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Construction in Australia - Key Trends and Opportunities to 2018

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NEW YORK, June 2, 2014 /PRNewswire/ -- Reportlinker.com announces that a new market research report is available in its catalogue:

Construction in Australia -- Key Trends and Opportunities to 2018

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Synopsis

This report provides detailed market analysis, information and insights into the Australian construction industry including:

- The Australian construction industry's growth prospects by market, project type and type of construction activity
- Analysis of equipment, material and service costs across each project type within Australia
- Critical insight into the impact of industry trends and issues, and the risks and opportunities they present to participants in the Australian construction industry
- Analyzing the profiles of the leading operators in the Australian construction industry
- Data highlights of the largest construction projects in Australia

Summary

The Australian construction industry registered a compound annual growth rate (CAGR) of 5.24% during the review period (2009--2013). Growth was supported by private and public investments in infrastructure, industrial and **residential** construction projects. Government infrastructure programs such as the Nation Building Program and the National Broadband Network supported the growth. Industry growth is expected to continue over the forecast period (2014--2018) as a result of the government's commitment to making infrastructural improvements. Consequently, industry

output is expected to record a forecast-period CAGR of 4.65%.

Scope

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

- Historical (2009-2013) and forecast (2014-2018) valuations of the construction industry in Australia using construction output and value-add methods
- Segmentation by sector (**commercial**, industrial, infrastructure, 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 Australia

Reasons To **Buy**

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

Key Highlights

- Since late 2012, construction activity in Australia has been fairly weak, with the industry posting a contraction of 0.2% in real value-added terms in 2013. This followed an annual average growth of 6.8% in real terms in 2011-2012. However, potential growth has emerged in the form of the total building permits for dwelling units reaching 51,417 in the fourth quarter of 2013, a growth of 23.2% over the fourth quarter of 2012. Permits for houses rose by 14.7%, whereas permits (excluding houses) grew by 33.8% during the same period. The forecast-period outlook for construction in Australia remains positive due to low interest and unemployment rates and improvements in consumer and investor confidence.
- The government's focus on road and rail infrastructure development is expected to support economic growth and improve regional connectivity. In its 2013-2014 budget, the government allocated AUD24.0 **billion** (US\$23.3 **billion**) under the Nation Building Program to expand the country's road, rail and port infrastructure by 2018-2019.

-- According to the Australian Bureau of Statistics (ABS), the seasonally adjusted number of permits for total dwelling and non-residential units combined in February 2014 measured 16,669, an increase of 23.2% compared with February 2013. According to the Commonwealth Bank of Australia, the supply of new housing units per year is 154,000, whereas the country needs around 170,000 units, based on an average population growth of 1.6% a year. Over the forecast period, growth in the residential market will be driven by the need to balance housing unit demand and supply.

-- The Reserve Bank of Australia cut its policy interest rate to a record low of 2.5% in September 2013, a level at which it has remained. This helped to support an improvement in business confidence across various sectors, which is expected to contribute to demand for office buildings. Moreover, the higher yield on asset prices, better leasing conditions and the recovery of the Australian real estate investment trust has helped attract investors to purchase office buildings. As a result, the office buildings category is expected to expand over the forecast period.

-- Various challenges such as decisions by Ford and GM in 2013 to shut down their manufacturing operations by 2017, a decline in new orders, tough competition in the international market and the slowing resource market due to slowing down of the industrial growth in the Chinese economy have all affected the Australian manufacturing industry. As a result, the manufacturing plants category is likely to grow at a slower pace over the forecast period.

Table of Contents

1 Executive Summary

2 Market Overview

2.1 Key Trends and Issues

2.2 Benchmarking by Market Size and Growth

3 Commercial Construction

3.1 Performance Outlook

3.2 Key Trends and Issues

3.3 Data and Project Highlights

4 Industrial Construction

4.1 Performance Outlook

4.2 Key Trends and Issues

4.3 Data and Project Highlights

5 Infrastructure Construction

5.1 Performance Outlook

5.2 Key Trends and Issues

5.3 Data and Project Highlights

6 Institutional Construction

6.1	Performance Outlook
6.2	Key Trends and Issues
6.3	Data and Project Highlights
7	Residential Construction
7.1	Performance Outlook
7.2	Key Trends and Issues
7.3	Data and Project Highlights
8	Company Profile: Watpac Ltd
8.1	Watpac Ltd -- Company Overview
8.2	Watpac Ltd -- Main Services
8.3	Watpac Ltd -- Company Information
8.3.1	Watpac Ltd -- key competitors
8.3.2	Watpac Ltd -- key employees
9	Company Profile: Mirvac Group
9.1	Mirvac Group -- Company Overview
9.2	Mirvac Group -- Business Description
9.3	Mirvac Group -- Main Services
9.4	Mirvac Group -- History
9.5	Mirvac Group -- Company Information
9.5.1	Mirvac Group -- key competitors
9.5.2	Mirvac Group -- key employees
10	Company Profile: John Holland Group Pty Ltd
10.1	John Holland Group Pty Ltd -- Company Overview
10.2	John Holland Group Pty Ltd -- Business Description
10.3	John Holland Group Pty Ltd -- Main Services
10.4	John Holland Group Pty Ltd -- History
10.5	John Holland Group Pty Ltd -- Company Information
10.5.1	John Holland Group Pty Ltd -- key competitors
10.5.2	John Holland Group Pty Ltd -- key employees
11	Company Profile: Leighton Holdings Ltd
11.1	Leighton Holdings Ltd -- Company Overview
11.2	Leighton Holdings Ltd -- Business Description
11.3	Leighton Holdings Ltd -- Main Services
11.4	Leighton Holdings Ltd -- History
11.5	Leighton Holdings Ltd -- Company Information

- 11.5.1 Leighton Holdings Ltd -- key competitors
- 11.5.2 Leighton Holdings Ltd -- key employees
- 12 **Company** Profile: McConnell Dowell Corporation Ltd
- 12.1 McConnell Dowell Corporation Ltd -- **Company** Overview
- 12.2 McConnell Dowell Corporation Ltd -- Business Description
- 12.3 McConnell Dowell Corporation Ltd -- Main Services
- 12.4 McConnell Dowell Corporation Ltd -- History
- 12.5 McConnell Dowell Corporation Ltd -- **Company** Information
 - 12.5.1 McConnell Dowell Corporation Ltd -- key competitors
 - 12.5.2 McConnell Dowell Corporation Ltd -- key employees
- 13 Market Data Analysis
 - 13.1 Construction Output and Value Add
 - 13.1.1 Construction output by project type
 - 13.1.2 Construction output by cost type
 - 13.1.3 Construction output by activity type
 - 13.1.4 Construction value add by project type
 - 13.2 **Commercial** Construction
 - 13.2.1 **Commercial** construction output by project type
 - 13.2.2 **Commercial** construction output by cost type
 - 13.2.3 **Commercial** construction output by activity type
 - 13.2.4 **Commercial** construction value add by project type
 - 13.3 Industrial Construction
 - 13.3.1 Industrial construction output by project type
 - 13.3.2 Industrial construction output by cost type
 - 13.3.3 Industrial construction output by activity type
 - 13.3.4 Industrial construction value add by project type
 - 13.4 Infrastructure Construction
 - 13.4.1 Infrastructure construction output by project type
 - 13.4.2 Infrastructure construction output by cost type
 - 13.4.3 Infrastructure construction output by activity type
 - 13.4.4 Infrastructure construction value add by project type
 - 13.5 Institutional Construction

- 13.5.1 Institutional construction output by project type
- 13.5.2 Institutional construction output by cost type
- 13.5.3 Institutional construction output by activity type
- 13.5.4 Institutional construction value add by project type

13.6 Residential Construction

- 13.6.1 Residential construction output by project type
- 13.6.2 Residential construction output by cost type
- 13.6.3 Residential construction output by activity type
- 13.6.4 Residential construction value add by project type

14 Appendix

- 14.1 What is This Report About?
- 14.2 Definitions
- 14.3 Summary Methodology
- 14.4 Methodology
- 14.5 Contact Timetric
- 14.6 About Timetric
- 14.7 Timetric's Services
- 14.8 Disclaimer

List of Tables

Table 1: Benchmarking with Other Major Construction Industries

Table 2: Commercial Construction Project 1 -- ARGBR -- Aquis Great Barrier Reef Resort -- Queensland

Table 3: Commercial Construction Project 2 -- PCR -- Palmer Coolum Resort Redevelopment -- Queensland

Table 4: Commercial Construction Project 3 -- CVX -- Elizabeth Quay Office Tower -- Western Australia

Table 5: Industrial Construction Project 1 -- RHHPL -- Roy Hill Iron Ore Development -- Western Australia

Table 6: Industrial Construction Project 2 -- CRL -- Jack Hills Iron Ore Expansion -- Western Australia

Table 7: Industrial Construction Project 3 -- PI -- Perdaman Collie Urea Manufacturing Plant -- Western Australia

Table 8: Infrastructure Construction Project 1 -- DoIT -- Brisbane-Sydney-Canberra-Melbourne High-Speed Rail Network -- Queensland

Table 9: Infrastructure Construction Project 2 -- EWLP -- Iron Boomerang Rail Line -- Queensland

Table 10: Infrastructure Construction Project 3 -- MoIT -- Sydney to Canberra High-Speed Railway Link -- New South Wales

Table 11: Institutional Construction Project 1 -- GoWA -- Fiona Stanley Hospital Development -- Western Australia

Table 12: Institutional Construction Project 2 -- QH -- Sunshine Coast University Hospital -- Queensland

Table 13: Institutional Construction Project 3 -- DEEWR -- Building the Education Revolution -- Australia

Table 14: **Residential** Construction Project 1 -- NSWG -- Greater Sydney Housing and Infrastructure Program -- New South Wales

Table 15: **Residential** Construction Project 2 -- Housing NSW -- National Building Economic Stimulus Social Housing Development -- New South Wales

Table 16: **Residential** Construction Project 3 -- Meriton -- Pagewood **Residential** Apartments -- New South Wales

Table 17: Watpac Ltd, Key Facts

Table 18: Watpac Ltd, Main Services

Table 19: Watpac Ltd, Key Employees

Table 20: Mirvac **Group**, Key Facts

Table 21: Mirvac **Group**, Main Services

Table 22: Mirvac **Group**, History

Table 23: Mirvac **Group**, Key Employees

Table 24: John Holland **Group** Pty Ltd, Key Facts

Table 25: John Holland **Group** Pty Ltd, Main Services

Table 26: John Holland **Group** Pty Ltd, History

Table 27: John Holland **Group** Pty Ltd, Key Employees

Table 28: Leighton Holdings Ltd, Key Facts

Table 29: Leighton Holdings Ltd, Main Services

Table 30: Leighton Holdings Ltd -- History

Table 31: Leighton Holdings Ltd, Key Employees

Table 32: McConnell Dowell Corporation Ltd, Key Facts

Table 33: McConnell Dowell Corporation Ltd, Main Services

Table 34: McConnell Dowell Corporation Ltd -- History

Table 35: McConnell Dowell Corporation Ltd, Key Employees

Table 36: Australian Construction Output by Project Type (AUD **Million**), 2009--2013

Table 37: Australian Construction Output by Project Type (AUD **Million**), 2013--2018

Table 38: Australian Construction Output by Cost Type (AUD **Million**), 2009--2013

Table 39: Australian Construction Output by Cost Type (AUD **Million**), 2013--2018

Table 40: Australian Construction Output by Activity Type (AUD **Million**), 2009--2013

Table 41: Australian Construction Output by Activity Type (AUD **Million**), 2013--2018

Table 42: Australian Construction Value Add by Project Type (AUD **Million**), 2009--2013

Table 43: Australian Construction Value Add by Project Type (AUD **Million**), 2013--2018

Table 44: Australian **Commercial** Construction Output by Project Type (AUD **Million**), 2009--2013

Table 45: Australian **Commercial** Construction Output by Project Type (AUD **Million**), 2013--2018

Table 46: Australian **Commercial** Construction Output by Cost Type (AUD **Million**), 2009--2013

Table 47: Australian **Commercial** Construction Output by Cost Type (AUD **Million**), 2013--2018

Table 48: Australian **Commercial** Construction Output by Activity Type (AUD **Million**), 2009--2013

Table 49: Australian **Commercial** Construction Output by Activity Type (AUD **Million**), 2013--2018

Table 50: Australian **Commercial** Construction Value Add by Project Type (AUD **Million**), 2009--2013

Table 51: Australian **Commercial** Construction Value Add by Project Type (AUD **Million**), 2013--2018

Table 52: Australian Industrial Construction Output by Project Type (AUD **Million**), 2009--2013

Table 53: Australian Industrial Construction Output by Project Type (AUD **Million**), 2013--2018

Table 54: Australian Industrial Construction Output by Cost Type (AUD **Million**), 2009--2013

Table 55: Australian Industrial Construction Output by Cost Type (AUD **Million**), 2013--2018

Table 56: Australian Industrial Construction Output by Activity Type (AUD **Million**), 2009--2013

Table 57: Australian Industrial Construction Output by Activity Type (AUD **Million**), 2013--2018

Table 58: Australian Industrial Construction Value Add by Project Type (AUD **Million**), 2009--2013

Table 59: Australian Industrial Construction Value Add by Project Type (AUD **Million**), 2013--2018

Table 60: Australian Infrastructure Construction Output by Project Type (AUD **Million**), 2009--2013

Table 61: Australian Infrastructure Construction Output by Project Type (AUD **Million**), 2013--2018

Table 62: Australian Infrastructure Construction Output by Cost Type (AUD **Million**), 2009--2013

Table 63: Australian Infrastructure Construction Output by Cost Type (AUD **Million**), 2013--2018

Table 64: Australian Infrastructure Construction Output by Activity Type (AUD **Million**), 2009--2013

Table 65: Australian Infrastructure Construction Output by Activity Type (AUD **Million**), 2013--2018

Table 66: Australian Infrastructure Construction Value Add by Project Type (AUD **Million**), 2009--2013

Table 67: Australian Infrastructure Construction Value Add by Project Type (AUD **Million**), 2013--2018

Table 68: Australian Institutional Construction Output by Project Type (AUD **Million**), 2009--2013

Table 69: Australian Institutional Construction Output by Project Type (AUD **Million**), 2013--2018

Table 70: Australian Institutional Construction Output by Cost Type (AUD **Million**), 2009--2013

Table 71: Australian Institutional Construction Output by Cost Type (AUD **Million**), 2013--2018

Table 72: Australian Institutional Construction Output by Activity Type (AUD **Million**), 2009--2013

Table 73: Australian Institutional Construction Output by Activity Type (AUD **Million**), 2013--2018

Table 74: Australian Institutional Construction Value Add by Project Type (AUD **Million**), 2009--2013

Table 75: Australian Institutional Construction Value Add by Project Type (AUD **Million**), 2013--2018

Table 76: Australian **Residential** Construction Output by Project Type (AUD **Million**), 2009--2013

Table 77: Australian **Residential** Construction Output by Project Type (AUD **Million**), 2013--2018

Table 78: Australian **Residential** Construction Output by Cost Type (AUD **Million**), 2009--2013

Table 79: Australian **Residential** Construction Output by Cost Type (AUD **Million**), 2013--2018

Table 80: Australian **Residential** Construction Output by Activity Type (AUD **Million**), 2009--2013

Table 81: Australian **Residential** Construction Output by Activity Type (AUD **Million**), 2013--2018

Table 82: Australian **Residential** Construction Value Add by Project Type (AUD **Million**), 2009--2013

Table 83: Australian **Residential** Construction Value Add by Project Type (AUD **Million**), 2013--2018

Table 84: Timetric Construction Market Definitions

List of Figures

Figure 1: Growth Matrix for Construction Output in Australia

Figure 2: Benchmarking with Other Major Construction Industries (%), 2009--2018

Figure 3: Australian **Commercial** Construction Output (US\$ **Million**), 2009--2018

Figure 4: Australian Industrial Construction Output (US\$ **Million**), 2009--2018

Figure 5: Australian Infrastructure Construction Output (US\$ **Million**), 2009--2018

Figure 6: Australian Institutional Construction Output (US\$ **Million**), 2009--2018

Figure 7: Australian **Residential** Construction Output (US\$ **Million**), 2009--2018

Figure 8: Australian Construction Output by Project Type (AUD **Million**), 2009--2018

Figure 9: Australian Construction Output by Cost Type (AUD **Million**), 2009--2018

Figure 10: Australian Construction Output by Activity Type (AUD **Million**), 2009--2018

Figure 11: Australian Construction Value Add by Project Type (AUD **Million**), 2009--2018

Figure 12: Australian **Commercial** Construction Output by Project Type (AUD **Million**), 2009--2018

Figure 13: Australian **Commercial** Construction Output by Cost Type (AUD **Million**), 2009--2018

Figure 14: Australian **Commercial** Construction Output by Activity Type (AUD **Million**), 2009--2018

Figure 15: Australian **Commercial** Construction Value Add by Project Type (AUD **Million**), 2009--2018

Figure 16: Australian Industrial Construction Output by Project Type (AUD **Million**), 2009--2018

Figure 17: Australian Industrial Construction Output by Cost Type (AUD **Million**), 2009--2018

Figure 18: Australian Industrial Construction Output by Activity Type (AUD **Million**), 2009--2018

Figure 19: Australian Industrial Construction Value Add by Project Type (AUD **Million**), 2009--2018

Figure 20: Australian Infrastructure Construction Output by Project Type (AUD **Million**), 2009--2018

Figure 21: Australian Infrastructure Construction Output by Cost Type (AUD **Million**), 2009--2018

Figure 22: Australian Infrastructure Construction Output by Activity Type (AUD **Million**), 2009--2018

Figure 23: Australian Infrastructure Construction Value Add by Project Type (AUD **Million**), 2009--2018

Figure 24: Australian Institutional Construction Output by Project Type (AUD **Million**), 2009--2018

Figure 25: Australian Institutional Construction Output by Cost Type (AUD **Million**), 2009--2018

Figure 26: Australian Institutional Construction Output by Activity Type (AUD **Million**), 2009--2018

Figure 27: Australian Institutional Construction Value Add by Project Type (AUD **Million**), 2009--2018

Figure 28: Australian **Residential** Construction Output by Project Type (AUD **Million**), 2009--2018

Figure 29: Australian **Residential** Construction Output by Cost Type (AUD **Million**), 2009--2018

Figure 30: Australian **Residential** Construction Output by Activity Type (AUD **Million**), 2009--2018

Figure 31: Australian **Residential** Construction Value Add by Project Type (AUD **Million**), 2009--2018

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