

Construction in South Africa Market 2017- Revenue, Price and Gross Margin Research Report 2021

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Synopsis

WiseGuyReports published new report, titled "Construction in South Africa, Key Trends and Opportunities".

In real terms, the South African construction industry's forecast-period (2017–2021) outlook is moderate compared to its review-period

(2012–2016) performance. This is a result of economic slowdown, poor investor sentiment, high unemployment and a weak currency, which will weigh on construction spending.

The industry's output value in real terms is expected to rise at a compound annual growth rate (CAGR) of 1.57% over the forecast period, down from 2.67% during the review period.

Over the forecast period, industry growth is expected to be supported by investment in transport and logistics infrastructure, and energy construction projects, as well as the expansion of low-cost residential buildings.

Government efforts to balance supply and demand for social housing will drive demand for the construction of new residential units. Urbanization will continue to generate demand for residential and infrastructure development.

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Summary

Construction in South Africa, Key Trends and Opportunities to 2021 report provides detailed market analysis, information and insights into the South African construction industry, including:



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Construction in South Africa

- The South African construction industry's growth prospects by market, project type and construction activity
- Analysis of equipment, material and service costs for each project type in South Africa
- Critical insight into the impact of industry trends and issues, and the risks and opportunities they present to participants in the South African construction industry
- Profiles of the leading operators in the South African construction industry
- Data highlights of the largest construction projects in South Africa

Scope

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

- Historical (2012-2016) and forecast (2017-2021) valuations of the construction industry in South Africa using construction output and value-add methods
- Segmentation by sector (commercial, industrial, infrastructure, energy and utilities, institutional and residential) and by project type
- 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)
- Analysis of key construction industry issues, including regulation, cost management, funding and pricing
- Detailed profiles of the leading construction companies in South Africa

Key points to buy

- Identify and evaluate market opportunities using Timetric's 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 Timetric's critical and actionable insight.
- Assess business risks, including cost, regulatory and competitive pressures.
- Evaluate competitive risk and success factors.

Key Highlights

- According to Stats SA, the total value of recorded building plans passed in the country grew by 6.0% in nominal terms, increasing from ZAR101.4 billion (US\$7.9 billion) in 2015 to ZAR107.5 billion (US\$7.3 billion) in 2016. Moreover, the total value of buildings reported as complete grew by 8.3% in nominal terms from ZAR56.7 billion (US\$4.4 billion) in 2015 to ZAR61.4 billion (US\$4.2 billion) in 2016.
- In line with the national development plan and medium-term strategic framework, in its 2017

budget, the government announced plans to invest ZAR947.2 (US\$62.2 billion) on public-sector infrastructure over the Medium-Term Expenditure Framework (MTEF) period.

- To meet the demand from the country's lower- and middle-income groups, the government is developing various affordable housing projects in South Africa; accordingly, the DHS is undertaking the Human Settlements Housing Program in the country. The program involves the construction of 1.6 million affordable housing units by 2019.
- The government is investing in road infrastructure projects to improve the country's transport network,. Accordingly, the government announced plans in its 2017 budget to spend ZAR135.5 billion (US\$8.9 billion) on road infrastructure over the next three years.
- The South African construction industry's growth will be driven by government plans to increase the share of renewable energy in terms of total installed electricity capacity, and encourage investment in renewable energy infrastructure. Under the updated Integrated Resource Plan (IRP), the government aims to increase the share of renewable energy in total installed electricity capacity from 16.2% in 2016 to 22.3% in 2020 and 46.3% by 2030.

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