

Infrastructure Sector in China - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Infrastructure Sector in China Market size is estimated at USD 1.10 trillion in 2024, and is expected to reach USD 1.49 trillion by 2029, growing at a CAGR of 6.32% during the forecast period (2024-2029).

Key Highlights

- The COVID-19 pandemic negatively impacted the economic livelihood of governments, businesses, and individuals in the country. In addition, the pandemic resulted in construction interruptions or delays due to a lack of personnel, supply chain disruptions, or delays in government approvals. After easing the restrictions, the government recognized the importance of infrastructure projects for re-establishing economic livelihoods and encouraged investments in the sector.
- In 2021, China's cabinet announced that infrastructure investments in telecommunication networks, satellite navigation, the industrial internet, smart logistics, and transportation might increase in the coming five years. On the other hand, in August 2022, China's State Council announced more incentive policies, including an additional CNY 300 billion (USD 44 billion) in quotas for infrastructure spending and investments by banks, apart from the existing CNY 300 billion (USD 44 billion) announced at the end of June 2022.
- The country is focusing on developing green energy, resulting in increasing investments in renewable power projects. For instance, in 2022, China tripled its investments in solar power projects in the first four months of the year. According to the National Energy Administration, the country invested more than CNY 29 billion (USD 4.3 billion) from January through April 2022, up by 204% higher than in the same period in 2021.
- Under the first phase, the country started the 450 GW phase, and the second phase may cost more than CNY 3 trillion (USD 435 billion). However, the country is continuously developing infrastructure projects to overcome the pandemic's effect and build a strong economy.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

China Infrastructure Market Trends

Transportation Infrastructure is Witnessing Significant Growth

China's transportation infrastructure is growing at a fast pace. For instance, in 2022, China's State Council released the 14th five-year plan for enhancing its transportation system. The plan aims to build and strengthen roads, railways, ports, and waterways, as well as the technology and human capital involved in the transportation industry. The country is highly focused on transportation infrastructure development. Currently, China has eight vertical (north-south) and eight horizontal (east-west) high-speed railways and has eliminated bottlenecks in regular speed railways.

China faced issues in providing logistics sectors, such as the poor state of warehouses and transportation equipment, urban traffic congestion, and talent shortage in the logistics sector. The 14th five-year plan will address these issues and promote the development of intelligent warehousing and distribution facilities, improving equipment standardization, etc. The plan also enhances the infrastructure of suburban railways, multimodal freight transportation, and specialized transportation services.

In 2021, China planned to set a 15-year plan to develop transportation infrastructure. Under this plan, the country aims to double the world's largest high-speed rail network by 2035. In addition, Beijing aims to increase the national high-speed railway network to 70,000 km (43,500 miles) by 2035, up by more than 84% compared to 2020. The plan also includes the development of a 460,000 km network of national expressways and ordinary highways and a 25,000 km of the high-quality inland waterway system. However, in 2021, China's railroad network operating length reached 150,000 km, up by 2.5% compared to the previous year. Thus, the country's initiatives are driving the transportation infrastructure.

Increasing Investments in Infrastructure Sector

Infrastructure spending has played a vital role in China's economic rise over the past three decades, from laying thousands of miles of railway tracks to building record-breaking skyscrapers. Beijing historically depended on local governments to invest in infrastructure to fuel growth and ensure employment in its jurisdictions. In 2021, investments in fixed assets grew by more than 4.9%, up by 2.9% from the previous year.

Local governments are raising funds for infrastructure projects by issuing special-purpose bonds (SPBs). In 2021, China allocated more than CNY 3.65 trillion (USD 573 billion) in SPBs for local governments, from which more than 95% of the funds were issued by December 2021. In addition, more than 50% of these raised funds were utilized for developing transport infrastructure, municipal administration, and industrial park infrastructure sectors. About 30% was spent on social projects, such as affordable housing, health and sanitation, education, elder care, and culture and tourism. In contrast, the remaining 20% was used to develop agriculture, forestry, irrigation, energy, and rural-urban cold chain logistics.

In 2022, China had planned to spend nearly USD 1 trillion on the construction of infrastructure projects. In addition, North China is focusing on developing renewable energy in desert locations. In 2022, construction began on wind and solar power projects, expected to be completed by 2030. However, in August 2022, according to the Ministry of Commerce, the People's Republic of China, monthly foreign direct investment (FDI) inflows to China amounted to nearly USD 14.5 billion. In addition, in 2021, the total FDIs in the country totaled more than USD 170 billion, up by 20% compared to the previous year. Thus, the growing investments are driving the market's growth.

China Infrastructure Industry Overview

The report covers the major players operating in the infrastructure sector in China. The market is fragmented and expected to

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

grow during the forecast period due to private and venture capital investment. Some of the major players in the market include China State Construction Engineering, China Railway Group Limited, China Railway Construction Corporation, and China Communications Construction Company.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS AND DYNAMICS

- 4.1 Current Economic and Construction Market Scenario
- 4.2 Impact of Government Regulations and Initiatives on the Industry
- 4.3 Supply Chain/Value Chain Analysis
- 4.4 Technology Snapshot and Digital Trends
- 4.5 Insights on Modernization of the Transportation Infrastructure Sector
- 4.6 Insights on Major Infrastructure Development Projects
- 4.7 Insights on Ongoing and Upcoming Infrastructure Projects
- 4.8 Market Dynamics
 - 4.8.1 Market Drivers
 - 4.8.2 Market Restraints
 - 4.8.3 Market Opportunities
- 4.9 Porter's Five Forces Analysis
- 4.10 Impact of COVID-19 on the Market

5 MARKET SEGMENTATION

- 5.1 By Type
 - 5.1.1 Social Infrastructure
 - 5.1.1.1 Schools
 - 5.1.1.2 Hospitals
 - 5.1.1.3 Defence
 - 5.1.1.4 Other Social Infrastructures
 - 5.1.2 Transportation Infrastructure
 - 5.1.2.1 Railways
 - 5.1.2.2 Roadways
 - 5.1.2.3 Airports
 - 5.1.2.4 Waterways
 - 5.1.3 Extraction Infrastructure

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.3.1 Power Generation
- 5.1.3.2 Electricity Transmission and Distribution
- 5.1.3.3 Water
- 5.1.3.4 Gas
- 5.1.3.5 Telecoms
- 5.1.4 Manufacturing Infrastructure
 - 5.1.4.1 Metal and Ore Production
 - 5.1.4.2 Petroleum Refining
 - 5.1.4.3 Chemical Manufacturing
 - 5.1.4.4 Industrial Parks and clusters
 - 5.1.4.5 Other Manufacturing Infrastructures
- 5.2 By Key Cities
 - 5.2.1 Shanghai
 - 5.2.2 Beijing
 - 5.2.3 Shenzhen

6 COMPETITIVE LANDSCAPE

- 6.1 Competition Overview (Overview and Market Share Analysis)
- 6.2 Company Profiles
 - 6.2.1 China State Construction Engineering
 - 6.2.2 China Railway Group Limited
 - 6.2.3 China Railway Construction Corporation
 - 6.2.4 China Communications Construction Company
 - 6.2.5 China Electric Power Construction Co. LTD
 - 6.2.6 China Metallurgical Group Corporation
 - 6.2.7 China Energy Engineering Corporation
 - 6.2.8 Shanghai Construction Group
 - 6.2.9 China National Chemical Engineering
 - 6.2.10 China Power International Development Limited
 - 6.2.11 China Resources Power Holdings Company Limited*

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

8 APPENDIX

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Infrastructure Sector in China - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts 2020 - 2029**

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

