



Road Construction & Maintenance

Australian road construction activity is forecast to reach a new peak of over A\$20 billion this financial year, with BIS Oxford Economics analysis revealing a strong outlook over the next five years. There are however significant variations in construction activity by state, by type of road, activity and funding source, with implications for cost escalation. The major challenge for governments around Australia will be whether the industry has the capacity to deliver the substantial pipeline of projects on time and on budget.

Market Segmentation

This service provides unique databases, detailed forecasts and extensive analysis of all market segments. Our data and forecasts break down the sector in the following ways:

- By type of work:
 - Construction
 - Road construction
 - Bridge construction
 - Maintenance
 - Routine maintenance
 - Periodic maintenance
 - Rehabilitation
 - Non-pavement
 - Bridge works
- By type of road:
 - > Rural highways and arterials
 - > Urban highways and arterials
 - > Private toll roads
 - > Local government roads
 - > Private subdivision roads
 - > Runways and access roads etc.
 - > Road bridges
- By state and territory
- By sector of ownership and sector of service provision:
 - > Public sector
 - > Private sector

Road Construction in Australia 2018 – 2032

Our comprehensive service on road construction, providing a detailed state by state breakdown, by type of road, in value work done terms. Includes a thorough written rationale for our forecasts, including assessment of key drivers, capital programs and project lists.

New 2018 timing/format

For more timely/accessible info for our subscribers, we're implementing these improvements:

- NEW more useful **Slide Deck format** (PDF) with charts, explanatory text and commentary (rather than the text-heavy annual report)
- **Supporting Chartbook** with graphs from Slide Deck (PPT)
- **Data and Forecasts** – extensive historical data series and thoroughly researched forecasts for all market segments, annually to 2021/22, followed by two five year averages to 2031/32, supported by **Major Project List** (Excel) will continue to be provided
- NEW Interactive and **Dynamic Charting Spreadsheet** (Excel)
- NEW **Quarterly Updates** of the Slide Deck, Excel datasets, Dynamic Charting Spreadsheet and Chartbook (Feb, May, Aug and November 2018) as the latest ABS road construction data (from ABS) becomes available. Fully revised forecasts will be delivered in the July Update.
- NEW – Key data and forecasts from our **'Road & Bridge Construction Cost Quarterly'** will be integrated into the new format of **Road Construction** service throughout the year.





Road Maintenance in Australia 2018 – 2032

Unparalleled market intelligence on Australia's road maintenance sector, providing historical data and forecasts, by type of maintenance work, by type of road, by state and territory. Includes analysis of the extent of outsourcing and types of contracts in use.

New 2018 format

For more /accessible info for our subscribers, we're implementing these improvements:

- NEW more useful **Slide Deck format** (PDF) with charts, explanatory text and commentary, including assessment of key drivers, capital programs and project lists (rather than the text-heavy annual report)
- **Supporting Chartbook** with graphs from Slide Deck (PPT)

- **Data and Forecasts** – extensive historical data series and thoroughly researched forecasts for all market segments, annually to 2021/22, followed by two five year averages to 2031/32 (Excel)
- To be published June/July 2018.

Presentation/Workshop

We can work with clients in a presentation or interactive workshop forum to discuss current and forecast market conditions, and examine implications for client business.

Methodology

Historical estimates of road construction and maintenance by category will be derived from:

- Published and unpublished data from the Australia Bureau of Statistics – including the Engineering Construction Survey and Government Finance Statistics data.
- Published and unpublished information from:
 - Bureau of Infrastructure, Transport and Regional Economics
 - National Transport Commission
 - State Road Authorities
 - Austroads
 - Australian Local Government Association.
- Interviews and surveys with road authorities, local councils and private sector owners/operators.
- Analysis of historical private sector housing construction and residential subdivision lot production.

Our forecasts of road construction and maintenance activity by sub-sectors will be derived from:

- The interviews with road authorities, local councils and others.
- BIS Oxford Economics' analyses and forecasts of demographics and housing construction by state.
- Projections of the capital stock, underlying maintenance requirement, road surface condition etc.
- Analysis of State and Commonwealth Government budgets, road authority annual reports and other published documents.
- 'Top-down' analysis of the Government funding cycle and Government spending patterns.
- Compilation and monitoring of projects and major maintenance contracts.

Our program of interviews with industry players will also enable us to collect and decipher information on the important developments in this sector, covering issues such as funding sources, contract arrangements and methods.

Contact us

Adrian Hart, Associate Director – Construction, Maintenance and Mining T: +61 (2) 8458 4233 • E: ahart@bisoxfordeconomics.com.au
Kellie Osta, Business Development Manager T: +61 (2) 8458 4287 • E: kosta@bisoxfordeconomics.com.au

BIS OXFORD ECONOMICS

Level 8, 99 Walker Street, North Sydney NSW 2060, Australia

T: +61 (2) 8458 4200 • F: +61 (2) 9959 5795

info@bisoxfordeconomics.com.au • www.bisoxfordeconomics.com.au