



INTERNATIONAL  
**T R A D E**  
ADMINISTRATION

## Construction Best Prospects\*

2021 - 2022 Edition



\*This document is derived in large part from the *Best Prospects* sections of *County Commercial Guides* prepared by the International Trade Division of the U.S. Department of Commerce. The source material may be viewed at <https://www.trade.gov/industries>. This booklet is offered as a convenience to U.S. exporters who prefer receiving the material as a single downloadable file.

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# INTRODUCTION

This report is a compendium of “Best Prospects” chapters from the Country Commercial Guides published by the Design & Construction Team of the International Trade Administration (ITA). It covers a limited number of top markets where the ITA has rated the construction sector as a best prospect. The chart below, from the ITA, shows the top 10 markets for construction materials by subsector. While a few years old, it tracks closely with more recent export data from United Nations ITC Group, as presented on the next few pages.

Overall Building Product Sector	HVACR	Lighting	Plumbing Products	Wood Products	Insulation	Doors & Windows	Glass
Canada	Canada	Canada	Mexico	China	Mexico	Canada	Hong Kong
Mexico	Mexico	Mexico	Canada	Canada	Canada	Mexico	Canada
China	China	China	Saudi Arabia	Mexico	China	Bahamas	Mexico
Japan	Saudi Arabia	Korea	UAE	Japan	UK	Australia	Colombia
UK	Germany	Saudi Arabia	Taiwan	Vietnam	Korea	Saudi Arabia	UAE
Saudi Arabia	UK	Germany	UK	UK	Australia	Russia	South Africa
Germany	Brazil	Japan	Venezuela	Italy	Brazil	UK	Turkey
Australia	Australia	UK	Korea	Turkey	Japan	Japan	Australia
Hong Kong	Japan	Taiwan	Australia	Australia	France	Venezuela	Venezuela
Korea	France	Netherlands	South Africa	Spain	Germany	Netherlands	Kuwait

The following charts show the top 10 export markets for US building materials made from wood, metal, and plastics. They tell us where we exported these products the most, and where our exports are increasing or decreasing.

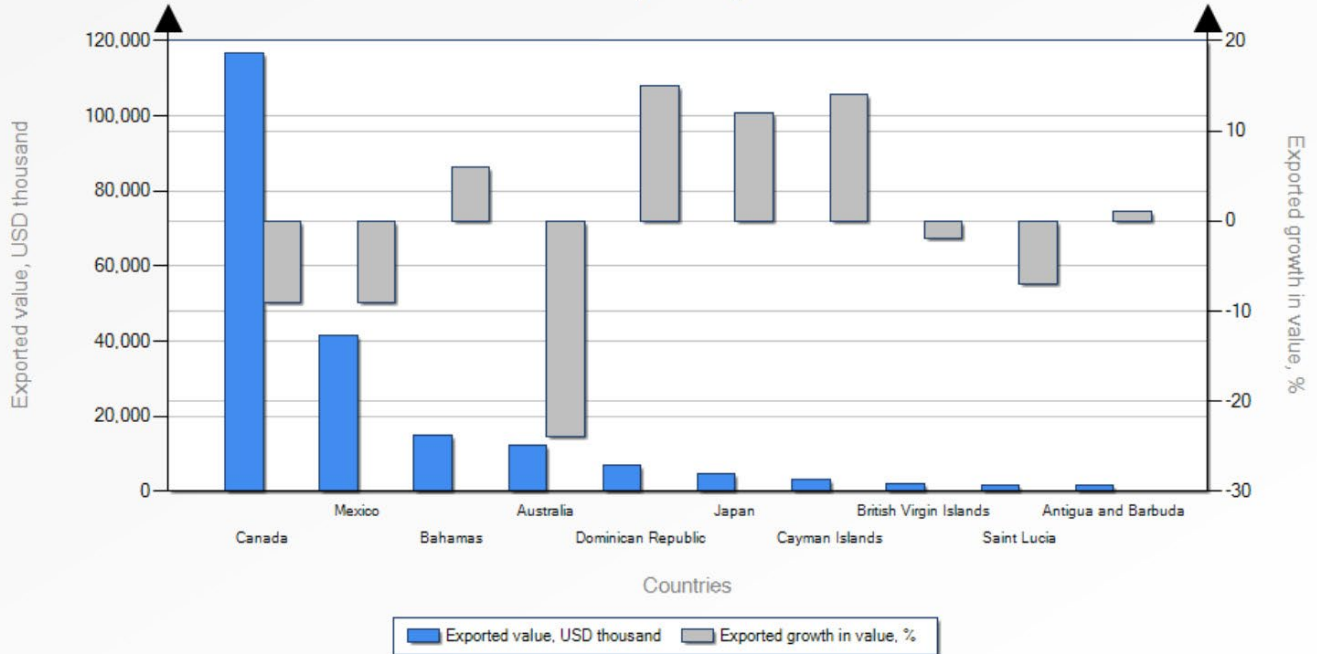
The blue vertical bars show the value of our exports, while the gray bars show the growth or decline in our exports sales. Please note: The largest export markets do not always offer the best export prospects. For example, Canada is the largest export market for US building products, but our exports are either stable or in decline. ITA did not rate it as a best prospect, so there is no sector report for Canada. (Exporting companies should use more precise data for their specific products when selecting target markets.)

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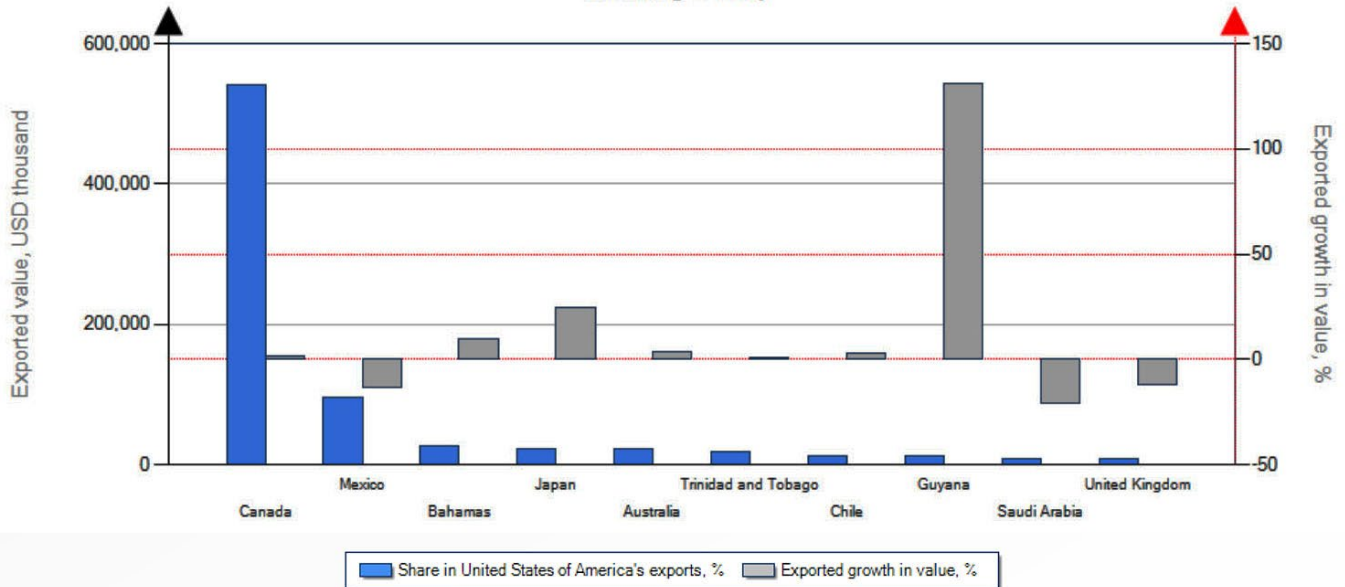
*The ITA Design & Construction Team centralizes industry expertise, market research, and best practices to better assist U.S. manufacturers of construction and building products, design firms and service providers with international development. Their industry specialists are dedicated to enhancing the global competitiveness of the U.S. design and construction sector, expanding market access, and increasing exports.*

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List of importing markets for a product exported by United States of America in 2020  
 Product: 4412 Plywood, veneered panel and similar laminated wood (excluding sheets of compressed wood, cellular wood panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)

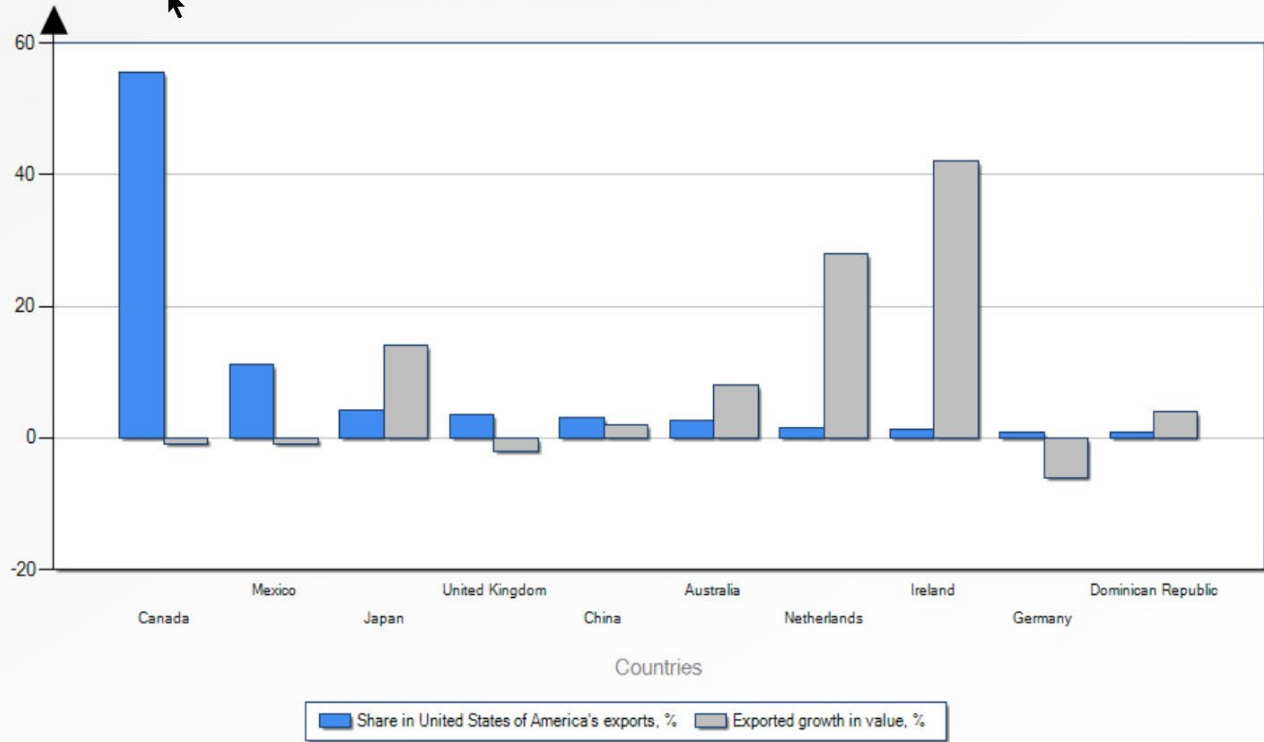


List of importing markets for a product exported by United States of America in 2020  
 Product: 7308 Structures and parts of structures "e.g., bridges and bridge-sections, lock-gates, towers, lattice masts, roofs, roofing frameworks, doors and windows and their frames and thresholds for doors, shutters, balustrades, pillars and columns", of iron or steel; plates, rods, angles, shapes, sections, tubes and the like, prepared for use in structures, of iron or steel (excluding prefabricated buildings of heading 9406)



Sources: ITC calculations based on [US Census Bureau](https://www.census.gov) statistics.

List of importing markets for a product exported by United States of America in 2020  
 Product: 3925 Builders' ware of plastics, n.e.s.



Sources: ITC calculations based on [US Census Bureau](#) statistics.

# BAHAMAS - Reconstruction & Redevelopment

This is a best prospect industry sector for this country. Includes a market overview and trade data.  
Last published date: 2021-09-16

## Overview

Grand Bahama and Abaco, the islands directly impacted by Hurricane Dorian in 2019, remain in need of immediate and long-term assistance. Housing, utilities, and other infrastructure was devastated. Opportunities for U.S. companies include reconstruction and redevelopment with emphasis on shelter and modular housing (including design and construction), energy infrastructure development, restoration of utilities, water treatment, and repairs to critical infrastructure such as air and seaports, roads, and telecommunications. In addition, the Bahamian government is looking to incorporate hurricane-resistant standards in its redesign and rebuilding plans for both islands, including topography design, temporary and permanent housing, and urban planning. There is also an acute need for project coordination and logistics management.

## Leading Sub-Sectors

Promising sub-sectors include hurricane-sustainable construction materials, heavy equipment, utility scale renewable energy products and services, and energy efficient products and services.

## Opportunities

Opportunities for U.S. companies focus on recovery and reconstruction on Grand Bahama and Abaco, with emphasis on shelter and modular housing (including design and construction), energy infrastructure development, restoration of utilities, water treatment, and repairs to critical infrastructure such as air and seaports, roads, and telecommunications. A three-stage bidding process for a multi-million-dollar airport redevelopment on several islands will begin in September 2021 and should be concluded by April 2022.

The Bahamian government is also looking to incorporate hurricane-resistant standards in its redesign and rebuilding plans for both islands, including topography design, temporary and permanent housing, and urban planning. There is also an acute need for project coordination and logistics management.

## Resources

- Ministry of Disaster Preparedness, Management and Reconstruction
- Disaster Reconstruction Authority: <https://drabahamas.org/>
- Bahamas Government Tenders: <https://suppliers.gov.bs/> or [www.bahamas.gov.bs](http://www.bahamas.gov.bs)
- Grand Bahama Chamber of Commerce
- Abaco Chamber of Commerce



# CHILE - Construction Sector

This is a best prospect industry sector for this country. Includes a market overview and trade data. - Last published date: 2022-01-25

## Overview

Following a 12 percent decrease in construction activity, the Chilean Chamber of Construction (CCHC) reported that construction activity began to rebound in the fourth quarter of 2020, but the chamber still predicts an uncertain recovery in 2021. The sector faces high cost and scarcity of machinery, equipment, products, raw material and general supplies, and building products as a result of lower production. Quarantines and sanitary protocols at construction sites continue to impact the schedules of private and public construction projects. Halted construction projects and slowdown of commercial and housing sales and labor scarcity are additional challenges. CCHC projects that the sector will grow 8.1 percent in 2021 and a 3 percent-4 percent growth in 2022, however growth depends on government commitment to announced projects. Chile has an excellent vaccination rate, but the emerging new virus variants may cause new lockdowns further delaying projects. Investors and other industry leaders are monitoring the Constitution process for proposals or amendments that could be perceived as negatively impacting the profitability of new investments.

Imports of construction machinery and equipment reached \$635.1 million during 2020, a significant increase of almost 68 percent and a recovery from the drop in 2019 imports. Chile manufactures very limited and basic types of construction equipment, mostly mining related. The U.S. is the single largest supplier of machinery and equipment, mostly with heavy machinery, high-tech building materials, and capital equipment, with 27.8 percent market share. Other leading suppliers are Germany (17.1 percent), China (9.8 percent), and Japan (6.1 percent). Building materials from the U.S. have an excellent reputation, and are in demand, but the market is small and very competitive. Chile's construction standards are very strict due to seismic activity, but other construction standards in insulation, energy efficiency, doors/windows, continue to improve. Demand for sustainable construction and green buildings are growing to mitigate the high cost of energy (one of the highest in Latin America), fosters the need to use energy efficient materials incorporated in project design. Industrialized construction is growing in an effort to maximize efficiencies and building time and cost.

Chile continues to incorporate sustainable practices and increase green infrastructure, engineering, and construction. In 2016, Chile started a National Program for Sustainable Production and Consumption, which involves the Ministries of Public Works, Housing & Urban Development, Energy, Environment, Mining, Health, Economy, Finance, and Agriculture to collaborate on design concepts in construction, production, and consumption to achieve a sustainable environment throughout the country. The Arcadis Sustainable Cities Index ranks Santiago number one in Latin America and 30th worldwide. Within Latin America, Chile ranks second in LEED Certifications, according to square meters per capita, and third in the number of certified square meters. Chile also has a very low rejection rate of projects applying for LEED certification, in contrast to other countries in the region. Chile is now certifying LEED 4.0 and 4.1 projects together with other international certification programs, including WELL. There are two locally developed certification programs:

Certificación de Edificación Sustentable (CES, Sustainable Construction Certification) and Certificación de Vivienda Sustentable (CVS, Sustainable Housing Certification). CES and CVS are used in housing construction, and CVS is used social housing construction. The Chile GBC and U.S. GBC signed a cooperation agreement in 2018.

## Total Market Size

	2018	2019	2020	2021 estimated
Total Local Production	110.0	95.0	70.0	78
Total Exports	58.6	61.1	57.7	60
Total Imports	900.3	378.1	635.1	700
Imports from the US	234.3	109.2	176.4	180
Total Market Size	951.7	412.0	647.4	718
Exchange Rates: 1 USD	641	770	770	

Total Market Size = (total local production + imports) – exports), UNITS: US\$ millions

Source: Thomson Reuters Chile/Chilean Customs

## Leading Sub-Sectors

1. **Energy Efficiency:** The best opportunities for U.S. exports are those products that offer mechanization and high levels of energy efficiency that can work on reduced operational costs, replacing expensive and scarce labor. Since the cost of energy in Chile is very high, energy efficient machinery has an excellent sales advantage. The most promising are earth moving equipment, concrete technology for high-rise building construction (scaffolding, concrete pumps), and supplies and consumables that accelerate the building process, including all industrialized construction systems equipment and supplies. Energy efficiency and green building materials are also in high demand.
2. **Building Materials:** Building materials used in green building are good prospects, including those that add points for LEED and other certification programs. Renewable energy equipment related to commercial, industrial, and housing construction, insulation products, heating systems, and air conditioning systems are important considerations.
3. **Construction Digitalization and Mechanization:** There is an increasing awareness of the benefits of industrialized and digital construction, including Building Information Modeling (BIM), blockchain, big data management, software services, inventory management, augmented reality, cloud computing, digital processes integration, and recycling/re-use processes (avoiding waste). Chile's construction is still conducted on paper, which is inefficient, imprecise, and causes fail phase to be recurrent. Digitalization and IT technology can improve efficiency, cut costs, and construction time.

Corruption can also be avoided by using technology and online data. There are some buildings constructed with 3D printer materials and the market is open for more advanced stages of this technology.

## Opportunities

By the end of 2021, the Ministry of Public Works will award contracts in projects worth \$5 billion, including paving 4,660 miles of highways, repairs and construction of 150 bridges, irrigation works covering 346,000 hectares, rural potable water works, airports, ports, water management, and public building construction. A parallel road to Route 5, Chile's 2,100 miles main north/south highway, is projected to begin construction by 2022. The Santiago subway system will be improved and expanded, as well as the national railroad system, to better serve urban and inter-regional passenger and cargo transportation. Mining is the most important generator of construction projects. In relation to private investment, and in response to the negative economic impact caused by the COVID-19 pandemic, the government is modifying regulations to reduce bureaucracy and speed up authorization processes and qualifications.

- Public Works, Infrastructure: urban and inter-urban roads and highways, airports, ports, hospitals, jails, etc.
- Agriculture dams and water reservoirs construction
- Mining, energy & general industry related construction
- Private sector buildings (offices, hotels, first & second homes, mountain, country, lake and beach resorts)
- Retail, especially shopping malls
- Educational and private health facilities
- Industrial facilities

## Resources

• [EXPO EDIFICA/Expo Hormigón](#), October 2022, Santiago, Chile

The local trade shows Expo Edifica, co-located with Expo Hormigón (Cement Construction Show), is the most important event in the construction industry, and brings together exhibitors and visitors from Chile, Latin America, North America, Asia, and Europe.

- Ministry of Public Works, Ministerio de Obras Públicas (MOP)
- Ministry of Housing and Urbanism, Ministerio de Vivienda y Urbanismo (MINVU)
- Chile GreenBuild Council (GBC; Chile Chapter)
- Chilean Chamber of Construction, Cámara Chilena de la Construcción (CCHC)
- Technology Development Corporation (CDT)
- Institute of Cement and Concrete (ICH)
- Association of Engineering Consultants (AIC)
- Association of Architecture Firms (AOA)

For additional information, please contact CS Chile Commercial Specialist, Mary L. Lathrop, [Mary.Lathrop@trade.gov](mailto:Mary.Lathrop@trade.gov).

# CHINA- Design and Construction Services

This is a best prospect industry sector for this country. Includes a market overview and trade data. -Last published date: 2022-01-04

According to the Fitch Solutions Infrastructure Report, China is the world's largest construction market and is forecasted to grow at an annual average of 8.6% between 2022 and 2030. However, it is also highly leveraged and the government is implementing policies to wean the economy off its dependence on land sales. At the same time, an aging population and general economic slowdown is impacting the sector.

China's 14th Five-Year Plan includes government-driven efforts to apply digital technology to the construction and building process. In infrastructure, the central government is expected to focus on transportation and energy, emphasizing increasing connectivity within city clusters. As China develops a greener economy, there will be increased opportunities in low-carbon construction, including green buildings, renewable energy, and water conservation.

## **Architectural Services**

China's urbanization rate is among the highest in the world. Data from the American Institute of Architects (AIA) Shanghai reports that by 2025, China will have constructed the equivalent of 10 New York-sized cities since the 1990s. According to the Chinese-language report, Market Status and Trends of China's Architectural Design Industry in 2020, architectural design and engineering industry revenue in China surpassed \$1 trillion in 2019.

Under China's 14th Five-Year Plan, the Ministry of Housing and Urban-Rural Development (MOHURD) issued a notice for the Implementation of Urban Renewal Actions in 2020. While China's urbanization rate reached 60.6% in 2019, this urban renewal policy aims to develop greener and more efficient cities as the government seeks to improve the quality of China's urban living conditions.

Recent trends in China's design and construction sector focus on local communities, younger residents, and culture-related projects. New super-high buildings over 500m are banned, and high buildings over 250m are restricted. New technologies also play an increasingly important role in increasing buildings' quality and safety, such as Building Information Modeling (BIM), green building and smart city solutions, and artificial intelligence applications.

Except in rare exceptions, U.S. architectural design companies need to work with local design firms on projects in China because it is difficult to get a full architectural license. Only a few multinational companies have obtained the "Class A" license by acquiring local companies.

## **Engineering Services**

Benefiting from the growth of China's construction market capacity, the demand for engineering services has increased rapidly. According to data from MOHURD, revenue generated from engineering consulting services in China, such as engineering supervision and cost consulting, will reach \$26.5 billion in 2021.

Market opportunities for engineering services mainly lie in the following areas:

- Green building products and solutions
- Lighting and HVAC products
- Engineering inspection for urban infrastructure projects
- Testing services (e.g., energy efficiency evaluation, indoor air quality testing, new material, and infill testing)
- Construction quality and safety supervision services
- Engineering and consulting services for historic districts & building preservation
- Repositioning and adaptive reuse of old buildings

The challenges for U.S. firms will be increased domestic competition and the relative shortage of senior professionals. Although the Ministry of Housing and Urban-Rural Development and the Ministry of Commerce decided to abolish the Regulations on the Administration of Foreign-Invested Construction Enterprises in 2020, which improves market access for foreign firms, it is still very complicated to meet all the criteria for U.S. companies to get fully qualified without working with a local firm.

### **Trade Events**

- China Refrigeration Expo 2022 – Chongqing
- China International Trade Fair for Heating, Ventilation, Air-Conditioning, Sanitation & Home Comfort Systems-Beijing
- Guangzhou International Lighting Exhibition

### **Education Design & Construction**

The design and construction market for education facilities in China (including building materials) is expanding.

China's end users of the design and construction market for education facilities (including building materials) experience local competition and challenges for U.S. schools and organizations.

With over 150 million K12 students, China has the world's largest basic education market. The number of international school students grew from 96,000 in 2010 to an estimated 326,000 in 2020. With the increase in school-aged students and increasing demand for overseas college education, there is great potential for future growth.

The market for international schools in China's first tier cities is highly competitive. Approximately 70% of the top 100 international schools are located in Beijing, Shanghai, Shenzhen and Guangzhou, according to the Hurun Education Top International Schools in China 2020 report. However, development of new schools is increasingly prevalent in second tier cities such as Suzhou, Wuhan and Chengdu.

### **Opportunities:**

Rapid expansion of new international schools in China, with a market size exceeding \$11.4 billion as of 2019, according to Dingsi Top Schools' assessment of development costs and tuition fees.

- There were 60 international schools added in 2019, and over 90% of those schools were newly built.
- Beijing municipal government plans to build 10 new international schools from 2020 to 2022.

- More British and American education groups entering the market.
- Chinese parents' increasing demand for "green schools."
- Most private school construction or expansion opportunities are still awarded through a public procurement process.

## Challenges

- Qualifications of Architectural Design Firms:
- Certifications are required for architectural design firms conducting business in China.
- Many foreign firms face difficulties obtaining such certifications and work with Chinese partners to meet this requirement.
- Competition from Domestic and Other Countries:
- U.S. firms face fierce competition from Chinese firms and other foreign companies, especially those with a British curriculum.
- Most building construction projects were halted due to the COVID-19 outbreak, hindering first quarter revenue in 2020. In response, the Chinese government has allowed the issuance of special debt funds.

## Best Prospects

Design of new schools, including main campuses and individual facilities, such as stadiums and libraries

## Education Technology

### Management and Consulting Services

- U.S.-style school affiliations and accompanying management and consulting services
- School management and professional services
- Curriculum design and academic support
- Assessment and qualification of schools

## Building Materials

- Green building materials
- Materials for school facilities, including multi-media facilities, laboratories, buildings and housing, athletic facilities and furniture

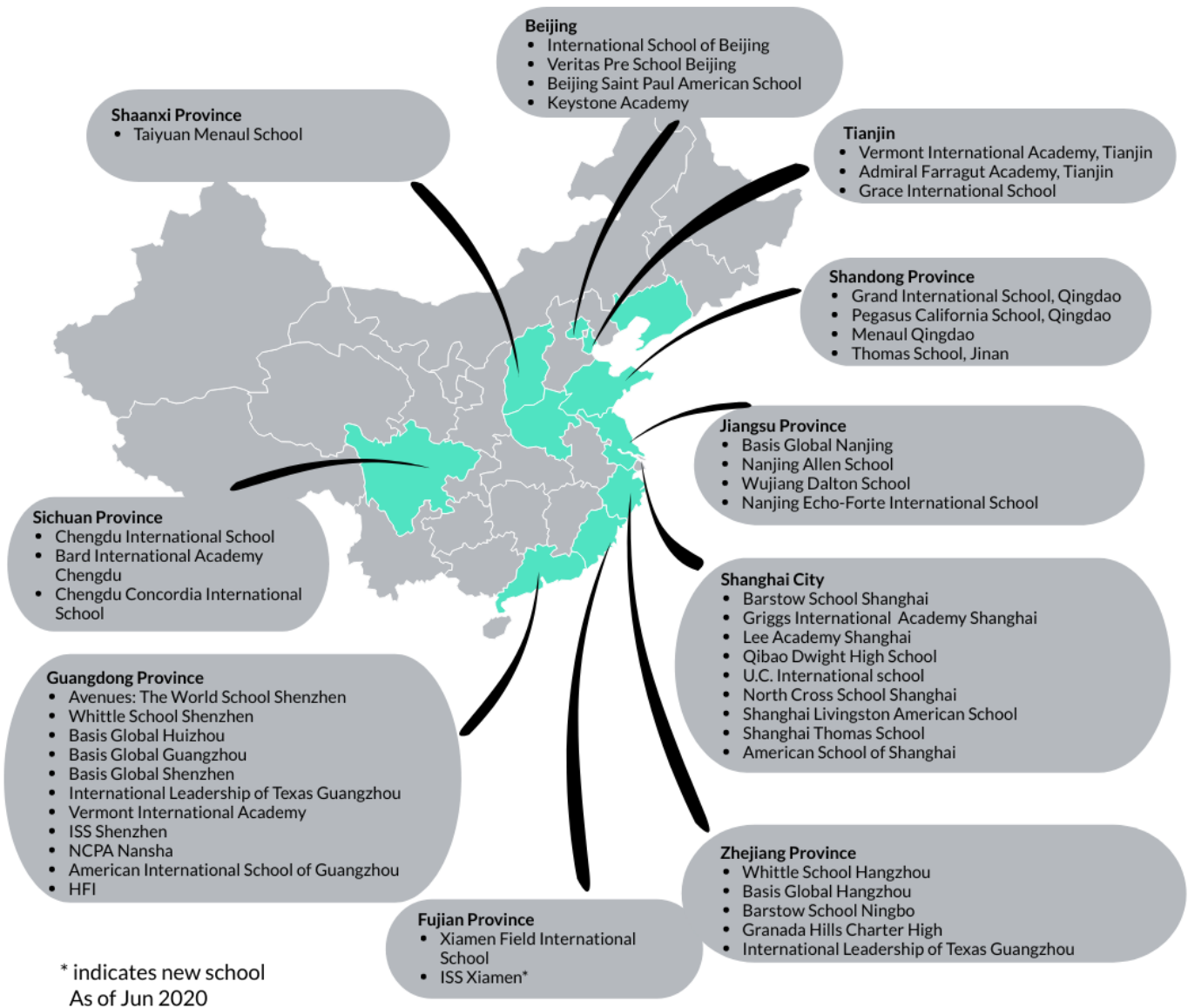
To learn more, contact us at: [Designconstruction.China@trade.gov](mailto:Designconstruction.China@trade.gov).

## Resources:

**Key Organizations:** · The China Association for Non-Government Education · China Education Association for International Exchange · New School Insights · Topschools · BEED

## Major Trade Shows:

- RAISE2020 Asia International School Expo, Oct 31-Nov 2, Shanghai
- New School Insight 2020 International School Expo, Nov 21-22, Beijing
- The 12th Asia School Construction and Facilities Exhibition/Conference – BEED 2020, Dec 9-10, Guangzhou



**This map shows the locations of K12 schools with U.S. partnerships in China.**

## Theme Park Design and Construction

China is a leader in the global theme park industry and the world's largest construction market.

AECOM's China Theme Park Pipeline Report estimated that China's theme parks would welcome 230 million visitors to Chinese theme parks in 2020 and generate approximately \$12 billion in ticket sales, up 367% compared to 2010 sales. While the pandemic reduced those numbers, the industry is on track for a significant surge because Chinese consumers have few foreign options. South China and East China are China's key regions for top theme parks.

### **Challenges:**

While U.S. exporters enjoy strong brand recognition and a reputation for high quality products in China, the following challenges often constrain U.S. exporters' market access and development.

China's travel entertainment sector is facing notable challenges due to the COVID-19 pandemic. The China Tourism Academy estimates that domestic tourist arrivals will decline by 43% in 2020, and domestic tourism revenue will decrease by 52%. However, the China Tourism Academy's 2020 Domestic Tourism Development Report expects the domestic tourism industry to rebound in the second half of 2020. In early August, domestic air travel within China returned to 98% of travel levels from August of the previous year, according to the travel analytics company ForwardKeys.

**Highly Competitive Market Environment:** U.S. exporters compete in the China market against leading global manufacturers renowned for product quality and innovation. Winning sales often requires regular direct engagement with buyers to demonstrate unique performance value.

**Complex Regulatory Environment - China's Control Over Theme Park Development:** In April 2018, the National Development and Reform Commission (NDRC) issued guidance on the development of theme parks to avoid excessive construction and mounting debt. Any project with an investment of over 50 billion yuan (\$726 million) and an area of at least 330 acres is considered a "mega-theme park" and is subject to the most scrutiny by the ministry-level NDRC.

### **Best Prospects:**

**Themed Developers and Intellectual Property:** As of August 2020, there were 160 theme parks in China according to AECOM, but only a minority are IP-branded parks. Domestic theme park developers are actively seeking their own IP to compete with established brands, creating an opportunity for companies that hold or can leverage IP-branded properties, as well as providers of turnkey IP-branded rides and solutions.

Although China's domestic industry is evolving to serve growing market demand, Chinese developers still rely heavily on imported ride equipment from leading and trusted foreign ride manufacturers. Moreover, the demonstrated quality and safety of proven foreign brands is a key factor in the stability of this demand.

Themed attractions and amusement experiences are becoming increasingly dependent on new technology to drive the consumer experience. Specifically, theme parks are increasingly adopting 3D and 4D technology. In addition, entire parks will be designed for virtual reality and augmented reality experiences.



New Projects Throughout China: In 2018, the Hainan provincial government released the Hainan Tourism Development Master Plan (2017-2030) and is determined to build the island of Hainan into a pilot zone for the reform of China's tourism industry. According to LvJie Media, there are 17 large scale theme parks either open or in the planning/construction phase in Hainan province.

Project Name	Opening	Investment Value (RMB)	Scale	Investor/Operator
<b>Atlantis Sanya Water Park</b>	2018	11 billion	200,000 sqm	Fosun Group
<b>Sanya Dream Water Park, Phase 1</b>	2018	600 million	150,000 sqm	Kasen International Holdings Limited
<b>Wet'n'Wild Haikou</b>	2018	453 million	50,000 sqm	Guangxi Investment Group
<b>Haikou Changying Universal 100 Fantasy Paradise</b>	2018	38 billion	400,000 sqm	Changchun Film Group
<b>Sanya Haichang Fantasy Town, Phase 1</b>	2019	6.9 billion	23.25 sqm	Haichang Ocean Park Holdings Ltd
<b>Sunac Tourism City</b>	2020	50 billion	4,447,333 sqm	Sunac Group
<b>Hainan R&amp;F Ocean Paradise, Mytikas Waterpark</b>	2019	6.5 billion	2,333,333 sqm	R&F Properties
<b>Six Flags</b>	2017	6 billion	N/A	Six Flags, Riverside Group
<b>Haitang Bay Discovery Adventures Park</b>	2018	N/A	N/A	Sunac Group, Discovery
<b>Hello Kitty Theme Park</b>	2019	11 billion	N/A	Funde Group

To learn more, contact us at: [Designconstruction.China@trade.gov](mailto:Designconstruction.China@trade.gov).

### Resources:

Major Chinese players: · Fantawild Holding Inc. · OCT Limited · Songcheng Worldwide · Shimao Group · Dragon City Tourism Holding Group · Evergrande Group · Fosun International · Sunac Group · Chimelong Group

Key Organizations and Industries: · International Association of Amusement Parks and Attractions (IAAPA) · Themed Entertainment Association (TEA) · China Association of Amusement Parks and Attractions (CAAPA)

### Major Trade Shows:

- IAAPA Expo Asia
- June 7-10, 2021, Macau, China · 2020 China (Beijing) International Amusement Equipment Expo
- March 25-27, 2021, Beijing, China
- 12/08/2020

## Sports Facility Design & Construction

U.S. design companies must partner with local design institutes to be qualified to access procurement opportunities for sports facilities.

China’s sports industry is developing rapidly and encompasses everything from sports stadiums and major event management to personal fitness. In 2018, there were over 2 million sports venues in China. So far this year, the China National Development and Reform Commission (NDRC) has invested \$450 million in public sports projects. There is strong demand for green and smart sports facilities as significant government investment is flowing into the sector, while existing facilities face problems such as operational inefficiencies, inadequate service provision and low utilization levels.

### **Opportunities**

The number of sports venues in China remains relatively small compared to the country’s population. Most stadiums are government-owned with a low level of commercialization. Many existing large-scale sports facilities are outdated and in urgent need of upgrading.

Local Chinese governments recognize the tremendous tax revenue opportunities of the industry and lament the many failed stadiums and struggling events. The NDRC’s investments are expected to alleviate the adverse impact of COVID-19 on the sports industry, boost confidence in the industry and promote the development of national fitness activities.

China has set specific targets for the development of urban sports. For example, Shanghai has proposed to build a “sports city” by 2025, and Chengdu also plans to develop a “sports city.” Large events to be held in the coming years are listed below. New stadiums have been built or are in development to host these events.

Year	Games	Host City
2021	The 14th National Games of PRC	Xi’an
2021	FISU Summer World University Games	Chengdu
2021	FIFA Club World Cup	Shanghai, Tainjin, Guangzhou, Wuhan, Shenyang, Jinan, Hangzhou, Dalian
2022	The Olympic Winter Games & Paralympics	Beijing, Zhangjiakou
2022	The Asian Games	Hangzhou
2023	AFC Asian Cup 2023	Beijing, Tainjin, Shanghai, Chongqing, Chengdu, Xi’an, Dalian, Qingdao, Xiamen and Suzhou
2023	The 3rd National Youth Games	Guangxi Province
2023	The 12th National Minority Traditional Sports Games	Hainan Province

The vast majority (98%) of China Sports Venue Association members who participated in a survey on the effects of the pandemic on their business are confident in the development of China’s sports industry. The sudden outbreak of COVID-19 boosted domestic interest in sports and exercise. Upon reopening to the public,

sports facilities experienced increased demand from those looking to exercise, as they remain more popular than home fitness alternatives.

## **Challenges**

Due to the outbreak of COVID-19, more than 120 large-scale sports events nationwide have been cancelled or postponed since the end of January 2020. Some construction plans for new stadiums were replaced by plans to renovate existing ones because of budget concerns and time constraints.

U.S. design companies must partner with local design institutes to be qualified to access procurement opportunities.

The sports facilities sector is also highly competitive. Chinese companies are developing rapidly, and competitive third-country firms have also entered the market.

## **Best Prospects**

### **Design services:**

- Sports facility design service to maintain high utilization and sustainability
- Design service to integrate the newly required emergency and epidemic prevention measures

### **Construction materials:**

- Reusable construction materials
- Green-building decoration materials

### **Equipment and technologies:**

- High-end sports specialty equipment
- Sports training systems and equipment
- Fitness courses, technology and apps
- Supporting facilities specialized for sports
- Smart devices to reduce operating costs

### **Management/IPR:**

Partnerships introducing U.S. brands, program design and athletic training expertise. To learn more, contact us at: [Designconstruction.China@trade.gov](mailto:Designconstruction.China@trade.gov).

## **Resources**

### **Major Players & Key Organizations:**

- General Administration of Sport of China (and its counterparts at the provincial and municipal levels) · China Sports Venue Association · China Sporting Goods Federation
- Major Trade Shows: China Sport Show China Sports Culture Expo & China Sports Tourism Expo

12/08/2020

## Healthcare Facility Construction

China's market for hospitals and senior center construction is large and growing, but government limits on procurement pose a challenge for U.S. firms.

### **Opportunities:**

According to growth targets in China's national development plans and the "Healthy China" initiative, medical infrastructure is expected to have expanded from 2015 to 2020, with a 30% increase in public hospital beds and a 100% increase in private hospital beds.

According to China's National Health Commission, by the end of 2019, China had 4,975,633 public hospital beds and 1,890,913 private hospital beds, representing increases of 16% and 83%, respectively, since 2015. In that same period, 7,906 of China's new medical institutions were private hospitals, which now account for 65% of hospitals nationwide.

Affluent urban and rural residents and an aging population create demand for the construction of healthcare facilities and senior care centers.

According to an industry expert, the market size of hospital construction in China will be over \$75 billion from 2020-2025, including \$30 billion in infrastructure, \$30 billion in digitalization (such as IoT and big data) and over \$15 billion in medical equipment.

COVID-19 has exposed the issue of insufficient public health services in China. Many provinces have started plans to renovate, expand or build hospitals. Some of these projects can be found on this Chinese language industry website.

Many American hospitals come to China seeking partnerships that deliver patients to their U.S. facilities, or real estate developers that build hospitals with the American brand. The map below shows some of these existing hospital projects.

Chinese hospitals have also sought to expand their capabilities through partnerships with U.S. healthcare providers. Those partnerships extend across many provinces and cities in China, including:

### **Anhui province:**

Wuxi Meizhong Jiahe Cancer Center has a partnership with MD Anderson Cancer Center

### **Guangdong province:**

- Guangzhou Concord Cancer Center has a partnership with MD Anderson Cancer Center
- Guangzhou R&F International Hospital has a partnership with UCLA Health

### **Hainan province:**

- Boao Evergrande International has a partnership with Brigham and Women's Hospital

### **Shaanxi province:**

- China Northwest International Medical Center has a partnership with Johns Hopkins Medicine

**Shanghai municipality:**

- Cleveland Clinic Connected has a partnership with Cleveland clinic,
- Delta Health has a partnership with the University of Columbia Heart Center
- Jiahui International Hospital has a partnership with Massachusetts General Hospital
- Shanghai Concord Cancer Center has a partnership with MD Anderson Cancer Center

**Zhejiang province:**

- Sir Run Run Shaw Hospital has a partnership with Mayo Clinic
- Taikang-Mount Sinai Ningbo International Hospital has a partnership with Mount Sinai Health System



\* indicates new hospital  
As of Jun 2020

**Healthcare Institutions with U.S. Partnerships**

## Challenges

**Qualifications of Architectural Design Firms:** Certifications are required for all architectural design firms that conduct business in China. Foreign design companies have difficulty obtaining such certifications, and most choose to work with a Chinese partner to overcome this requirement.

**Foreign Competition:** U.S. companies face fierce competition from Chinese and third-country firms.

## Best Prospects:

- **Design**
  - Hospital architectural and interior design
  - Senior care centers
- **Technology**
  - Medical technology
  - Healthcare IT
- **Management and Consulting Services**
  - U.S. hospital official affiliations and the accompanying management and consulting services
  - Medical facility planning
  - Senior care management

## Building Materials

- Specialty building materials for healthcare facilities

## Resources

### Major Players

- Hospitals
- Hospital and Senior Care Center Investors
- Real Estate Developers

### Key Organizations:

- [China Association of Medical Equipment](#)
- [The U.S. Cooperative for International Patient Programs](#)
- [Zhu Yi Tai](#)

**Major Trade Shows:** (Events supported by the U.S. Commercial Service China Office)

- [China Hospital Construction Conference](#)

### Contact Us:

- [Designconstruction.china@trade.gov](mailto:Designconstruction.china@trade.gov)

07/13/2020

# COLUMBIA - Infrastructure

This is the best prospect industry sector for this country. Includes a market overview and trade data.  
Last published date: 2021-11-08

## Overview

In the 2019 ranking of the World Economic Forum Global Competitiveness Index (GCI), Colombia ranked 57 out of 140 economies. Colombia climbed from a ranking of 66 in 2017. Colombia's advancement in ranking reflects recent improvements in infrastructure, stability, and institutional development. However, Colombia's infrastructure is still underdeveloped compared to regional counterparts like Chile that is leading the Latin America and Caribbean region. In 2018, the Infrastructure GCI for Chile was 41, while Colombia's was 83. The following year, Colombia increased its Infrastructure GCI by two points, demonstrating that while progress in this sector is slow, it is steady.

### **Colombia and Chile's Global Competitiveness Index for Infrastructure**

Infrastructure Index Component	Colombia		Chile	
	Rank	Score	Rank	Score
Road Connectivity	97	65.4	9	96
Quality of Road Infrastructure	104	39.7	25	70
Railroad Density km/1,000km	89	4.8	59	19
Efficiency of Train Services	99	12.2	61	36
Airport Connectivity	31	68.7	51	58
Efficiency of Air Transport Services	78	57.6	54	66
Liner Shipping Connectivity	33	50.1	40	43
Efficiency of seaport services	72	51.5	31	66

Colombia's most recent National Competitiveness Report published in 2020 highlights Colombia's regional and national infrastructure challenges:

- Colombia ranks 104 out of 141 countries in terms of quality of land transport infrastructure.
- In terms of digital innovation related to the infrastructure sector, 64 percent of companies in Colombia do not use any technological tool in their logistics processes.
- While the Colombian Government has invested heavily in internet connectivity since 2019, a significant digital divide persists.

- Colombia scores 2.94 out of five on the Logistics Performance Index, lower than the OECD average (3.64) and countries in the region such as Chile (3.32), Mexico (3.05), and Brazil (2.99).
- The increase in e-commerce due to COVID-19 has challenged logistics capacity. Many companies do not use digital tools in their logistics processes.
- Intermodal transport is a significant challenge: more than 80 percent of freight is moved by road in Colombia.

After the signing of the Peace Agreement between the Colombian Government and the Revolutionary Armed Forces of Colombia (FARC) in 2016, infrastructure development became a priority for former president Juan Manuel Santos. In 2015, as the Agreement with the FARC was being negotiated, the Santos administration established an infrastructure initiative to connect Colombia through multimodal transportation projects, commonly referred to as the Intermodal Transportation Master Plan (PMTI). This initiative encompasses 101 road projects, 52 highway projects, 5 railway projects, 8 fluvial projects, and 31 airport projects, and various dredging projects. In 2016, PMTI's value was COP 10.2 trillion (USD 2.7 billion) equivalent to 1.3 percent of Colombia's GDP.

Colombia's 2021 transportation budget was COP 12 trillion (USD 3.1 billion). According to Colombia's Infrastructure Chamber of Commerce, this budget may increase to COP 15 trillion (USD 3.9 billion). New highway and bridge projects are a priority of the Colombian Government's infrastructure investment and designed to promote Colombia's exports by lowering the high logistics costs which hamper the country's productivity and drive up the cost of consumer goods and industrial inputs. PMTI includes the construction of 4,970 miles of undivided highway, 851,278 miles of two-lane highway, 160 tunnels, and 1,300 viaducts. New highway construction is being developed under a public-private partnership (PPP) scheme (concession projects). As of August 2021, two out of twenty-nine of the PMTI highway projects have been fully completed. By the end of 2021, it is anticipated that a total of six projects will be completed.

One of the priorities of the Duque administration is to deliver 19 concession projects under his administration, which ends in August of 2022. According to the Colombian Transportation Ministry, these highway projects are valued at COP 47 billion (USD 12 million), from those, COP 27 billion (USD 7 million) have been completed. In addition to the highway projects, the Duque administration also announced a series of 24 multimodal transportation projects to connect Colombia's distribution centers with seaports.

Generally, U.S. companies have not participated in Colombia's highway development due to the uncertainty surrounding cost recovery, the high risk associated with the projects (many in remote areas), and the complexities of environmental licensing that require consulting with local communities. Many U.S. companies have found the return on investment to be too low given the risks, preferring to participate in less risky portions of projects, such as engineering, architectural design, and financing. As a result, international firms from Spain, France, Italy, Portugal, Brazil, and Mexico are leading development of Colombia's highway projects. Recently, China has begun bidding on highway projects. Colombian firms also participate in bids under a consortium with international firms.

## **Railways**

In November 2020, the Duque administration launched the Railway Master Plan which aims to develop the existing cargo and passenger railways, built in the nineteenth and twenty centuries. Its goal is a 26 percent



reduction by 2030, of relatively high logistics costs, that hamper the country's productivity and cause environmental pollution. The greater Bogota and Medellin areas plan to have railway developments in the coming years. Bogota aims to foster the Cundinamarca region by connecting the city and rural surrounding areas with metro lines and commuter trains. Similarly, Medellin is looking to increase the Antioquia Department's competitiveness by connecting the city's distribution centers to seaports.

## **Airports**

In Colombia, airports are operated via concession agreements. The Duque administration announced airport renovations for Cali, Neiva, and Choco, estimated at COP 1.42 trillion (USD 368 billion), Cartagena estimated at COP 2.83 trillion (USD 734 billion), and San Andres estimated at COP 300 billion (USD 78 million).

## **Seaports**

Colombia's National Infrastructure Agency (ANI) grants concessions for seaports for 20 to 25 years to private companies. Currently, Colombia has eight port areas located in the Pacific and Caribbean regions. ANI has provided concessions to 61 ports. Colombia's principal seaports in Buenaventura and Barranquilla are losing competitiveness because sediment is impacting port access. Dredging projects have been proposed for Colombia's principal waterway, the Magdalena River and the Dique Canal which connects it to the Cartagena Bay.

## **Residential Buildings**

The residential construction subsector leads the construction sector in Colombia. Thirty-eight different construction companies, commonly referred to as "Constructoras", dominate the residential housing sector. Since 2013, this subsector has grown from 112,000 housing units sold to 176,000 housing units in 2020. According to the Minister of Housing and Cities of Colombia, Jonathan Malagón, by the end of 2021, the residential construction sector will close the year having sold 209,000 units. The growing demand is due to the National Government's subsidies for the construction of low-income houses and low mortgage rates. The principal regions that saw growth in residential housing demand in 2020 were Bogota and Cundinamarca with 30,830 house units, Antioquia with 8,761 units, and Atlántico with 6,727 units.

## **Leading Sub-Sectors:**

- Complex engineering projects and services related to mass transportation systems: seaports, dredging, tunnels, and bridges
- Specialized construction equipment
- Intelligent transportation systems equipment and services
- Road safety equipment and services (such as electronic toll collection)
- Architectural and engineering for healthy, highly efficient, and cost-saving green buildings under the LEED framework

## **Opportunities**

The U.S.- Colombia Trade Promotion Agreement (TPA) enables road and construction equipment to enter Colombia duty free. Services such as project management, bridge design, architecture, and engineering, among others, also enter Colombia duty free. Other advantages from the TPA include stronger legal

protections for U.S. companies, expanded access to the services market, market access for used goods, increased transparency in procurement, and improved dispute settlement mechanisms. Under the National Treatment Caveat, Chapter Nine of the TPA, U.S. companies must be treated as locals when they participate in public bids, eliminating the disadvantage they used to face before the TPA. The one exception is public bids issued by the Colombian Civil Aviation Authority (AeroCivil). Since opportunities in road construction, airport expansion, and port expansion are offered through concessions and contracts governed by Colombia's PPP legal framework, U.S. firms interested in offering services to construction companies in Colombia should understand how the PPP structure works. U.S. firms are advised to find a local representative who can support them in-country or explore the possibility of a joint venture for infrastructure projects.

## Trade Events

- [National Infrastructure Congress](#)
- Colombian Chamber of Infrastructure - CCI
- Virtual due to COVID-19 restrictions
- [AAPA Latino](#)  
XXIX Latin American Congress of Ports  
Cartagena, Colombia
- [XVI Expo construction – Expo design 2021](#), Cundinamarca and Bogota Construction Chamber-CAMACOL, Bogota, Colombia

## Key Contacts

- Colombia's National Infrastructure Agency
- Colombian Chamber of Infrastructure
- Colombian Society of Engineers
- Camacol-Colombian Construction Chamber
- Camacol Antioquia's – Regional Construction Chamber
- SECOP

For additional information, including market analysis, trade events, and the products and services that the U.S. Commercial Service can provide to help you succeed in the Colombian market, please contact:

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# HONG KONG AND MACAU - Construction Industry

This is a best prospect industry sector for this country. Includes a market overview and trade data.  
Last published date: 2022-01-21

## Overview

This table shows trade data for construction materials and equipment in Hong Kong. \_

	2018	2019	2020	2021 (estimated)
<b>Total Exports</b>	75	69	70	71
<b>Total Imports</b>	73	68	68	69
<b>Imports from the U.S.</b>	2.4	2	2	2
<b>Exchange Rate: 1 USD</b>	7.8	7.8	7.8	7.8

Units: USD billion; Data Sources: Hong Kong Census & Statistics Department  
(Construction materials and equipment refer to SITC codes from 62111 to 81217)

As one of the most densely populated cities in the world, Hong Kong's construction industry is characterized by compact high-rise residential buildings and office towers. Hong Kong developers are experts in slope and high-density design, as well as designing within tight space constraints. The techniques of reclamation, design-and-build methods with innovative application of building materials have also made Hong Kong a regional leader.

The U.S. Commercial Service in Hong Kong has met with several top developers in Hong Kong. Each of these contacts has expressed willingness to have future discussions about partnerships with U.S.-based architecture, construction, and engineering firms. In addition, U.S.-made construction equipment and technology has potential in Hong Kong, particularly higher value-added products. Interested U.S. firms should work with a local distributing company to enter the market as most construction companies will source supplies through local distributors. For some major projects, however, Hong Kong contractors may seek suppliers directly from manufacturers for specific types of products and equipment.

Leading construction companies and developers are interested in engaging with foreign companies that understand the most cutting-edge construction and design practices. Currently, European construction and design firms are much more dominant than U.S. firms. The U.S. Commercial Service believes that there is potential for the U.S. to have more market share.

Due to the disruptions caused by the Covid-19 pandemic and uncertainty from the U.S.-China trade war, Hong Kong experienced a record plunge in economic performance in 2020, causing infrastructure and construction projects to be largely halted. According to the Hong Kong Census and Statistics Department, the city's

construction industry continued to decline in the third quarter of 2020, contracting by 10.6 percent year on year in real value-add terms, marking the eighth consecutive quarterly decline since the fourth quarter of 2018. The total gross value of construction works performed by main contractors in 2020 was recorded at US\$16.5 billion, down from US\$17 billion in 2019.

To help revive the economy, the Hong Kong government increased spending on US\$65 billion of public works such as housing, metro/railroads, highway construction etc. over the next 5 years, and another US\$65 billion on two 10-year (2016-2035) hospital development programs to provide about 90 operating theatres and other hospital supplies to meet projected service demand. In addition, to tackle the city's chronic land shortage and housing problem, the government has approved [Lantau Tomorrow Vision](#). This project will become the largest reclamation project in the city, with an estimated at US\$80 billion to be spent on housing, transportation links and other infrastructure. U.S. construction design and engineering firms can partner with local developers and construction firms to bid for various projects in this Lantau Tomorrow Vision. Please note that either the foreign construction professionals such as architects, engineers and surveyors or local partners must register with the [Development Bureau](#) to be on the approved list for works. Aside from government spending as a driver of construction in Hong Kong, Mainland Chinese investors are also active in the market. Most investments from Mainland China are in commercial and residential property, financing and banking, import/export trade, wholesale and retail.

To enhance efficiency and minimize material waste in the construction sector, the government has strongly encouraged the industry to engage more in automation technology, prefabricated parts, and innovative construction methods such as BIM and MiC to increase productivity. In 2018, the government mandated the use of BIM for all government projects over US\$3.9 million.

### Leading Sub-sectors:

- green building materials and equipment
- low/zero carbon design and technologies
- building efficiency optimization systems and equipment
- building automation and management systems
- carbon assessment tools
- building information modeling software and modular integrated construction solutions

### Opportunities

Green Building and Design: In response to the Paris Agreement on climate change, the Hong Kong government-initiated policies aimed at achieving carbon neutrality by 2050. These policies include investing in the development of green buildings as a top priority. There are over 42,000 private buildings and more than 8,000 government buildings in Hong Kong. These buildings account for 90 percent of the total city's electricity consumption and generate 60 percent of the city's carbon emissions. To save energy and reduce emissions, the government has introduced [BEAM Plus](#), a set of strict green certification standards to drive strong sustainable building performance and it has saved over 700,000 MWh of electricity each year.

Buildings that achieve certain energy savings with BEAM Plus or other internationally recognized standards such as [LEED](#), [BREEAM](#), and [EDGE](#) will be eligible for tax deductions. The government also allows private buildings to increase floor areas when green design elements are incorporated into buildings. With these incentives, property developers are increasingly willing to invest in green buildings. Prominent buildings with top green rating include K11 (New World Development), Taikoo Place (Swire Properties) and the International Commerce Centre (MTR and Sun Hung Kai Properties). These developers have established strong partnerships with foreign green design and engineering firms such as AECOM, Kohn Pedersen Fox, Arup, James Corner Field Operations, etc.

## **Current Market Assessment**

According to ResearchAndMarket.com, the construction industry is expected to grow by 1.5 percent in real terms in 2021 as ongoing vaccinations have given a higher expectation to contain Covid-19 epidemic in Hong Kong, in addition to increased investment on infrastructure projects by the government. The easing of social distancing measures and other fiscal stimulus measures announced in early 2021 have further improved domestic consumption and private investment in the city.

Many foreign construction companies are attracted to the Hong Kong market as the city also serves as a springboard to gain access to the vast Chinese mainland market and the greater Asia-Pacific region. U.S. exporters of design and build technology and equipment enjoy a good reputation of high quality, advanced and innovative products. They are well-known for providing strong project management skills and sophisticated engineering services. There are some successful U.S. construction and engineering firms that participate in major projects in Hong Kong, namely, AECOM (involved in over 20 major infrastructure projects), Bechtel, Cummins, Emerson, Honeywell, Jacobs Engineering, etc.

## **Resources**

### **Major Trade shows:**

- [The Construction Innovation Expo, Dec 13-16, 2022](#)  
The event provides an excellent sharing and matching platform with the vision to promote innovative and advanced construction design methods, devices, processes, materials, systems and applications on 4 key themes - Offsite Construction, Mechanized Construction, Digital Construction, and Advanced Materials & Technologies.
- [Build4Asia](#), May 4-6, 2022  
Build4Asia is a trade show for the Building, Electrical Engineering and Security Industries in Hong Kong which covers every facet of the construction industry from building materials and automation, smart city technologies to total surveillance system.

### **Associations and government agencies:**

- [Hong Kong Construction Association](#)
- [Construction Industry Council](#)
- [The Hong Kong Institute of Architects](#)
- [The Hong Kong Green Building Council](#)
- [Development Bureau](#)

## **For more information about this industry sector, please contact:**

U.S. Commercial Service, Hong Kong

Kitty Leung, Commercial Specialist, Email: [kitty.leung@trade.gov](mailto:kitty.leung@trade.gov)

## **Hong Kong Green Building is Trending Up**

Hong Kong's growing green construction sector is open to U.S. companies.

In response to the Paris Agreement to prevent climate change, the Hong Kong government has initiated the [Climate Action Plan 2030+](#) to reduce carbon emissions by 26 to 36 percent by 2030 and become carbon neutral by 2050. To achieve these goals, the government has announced a series of measures and incentives, one of which is to promote and invest in the development of green buildings.

### **Energy Efficiency Incentives**

There are over 42,000 private buildings and more than 8,000 government buildings in Hong Kong.

These [buildings](#) account for 90% of the total city's electricity consumption and generate 60% of the city's carbon emissions. To save energy and reduce emissions, the government has introduced BEAM Plus, a set of strict green [certification standards](#) developed by the BEAM Society Ltd which saved over 700,000 MWh of electricity each year. Commercial property owners are incentivized to save energy under the Buildings Energy Efficiency Ordinance. Buildings that achieve certain energy savings with [BEAM Plus](#) or other internationally recognized standards such as LEED, BREEAM, and EDGE will be eligible for tax deductions. The government also allows private buildings to increase floor areas when green design elements are incorporated into buildings. With these incentives, property developers are increasingly willing to invest in green buildings.

### **Foreign Companies are Welcome**

A recent meeting with the Hong Kong Institute of Architects confirmed that Hong Kong developers and architects often seek out foreign expertise on energy efficiency design and technology for design projects as Hong Kong works to catch up with the rest of the world in green building practices. Progress in this area is steady. As of 2019, over 3,000 buildings and development projects obtained a BEAM Plus certification.

Prominent buildings with a [top green rating](#) include K11 (New World Development), Taikoo Place (Swire Properties) and the International Commerce Centre (MTR and Sun Hung Kai Properties). These developers have partnered with foreign green design and engineering firms such as AECOM, Kohn Pedersen Fox, Arup, James Corner Field Operations, etc.

While foreign construction companies are welcome to tender public sector projects, we advise them to partner with a local construction company. Either the foreign firm or the local partner must register with the Development Bureau as the Approved Contractor for Public Works and/or Approved Suppliers of Materials.

### **Top prospects**

for the green design and construction sector in Hong Kong include:

- green building materials and equipment
- low/zero carbon design and technologies
- energy efficiency equipment and technologies

- building management systems
- air quality control systems

For more information or assistance, email us at [office.hongkong@trade.gov](mailto:office.hongkong@trade.gov).

05/27/2021

## **Hong Kong Green Building Council**

U.S. green building & design firms interested in marketing products/services in Hong Kong are encouraged to list in Eco-Product Directory.

The U.S. Commercial Service in Hong Kong recently met with senior management of the Hong Kong Green Building Council (HKGBC). HKGBC has a strong network with around 140 institutional members and over 3,700 associate members in Hong Kong that ranges from major developers, top contractors, leading consultants and building management companies.

One key outcome of the meeting was the announcement by HKGBC that it is creating an Eco-Product Directory, a platform that will enable the Hong Kong construction industry and associated companies to incorporate green solutions to their procurement processes. The platform is set to launch in the fall of 2021. U.S. firms interested in marketing their products and services in Hong Kong are encouraged to list in the directory. According to the HKGBC, the directory will not only be useful in promoting U.S. solutions in Hong Kong, but will also be utilized broadly in southern China as most HKGBC members are active in the region. To qualify, materials and products need to be certified. Details of the required certifications can be viewed on the [HKGBC website](#). HKGBC also touted their “Existing Buildings Retro-Commissioning” initiative, which is a process to improve the efficiency of an existing building’s equipment and systems. U.S. companies with expertise in retro-commissioning can contact the U.S. Commercial Service Hong Kong for information about engaging with HKGBC on this initiative.

The HKCBC maintains an extensive series of training and event programs through out the year. These range from forums such as Green Museums and the Paris Agreement and Advancing Net Zero Webinar Series are designed to connect professionals from around the globe to exchange ideas and generate innovative solutions. Of particular note for American companies, the Advancing Net Zero International Conference 2021 is tentatively scheduled to be held virtually end of November, with the theme of “Advancing Net Zero in high Density Compact cities for Sustainability”. U.S. companies interested in participating events, which are mostly free of charge, can view the events and training calendar [here](#).

To find out more about HKGBC, list in their forthcoming Eco-Product Directory, and learn how the U.S. Commercial Service can facilitate the growth of your business in Hong Kong, please email Kitty Leung, Trade Specialist at the U.S. Commercial Service office in Hong Kong at [Kitty.Leung@trade.gov](mailto:Kitty.Leung@trade.gov). You can also visit our website at [www.trade.gov/hong-kong](http://www.trade.gov/hong-kong)

07/18/2021

# ITALY- Design and Construction

This is a best prospect industry sector for this country. Includes a market overview and trade data.

Last published date: 2021-10-29

## Overview

Italy, which has the eleventh largest global construction market outside the United States, is of strong interest to U.S. exporters. U.S. building products enjoy a reputation for quality and reliability in Italy, although not always up to Italian standards for aesthetic design, which is considered important even for the materials and components that end-users do not usually see. The Italian design and construction industry considers itself to be a world leader, in the same league as the United States, and is therefore interested in looking at unique or cutting-edge products and solutions.

According to estimates from the National Association of Building Contractors (ANCE), investments in construction fell by 10.1% in 2020 compared to the previous year, to around €125.5 billion (\$153.3 billion). ANCE forecasts that the construction industry will grow by 8.6% in 2021, fueled by post-pandemic public works, public incentives to make buildings more sustainable and more digital, and an increase in demand for larger homes caused by the perception that teleworking and distance schooling – widely implemented during the pandemic – will become a fixture of life for the next few years.

In 2020, investment in construction of new housing declined by 12.5% on 2019, nonresidential building dropped by 13.5%, public works and civil engineering fell by 2.5%. Even housing renovation projects, which was the only sub-sector to grow regularly throughout the post-2009 financial crisis period, declined by a sharp 9.8%. The COVID-19 pandemic caused the number of housing transactions to drop by 7.7% in 2020. A further decline of between -1.1% and -4.8% is expected in 2021.

ANCE's outlook for 2021 predicts a rebound of 8.6% in construction investment, mainly driven by the redevelopment of the existing stock for housing purposes (+14%), new housing construction (+3,5%) and by a gradual recovery in both private investments for non-residential building (+5%) and public works (+7.7%). ANCE expects most new housing and non-residential investments will be concentrated in a few cities in the north of Italy (Milan, Turin, Bologna). The largest area of uncertainty remains in tourism (hotels) and non-food retail, the sectors hit hardest by the pandemic.

In 2020, public works fell by 2.5% due to a contraction of production levels and a fall in new construction project launches. The main causes were pandemic-related work and movement restrictions and the disruptions in functioning of public authorities as they transitioned to teleworking and shifted public resources to deal with the crisis. The number of calls for civil engineering tenders dropped by 11.1% in 2020, with particularly intense reductions in the second half of the year. Although the number of tenders fell, the average value of tenders registered an overall growth of 28.7% as public entities concentrated their energies on issuing tenders for larger projects.

ANCE forecasts that investments in public works will rise by 7.7% in 2021. This is due to a combined result of several measures in support of civil engineering works included in recent years' budget laws and the



approaching 2023 deadline for the 2014-2020 European Structural and Investment Funds programming period. The €209 billion (\$255 billion) of EU funding that will be made available through Italy's National Recovery and Resilience Plan, NRRP or "Piano Nazionale di Ripresa e Resilienza" over the period 2021-2026 is expected to produce only limited and uncertain results in 2021 as the allocation and planning processes will take up most of 2021.

Italy counted 490,000 companies in construction and related industries in 2018, the last year for which data is available. Specialized construction services and products accounted for 75.9% of the total, followed building construction (22.8%), and civil engineering construction (1.3%). Construction and related industries accounted for 11.2% of GDP in 2018, employing 1.33 million people. Italy also has one of the world's highest home ownership rates as over 75% of families own their own homes, accounting for over 20 million units.

Italy is home to manufacturers of high-quality products and has access to European and global suppliers of competitively priced building products. To be competitive, U.S. suppliers must overcome shipping and regulatory costs and deliver on product performance and post-sales service requirements to compete on quality, reliability, innovation, or they must provide a unique selling proposition. Regular direct engagement with distributors and buyers is often necessary to create and maintain sales and to distinguish specific product performance versus competitors.

## Leading Sub-Sectors

### **HVAC**

Italy is one of Europe's three largest heating, ventilation, and air conditioning (HVAC) markets. According to Assoclima, Italy's HVAC industry association, in 2020 the HVAC market fell by 7.7% on 2019 reaching a total value of €1.5 billion (\$1.8 billion), about half of which represents imports. This is the first drop after five years of regular growth. National production in Italy fell from €762 million (\$940 million) in 2019 to €712 million (\$870 million) in 2020. Residential systems sold well, while systems for those industries hardest hit by the pandemic – hotels, retail stores, restaurants – fell drastically. Increased interest in air quality during the pandemic stimulated a sturdy 20.6% increase in the number of air treatment systems sold in Italy in 2020.

The pandemic accelerated already rising demand for residential HVAC systems, as more people began to work and study from home. This post pandemic situation may increase the demand for more energy efficient systems as well as IoT-enabled heating and cooling systems to offer real-time monitoring of system functionality and condition. As offices, retail outlets, hotels, restaurants, and other commercial spaces re-open, the increased attention to air circulation, hygiene, and quality is also expected to stimulate new demand. The pandemic therefore accelerated consumer demand for these products as awareness in Italy regarding the health hazards caused by poor air quality was already on the rise.

## Trade Shows

MCE Expocomfort - Italy hosts one of the world's leading exhibitions dedicated to residential and industrial HVAC&R solutions. The next edition will be held March 8- 11, 2022 at Fiera Milano.

<https://www.mceexpocomfort.it/en-gb.html>.

## Opportunities

Incentives for home improvements that improve energy efficiency

U.S. suppliers of products, services, and technologies that improve the energy efficiency of buildings, including heating systems, air conditioning, insulation, solar panels, and charging stations for electric cars may benefit from Italy's incentive program for homeowners. Known in Italy as the "110 Incentive," the program reimburses homeowners for up to 110% of the cost of building improvements that increase energy efficiency. First enacted on July 17, 2020, Italy has extended the incentives up to December 2022 and is considering extending them beyond homeowners to include the owners of hotels and other corporate building owners.

The program covers 110% the cost of purchase and installation of more energy-efficient heating and cooling systems and extends this subsidy to all related improvements that ensure or increase their efficiency – like doors, windows, roofs, insulation, and internet-of-things electronics.

Opportunities may exist for U.S. companies with products or solutions in the following categories:

- Substitution of heating and air conditioning systems for single-family homes
- and some multi-family, residential buildings
- Home improvements for better insulation
- Improvements that increase a building's ability to withstand earthquakes
- Improvements that increase the energy efficiency of new home heating and cooling systems, including doors, windows, insulation, and roofing
- Solar panels
- Recharging equipment for electric vehicles
- Elevators and other improvements to improve access to people with disabilities.

## Intelligent and Sustainable Buildings

Italian companies, the public sector, and end-users are increasingly interested in sustainability and opportunities exist for products with strong "green" performance attributes, in areas such as energy and water savings and indoor air quality improvement. The Green Building Council's LEED protocols, which originated in the United States, are growing in acceptance in Italy and many building professionals take them into account for new energy efficient structures.

In June 2021 the European Commission approved Italy's National Recovery and Resilience Plan as part of Next Generation EU (NGEU), Europe's €750 billion recover package. Italy will receive €68.9 billion (\$84.2 billion) in grants and €122.6 billion (\$149.8 billion) in loans from the EU to spend between 2021 and 2026. The plan sets aside €32.1 billion (\$39.2 billion) for sustainable mobility, including investments to integrate more regions into the high-speed rail network and complete the rail freight corridors. The plan should boost sustainable

local transport through the extension of cycle lanes, metros, tramways and zero emission buses. This includes the construction of electric charging stations across the country and hydrogen refueling points for road and rail transport. It also sets aside money to “green” Italy ‘sports.

### **Port Infrastructure Modernization and Expansions:**

Italy will invest €7.4 billion (\$8.9 billion) to modernize and increase capacity at its ports between now and 2026. Much of this spending is earmarked to increase the size of the ships that Italy’s main container ports can handle through dredging, new breakwaters, and improved connections to road and rail links. Other funds will be spent on measures to make ports more ecologically sustainable or more efficient and secure through digitalization. U.S. companies with innovative solutions in these sectors may benefit from increased public spending.

These funds come on top of the projects already planned by the Ports of Genoa, Italy’s busiest container ports, which in 2021 plans to award €2.6 billion (\$3.1 billion) in tenders for a new breakwater, dredging, and an expansion of its shipyards.

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# MEXICO - Construction

This is a best prospect industry sector for this country. Includes a market overview and trade data.

Last published date: 2021-09-02

The construction sector—including building materials and specialized expertise such as sustainable building technologies and seismic stabilization—is a best prospect industry sector for Mexico. This section includes a market overview and trade data. It is expected that in 2021 Mexico’s construction industry will recover from the impacts of the COVID-19 pandemic, driven by an improving economic outlook and public investment in priority infrastructure projects.

## Overview

Mexico’s USD 1.3 trillion economy makes it the second largest economy in Latin America and the 15th-largest in the world. Its infrastructure plans are an important consideration for any U.S. engineering or construction supply firm.

According to Business Monitor International (BMI), a Fitch Solutions data and analytics company, Mexico’s construction industry is expected to recover after a significant decline of 17 percent in 2020. BMI estimates the construction industry will grow by 12 percent in 2021 as the Mexican economy recovers from the COVID-19 pandemic, with average annual growth reaching 3.1 percent between 2022 and 2025. This expected growth will be offset by weak investor sentiment, limited public investment, changes in public policies, and the duration of the COVID-19 pandemic that could affect the economic recovery.

In its decree on the COVID-19 public health emergency, the Mexican Government identified construction and infrastructure projects as essential industries. President López Obrador specifically directed key infrastructure projects to continue during the national COVID-19 related shutdowns. These large “signature” projects include the new airport to serve Mexico City at the Santa Lucía Military Base; the Isthmus of Tehuantepec Inter-Oceanic Corridor; the “Maya Train” on the Yucatan Peninsula; rural roads; and various sector-specific developments in oil and gas production, refinery development, agricultural production, and mines. President López Obrador announced these projects in December 2018 under his National Development Plan (Plan Nacional de Desarrollo or PND) 2018–2024. This plan seeks to increase infrastructure investment from 2.5 to 4.5 percent of GDP by 2022.

In 2019 and 2020, President López Obrador, along with private sector representatives, announced multiple projects as part of the nation’s infrastructure plan. The overall plan covers transportation, telecommunications, water and sanitation, energy, tourism and social welfare. For more details on these projects, please see our sections on transportation infrastructure, energy, oil and gas, and water.

The following table indicates the value of the Mexican construction and infrastructure industry. These figures were estimated by BMI based on data provided by the Mexican National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía or INEGI).

## Construction and Infrastructure Industry Data

(Figures in USD billions)

	2018	2019	2020 (estimated)	2021 (forecast)
<b>Construction Industry Value</b>	93.22	90.47	72.89	82.56
<b>Construction Industry Value, Real Growth, % y-o-y</b>	0.6	-5.0	-17.2	12.0
<b>Infrastructure Industry Value</b>	33.83	32.82	26.72	29.90
<b>Construction Industry Value, Real Growth, % y-o-y</b>	0.5	-5.1	-16.2	10.7
<b>Exchange Rates</b>	19.23	19.26	20.00	21.00(e)

Sources: Secretariat of Finance and Public Credit (SHCP), National Institute for Statistics and Geography (INEGI), Fitch Solutions Business Monitor International (BMI).

Macroeconomic conditions in Mexico will improve over the next several years as consumption recovers and key economic sectors return to normal levels of activity post COVID-19. The construction of new manufacturing and industrial plants will be a crucial driver of investment and Mexico will benefit as a result of the implementation of the United States-Mexico-Canada Agreement (USMCA), which may shift supply chains to the region from countries such as China.

Analysts and industry experts have agreed about elements that could affect investment during the upcoming years, preventing a significant recovery of the Mexican construction industry. The COVID-19 pandemic has been one of the most influential, as firms may continue to limit capital expenditure. This adverse environment would be exacerbated by a combination of project cancellations and abrupt changes to key policies under the current López Obrador Administration.

On the public works side, the majority of PND projects, such as the Maya Train, have shifted from being planned as public-private partnerships (PPPs) to being primarily government-funded. For those projects involving PPP financing, including some in the private sector-led package, the Public-Private Partnership Law allows the government to enter into infrastructure and service provision contracts with private companies for up to 40 years. This law provides more legal certainty to private investors by distributing risk more evenly, facilitating access to bank loans, and harmonizing existing state public-partnership models into one federal law. All investors can participate in the bidding process, except for some restricted sectors outlined in the existing Foreign Direct Investment Law. The COVID 19 pandemic could also have a negative impact in public

investment as reduced tax revenue and the government's reluctance to take on additional debt may generate cuts to capital investment.

Mexico ranks second among top markets for U.S. building product exporters due to its proximity, established transport links, and duty-free status under USMCA. For 2021, we will continue to see opportunities related to major PND government infrastructure projects, including work on specific highways and roads, railways, airports, ports, oil and gas-related infrastructure, telecommunications, and housing projects. In the private sector, we continue to see opportunities in mixed-use buildings (retail, corporate, and housing), corporate offices, logistic and manufacturing hubs, shopping malls, retail stores, and other small projects. The large private projects will be developed and executed by local and foreign investors. Most public projects will be developed and executed by local investors and a minority by foreign investors. As previously mentioned, interested companies should follow cautiously the development of these projects given possible changes in public policies related to investment as a result of continued effects of the COVID-19 economic downturn.

## **Leading Sub-Sectors**

We see three leading sub-sectors in the construction industry: general construction, housing, and green building.

### **General Construction**

Construction techniques in Mexico differ from those in the United States. Most of the houses, commercial and public buildings, industrial facilities (industrial manufacturing plants, logistical and distribution centers), and mixed-use buildings in Mexico are built with bricks and concrete, which are the traditional building materials in Mexico. Demand for cement, steel bars, glass, and air conditioner systems are growing and not always met by local suppliers. This presents a market opportunity for U.S. firms, especially in industrial areas along the U.S.-Mexico border where most facilities are being built with raw materials from both countries. Nonetheless, state-of-the-art panel systems for mixed-use buildings and facilities are gaining market share due to trends toward flexible spaces and areas in offices, distribution centers, as well as in luxury apartments.

There is also a high demand for plywood. Potential niche markets exist in the furniture manufacturing sector, the construction sector (which consumes large quantities of wood for concrete forming purposes), and the interior decoration sector, particularly in flooring, paneling, and molding.

### **Housing**

Unfortunately, 2020 was not positive for the housing sub-sector. INEGI data shows that, for 2019 and 2020, a significant number of housing investment projects were postponed or canceled in several cities, but mainly in the metropolitan areas of Mexico City, Guadalajara, and Monterrey, which are the main engines of real estate development in the country.

Uncertainty over public policies accentuated housing project declines in the last 18 months. For 2021 we expect to see continued weakness in housing development, especially in the middle, residential, and residential-plus segments. Potential buyers have postponed purchasing decisions and will do so as long as they continue to perceive uncertainty. In addition, the Federal Law on the Remuneration of Public Servants

reduced the income of federal government workers, further depressing home sales. The National Housing Registry (Registro Único de Vivienda) is a good source for information on housing inventories. It shows that units remain below the initial plans from housing developers and the federal government.

Mexico's housing sector is dominated and funded by large independent government and parastatal agencies. These include the National Housing Commission (Comisión Nacional de Vivienda or CONAVI), INFONAVIT (Instituto del Fondo Nacional para la Vivienda para los Trabajadores, the largest housing fund for private workers in Mexico), FOVISSSTE (Fondo de la Vivienda del Instituto de Seguridad y Servicios Sociales de los Trabajadores del Estado, the largest housing fund for state workers in Mexico), FONHAPO (Fideicomiso Fondo Nacional de Habitaciones Populares, a government fund for creating low-income housing options), CFE (Comisión Federal de Electricidad, the government owned electric utility company), Pemex (Petróleos Mexicanos, the state-owned oil company), some state government housing agencies, and large private banks and other financial institutions. Government institutions provide almost 60 percent of the funds for the Mexican housing sector. The other 40 percent is covered by private banks and other financial institutions.

Under the López Obrador Administration, housing analysts suggest we might see a continuation of (1) housing support for six million workers not covered by the INFONAVIT and FOVISSSTE housing funds; (2) a subsidy for houses valued between USD 12,000 and USD 25,000; and (3) subsidies for green housing projects (up to 25 percent of the mortgage). New home construction could account for approximately 22 percent of housing investments through 2024. These initiatives have been offering opportunities to the Mexican housing developers focused on the low-income market (e.g., Consorcio Ara, Gicsa, Frisa, Gigante Grupo Inmobiliario, Inmuebles Carso, ICA, Inmobiliaria Vinte, Thor Urbana Capital, and Acciona Parque Reforma, among several others).

There are no major barriers to the importation of housing building materials. Certain regulated products will need to comply with local standards' testing (e.g., wires, switches, back-up power batteries, etc.), so it is necessary to check the requirements for your particular product.

For U.S. firms interested in entering Mexico's housing industry, one of the best options is to partner with a Mexican housing developer or construction firm that is active in the housing industry. Mexican companies' knowledge of the market and labor and legal aspects is invaluable to U.S. firms. Despite the Government's focus on subsidized housing, there are outstanding business opportunities in providing housing for the mid- and high-income segment of the housing industry.

Building materials suppliers that have successfully entered the Mexican market typically have hired a representative to sell to the major distributors and construction companies in the country. In addition, it is important that manufacturers register as building materials suppliers with INFONAVIT, FOVISSSTE, FONHAPO, Pemex, CFE, and state housing institutes.

## **Green Building**

Like other emerging economies, Mexico is moving rapidly towards green, or environmentally-friendly, construction activities. The construction industry has embraced the green building movement. Mexico joined the World Green Building Council (WGBC) and is learning best practices from Europe, Canada, and the United States to lower costs and enjoy health benefits derived from green and sustainable buildings. The Mexican

construction industry also aims to demonstrate to other countries how to use simple, moderate-cost strategies acquired through its own longstanding building practices to achieve green building advantages.

Mexico has a tradition of architecture that favors environmentally-sensitive, small-footprint building practices and designs. Nonetheless, policy efforts to promote green buildings are relatively new and generally focused on the housing sector. The top organizations documenting and implementing green practices, as well as working to define criteria for green buildings and homes include CONAVI, INFONAVIT, the Mexican Chamber for the Construction Industry (Cámara Mexicana de la Industria de la Construcción or CMIC), the National Chamber for Consulting Firms (Cámara Nacional de Empresas de Consultoría or CNEC), the National College for Architects (Colegio Nacional de Arquitectos de la Ciudad de México), the Mexican Council for Sustainable Construction (Consejo Mexicano para la Edificación Sustentable), Sustainability for Mexico (Sustentabilidad para México or SUME), and the Association of Firms for the Saving of Energy on Construction and Buildings. Additionally, INFONAVIT has created a “green mortgage” program, supported by mandatory employer and employee contributions.

The worldwide green building certification program developed by the United States Green Building Council—a program known as LEED for “Leadership in Energy and Environmental Design”—is increasingly used in Mexico. As a result of these efforts and developments, by early 2019 Mexico was home to over 755 LEED certified projects totaling 15.9 million gross square meters of space. From hospitality to retail, whether single projects or LEED volume certification, the projects in Mexico represent the diversity and breadth inherent in LEED. Mexican public authorities have developed specific regulations and certifications to promote energy efficiency and buildings that respect the environment. One of them is the Certification of Sustainable Buildings Program (Programa de Certificación de Edificaciones Sustentables or PCES), an instrument developed by Mexico City’s Secretariat of the Environment (Secretaría del Medio Ambiente or SEDEMA) to ensure the energy efficiency of current and future buildings.

## Opportunities

The U.S. Commercial Service in Mexico is happy to assist you in exploring construction sector opportunities. Residential U.S. building and construction products are generally well-received in Mexico by local construction companies seeking to offer their clients houses with better features and quality. When home construction recovers, Mexican buyers will once again seek quality, affordable homes with more green products. Housing developers and construction companies located in border-states have greater access to the latest trends in design, products, and accessories. Nonetheless, developers and construction companies in central Mexico are also interested in U.S. products that can improve the quality of their final product.

To the extent private sector construction continues, there are opportunities for U.S. suppliers in both residential and non-residential construction/building. These include wooden windows, doors, flooring, and frames from sustainable woods; ecological paints, coverings and coatings; ecological concrete pipes for potable water and sewage; energy saving light bulbs; ecological pipes and fixtures for electrical applications; skylights; green-certified electrical devices and home appliances; permeable concrete; and green roof systems and equipment. There is also demand for high-efficiency air conditioning systems and equipment; high-efficiency HVAC equipment for commercial buildings and hospitals; ecological water purification systems and devices; ecological indoor and outdoor furniture; natural insulation materials; ecological blocks and bricks;



insulation; acoustics; and fire-retardant thermal protection materials. Business opportunities in engineering, design, architectural, electrical, plumbing, foundation, landscape, and other green services and technologies are also significant.

The COVID-19 pandemic will continue to have an impact in the construction market as multiple office, mixed-used spaces, and commercial facilities will have to be reconverted or adapted to the new reality. The market segments most affected by the pandemic will be office and commercial construction, as demand for such spaces decreased significantly as a result of the economic crisis and the different remote work schemes adopted by a large number of firms. Many commercial construction projects were put on hold or cancelled as a result.

Construction elements and supplies that allow spaces to be adapted to different needs and uses will be in high demand, whereas the office and commercial construction markets are only likely to recover in the medium- to long-term. Demand for IT tools, communication platforms, and software to facilitate construction processes, design, and materials management, among other, has increased during the last year and will continue growing in the near future. Industry experts have noted increasing interest by the Mexican construction industry in Building Information Modeling (BIM) tools, which are steadily becoming a major asset of the construction industry as it evolves and creates opportunities for owners, architects and contractors.

The following table provides additional details on specific opportunities.

### **Best Prospects in Mexico for U.S. Manufacturers of Building Materials**

(% of U.S. Market Share in Mexico’s Construction Industry)

<b>Description</b>	<b>HS Code</b>	<b>U.S. Market Share</b>
Filtering or purifying machinery and apparatus for gases, others	842139	70%
Tubes and pipes—copper	741110	68%
Aluminum doors, windows, and frames	761010	65%
Bulbs for incandescent lamps	701110	63%
Air conditioning machines others, incorporating a refrigerating unit, other	841582	61%
Steel doors, windows, and frames	730830	58%

Source: Sistema de Información Comercial Via Internet (SIAVIO, Secretariat of Economy (SE).

### **Resources**

- National Chamber for Housing Development (CANADEVI)
- National Housing Commission (CONAVI)
- Mexican Chamber for the Construction Industry (CMIC)
- National Chamber for Consulting Firms (CNEC)
- Construction and Housing Development Center (CIHAC)

- National Institute for Statistics and Geography (INEGI)
- National Workers Housing Fund Institute (INFONAVIT)
- Secretariat of Communications and Transportation (SCT)

We recommend the following events to connect with Mexican buyers, representatives, and industry officials.

- Expo Ferretera, Guadalajara, Jalisco
- Expo CIHAC, Mexico City

## Contacts

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# SAUDI ARABIA - Architecture, Engineering and Construction

This is a best prospect industry sector for this country. Includes a market overview and trade data.  
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## Overview

The government of the Kingdom of Saudi Arabia's priorities are shaping trends in architecture and design in the Kingdom. The government continues to invest heavily in infrastructure development as it moves to diversify its economy and respond to the needs of a young, growing population seeking employment opportunities in a diversifying economy. Despite budget deficits and lower oil prices, Saudi Arabia's construction sector remains strong as the country builds the infrastructure necessary for its "new economy" model based on knowledge industries, local manufacturing and capacity building of the Saudi labor force.

Economic cities are the foundation of the country's strategy plan to diversify into new-generation economic sectors like healthcare, life sciences, automotive, information technology, logistics, alternative energy and advanced manufacturing. These cities are massive construction projects that require urban planners, civil engineers and project management services. In addition to government initiatives, the market for architectural design is driven by regional competition and the status that bold and innovative designs confer status.

The Kingdom's goal to decrease dependence on petroleum is generating demand for more energy-efficient building designs. The Kingdom is becoming a regional leader in this area. It is estimated that 68% of electricity consumption in Saudi Arabia is utilized for air conditioning. The Saudi Green Building Forum (SGBF) was recently established as the country's official organization in charge of promoting sustainable construction. The U.S. Green Building Council's LEED rating system is recognized in projects in Saudi Arabia and SGBF is the sole authorized Education Delivery Partner for LEED. There are currently at least sixteen certified LEED projects in Saudi Arabia, including King Abdullah Financial District, the world's largest LEED-registered project, and King Abdullah University of Science and Technology, the world's largest LEED Platinum project. Standards are being developed for "green" construction as well as building materials, appliances, electronic systems and HVAC applications, with U.S. building codes increasingly being adopted by Saudi standards bodies.

Saudi Arabia is also investing in its domestic talent pool of architects, urban planners and construction project managers through academic programs in architecture, planning and design at King Saud University, King Fahd University, King Abdulaziz University and King Abdullah University of Science and Technology.

The construction sector in Saudi Arabia declined during 2015–2018 due to low oil prices, which led to the implementation of various austerity measures by the government. Reduced public expenditure coupled with weak investor confidence led to a decline in construction activity. The industry is expected to experience slow growth during 2019, as oil prices stabilize. The industry is expected to gain momentum from 2020, however, supported by a probable rise in oil prices and a gradual improvement in economic conditions. The

government's effort to diversify the economy to reduce its dependence on the oil sector is also expected to bode well for the industry over the forecast period (2019–2022). In April 2016, the government launched the Vision 2030 program, under which it aims to increase the share of non-oil sector revenues.

In July 2019, The Red Sea Development Company (TRSDC) awarded Saudi Amana Contracting a public tender award to build accommodation and offices for staff and laborers working on the project. It also awarded Netherlands-based Archirodon a contract to construct a 3.3-kilometer crossing to Shuraurah, the hub Island for the first phase of development. TRSDC states that the project is on track for completion by the end of 2022. The plans include 14 luxury hotels offering 3,000 rooms across five islands and two inland resorts. It will also include a yachting marina, entertainment facilities, an airport, and the necessary supporting logistics and utility infrastructure.

The private sector has kept growth in the construction business steady as Saudi Arabia's overall economic growth slowed in 2016. In real terms, the Saudi Arabian sector output contracted by 1.6% in 2018, following average annual growth of 1.9% during the preceding four years 2014-2016. This decline was mainly due to low oil prices and the country's high fiscal deficits, which reduced the government's budget spending. The country's construction industry is expected to contract further in real terms in 2019 by 0.4%, before regaining growth momentum. Growth over the forecast period (2019–2023) is expected to be supported by government stimulus on developing transport infrastructure, educational, healthcare, energy and utilities facilities, and affordable housing across the country. Under the National Transformation Program (NTP) 2020 and the Saudi Arabia Vision 2030, the government plans to develop sea ports, railway lines, airports and manufacturing facilities, with an aim to reduce the country's dependency on the oil sector and reduce unemployment. Saudi Arabia's continued economic growth has kept the construction industry strong. The large budget indicates that Saudi Arabia is expecting significant revenue growth in the years to come. The Vision 2030, NTP 2020 and private-sector-investment boost, and ongoing reforms, are likely to aid growth for Saudi's construction market in 2018 and beyond. According to an official at the Ministry of Finance, Saudi Arabia's economy is entering a post-oil era in which the Kingdom's mega-cities, which are under construction, will provide the country's future growth.

### **Sub-Sector Best Prospects**

Target sectors holding high potential for U.S exporters include: master planning, regional design and urban planning; project management, interior design; urban port re-development and related design of boardwalks, corniches, buildings, retail space and parks; hospitals and healthcare architecture; hospitality; transportation infrastructure facilities including airports and seaports; architecture and engineering services for mixed-use projects; sports and entertainment complexes; and educational facilities and college campuses.

### **Opportunities**

#### **Transportation Infrastructure**

Upgrades to airports are in various stages of the tendering process, including expansions to the major airports in Riyadh and Jeddah. Several major rail projects are in the pipeline and contracts have yet to be awarded for the design of the Saudi Land Bridge that will connect ports on the Red Sea to ports in the Arabian (Persian)

Gulf. Saudi Arabia is also part of a GCC regional rail initiative that is currently in the design phase and that will connect passenger and freight traffic in the six countries of the GCC through a 1,400-mile rail network.

## **Economic Cities**

The \$500-billion NEOM city project is a 26,500 square kilometers (km) (10,230 square mile) zone that will focus on industries including energy and water, biotechnology, food, advanced manufacturing and entertainment. The Saudi government, the PIF, and local and international investors are expected to invest more than half a trillion dollars into it in the coming years. The first phase of the project is expected to be completed by 2025. Also, there are six economic cities in various stages of development located across the Kingdom in urban areas surrounding Tabuk, Medina, Rabigh, Hail, Jazan and Eastern Province. King Abdullah Economic City (KAEC) is the flagship Economic City located north of Jeddah. Completion dates for some of these cities are as far out as 2035 and will thus generate long-term opportunities for urban planners, design engineers and project managers.

## **Housing/Residential Infrastructure**

The government recently announced a national housing strategy to build more than 1.5 million new homes at a cost of almost \$80 billion to address the shortage of affordable housing for Saudi citizens. Housing and small business are major beneficiaries of the Saudi government's \$19-billion stimulus package. Among the measures announced in a decree by King Salman are a \$6-billion initiative on subsidized loans to provide housing, a \$4-billion injection into new building technologies, and a proposal valued at \$3 billion to support the funding of infrastructure initiatives.

## **Entertainment**

The government officially allowed public movie theaters to return to the Kingdom for the first time in more than 30 years in March 2018. Opening cinemas is anticipated to act as a catalyst for economic growth and diversification. By developing the broader cultural sector, it will create new employment and training opportunities, as well as enrich Saudi Arabia's entertainment options. By 2030, there are projected to be over 350 cinemas with more than 2,300 screens.

**Al-Qiddiya Entertainment City:** The City is 40km from the national capital city, Riyadh, with phase one of the project expected to be complete by 2022. Total investment in the project will be about \$30 billion. The Public Investment Fund (PIF) will inject initial investments into the project and start partnerships with international companies.

**Red Sea Beach Tourism Project:** Saudi Arabia wants to turn hundreds of kilometers of the Red sea coastline into a global tourism destination as part of its plan to transform the economy and reduce its reliance on oil. The project will cover more than 50 islands and 34,000 square kilometers between the cities of Umluj and Al Wajh. Total investment in the project is expected to be about \$60 billion.

**Souq Okaz City:** Work has begun on a massive Saudi heritage tourism project in Taif, that will eventually cost more than \$2.5 billion, nearly 90 percent of it invested by the private sector. The new city will have heritage centers, museums, recreational facilities, open markets, hotels, environmental camps, shopping malls, hospitals, medical centers, business centers, a social club, international schools, health clubs, sport facilities areas, tourist accommodation and a convention center.

## Web Resources

- Saudi Green Building Forum: [www.saudigbf.org](http://www.saudigbf.org)
- Ministry of Housing. [www.housing.gov.sa](http://www.housing.gov.sa)
- The Saudi Council of Engineers: [www.saudieng.sa](http://www.saudieng.sa)
- Saudi Railway Organization: [www.saudirailexpansion.com](http://www.saudirailexpansion.com); [www.saudirailways.org](http://www.saudirailways.org)
- Ministry of Municipal and Rural Affairs (MOMRA): [www.momra.gov.sa](http://www.momra.gov.sa)
- Ministry of Defense [www.mod.gov.sa](http://www.mod.gov.sa)
- Ministry of Interior: [www.moi.gov.sa](http://www.moi.gov.sa)
- Ministry of Education: [www.moe.gov.sa](http://www.moe.gov.sa)
- Ministry of Energy, Industry & Mineral Resources [www.meim.gov.sa](http://www.meim.gov.sa)
- Aramco: [www.aramco.com](http://www.aramco.com)
- Royal Commission for Jubail & Yanbu: [www.rcjy.gov.sa](http://www.rcjy.gov.sa)
- Saudi Arabian General Investment Authority: [www.sagia.gov.sa](http://www.sagia.gov.sa)
- Public Investment Fund: [www.pif.gov.sa](http://www.pif.gov.sa)

# SOUTH AFRICA - Green Building Technologies

This is a best prospect industry sector for this country. Includes a market overview and trade data.

Last published date: 2021-09-11

## Overview

Survey South Africa presents potentially lucrative opportunities for U.S. firms involved in Green Building Technologies (GBT). According to McGraw-Hill Construction in the World Green Building Trends survey, the growth of green building in South Africa exceeds that of established sustainability building regions such as Europe, Australia, United States, United Arab Emirates, Singapore, and Brazil.

Needs The South African government, together with the private sector, recognizes the need for energy-efficient building systems and practices. To achieve a green and sustainable building culture, South Africa requires extensive international, financial, and technical support. Green building technologies and practices from developed countries, such as the United States and Australia, are sought.

## Market Developments

Efficiency Rising energy costs and changing regulations driven by environmental realities have led to an urgent need for more energy efficient buildings in South Africa. This has resulted in greater awareness of and increased demand for designs and products that reduce the energy intensity of buildings. The market for improved energy efficiency interventions and resource efficient building materials is also growing steadily within the South African construction sector.

GBCSA The South African government's progressive green policy is exemplified in South Africa's involvement with the World Green Building Council (WGBC), where it used the expertise and guidance of other nations in establishing the Green Building Council of South Africa (GBCSA) in November 2008. The GBCSA is the entity currently leading the green revolution in South Africa. Market trends indicate great potential in this growing market and a growing desire and ability to offer more environment-friendly products. GBCSA is positioned strongly to lead the green building movement in South Africa and has been recognized as the fastest growing member of the World Green Building Council.

Finances While green building in South Africa is still about the drive for companies to operate in a more socially and environmentally responsible manner, financial incentives are becoming realized. Businesses strive to operate more efficiently in a climate of sharp increases in operating expenses such as electricity and water. As these costs rise, businesses are looking for ways to contain their total cost of occupation. Developers in South Africa are focusing on matters of bottom line, with the second motivation being natural resource conservation.

Skills The green building industry is gaining momentum in South Africa, however, resources, including skilled professionals and manufacturers of green products and services are limited. Despite these constraints, the green building market in South Africa, is responding with a diverse range of green building materials, products, and an accelerated growth of certified professionals.

Statistics In South Africa, certified new green buildings cover over two million square meters and savings in electricity, water consumption and waste disposal at these buildings are having a significant impact on reducing the construction sector's carbon footprint. Developers of a sample of 50 certified projects expect their buildings will result in yearly savings of 76-million kilowatt hours, the amount of electricity needed by 5,300 households for a year; yearly carbon emissions savings of 115-million kilograms, the equivalent to having 28 000 fewer cars on the road; and savings of 124 million liters of water a year - enough to sustain 34 000 households for a year.

## **Market Data**

**Mitigating Variables** Currently South Africa's commercial property sector remains vulnerable to shrinking economic growth rates across many parts of the national economy. An over-supply of office space in some of the major commercial centers has also led to a decrease in the number of 'new-build' projects. There are positive trends in the rising number of speculative, multi-tenant commercial buildings that are choosing to target certification and there is an increase in the number of commercial properties that are undergoing refurbishment to Green Star Standards. Against this backdrop, the GBCSA reports that the value proposition for green buildings remains resilient thanks to their superior tenant retention rates and lower operating costs versus conventional, non-green buildings.

**Estimates** Although no formal statistics are recorded for green building products in South Africa, the building and construction materials market is estimated at about \$10 billion per annum, with 60 percent sold direct to end-users and 40 percent via the distribution/merchant network. Of this total, 18 percent worth of materials are used in the additions, alterations, and home improvement market (including unrecorded home improvement).

**Concentrations** As increasing environmental pressures take hold in South Africa, the country's major construction companies and developers have shown they are focusing on pursuing green practices and projects, particularly in renewable energy projects where opportunities are emerging. There is a growing recognition that climate change opportunities exceed risks, and companies now seek to develop capabilities around greener practices and technologies on a wide scale across business units. Green Star SA certified buildings are currently located predominantly in Gauteng, the Western Cape, and the Durban/Umhlanga area of Kwazulu-Natal. Green building in South Africa continues to gain traction.

## **Best Sub-Sector Best Prospects**

- Natural Heating and Cooling; Natural Lighting (design of buildings to make optimal use of daylighting) and Energy-Saving Lighting technologies.
- Energy Generation: photovoltaics, wind turbines, solar water heaters, flat panel collectors, evacuated tubes.
- Heating, Ventilation and Cooling, Greenwalls, Glazing and Windows, Solar Shading, Greenroofs/Cool Roofs, Permeable Paving,
- Water-Efficient technologies,
- Structural Insulated Panels and Formaldehyde-free board.
- Alternative Building Technologies



## Opportunities

Trade-offs South African trained environment professionals are taking seriously the ambition to lessen the carbon footprint associated with buildings and residences, especially by using design and technological innovation to decrease energy consumption and limit waste. Local suppliers and manufacturers, however, are reluctant to tie funds up with expensive green stock and resources amidst the decline in the general construction industry.

Changes Architects, consulting engineers and sustainability consultant teams are constantly coming up with alternative and cost-efficient building designs to offset the impact of the building on its immediate environment. Previously it was thought to be costlier to make the upfront capital investments to go green, however, volatility in both the cost and availability of power and water is influencing a mind-set change.

Outsourcing These circumstances leave a small but growing niche of green manufacturers in South Africa, resulting in many complex green building products being outsourced from abroad (mainly from Australia and the EU). In the long run, South Africa should have adequate resources to supply many green building materials, if they partner with relevant international companies to source technological expertise and obtain distributor and/or licensing agreements with these foreign entities. This is a potential opportunity for U.S. companies to explore.

As a first step, U.S. companies seeking South African representation should contact U.S. Commercial Service South Africa (<https://www.trade.gov/south-africa>)

## Exhibitions

- Trade Events in South Africa
- The Green Building Convention
- Venue: Century City Exhibition Center, Cape Town or Virtual

## Resources

- Green Building Council of South Africa
- Green Cape

For More Information, the U.S. Commercial Service, South Africa, can be contacted via e-mail at: [Jaisvir.Sewpaul@trade.gov](mailto:Jaisvir.Sewpaul@trade.gov); Phone: +27 21 702 7379; Fax: +27 21 702 7402, or visit our website at <https://www.trade.gov/south-africa>.

# UAE - Design and Construction

This is a best prospect industry sector for this country. Includes a market overview and trade data.  
Last published date: 2022-01-08

## Overview

The UAE offers many opportunities for U.S. companies in the design and construction sectors.

The UAE's construction sector is anticipated to attain moderate post-pandemic growth over the coming years. The UAE government focuses on investment in energy and infrastructure including transportation, utilities, decarbonization, renewable and nuclear energy generation, and resolving the ongoing water scarcity. The significant commitment and resources of the government leads to the development of various mega-project opportunities for construction and engineering companies in the UAE. Recent major projects announced include the Abu Dhabi National Oil Company's (ADNOC) Al-Nouf seawater treatment plant, Dubai Municipality's plan to build a strategic sewerage tunnel, and other mega construction projects like the redevelopment of Mina Rashid in Dubai, and the Dubai International Financial Centre Expansion 2.0.

Experts anticipate UAE's construction sector will see a solid recovery in 2021, with construction industry value growing by 5.9%, from a negative 10.4% as delayed and stalled projects during the pandemic resume construction. The outlook for the residential construction sector remains weak due to the ongoing issue of an oversupply of residential buildings. Non-residential construction will fare better, given government aims to boost industrial production and expand the vital hydrocarbons sector.

## Leading Sub-Sectors

### **Utilities and Energy Projects**

The utilities energy infrastructure sector is expected to expand over the next decade to boost electricity generation capacity to meet growing demand, increase the UAE's water security, and to diversify the economy away from oil. Growth in energy and utilities infrastructure will be driven by the expansion of water and renewable energy capacity over the coming years, in line with pressing water scarcity of the UAE and the government's low carbon energy agenda. ADNOC announced earlier this year the commencement of a competitive process to evaluate and select a developer to participate in the development of a large-scale seawater treatment and transmission pipeline project in the Emirate of Abu Dhabi. This \$2.5 billion project is aimed to replace the current aquifer water injection systems used for maintaining reservoir pressure at onshore oil fields in Abu Dhabi.

### **Transportation and Road infrastructure Projects**

Transportation and road infrastructure development continues to be key to the car-reliant UAE to meet the needs of the growing population and increasing number of cars. This comes in line with the government Abu Dhabi Plan Capital 2030 to expand urbanism and tourism in both main Emirates cities. The UAE has a sizable transportation and road infrastructure projects pipeline, including the \$11 billion Etihad Rail, the \$5.9 billion

proposed hyperloop project between Dubai and Abu Dhabi, the \$2.7 billion Sheikh Zayed double-deck road project, and more.

The increasing demand for urban transport and government aims to bolster tourism and broaden transportation infrastructure will also drive rail and road development across the country.

## **Real Estate Sector**

The outlook of UAE's residential buildings sector remains weak due to the ongoing issue of an oversupply of residential buildings. Growing concerns about excess supply in Dubai's residential building sector are expected to have an impact on the construction industry. Emaar, Dubai's largest property developer, has halted new construction works, citing both an oversupply of property in the market and a drop in demand from government entities. Emaar has reportedly also suspended high-profile projects including the Dubai Creek Harbour, which was intended to build homes for 200,000 people. Other renowned Emirati developers such as Damac Properties, Meraas Holding and Nakheel have cut back on their construction plans in

order to maintain their price levels. This trend is expected to continue throughout 2021, with property sales and rents in Dubai to remain under downward pressure, with reports of increased flexibility in lease terms.

## **Opportunities**

A wave of private sector projects, combined with high levels of government spending and investment plans, is bringing renewed optimism to the market. Despite the fierce competition from local developers, U.S. companies are market leaders in the design and construction field in the UAE.

Local developers are increasingly seeking efficiency and digitally integrated processes in projects planning, staffing, monitoring, and delivery. American companies catering for digitized innovative technology solutions will find increased opportunities.

Recent trends indicate a growing demand for technologies such as:

- Building Information Modeling (BIM)
- Augmented Reality (A/R)
- IoT data applications
- Drones in construction fitted with radio frequency identification (RFID)
- 360° video capturing technologies
- 3D scanning technology
- 3D Printing

## **Trade Shows and Exhibitions**

Cityscape Abu Dhabi

Date: TBC

Abu Dhabi, United Arab Emirates

[UAE capital's largest real estate exhibition | Cityscape Abu Dhabi](#)

Cityscape Dubai

Date: TBC

Dubai, United Arab Emirates

[Cityscape Global | Real Estate Exhibition & Summit in Dubai](#)

Index Exhibition

Date: 24-26 May, 2022

Dubai, United Arab Emirates

[INDEX Dubai | 24 - 26 May 2022 | International Interiors Exhibition \(indexexhibition.com\)](#)

Light Middle East

Date: 15-17 November, 2022

Dubai, United Arab Emirates

[Light Middle East | 15 - 17 November 2022 | Dubai \(messefrankfurt.com\)](#)

The Big 5 Show

Date: 5-8 December 2022

Dubai, United Arab Emirates

[The Big 5 - 5 - 8 DECEMBER 2022](#)

Trenchless Middle East

Date: TBD

Dubai, United Arab Emirates

[Welcome - Trenchless Middle East 2021](#)

Windows Doors and Façade Event

Date: September 2023

Dubai, United Arab Emirates

<https://www.windowsdoorsandfacadeevent.com/>

## **Resources**

- Countries & Regions :: Fitch Solutions: <https://www.fitchsolutions.com/products/countries-regions>
- <https://oxfordbusinessgroup.com/>
- <https://www.zawya.com>
- <https://www.bayut.com/>
- <https://gulfnews.com>
- <https://khaleejtimes.com>

# UNITED KINGDOM - Design and Construction

This is a best prospect industry sector for this country. Includes a market overview and trade data.

Last published date: 2021-09-22

## Overview

The UK medical technology sector generates an annual turnover of approximately \$30 billion each year. It has a strong foundation of mostly small to medium-sized companies around the country, with clusters of activity in areas such as the South East of England and the Midlands. Many multi-national companies, including several leading U.S. medical technology manufacturers, have head offices or subsidiaries in the UK. As a significant percentage of domestically produced products are exported, the country has a large import market making it very receptive to new and innovative international technology.

The largest purchaser of medical technology, the publicly funded National Health Service (NHS), accounts for approximately 85% of the country's healthcare provision. It receives funding from central government but is essentially managed as four separate segments: NHS Wales, NHS Scotland, HSC Northern Ireland, and NHS England, each one delivering strategy and services both centrally and locally, through regional local authorities and other public or private organizations. Most medical technology procurement is carried out by the acute hospital trusts which spend an average of \$6.6 billion on clinical supplies, including medical technology, per year. They have the option of purchasing goods through centralized procurement bodies or hubs, procuring products individually, or by joining with other trusts to form consortia for procurement decisions.

The private (independent) healthcare sector is considerably smaller and funded through health insurance, self-pay patients, or NHS funded referrals. Its strengths lie in the provision of secondary and tertiary care, fields not traditionally offered by the NHS (cosmetic surgery) or where public sector service is limited (dental care). The acute hospital sector is dominated by a handful of major hospital groups: HCA Healthcare, Circle Health, BMI Healthcare, Nuffield Health, and Ramsey Healthcare. There has also been the recent entry of U.S. providers Mayo Clinic Healthcare and Cleveland Clinic London. Publicly funded adult social care services (home care, nursing, or care homes etc.) are commissioned by regional government councils however typically provided by private for profit or voluntary organizations.

2021-22 activity will continue to be dominated by major legislative reform in England and COVID-19. The Health and Social Care Bill, which was introduced into Parliament in July 2021, will drive the push to a system that delivers care via regional integrated services, collaboration and partnerships. As it undergoes radical change, the NHS is also facing the task of tackling the vast backlog of non-urgent elective surgeries and out-patient appointments which were postponed during the pandemic. It is likely approved private providers will be able to assist with the backlog by offering some NHS funded elective care services.

Medical devices that are CE marked can be sold in Great Britain (England, Wales, and Scotland) until June 2023. The new UKCA mark will be required from that time. The CE mark will still be required in Northern Ireland.

## Leading Sub-Sector: Digital Technology

The size, structure, and complexity of the NHS has created the need for a vast, efficient digital health infrastructure. Whilst successive governments have regarded digitalization as an essential component in tackling the social and economic challenges facing the NHS, the road to full digital maturity has not always been easy. Progress is being made, for example within NHS England the current executive has committed the organization to achieve national interoperable electronic health records. Digital innovation also forms a key part of the 2019 NHS Long Term Plan. These initiatives demonstrate a strong commitment to making the NHS a fully digitalized organization, one capable of utilizing the latest innovation. In addition, NHS adoption and integration of digital technology has increased significantly during the pandemic. Despite the challenges, many more stakeholders are seeing digital technology as an invaluable tool as the system adapts to the need for safer working practices and different, advanced models of care.

Whilst it's difficult to place an exact value on the digital health sector in the UK, this is already a very well developed and competitive market that plays host to numerous leading technology companies such as Cerner, IBM, Oracle, EMIS, and BT. The market also offers a lot of opportunities for smaller companies and developers. Potential suppliers are advised to begin by gaining an in-depth understanding of their respective industry segment and building contacts to establish what is required within the market to determine the best method of entry. It will be necessary to adhere to relevant NHS as well as broader national compliance rules or regulations.

## Opportunities

The U.S. is a leading supplier of diagnostic, dental, orthopedic equipment, and high-quality wound care products to the UK. Within the digital segment there's demand for clinical efficiency tools, innovative apps and wearables, health analytics tools, remote consultation tools, and monitoring devices that can improve clinical outcomes and patient experience across all areas of the healthcare system.

In the UK, it is currently mandatory for public sector organizations to advertise procurement opportunities over £10,000 (\$13,000) on the UK's Contracts Finder. A new provider selection regime is likely to be implemented via the Health and Care Bill. Firms can register on the Supplying to the NHS procurement portal to receive updates on business opportunities.

NHS Agencies, such as SBRI Healthcare, frequently host competitions in which companies are invited to bid for funding to develop innovative solutions for address particular health needs.

The NHS is a large and competitive organization that has a constant need for all types of new products and services. As it can be challenging to sell directly to the NHS from overseas, many U.S. exporters find it easier to form partnerships with well-established local companies. This enables new entrants to take advantage of their partner's market expertise as well as their access to buyers and other decision makers. Potential suppliers also have the option of approaching private sector healthcare providers through their procurement teams.

## Resources

### **Industry Events**

- NAIDEX, Dementia, Care and Nursing Home Expo, Neuro Convention,
- Medical Imaging Convention, Oncology Convention, and Smart Home for Assisted Living, NEC, Birmingham
- Medtech Innovation Expo, NEC, Birmingham
- Healthcare Excellence Through Technology (HETT), ExCel, London
- Digital Health World Congress 2021 virtual conference, virtual conference
- MEDICA Trade Fair, Dusseldorf, Germany
- Health+Care incorporates the Digital Healthcare Show and The Residential & Home Care Show, ExCel, London
- NHS ConfedExpo, Manchester Central, Manchester

### **Government Departments**

- Department of Health and Social Care (England) & NHS Digital
- NHS Scotland & Digital Health & Care Scotland
- NHS Wales & Digital Health and Care Wales
- Health and Social Care (HSC) Northern Ireland
- Trade Associations
- Association of British Healthtech Industries
- ECHAlliance
- British Healthcare Trades Association
- Scottish Life Sciences Association
- techUK

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