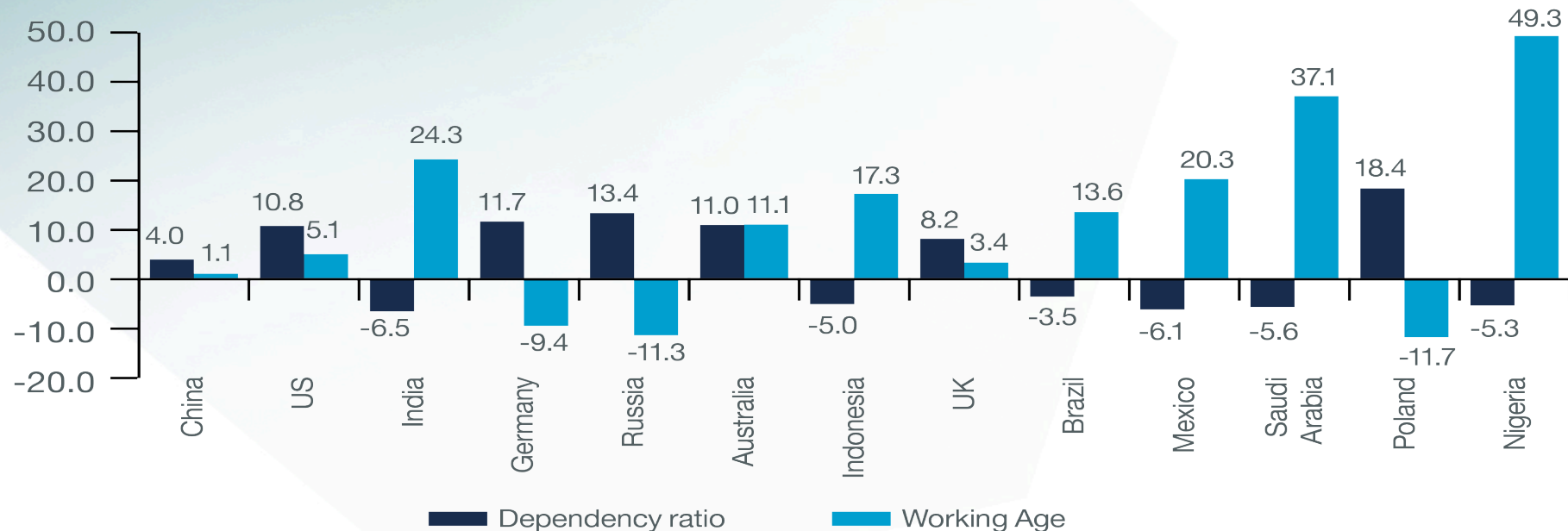
% pa 2012-25



Source: United Nations, Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Population structure

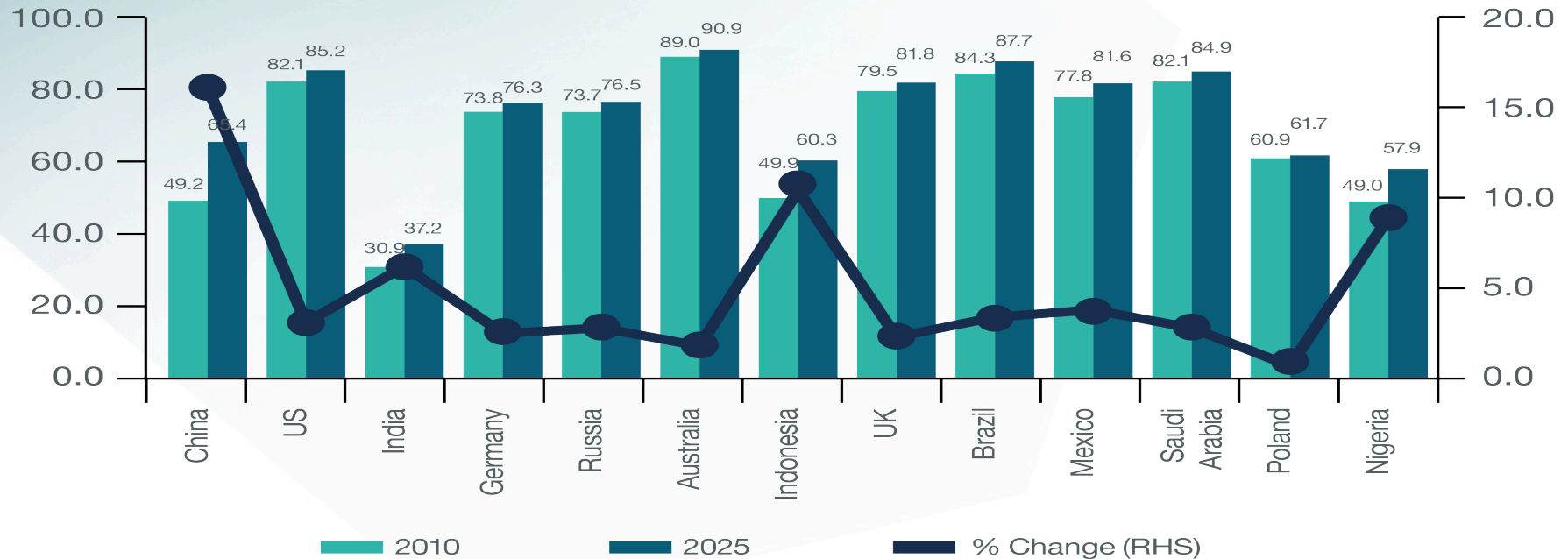
% change 2012-25



Source: United Nations, Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Urbanisation

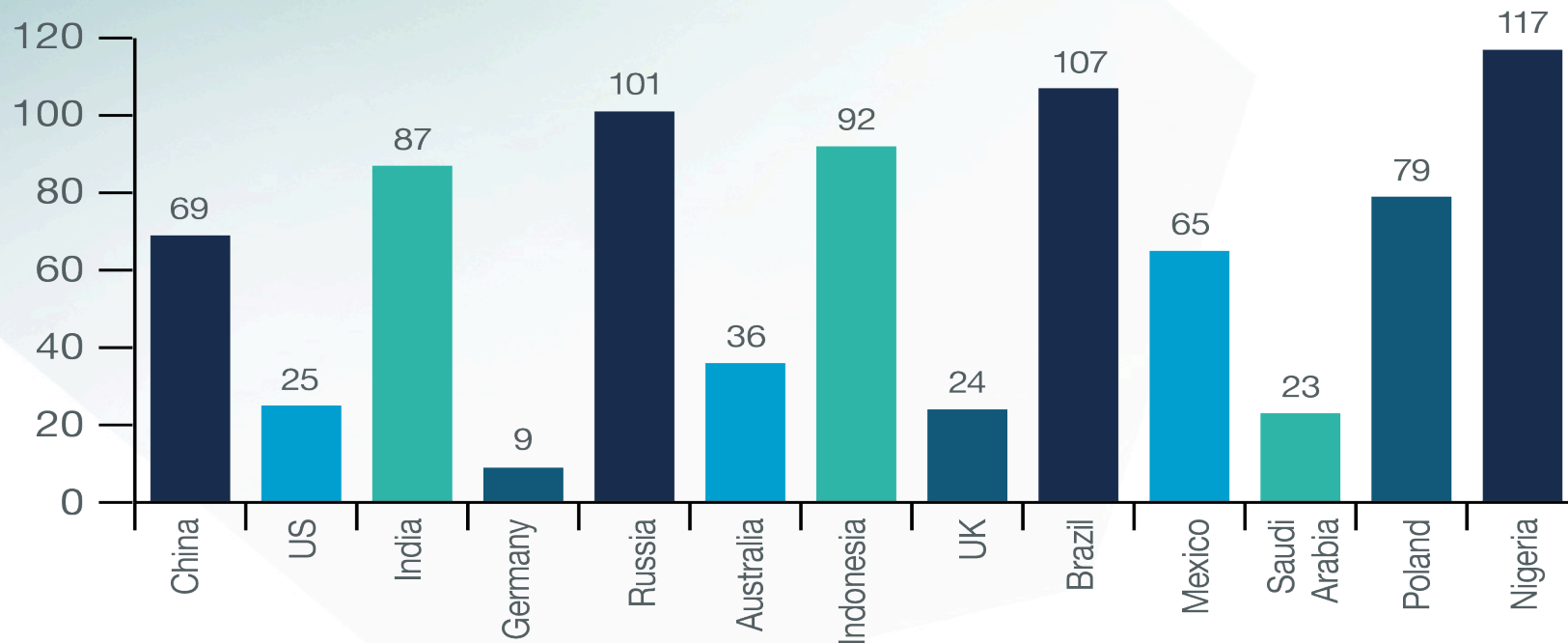
% of population living in urban areas in 2010 and 2025 (LHS) and % change 2010-25 (RHS)



Source: United Nations, Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Quality of existing infrastructure

Ranking out of 144 countries

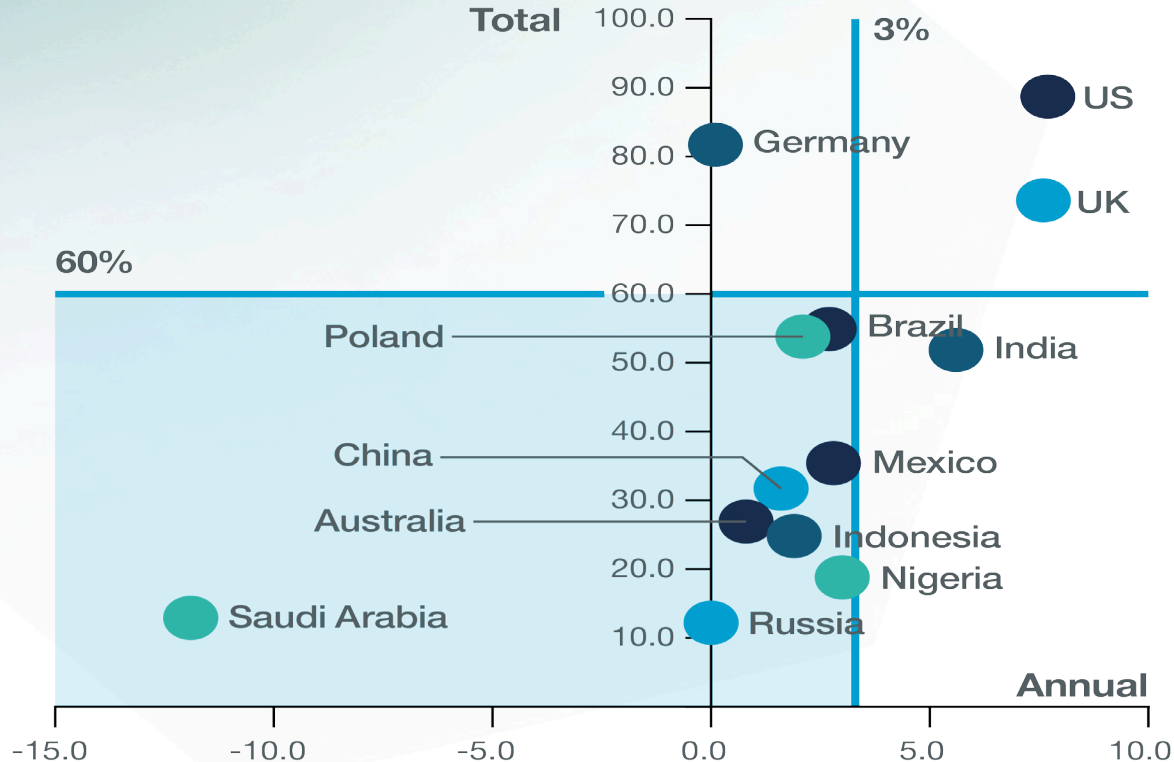


Source: World Economic Forum, The Global Competitiveness Report 2012-13

www.globalconstruction2025.com

Ability to finance public investment

% total and annual public debt 2012

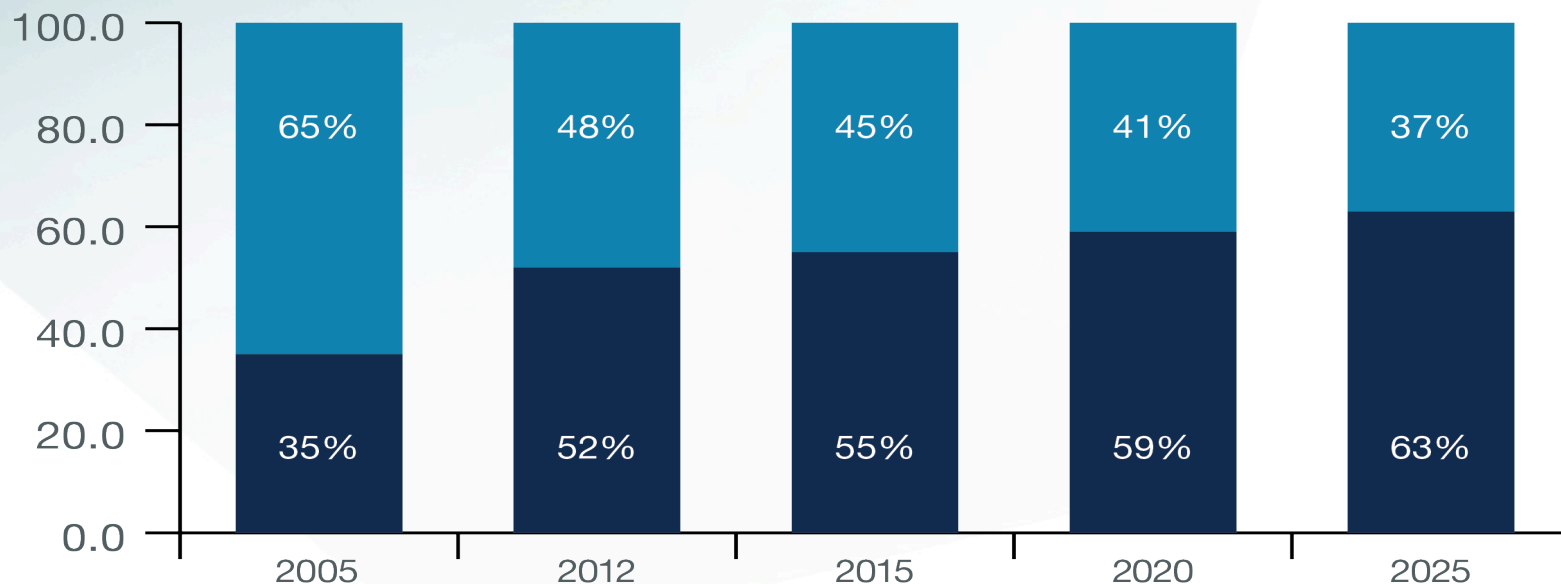


Source: CIA, The World Factbook
www.globalconstruction2025.com

Growth in construction in emerging markets

% split of construction output in developed versus emerging markets

Developed
Emerging



Source: Global Construction Perspectives and Oxford Economics
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North American Construction Outlook 2025



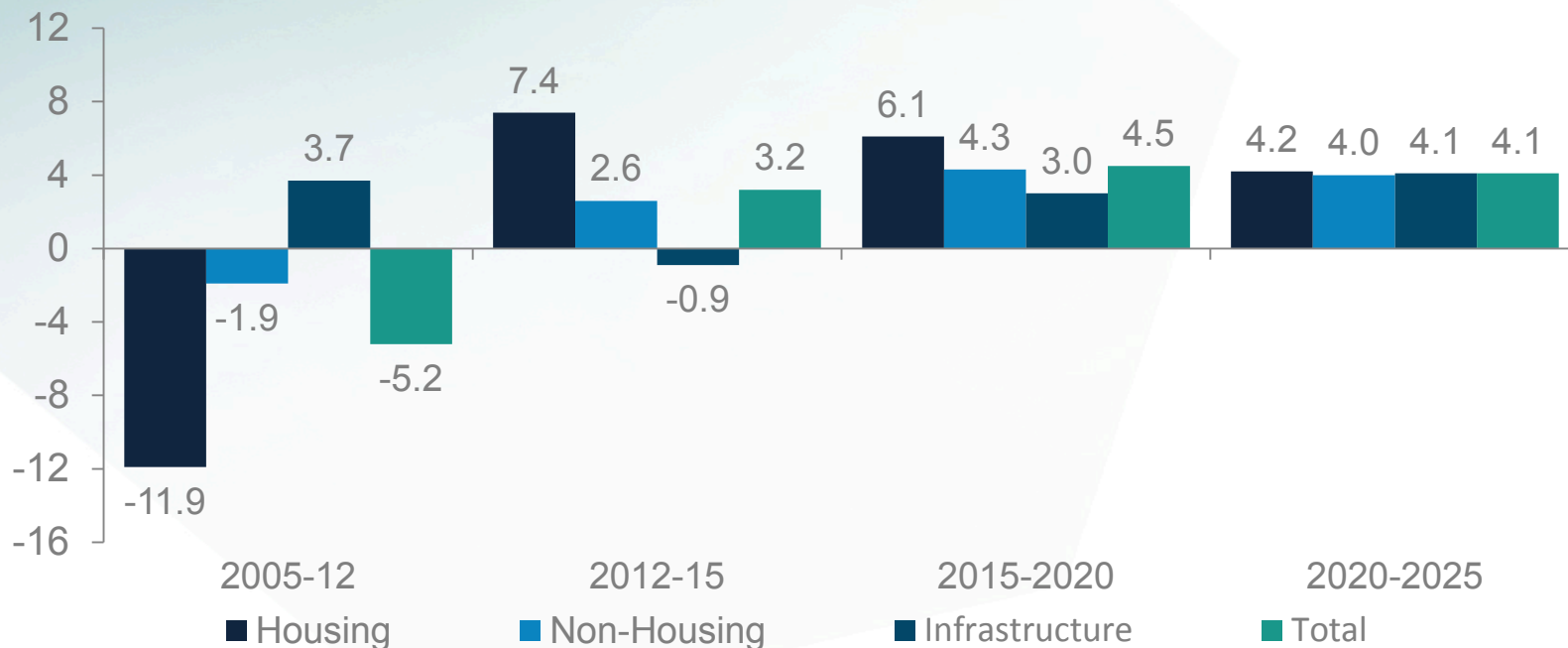
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Growth in US highest in Developed Countries

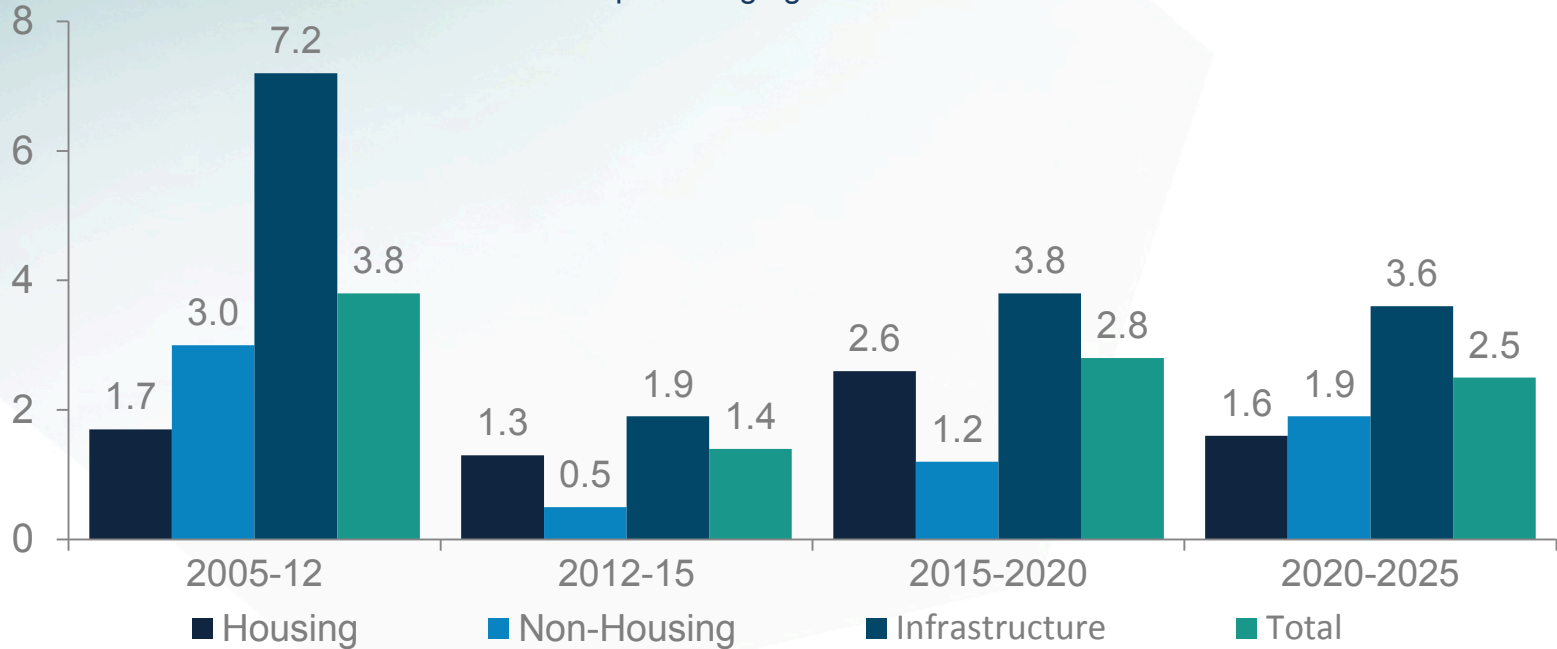
% pa average growth rates



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Natural resources and PPP drive Canadian Infrastructure

% pa average growth rates



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

LATAM Construction Outlook 2025



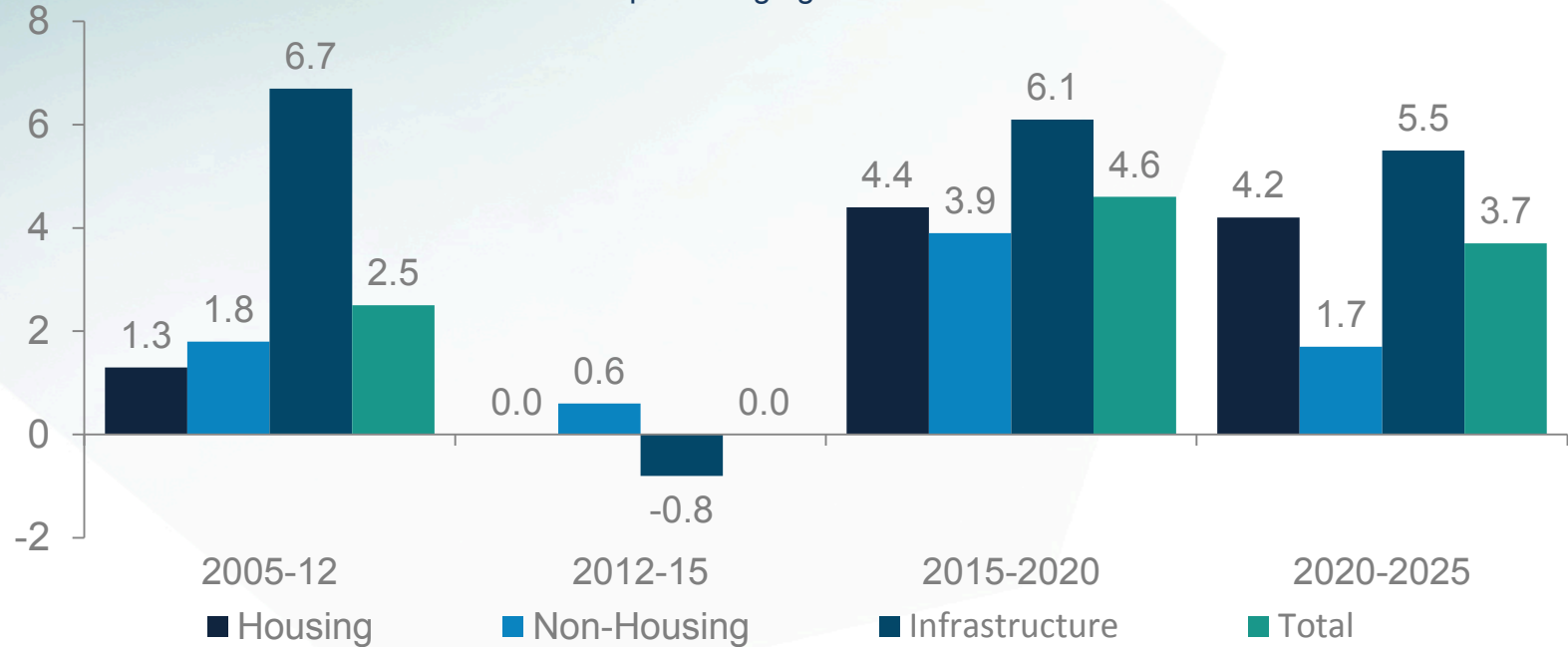
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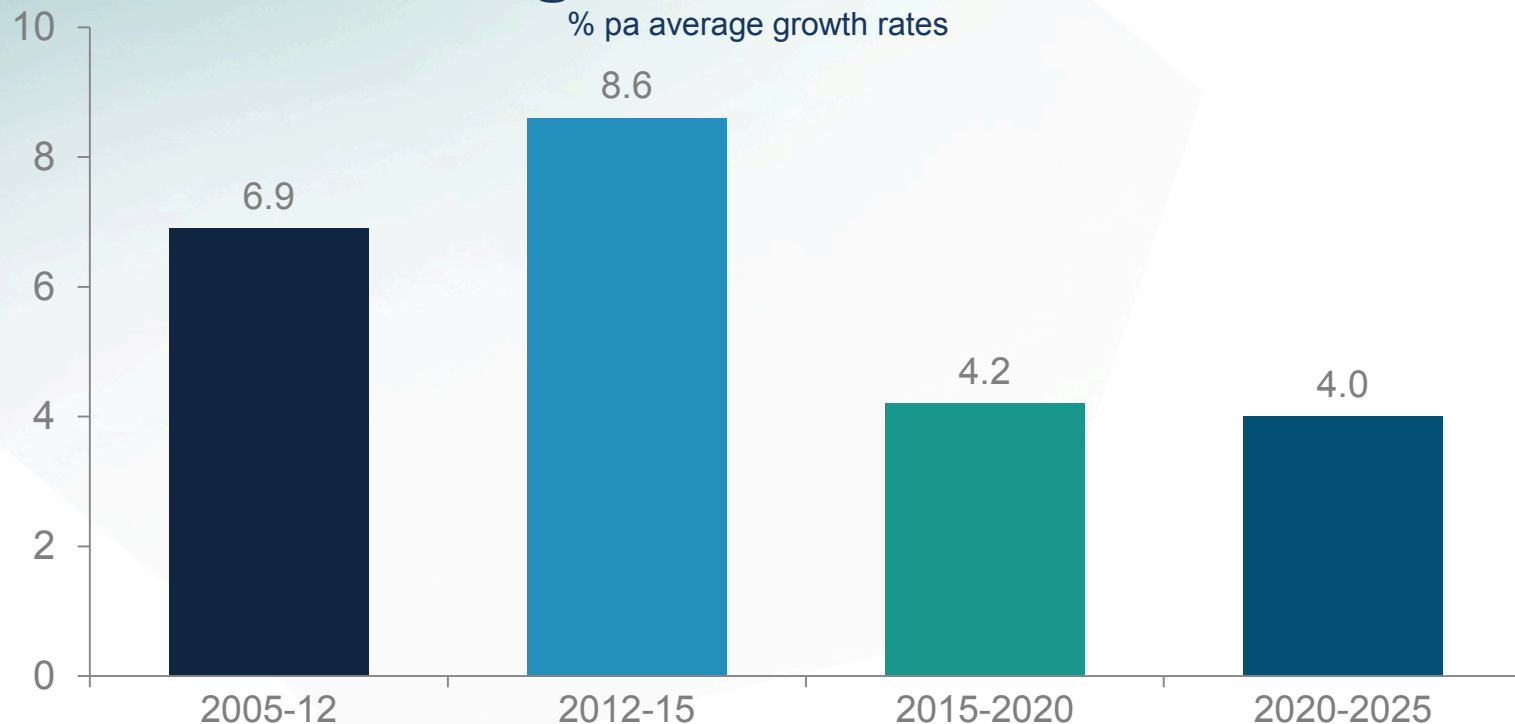
Infrastructure and US economy drives growth in Mexico

% pa average growth rates



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

PPP Infrastructure drives growth in Colombia



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

MENA Construction Outlook 2025



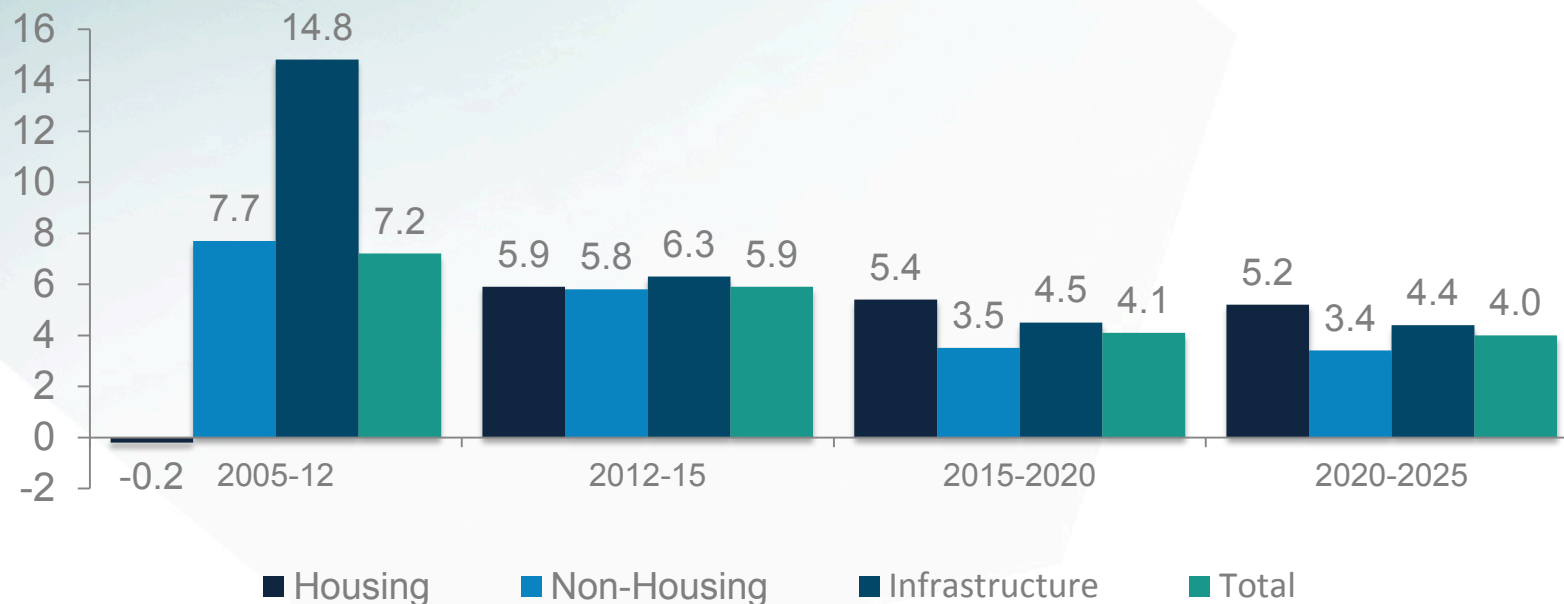
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Saudi Arabian Construction Output by Sector 2005-2025

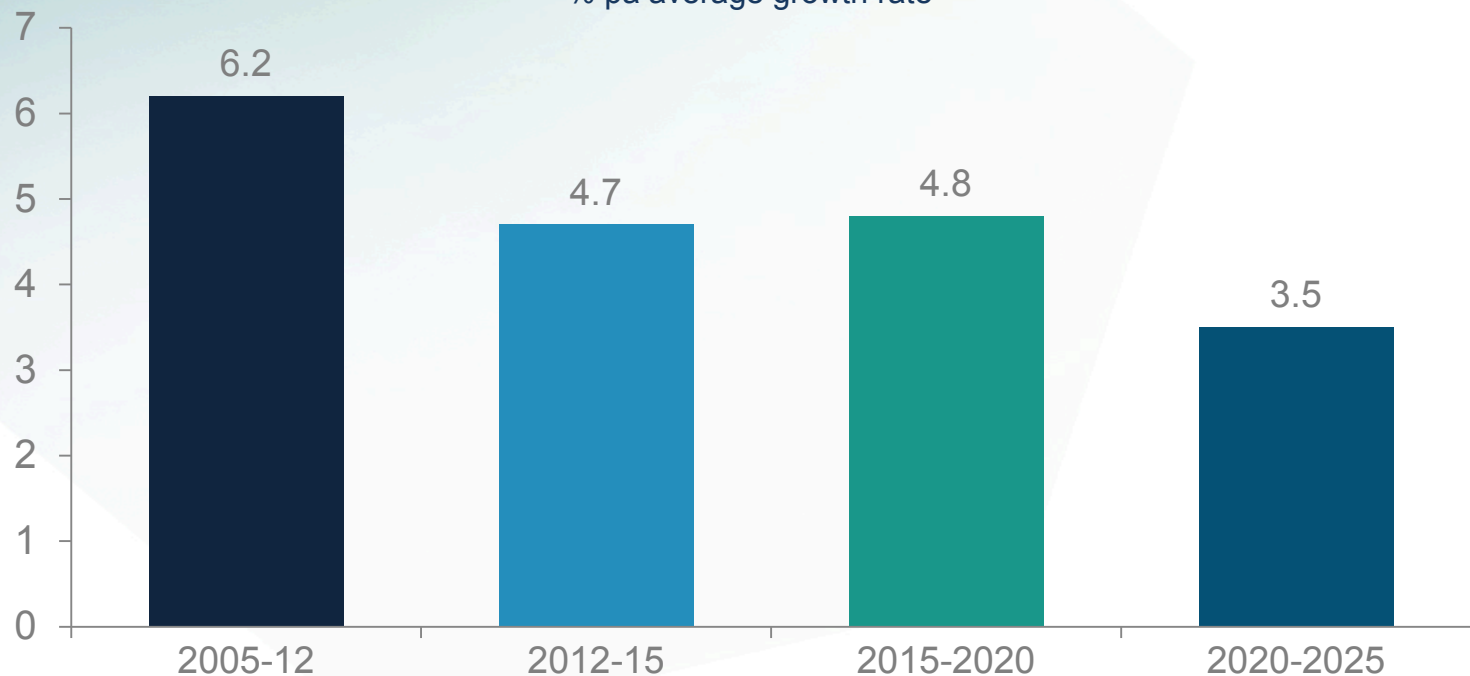
% pa average growth rate



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

United Arab Emirates Construction Output 2005-2025

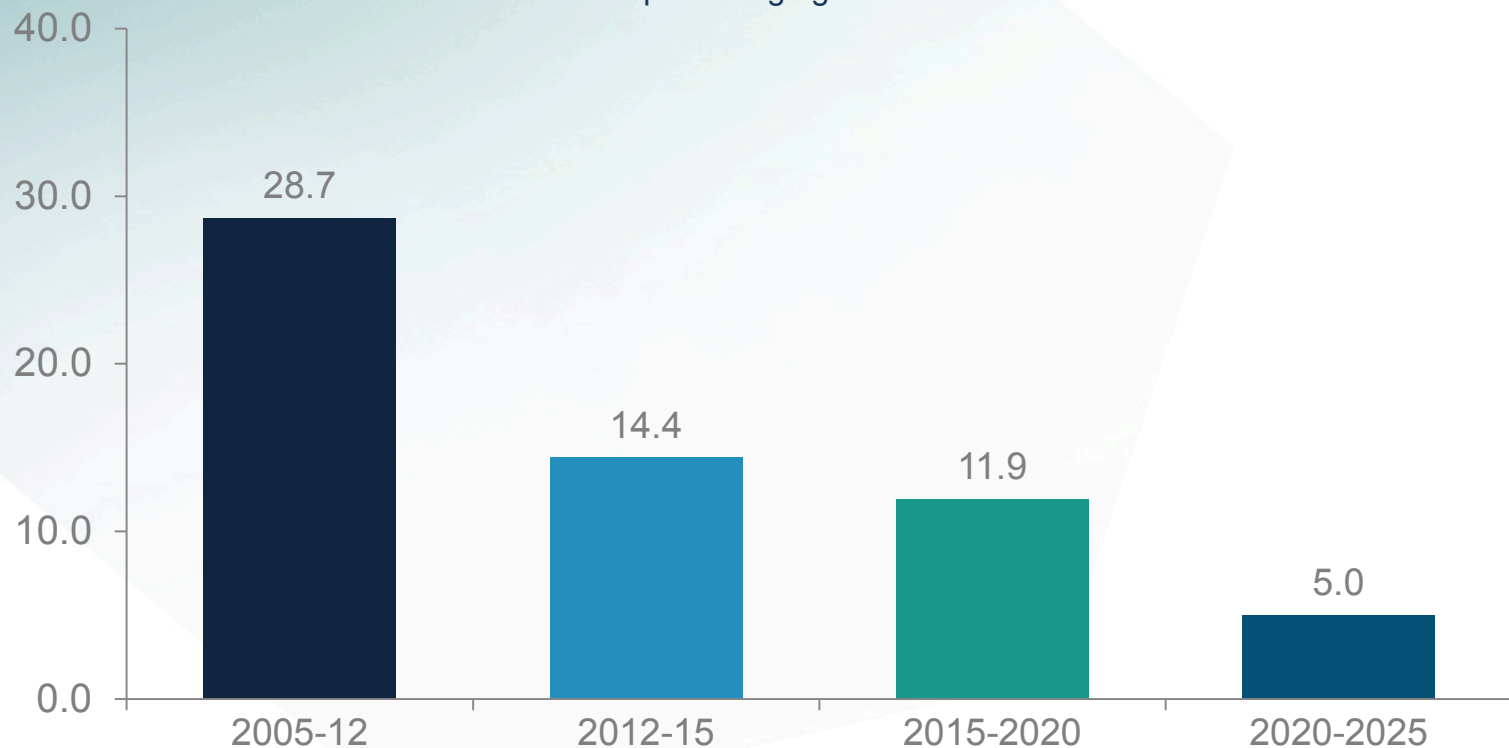
% pa average growth rate



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Qatar Construction Output 2005-2025

% pa average growth rate



Source: Global Construction Perspectives and Oxford Economics
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Emerging Asia Construction Outlook 2025



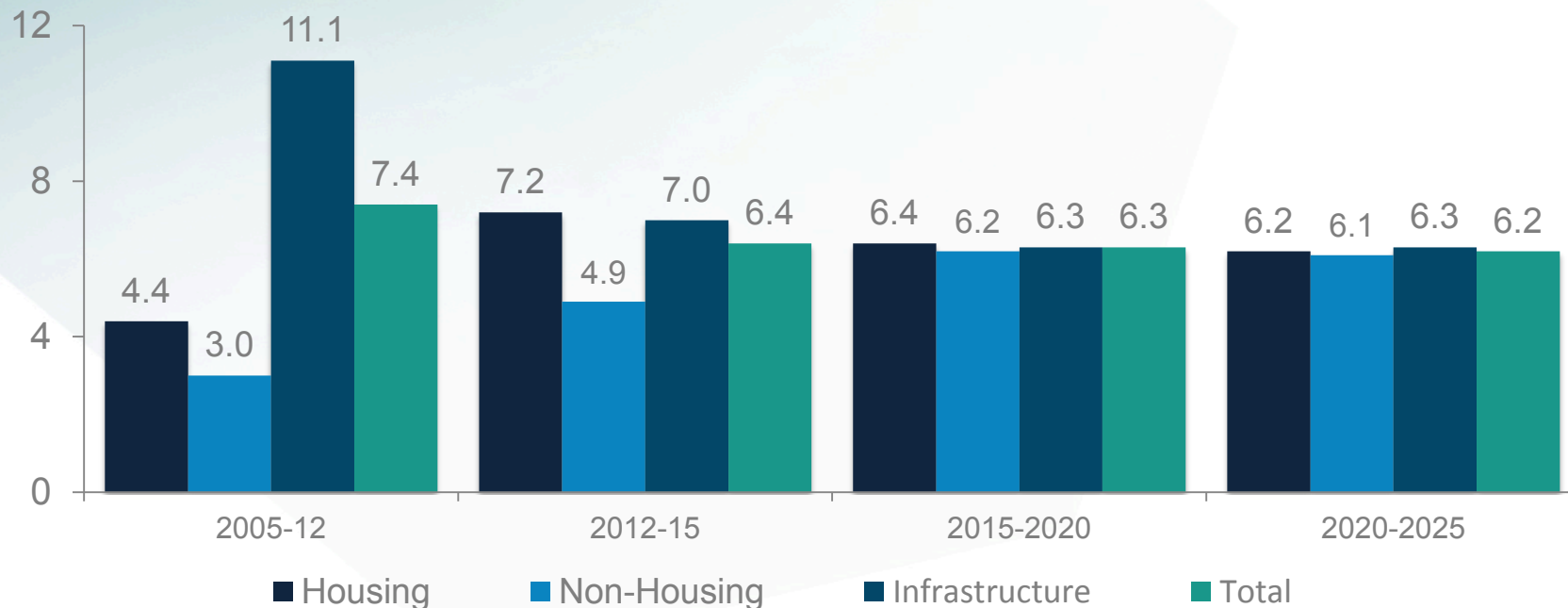
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Indonesia is new Asian Tiger and world's fifth largest construction market by 2025

% pa average growth rates



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Asia Pacific Construction Outlook 2025



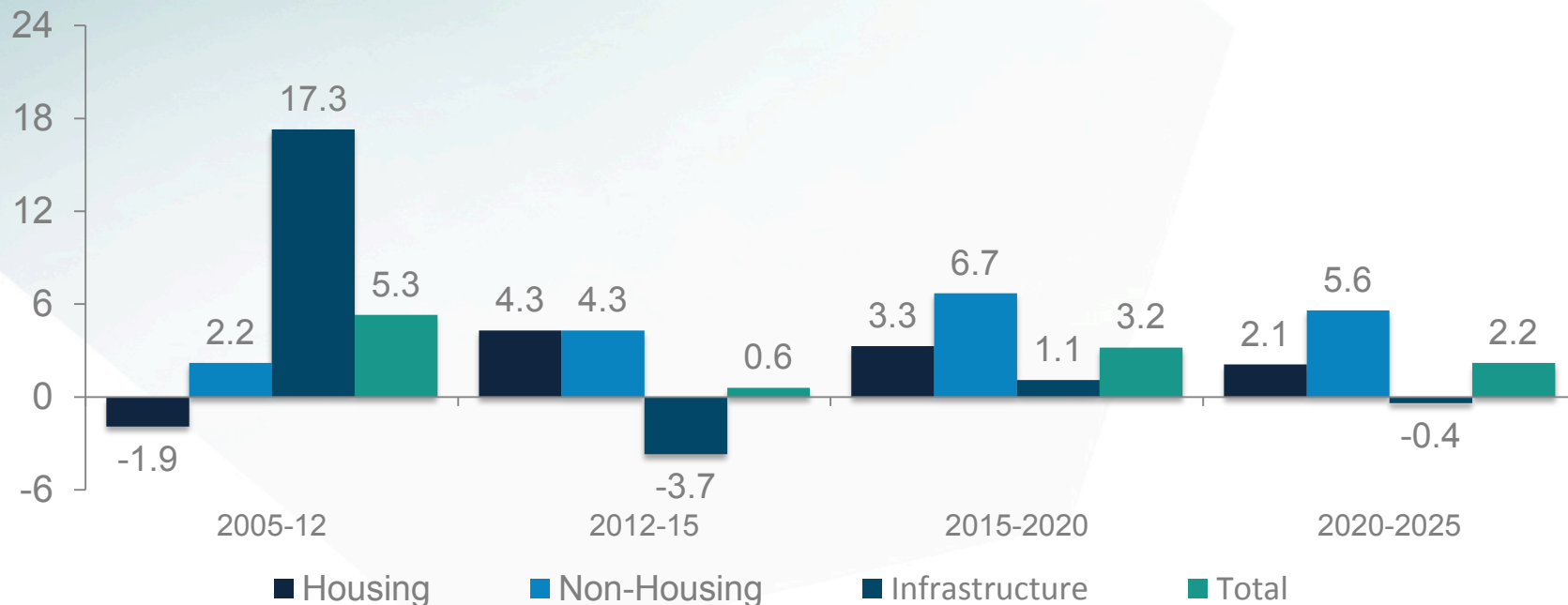
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Mixed Fortunes for Infrastructure in Australia

% pa average growth rates



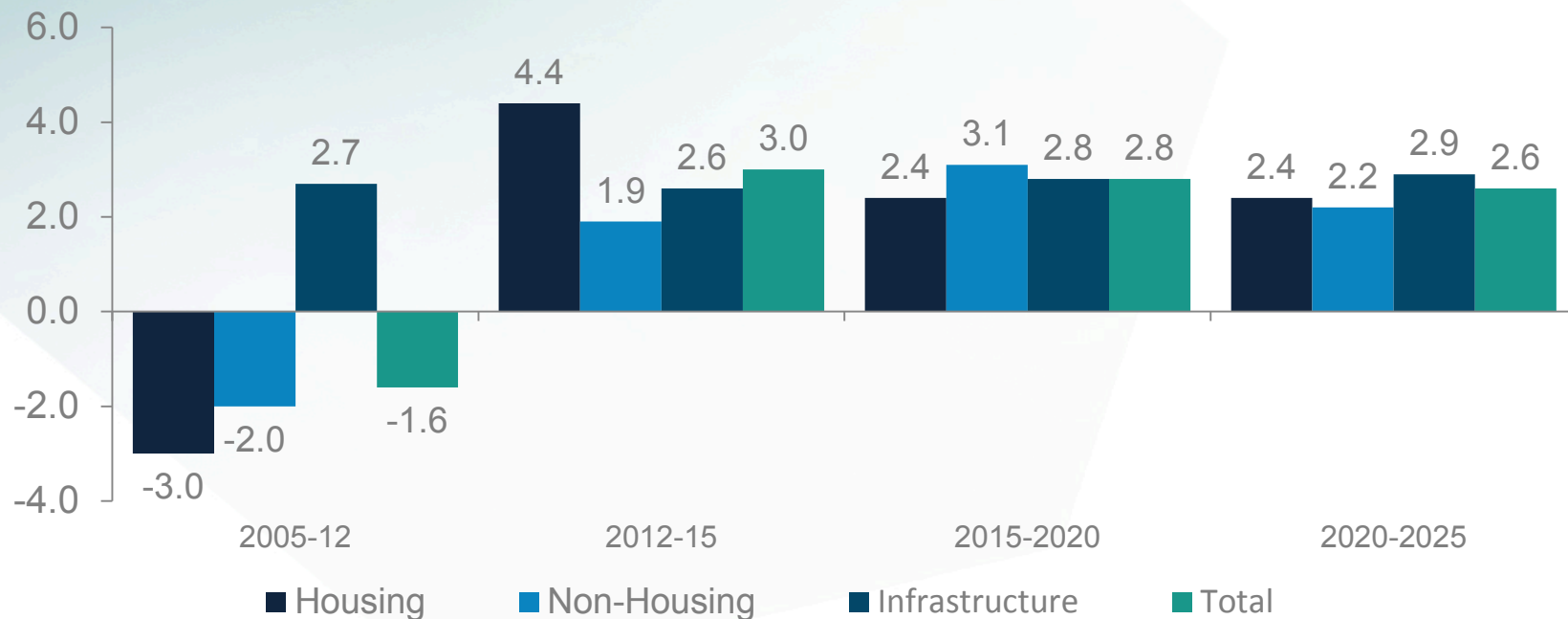
Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Regional Construction Outlook 2025

Western Europe

UK construction grows at over twice the pace of Western Europe

% pa average growth rates



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2025.com

Regional Construction Outlook 2025

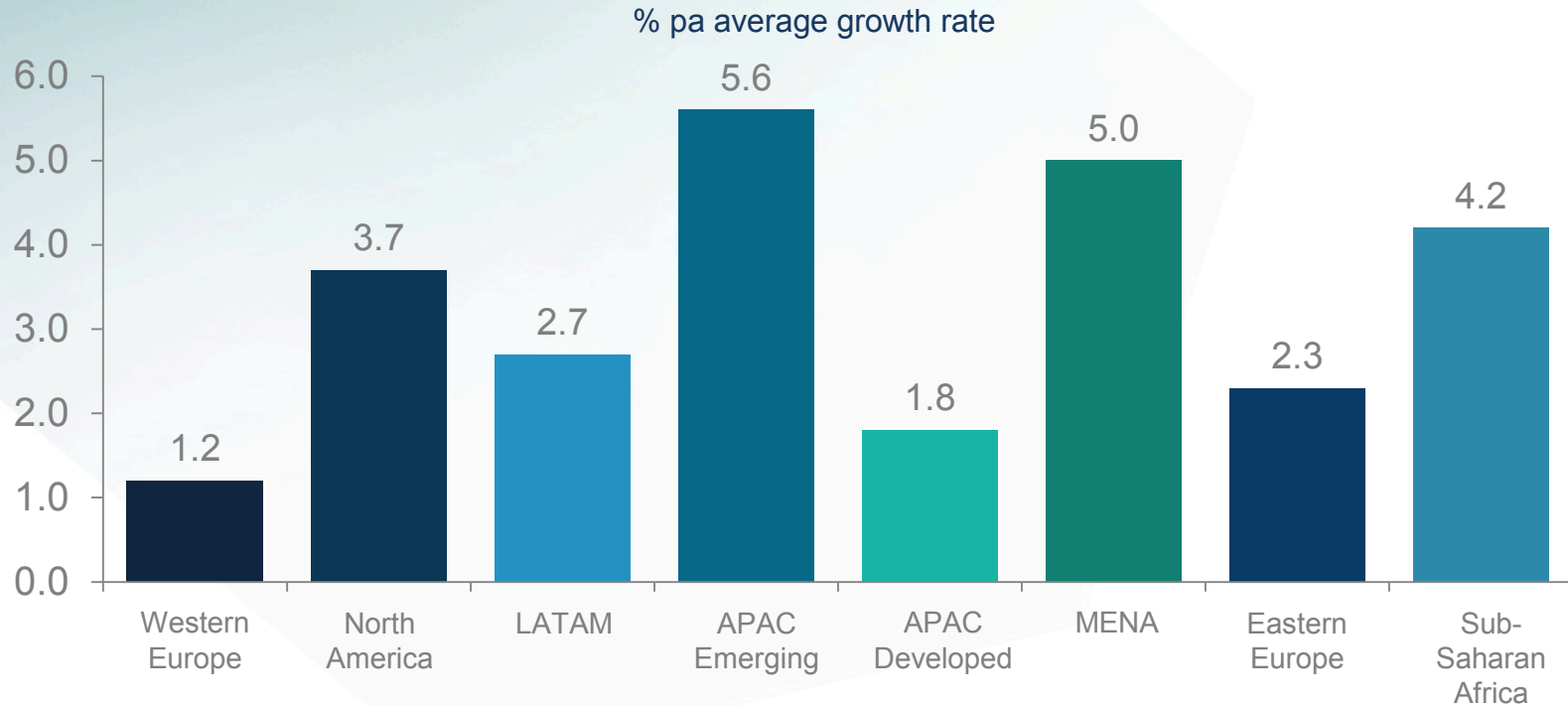


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Regional Construction Markets: 2012-2025 Growth Rates for Construction Output



Source: Global Construction Perspectives and Oxford Economics
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