

Global
Construction

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A global forecast
for the construction
industry to 2030



Global Construction 2030

Expo EDIFICA 2017
Santiago – Chile

4-6 October 2017



Graham Robinson – Global Construction Perspectives

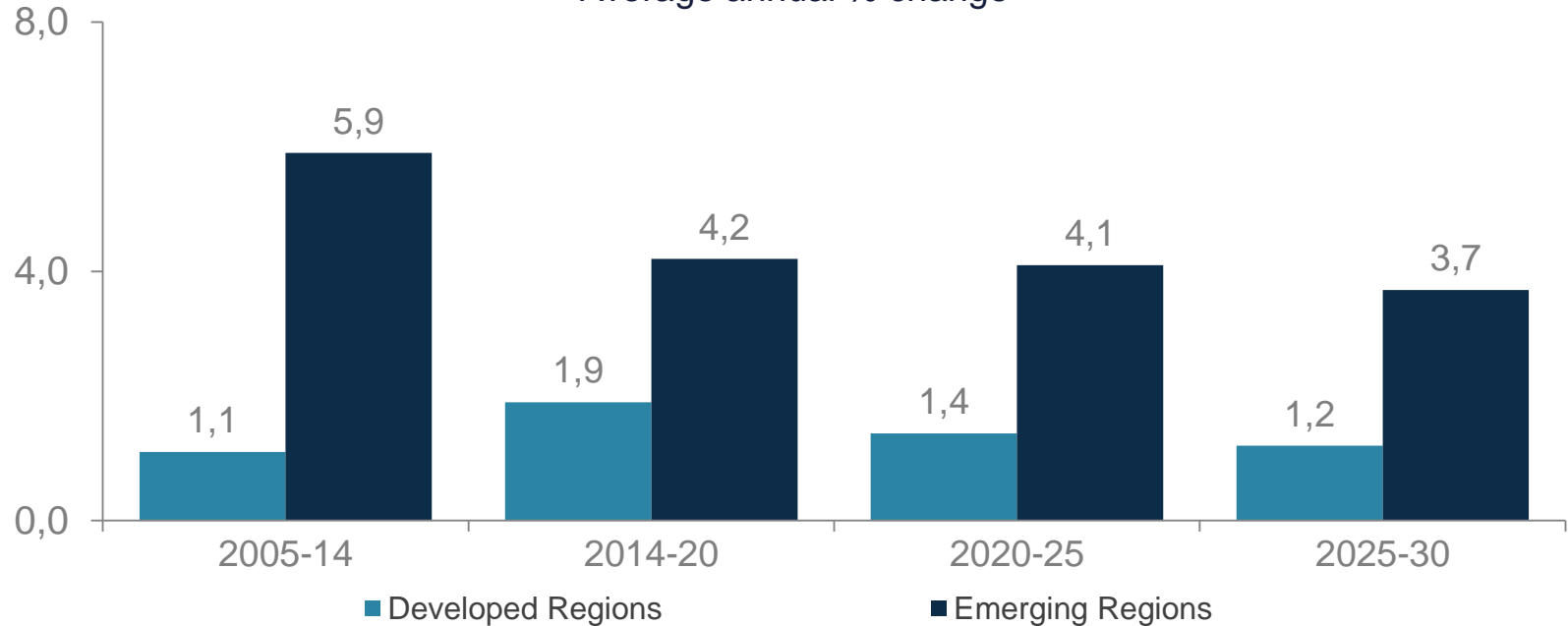
Global Construction 2030 is the fourth in a series of global studies of the construction and engineering industry published by Global Construction Perspectives and Oxford Economics

www.globalconstruction2030.com
graham@constructglobal.com



Medium Term Trends in GDP Global Regions

Average annual % change

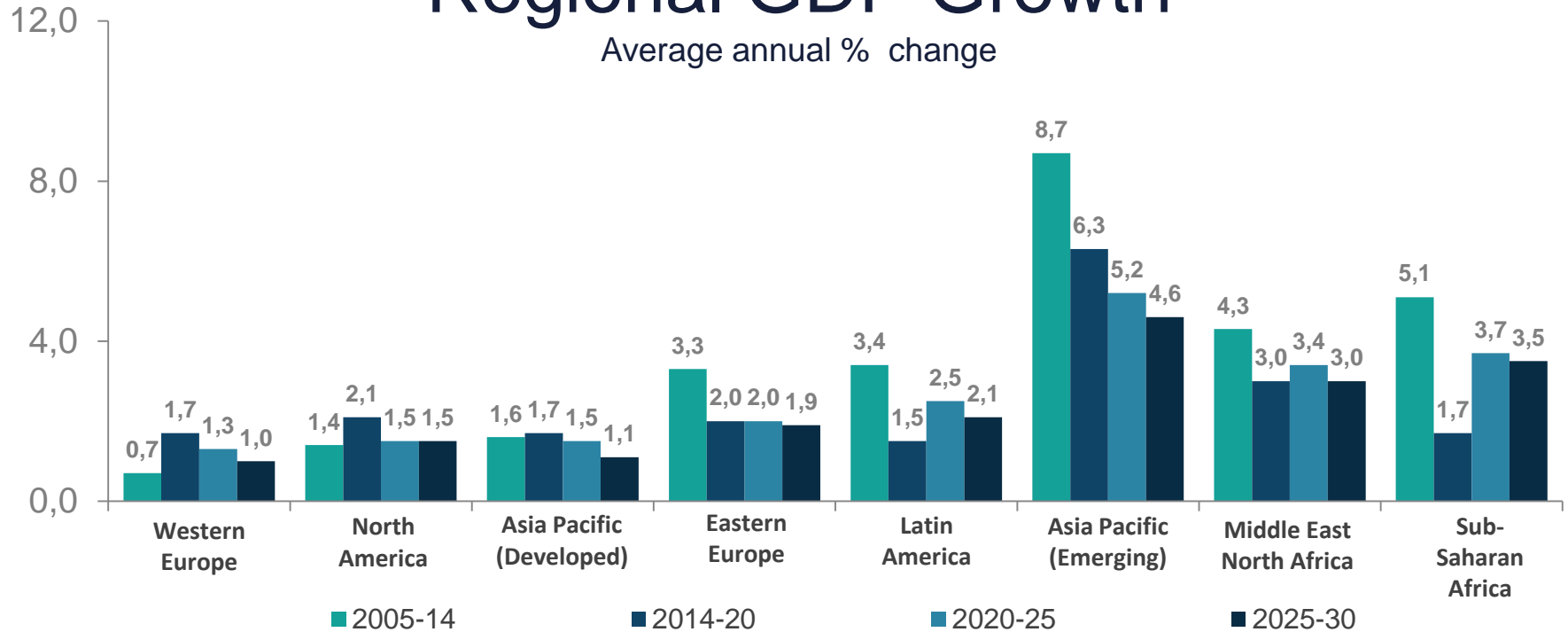


Source: Global Construction Perspectives and Oxford Economics

www.globalconstruction2030.com

Regional GDP Growth

Average annual % change



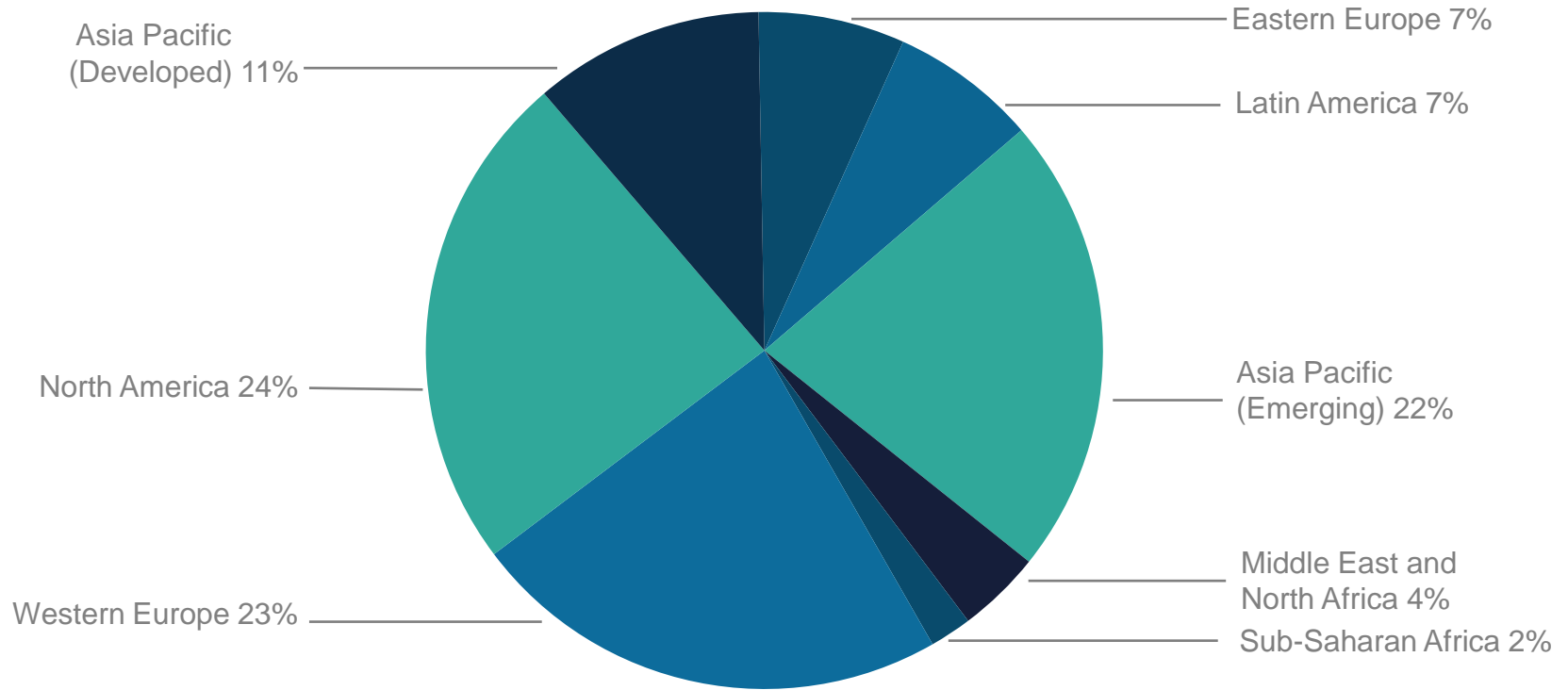
Source: Global Construction Perspectives and Oxford Economics

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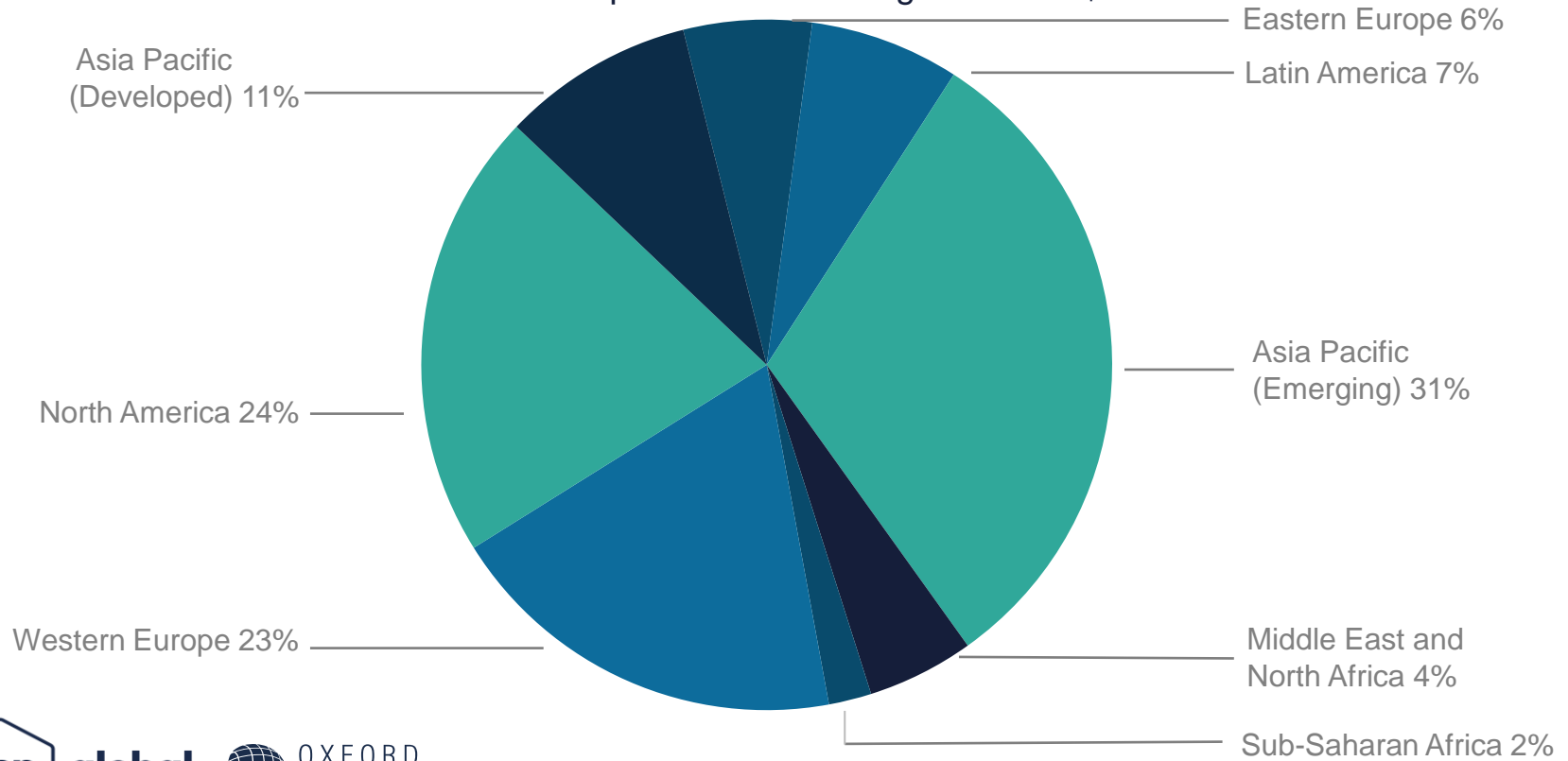
GDP by Region in 2017

GDP at 2014 prices and exchange rates US\$bn



GDP by Region in 2030

GDP at 2014 prices and exchange rates US\$bn



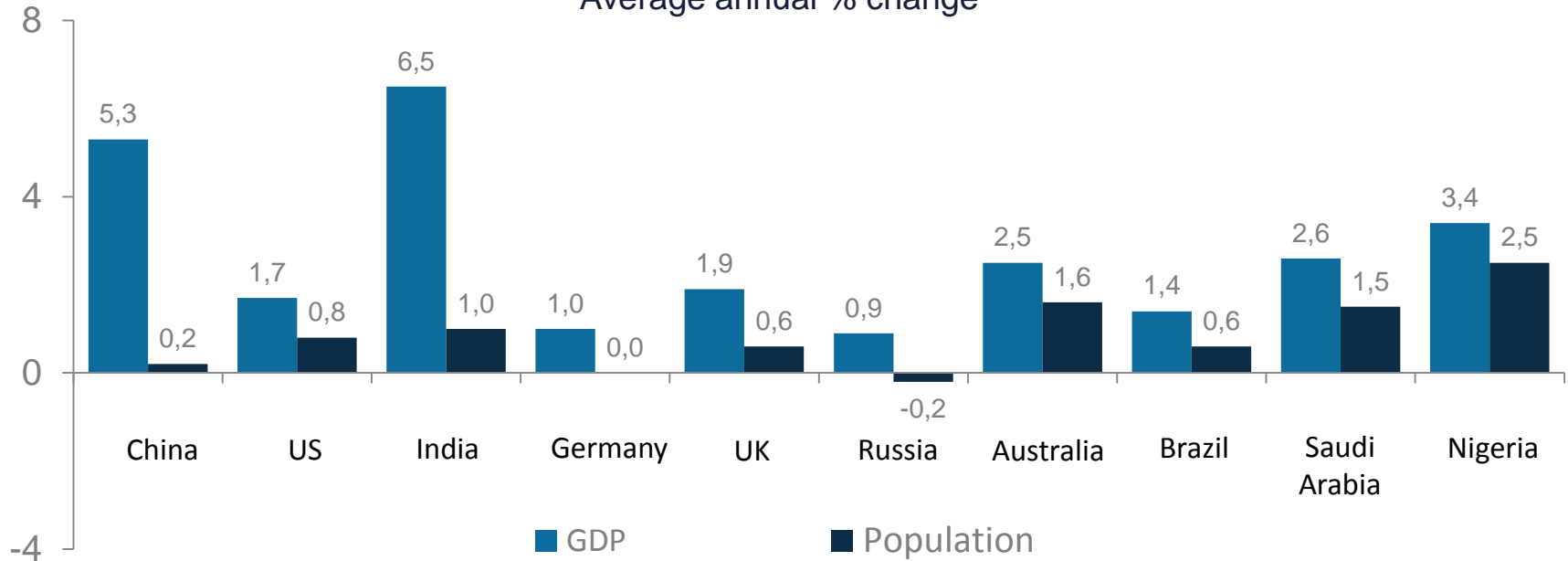
Global Construction Outlook 2030 Key Growth Drivers

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GDP and Population Growth – 10 countries

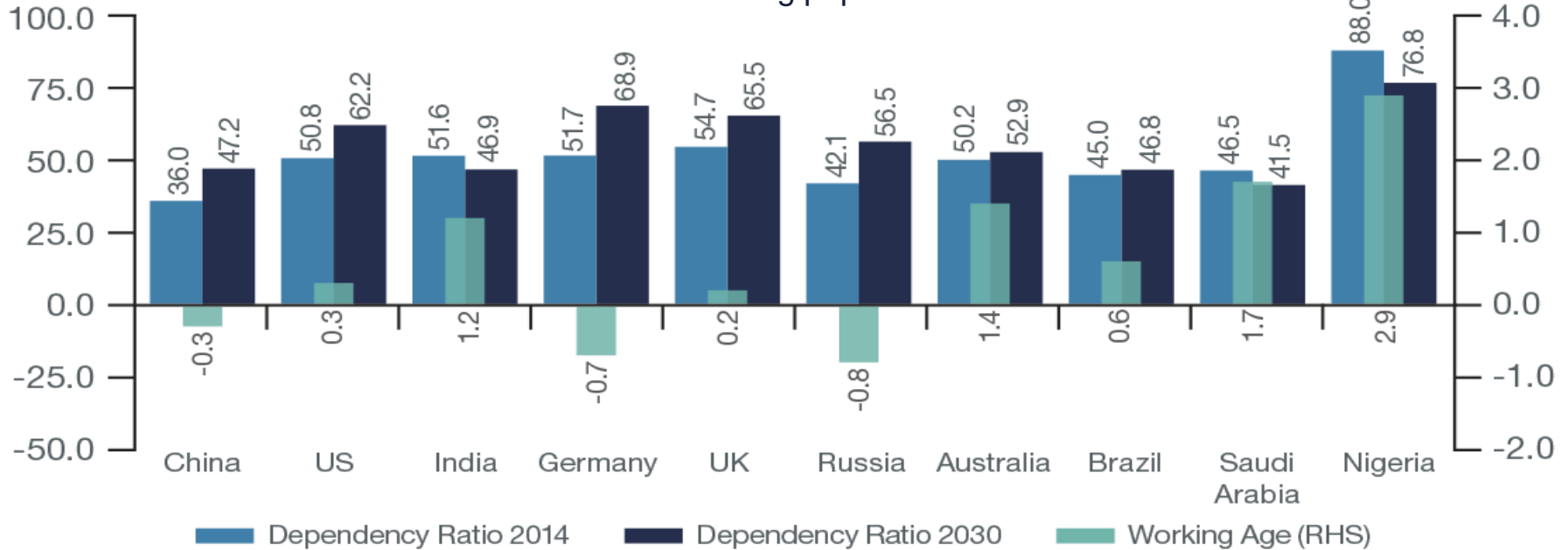
Average annual % change



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

Population Structure — 10 countries

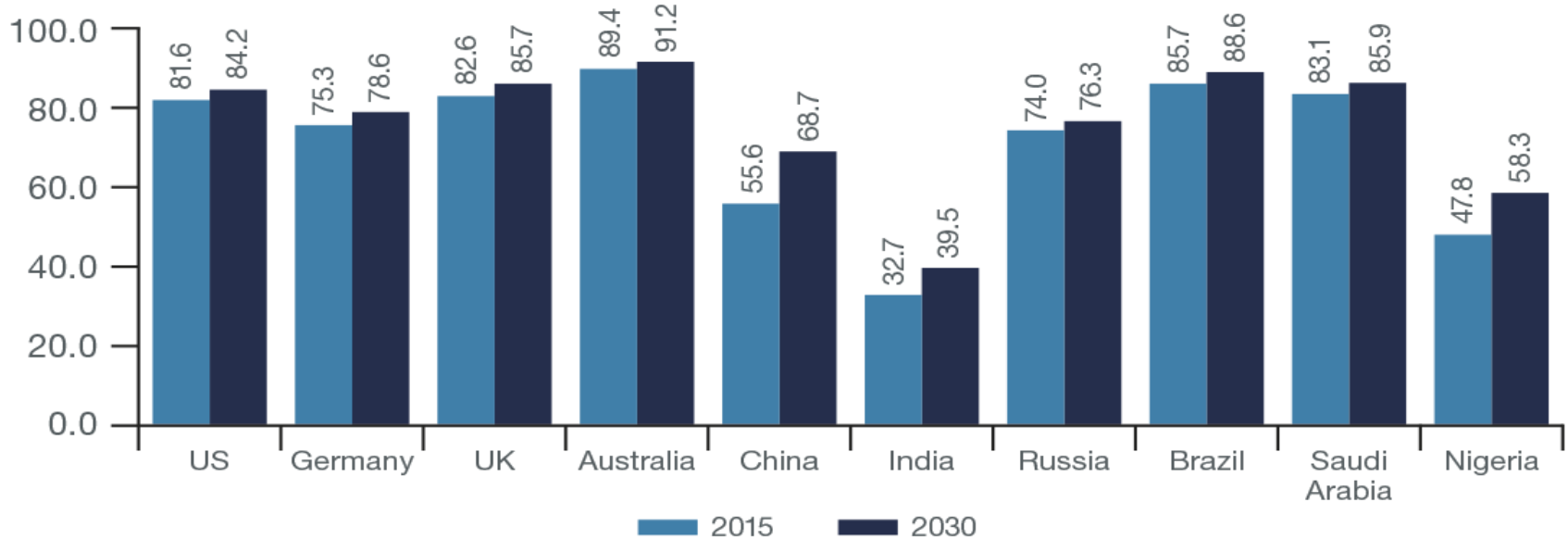
% of working population



Source: Global Construction Perspectives and Oxford Economics

www.globalconstruction2030.com

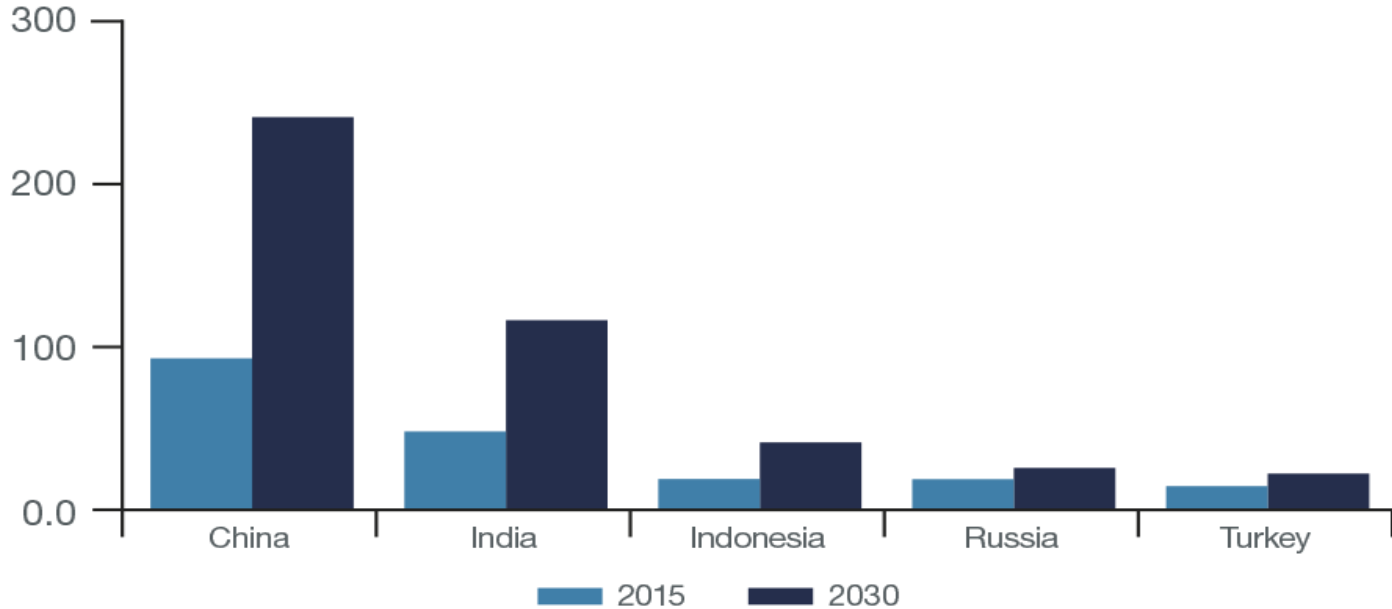
Urbanization Trends – 10 countries



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

Rise of Middle Income Households

households with incomes above US\$35,000 (millions)

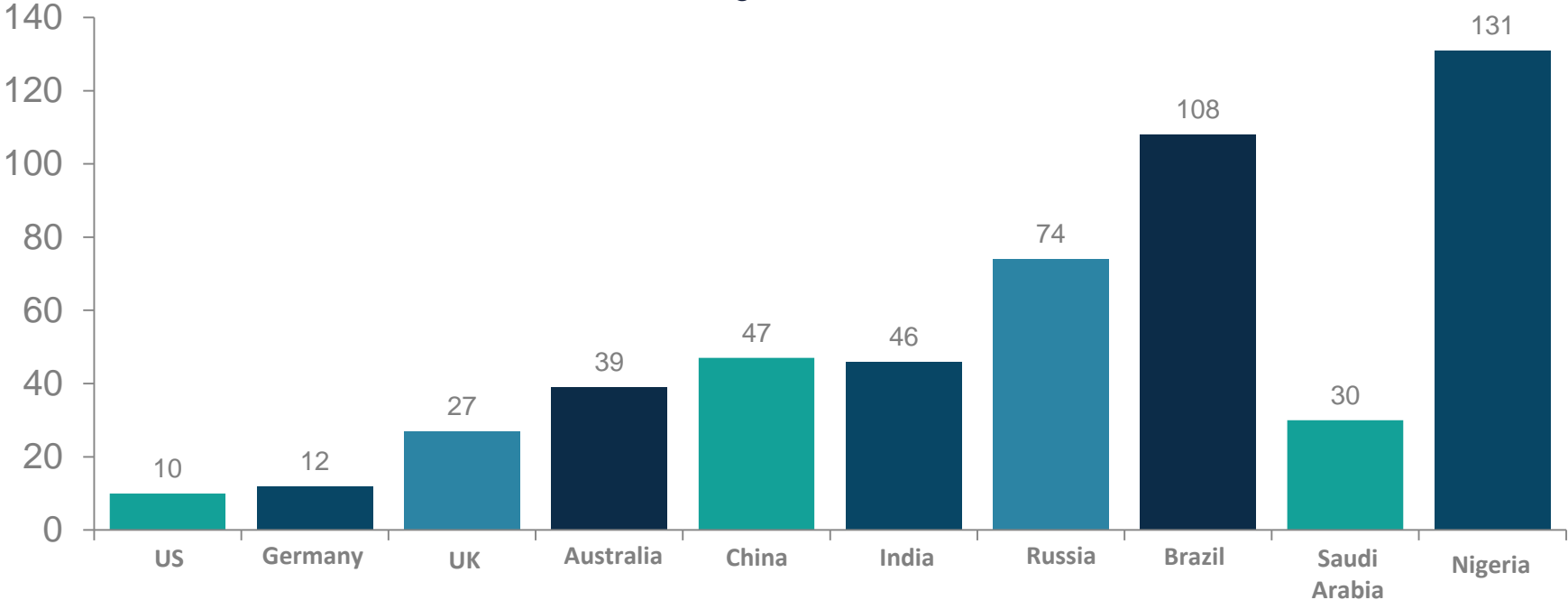


Source: Global Construction Perspectives and Oxford Economics

www.globalconstruction2030.com

Quality of Existing Infrastructure — 10 Countries

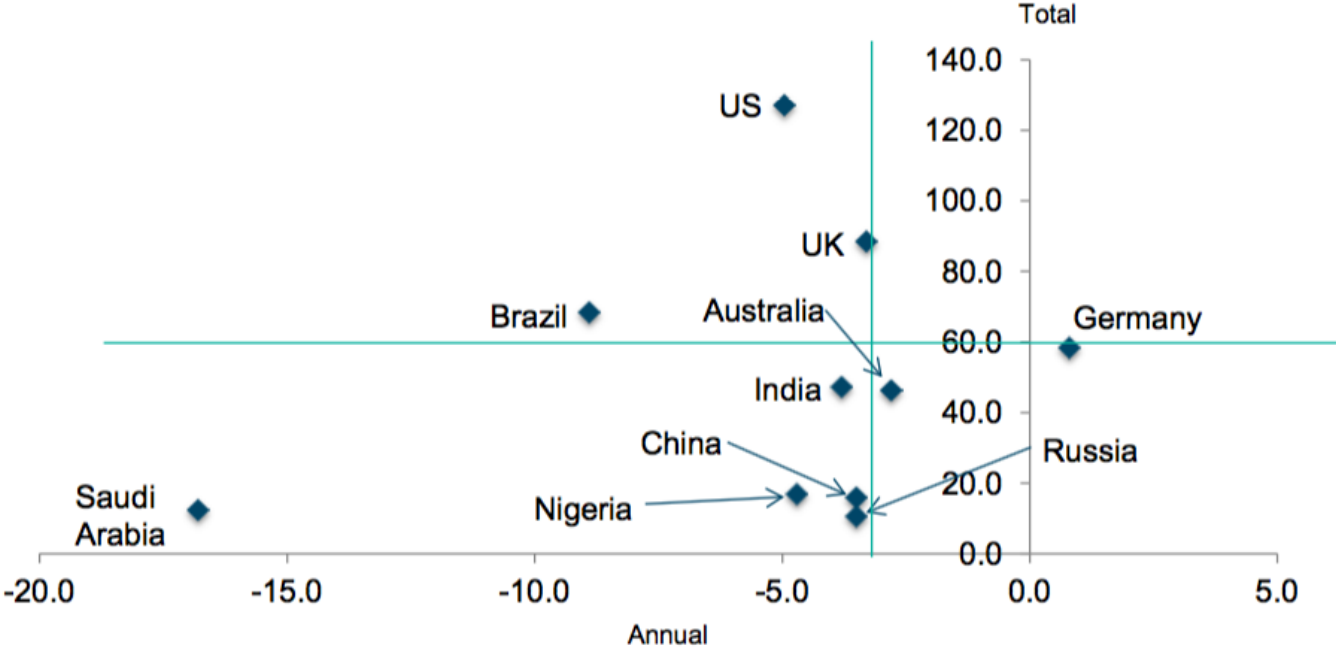
Global Ranking out of 137 countries



Source: WEF Global Competitiveness Index 2017/18 (published 27 September 2017)
Global Construction Perspectives and Oxford Economics Analysis



Budget Deficit: Ability to Fund Infrastructure

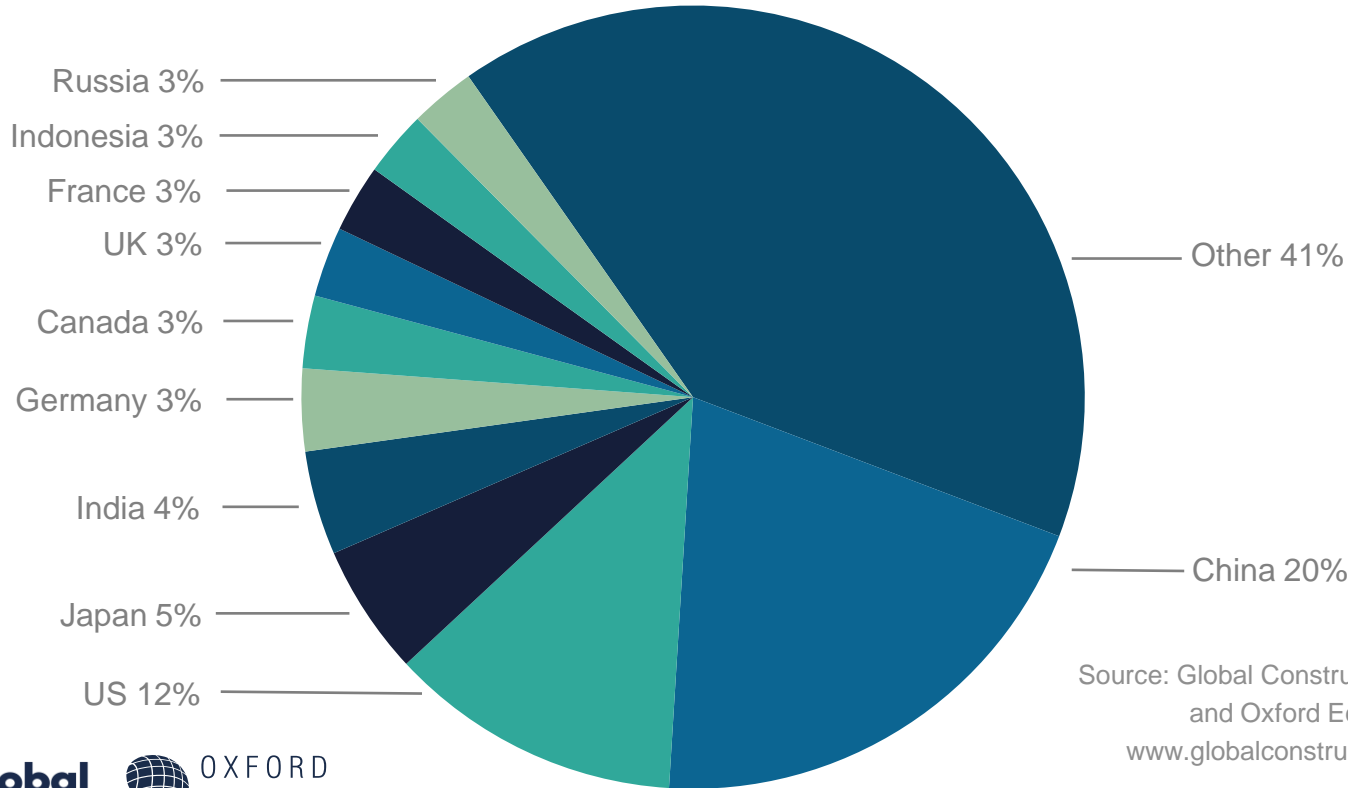


Source: Global Construction Perspectives and Oxford Economics
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2017 Global Market: Country Split

US\$10.7 trillion at 2014 prices and exchange rates



Source: Global Construction Perspectives
and Oxford Economics
www.globalconstruction2030.com



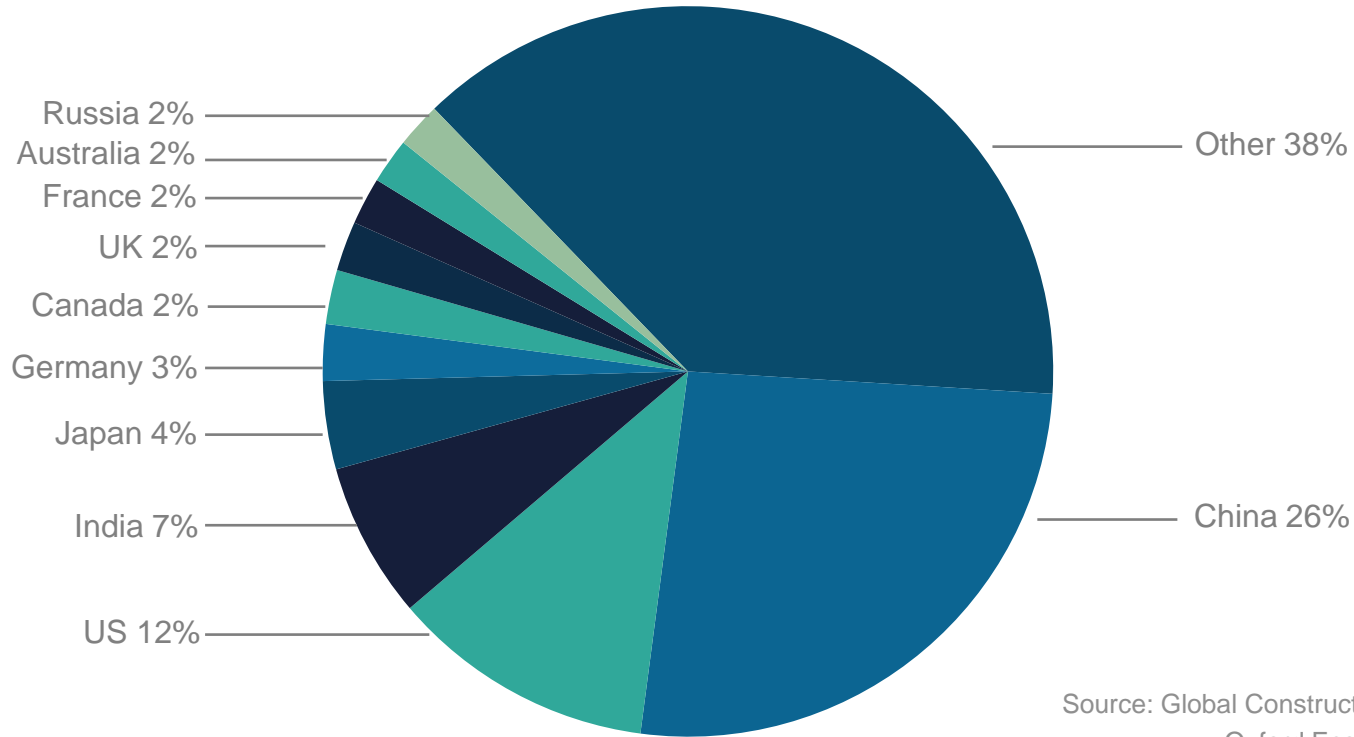
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2030 Global Market: Country Split

US\$16.6 trillion at 2014 prices and exchange rates

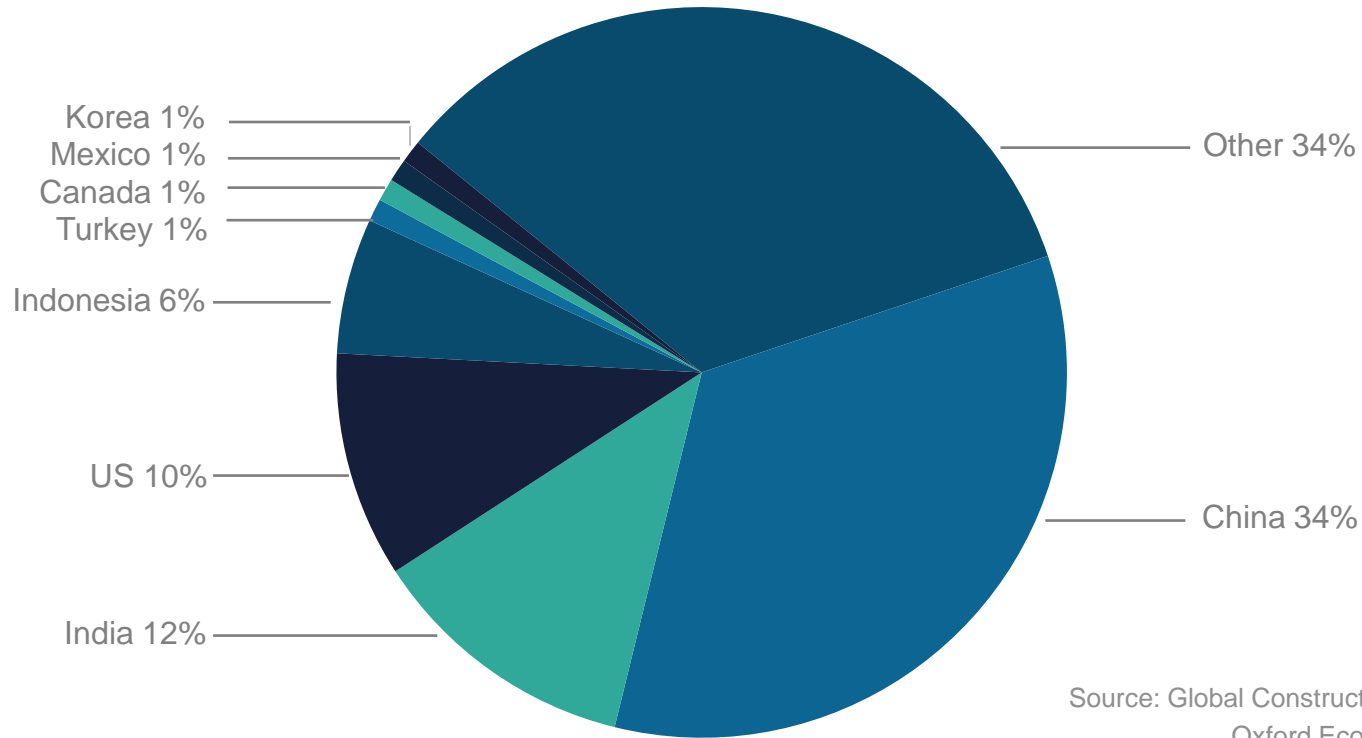


Source: Global Construction Perspectives and Oxford Economics

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Contribution to Global Growth 2017-2030

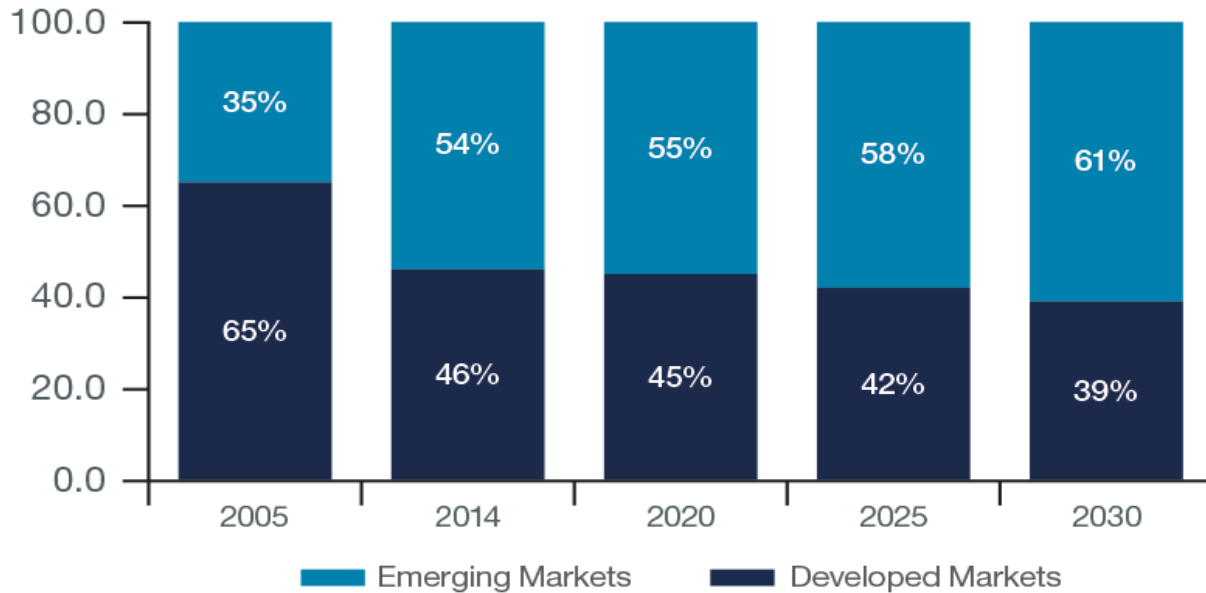
US\$bn at 2014 prices and exchange rates



Source: Global Construction Perspectives and Oxford Economics

www.globalconstruction2030.com

Increasing Importance of Emerging Markets



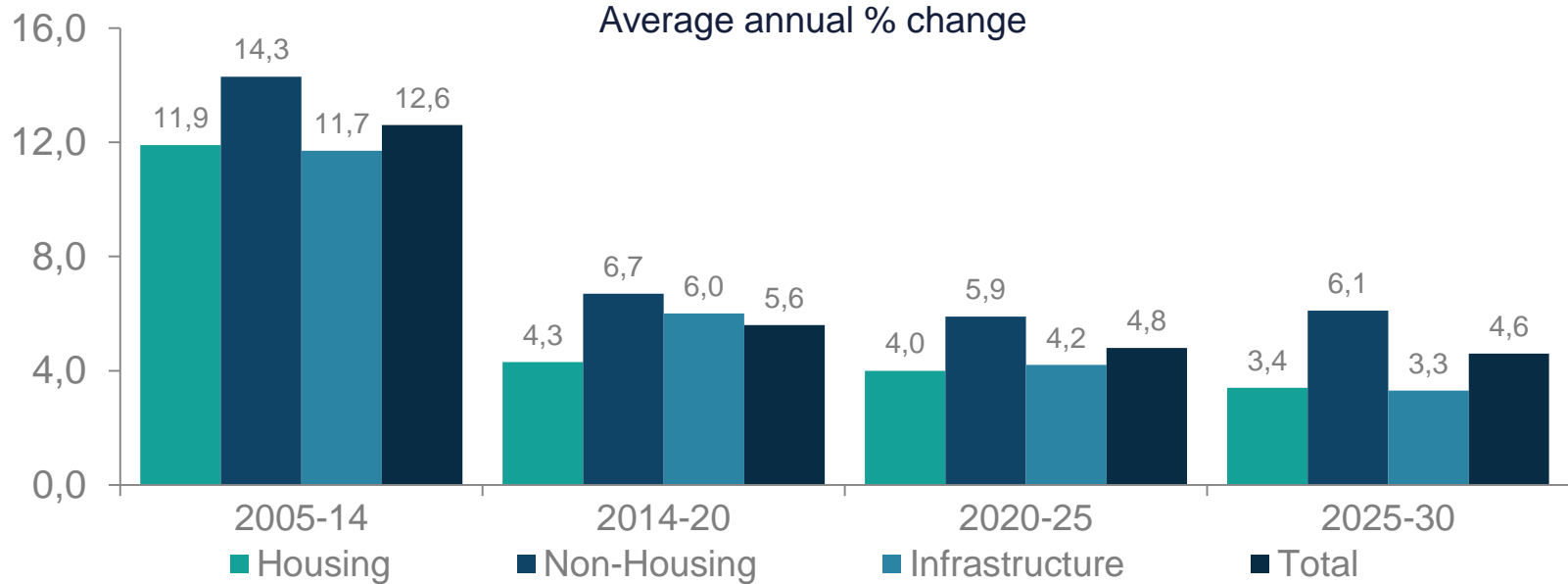
Source: Global Construction Perspectives and Oxford Economics
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Construction Outlook 2030 Global Super Powers

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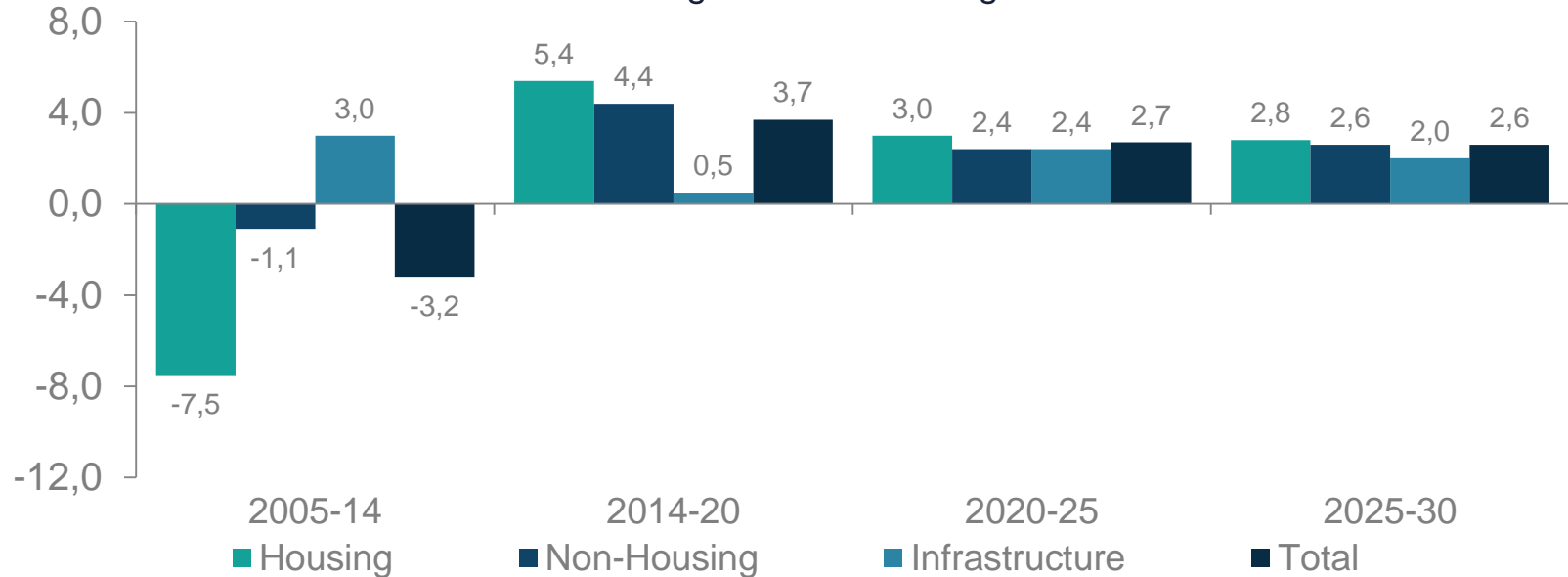
China: Growth Rates for Construction Output 2005-2030



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

US: Growth Rates for Construction Output 2005-2030

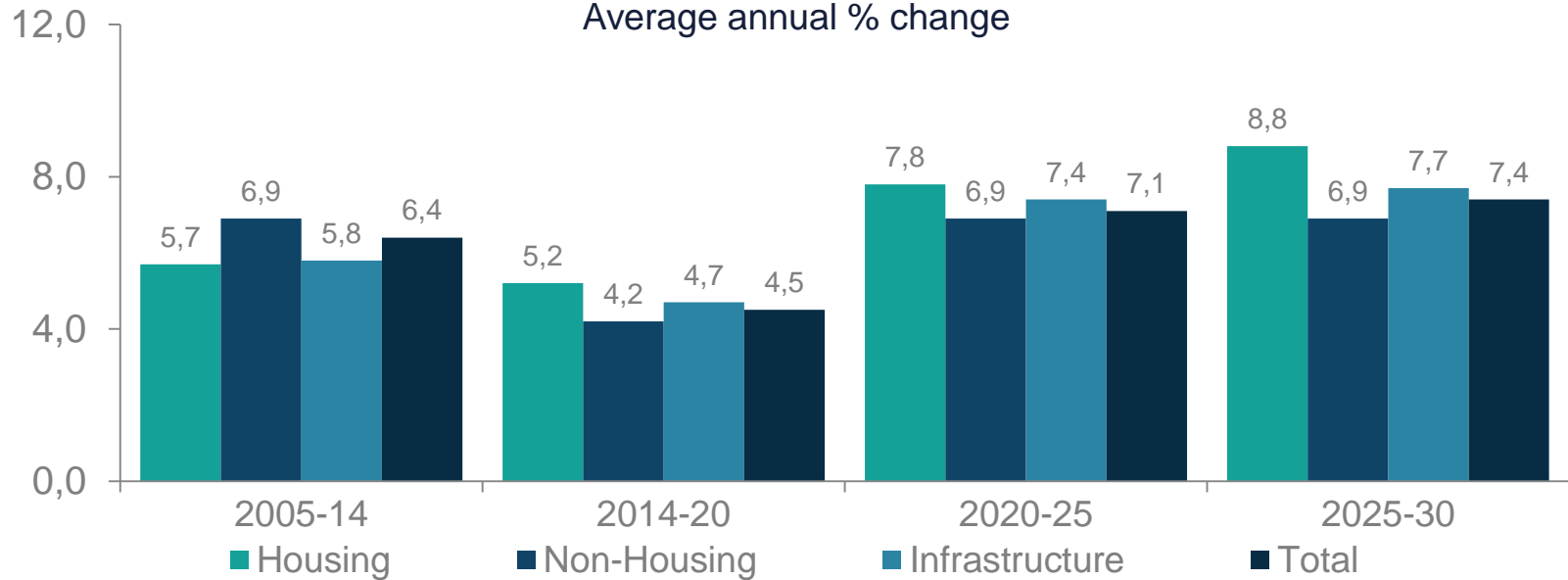
Average annual % change



Source: Global Construction Perspectives and Oxford Economics

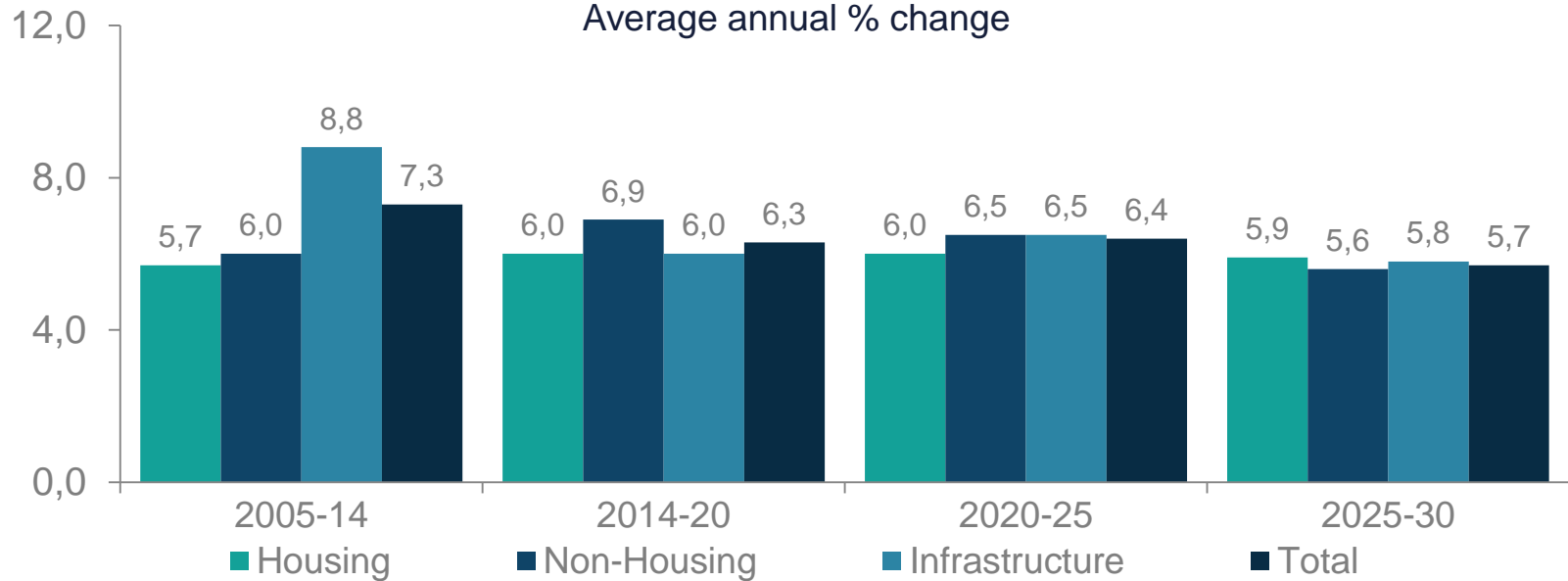
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India: Growth Rates for Construction Output 2005-2030



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

Indonesia: Growth Rates for Construction Output 2005-2030



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

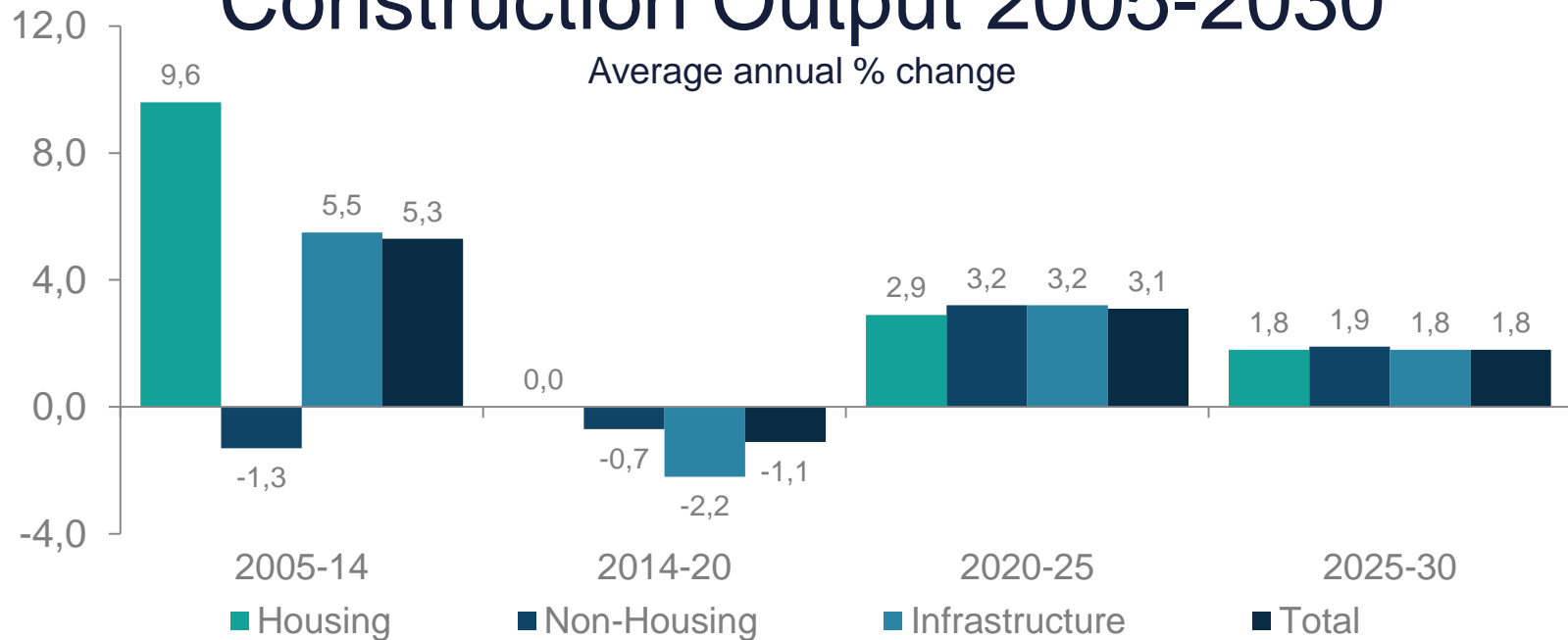
Regional Construction Outlook 2030

Regional Growth – Latin America

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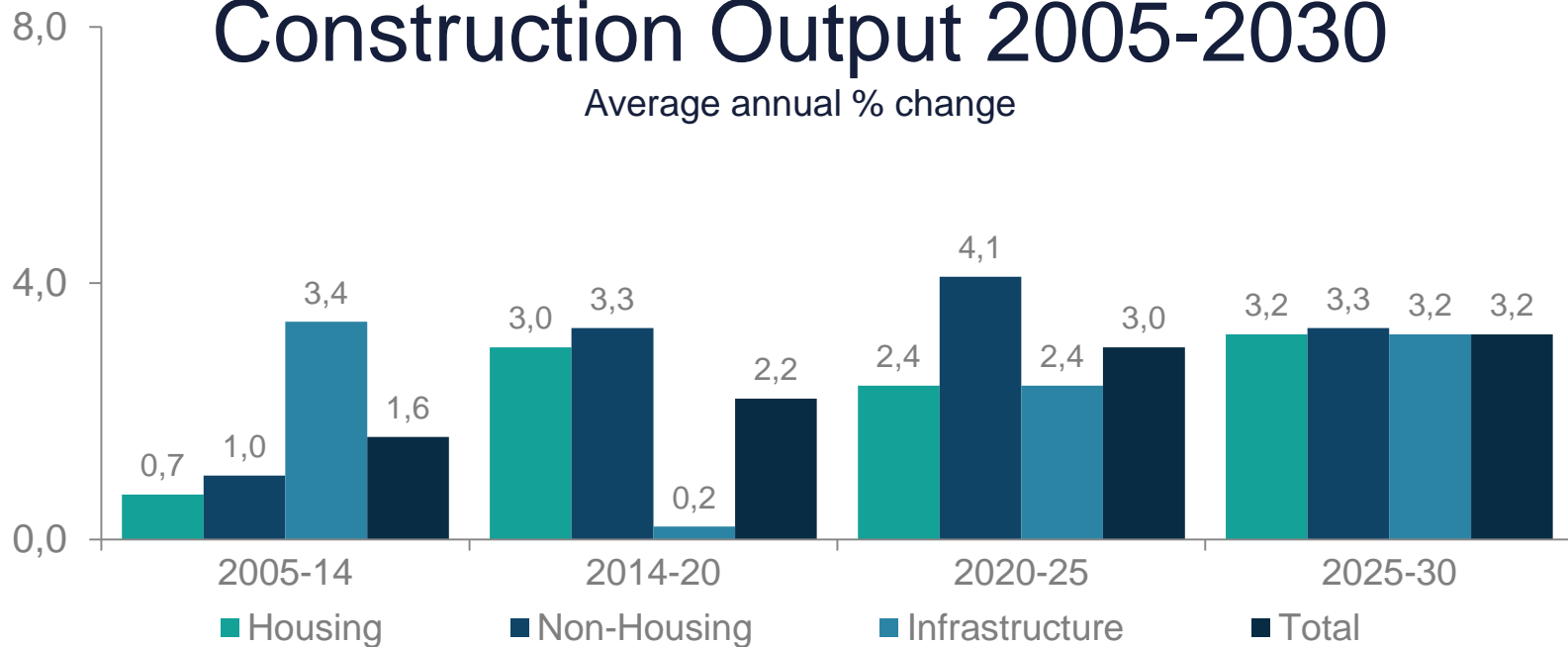
Brazil: Growth Rates for Construction Output 2005-2030



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

Mexico: Growth Rates for Construction Output 2005-2030

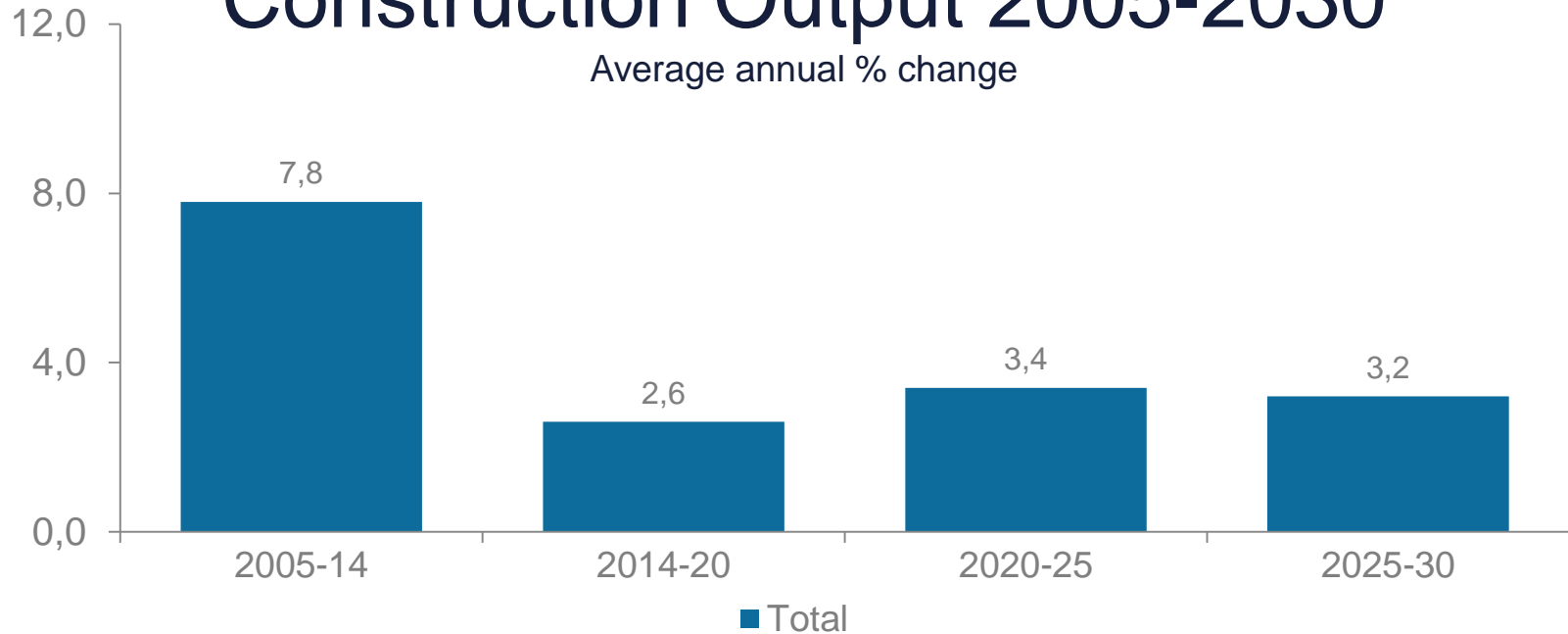
Average annual % change



Source: Global Construction Perspectives and Oxford Economics
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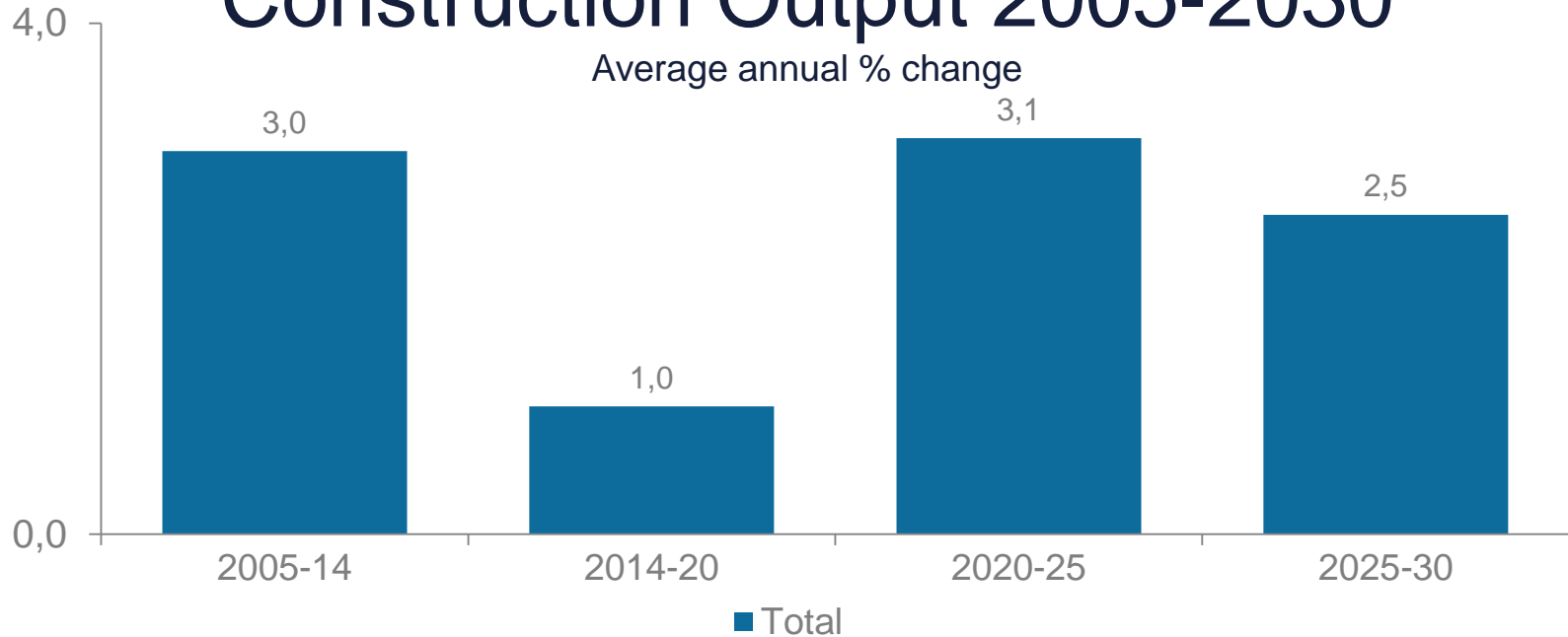
Colombia: Growth Rates for Construction Output 2005-2030

Average annual % change



Source: Global Construction Perspectives and Oxford Economics
www.globalconstruction2030.com

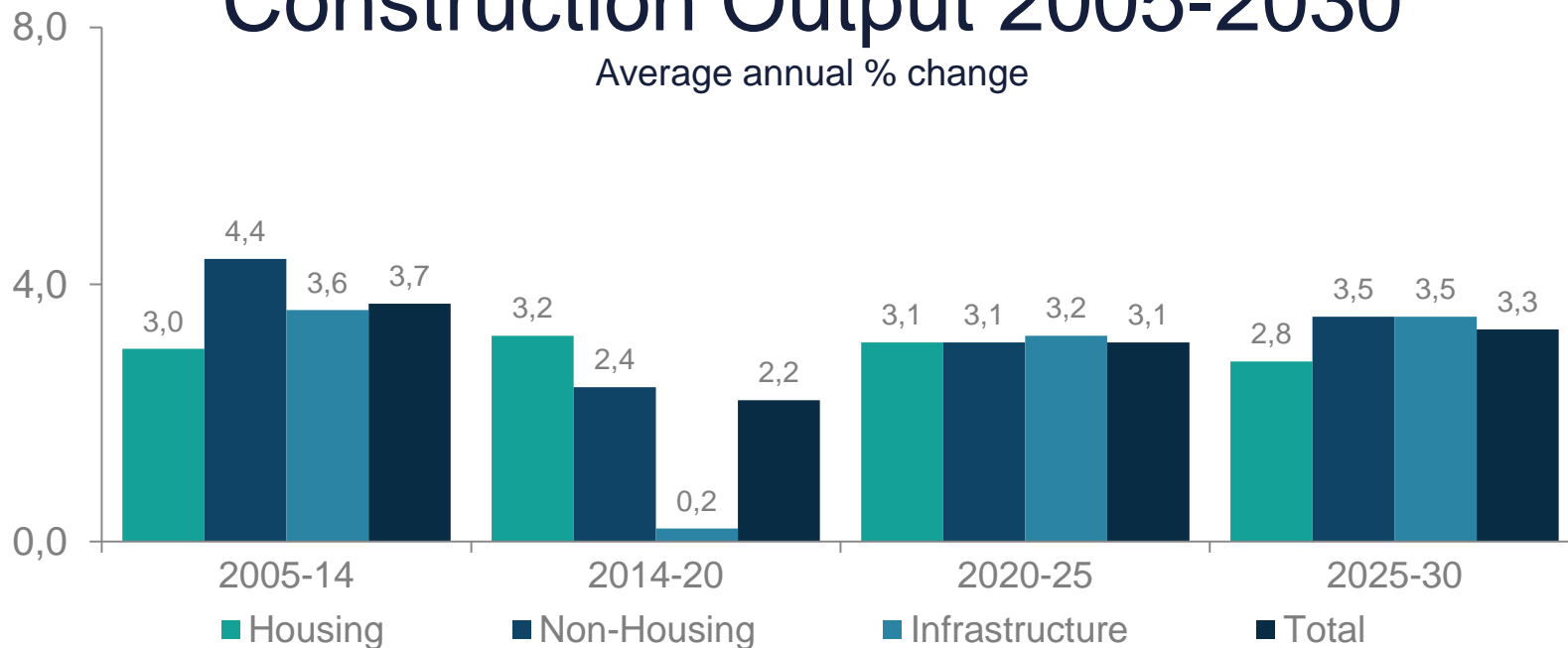
Argentina: Growth Rates for Construction Output 2005-2030



Source: Global Construction Perspectives and Oxford Economics
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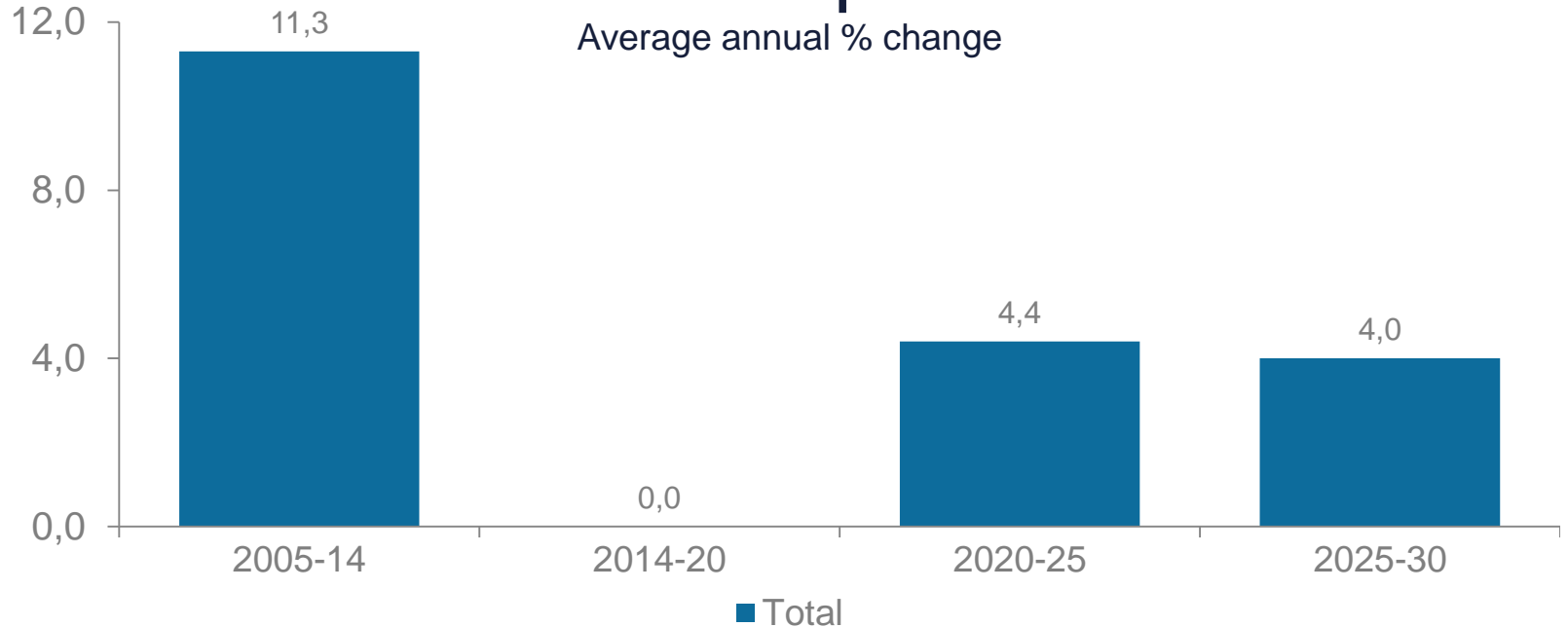
Chile: Growth Rates for Construction Output 2005-2030

Average annual % change



Source: Global Construction Perspectives and Oxford Economics
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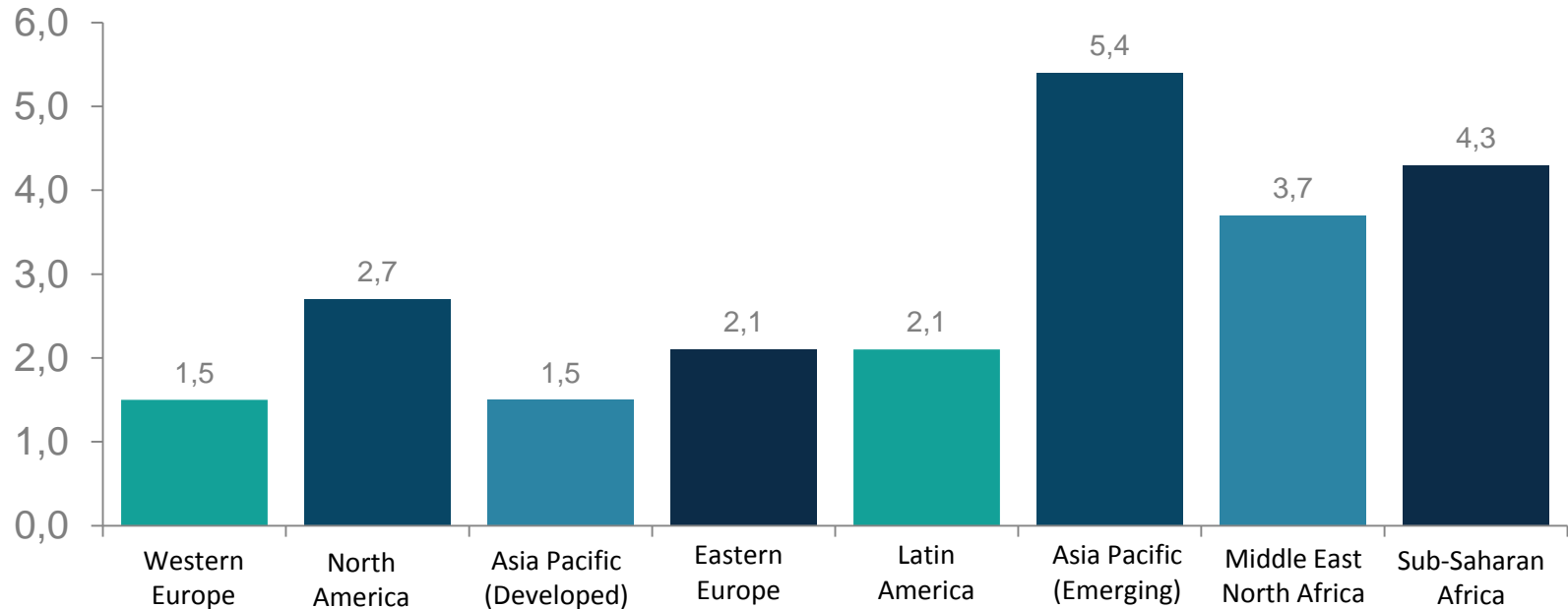
Peru: Growth Rates for Construction Output 2005-2030



Source: Global Construction Perspectives and Oxford Economics
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Regional Summary 2014-2030

Average annual % change



Source: Global Construction Perspectives and Oxford Economics

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