

Construction in Japan Market 2017- By Plan Future Business Decisions Using the Forecast Figures 2021

PUNE, MAHARASHTRA, INDIA,
November 8, 2017 /EINPresswire.com/

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WiseGuyReports published new report,
titled "Construction in Japan"

Synopsis

In real terms, the Japanese construction industry registered positive growth during the review period (2012–2016). Construction activity slowed during 2014–2015 as

the economy suffered a technical recession, which affected business confidence. However, the economy gradually recovered in 2016, driven by strong global demand and improvements in the country's export trade. This accelerated the pace of public and private sector investment in construction projects.

Over the forecast period (2017–2021), the industry is expected to expand slowly due to factors such as high public debt and deflation. However, government efforts to revitalize the economy by focusing on infrastructure development are expected to provide momentum to the construction industry's growth.

The Olympic Games, to be hosted by Japan in 2020, are expected to be a key driver of the industry's expansion over the forecast period. The government estimates that JPY898.8 billion (US\$8.4 billion) is required to develop games-related infrastructure by 2020. Infrastructure construction is expected to be the fastest-growing market in the industry over the forecast period, registering a nominal CAGR of 3.29%, backed by the government's effort to develop the transport infrastructure in order to improve regional connectivity during the 2020 games.

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Summary



Construction in Japan – Key Trends and Opportunities to 2021 report provides detailed market analysis, information and insights into the Japanese construction industry, including:

- The Japanese construction industry's growth prospects by market, project type and construction activity
- Critical insight into the impact of industry trends and issues, and the risks and opportunities they present to participants in the Japanese construction industry
- Profiles of the leading operators in the Japanese construction industry

Scope

This report provides a comprehensive analysis of the construction industry in Japan. It provides:

- Historical (2012-2016) and forecast (2017-2021) valuations of the construction industry in Japan using construction output and value-add methods
- Segmentation by sector (commercial, industrial, infrastructure, energy and utilities, institutional and residential) and by sub-sector
- Breakdown of values within each project type, by type of activity (new construction, repair and maintenance, refurbishment and demolition) and by type of cost (materials, equipment and services)
- Detailed profiles of the leading construction companies in Japan

Key points to buy

- Identify and evaluate market opportunities using standardized valuation and forecasting methodologies.
- Assess market growth potential at a micro-level with over 600 time-series data forecasts.
- Understand the latest industry and market trends.
- Formulate and validate strategy using critical and actionable insight.
- Assess business risks, including cost, regulatory and competitive pressures.
- Evaluate competitive risk and success factors.

Key Highlights

- In December 2016, the government initiated the construction of the huge national stadium in Tokyo for the 2020 Olympic Games. With an estimated investment of JPY160.5 billion (US\$1.5 billion), the new stadium is being built to accommodate over 80,000 spectators. It is expected to be completed in 2019.
- Government efforts to provide efficient transport for the large number of visitors during the games are expected to bode well for the infrastructure construction market over the forecast period. In 2015, the government announced plans to invest JPY9.0 trillion (US\$74.3 billion) until 2020 to construct new roads and bridges. According to the infrastructure construction market is expected to increase in importance over the forecast period, to account for 29.7% of the

industry's total value in 2021.

- Following damage caused to the country's infrastructure during the earthquakes and tsunami in 2011, the government announced plans to spend JPY6.5 trillion (US\$53.7 billion) between 2016 and 2021 for reconstruction in Northern Japan.
- The country's expanding urban population, coupled with the need for new housing units during the 2020 Olympic Games is expected to support the residential construction market over the forecast period. According to the residential construction market is expected to post a nominal forecast-period CAGR of 2.39%, as compared to 1.88% registered during the review period.
- In line with the growing demand for improved healthcare services, in August 2016, the Ministry of Health, Labor and Welfare, announced plans to develop a new 209-bed hospital in Osaka. The project involves an estimated investment of JPY10.7 billion (US\$100.0 million) and is expected to be completed in 2019.

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