

THE MALAYSIAN CONSTRUCTION SECTOR REVIEW 2005



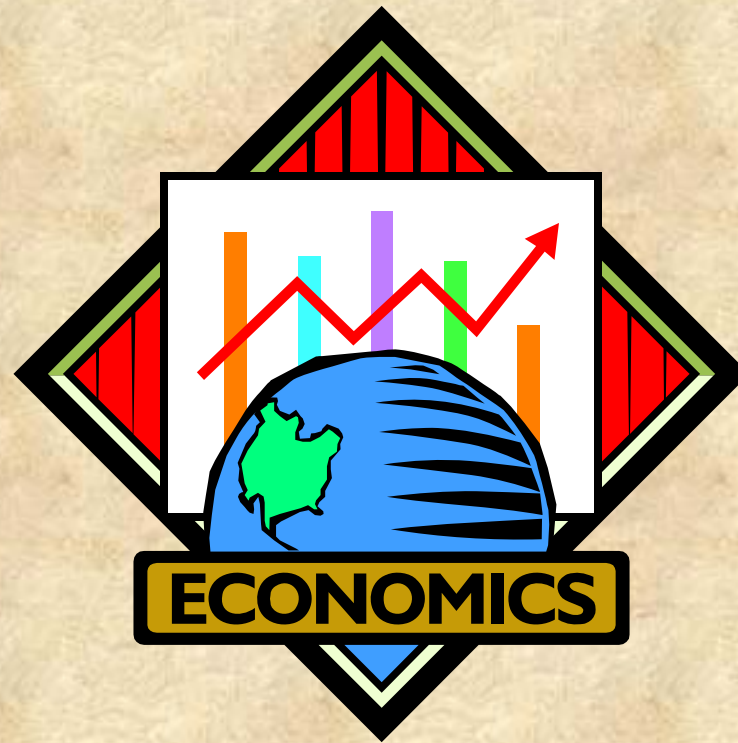
MEGAT KAMIL AZMI
General Manager
Construction Industry Development Board
Malaysia



PRESENTATION OUTLINE

- **CONSTRUCTION SCENARIO**
 - Contract Awarded
 - Registered Contractor
 - Contract Awarded in Oversea
- **PROSPECTS 2005/2006**
 - Forecast Domestic Demand

CONSTRUCTION SCENARIO



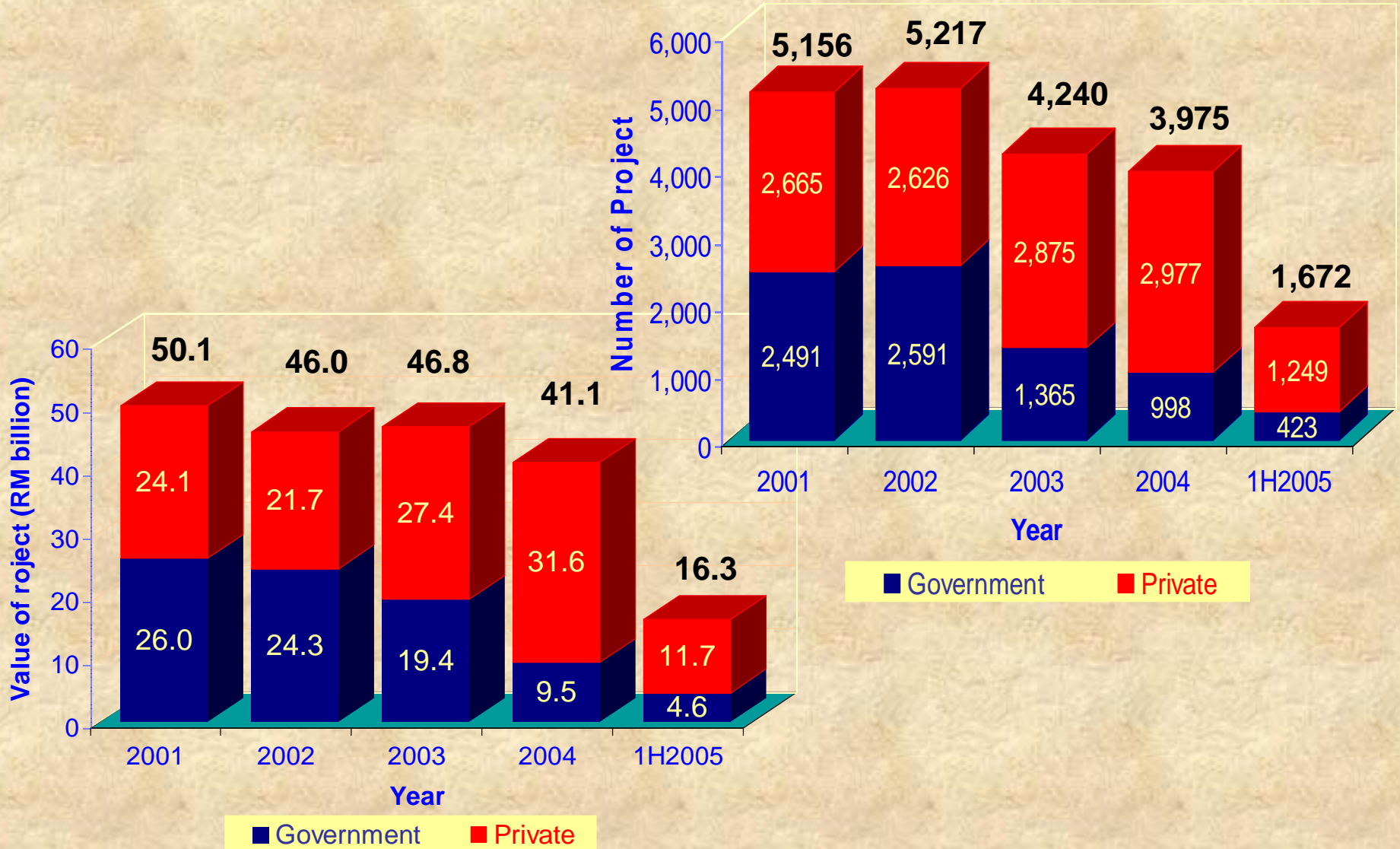
VALUE OF CONTRACT (RM bil)

REGION	2003	2004	1H 2005
NORTH	5.19	4.42	1.74
CENTRAL	19.84	18.77	7.72
SOUTH	11.86	11.55	3.54
EAST	3.91	1.86	1.65
EAST M'SIA	6.06	4.44	1.65
TOTAL	46.87	41.04	16.30
CHANGE	1.7%	(12.4%)	(14.6%)

NUMBER OF CONTRACT

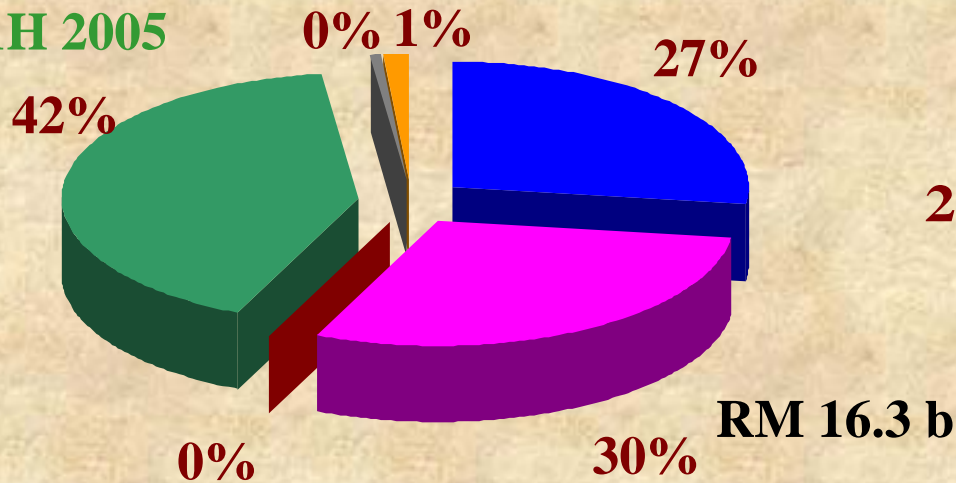
REGION	2003	2004	1H 2005
NORTH	827	799	329
CENTRAL	1,621	1,604	627
SOUTH	856	821	358
EAST	397	294	174
EAST M'SIA	539	457	185
TOTAL	4,240	3,975	1,673
CHANGE	(15.6%)	(6.2%)	(22.4%)

GOVERNMENT AND PRIVATE PROJECT

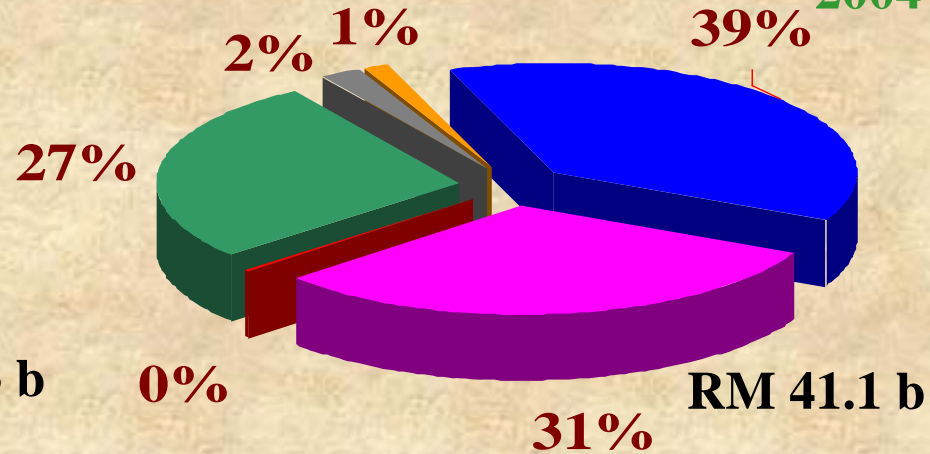


VALUE OF PROJECT ACCORDING TO CATEGORY

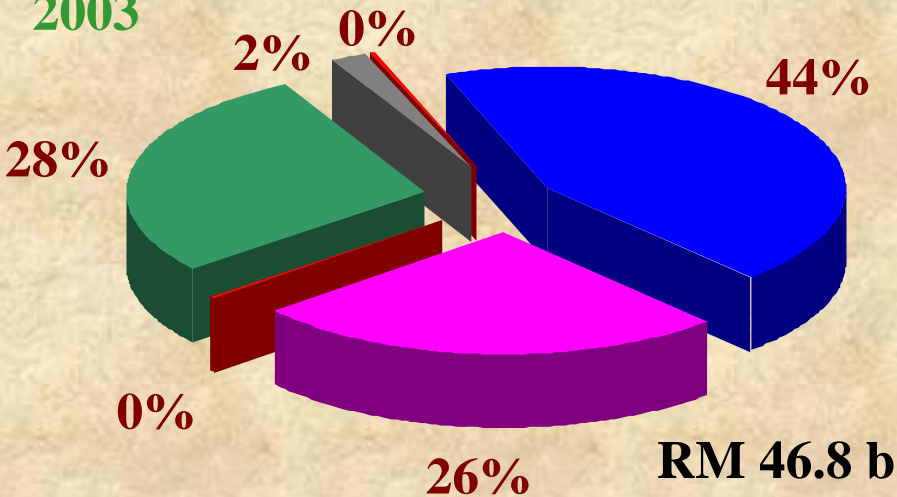
1H 2005



2004

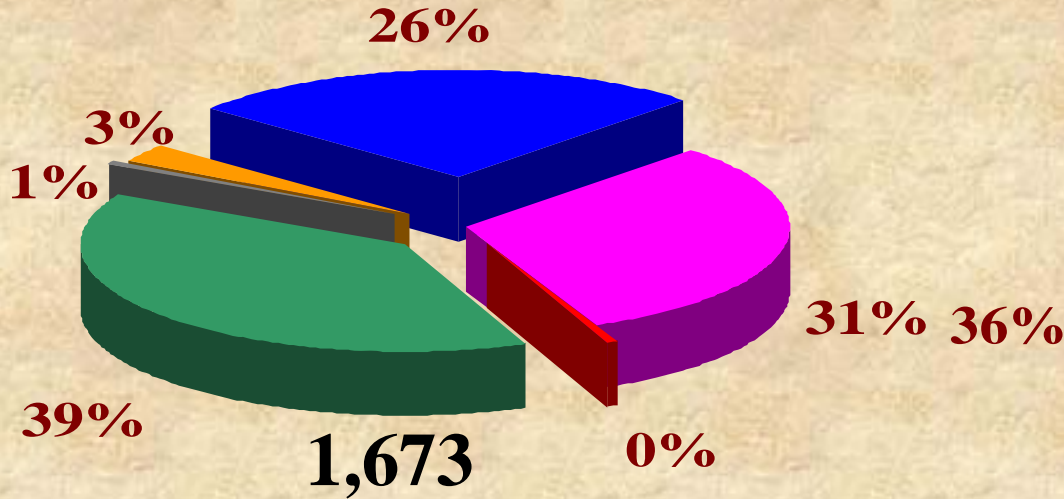


2003

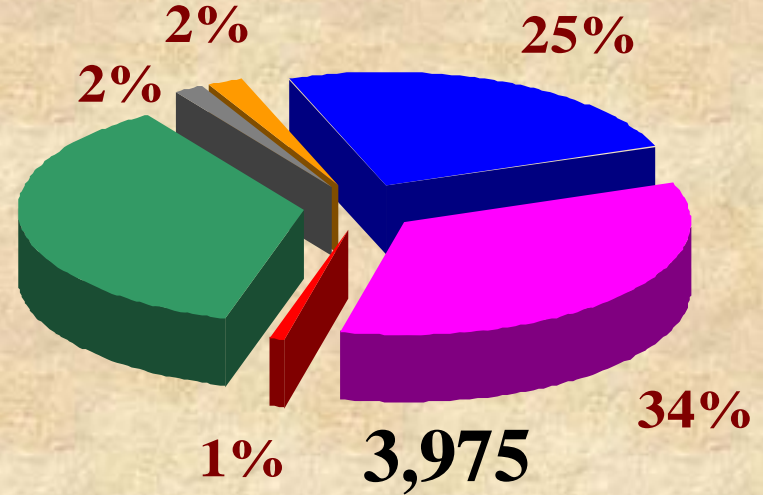


NUMBER OF PROJECT ACCORDING TO CATEGORY

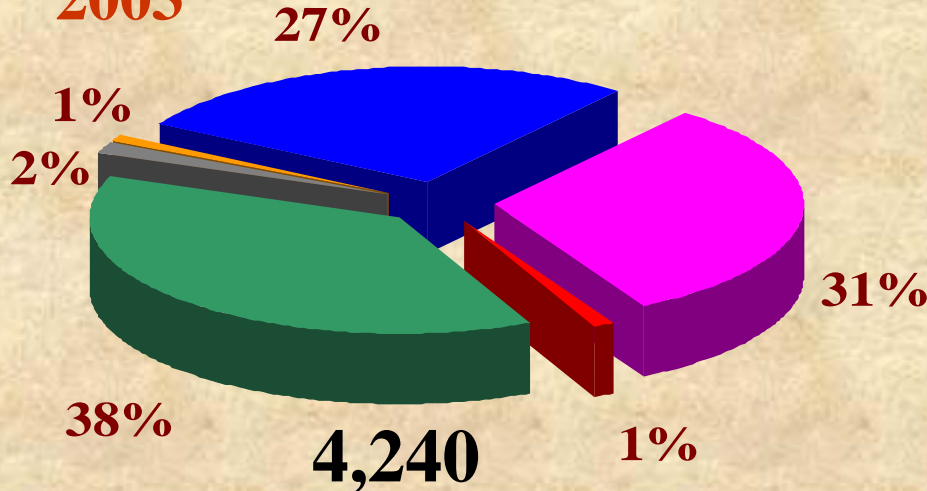
1H 2005



2004



2003

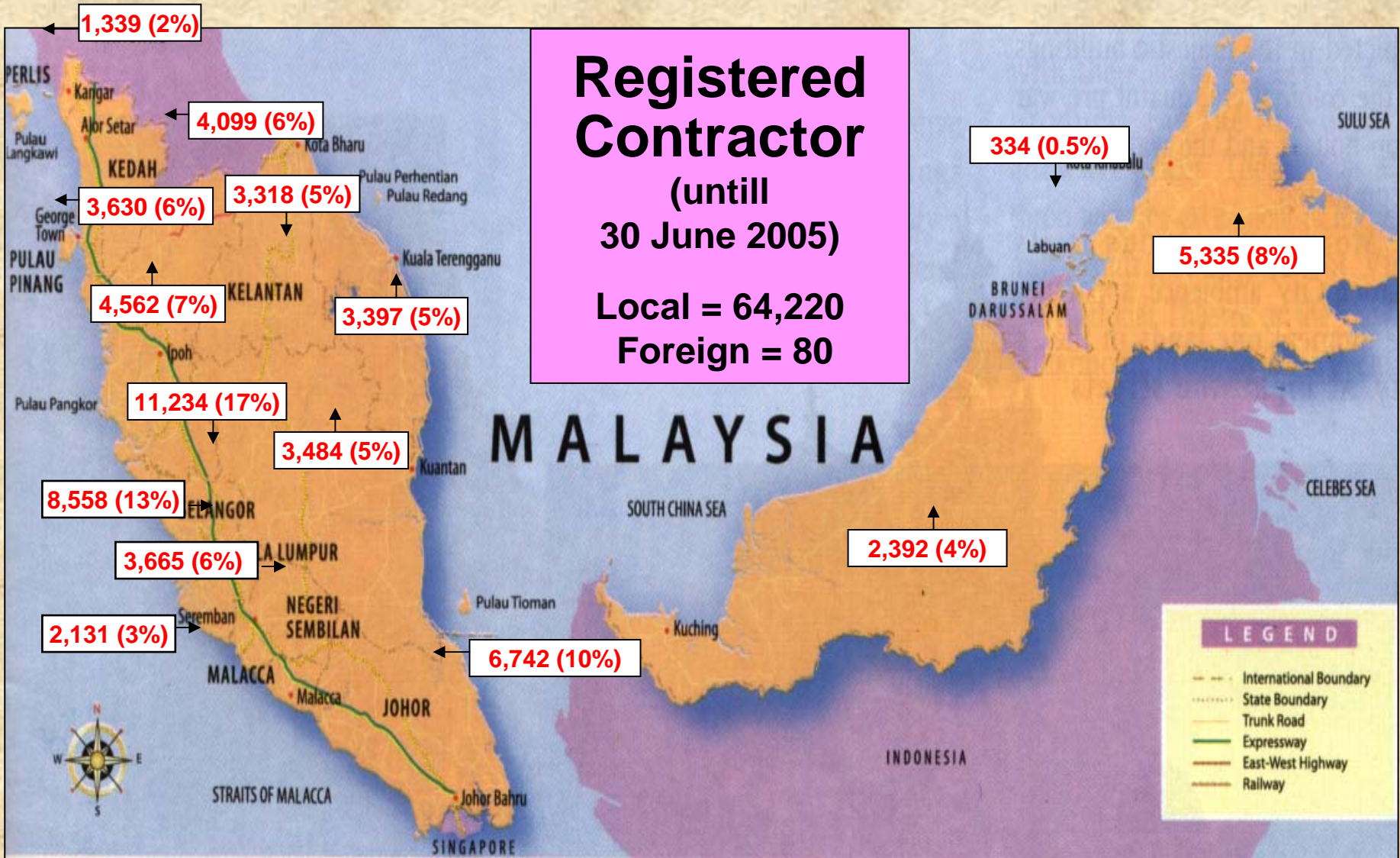


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SIZE OF PROJECT

Value Range (RM million)	2003		2004		1H 2005	
	Nos.	Value (RM b)	Nos.	Value (RM b)	Nos.	Value (RM b)
Exceeding 0.5 – 1	893	0.67	869	0.64	319	0.24
Exceeding 1 – 5	1,974	4.73	1,926	4.51	770	1.84
Exceeding 5 – 10	549	3.90	504	3.53	270	1.87
Exceeding 10 – 50	681	13.83	552	11.85	263	5.51
Exceeding 50 – 100	96	6.50	78	5.44	34	2.28
Exceeding 100 – 300	38	5.86	39	6.41	13	2.14
Exceeding 300 – 500	4	1.44	3	1.24	2	0.81
Exceeding 500 – 1000	1	0.98	1	0.57	1	0.58
Exceeding 1000	4	8.96	3	6.85	1	1.06
Total	4,240	46.87	3,975	41.04	1,673	16.31

THE MALAYSIAN CONSTRUCTION SECTOR REVIEW 2005

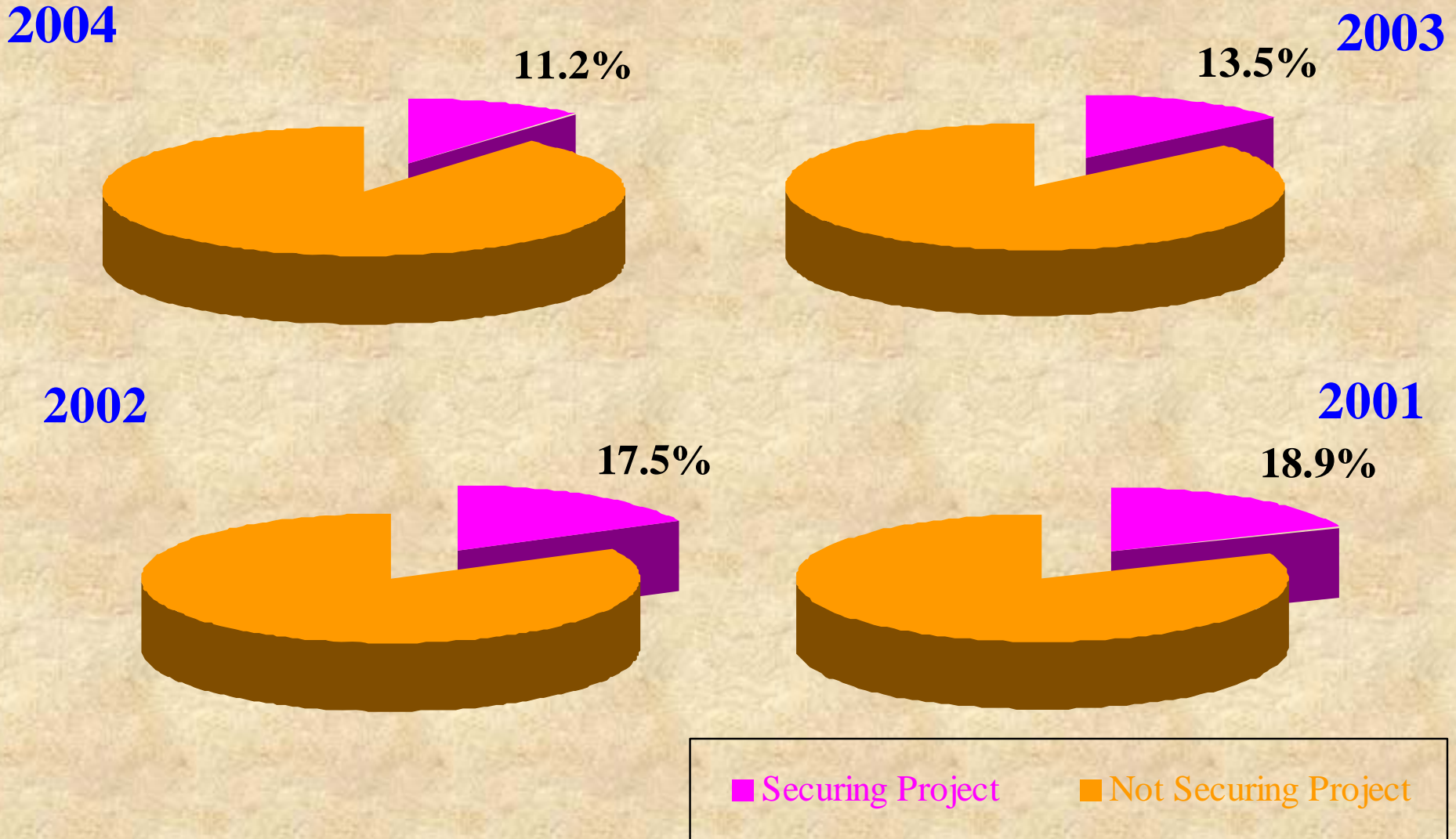


REGISTERED CONTRACTOR

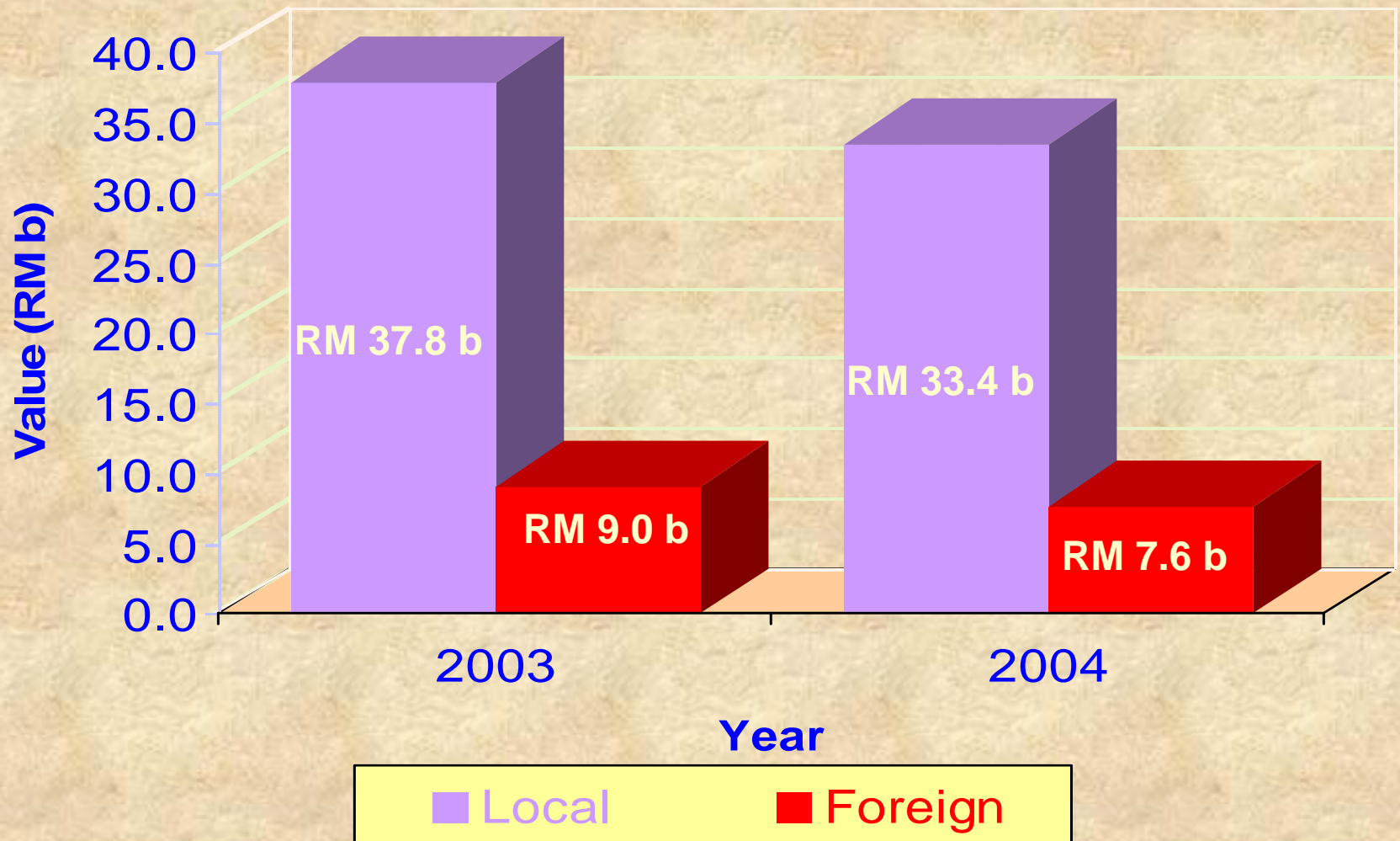
(until 30 June 2005)

GRED	TOTAL REGISTRATION	PERCENTAGE	TENDEREING CAPACITY
G1	37,886	59.9%	RM 200 k
G2	7,231	11.2%	RM 500 k
G3	9,757	15.2%	RM 1.0 m
G4	1,983	3.1%	RM 3.0 m
G5	2,816	4.4%	RM 5.0 m
G6	1,069	1.7%	RM 10.0 m
G7	3,478	5.4%	No limit
Foreign	80	-	No limit
Total	64,300	100.0%	-

CHANCES OF SECURING PROJECT

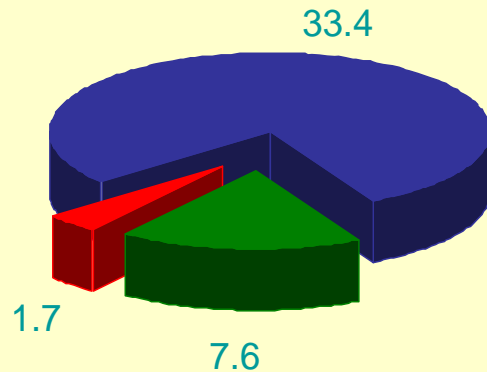


CONTRACTS AWARDED BY TYPE OF CONTRACTOR

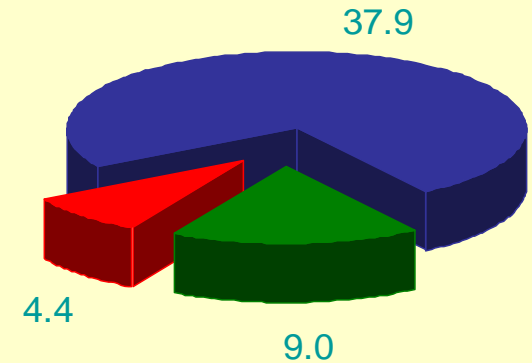


STATUS OF PROJECTS SECURED

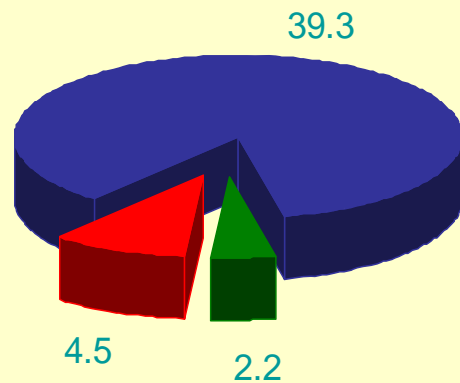
2004



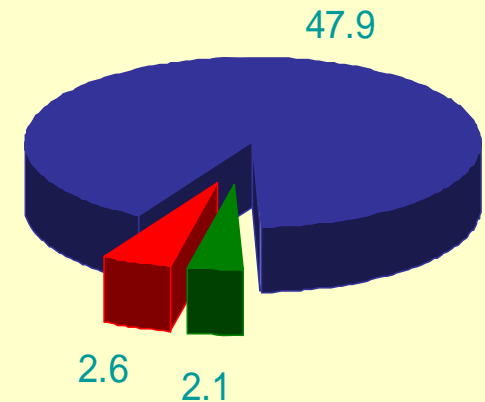
2003



2002

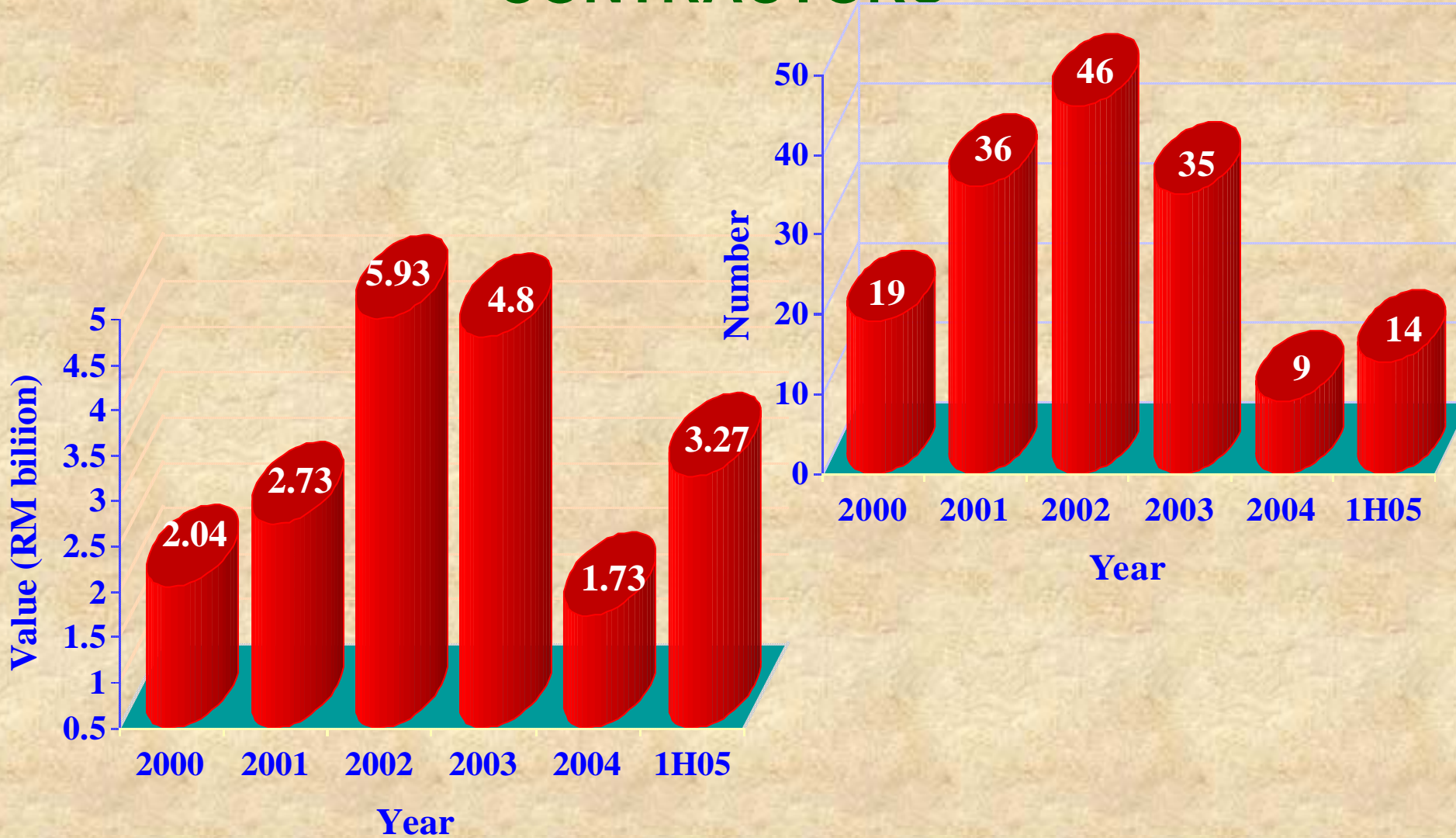


2001



-  Value of Contract Local Contractor (RM b)
-  Value of Contract Foreign Contractor (RM b)
-  Value of Contract Local Contractor in Overseas Market (RM b)

OVERSEAS PROJECT BY MALAYSIAN CONTRACTORS



PROJECT STATUS IN OVERSEAS MARKET (1987 – 1H 2005)

COUNTRY	Completed Project		Project Currently Under Implement		1H 2005	
	Total	Value (RM mil)	Total	Value (RM mil)	Total	Value (RM mil)
INDIA	39	5,724.23	18	4,066.41	5	2,053.27
GULF COUNTRIES	8	1,213.10	14	2,882.78	7	1,133.70
ASEAN	68	1,172.35	5	202.24	-	-
AFRICA	10	1,864.41	4	1,215.0	-	-
OTHERS	121	3,141.73	9	5,542.45	2	79.40
TOTAL	246	13,115.82	50	13,908.88	14	3,266.37

PROJECTS CURRENTLY UNDER IMPLEMENTATION UNTIL 1H 2005

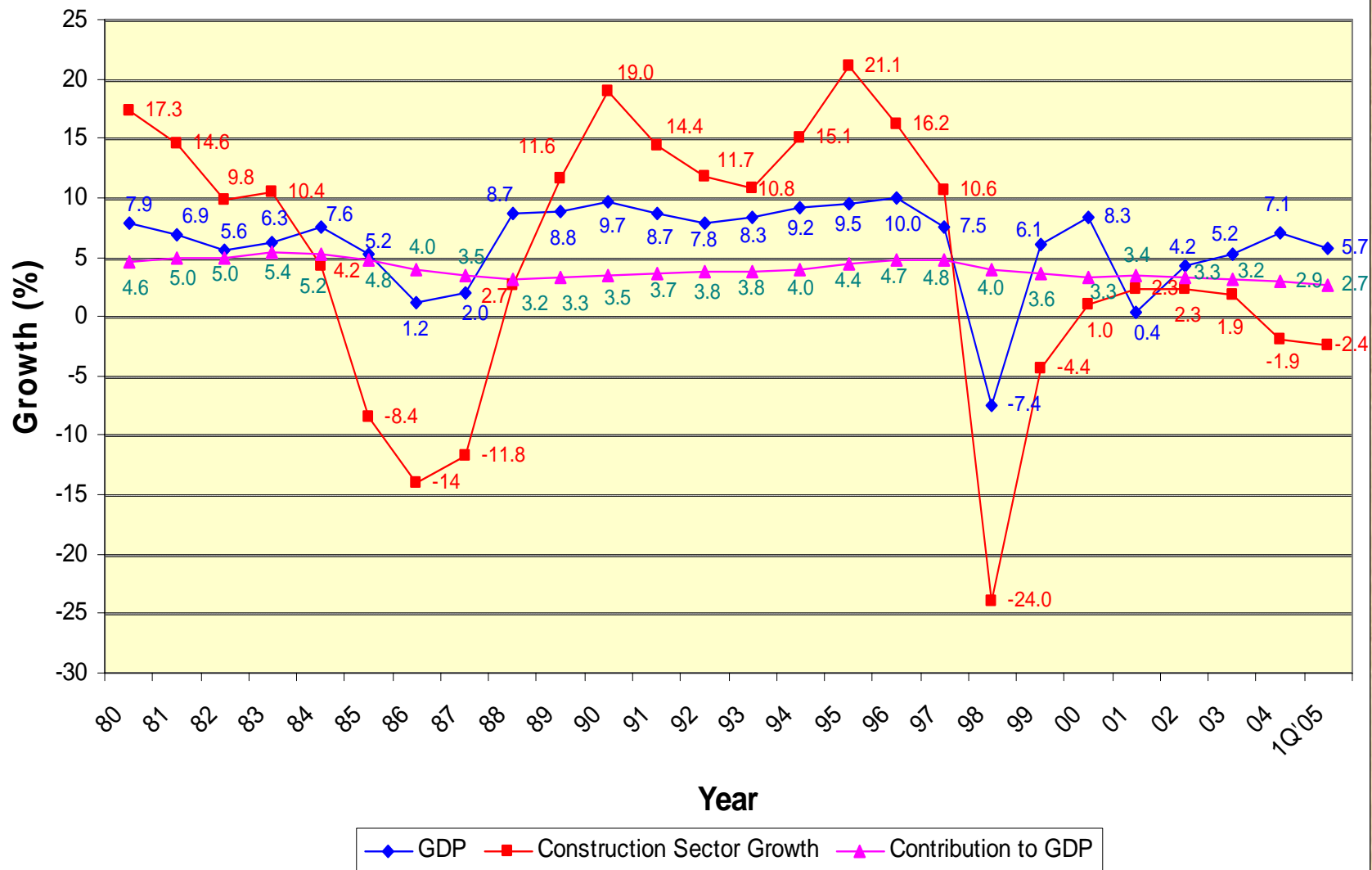
Scope of Work	Number of Project	Value (RM m)
RAILWAY TRACK	1	811.8
MECHANICAL & ELECTRICAL	2	870.20
RESIDENTIAL	4	1,969.80
HIGHWAY	17	3,532.73
BUILDING	7	2,539.27
AIRPORT	1	570.0
STRUCTURE STEEL WORK	6	631.02
WATER	7	1,526.07
MIX DEVELOPMENT	1	1,121.25
OIL & GAS	1	90.0
CIVIL WORK	3	246.74
Total	50	13,908.88

CONSTRUCTION 2005/06





THE MALAYSIAN CONSTRUCTION SECTOR REVIEW 2005

Construction Sector Growth & Malaysian Economic Trend For Year 1980 - 2004



FORECAST FOR NEW CONSTRUCTION WORKS 2005/06

➤ **Year 2004** **RM 44.48 b**

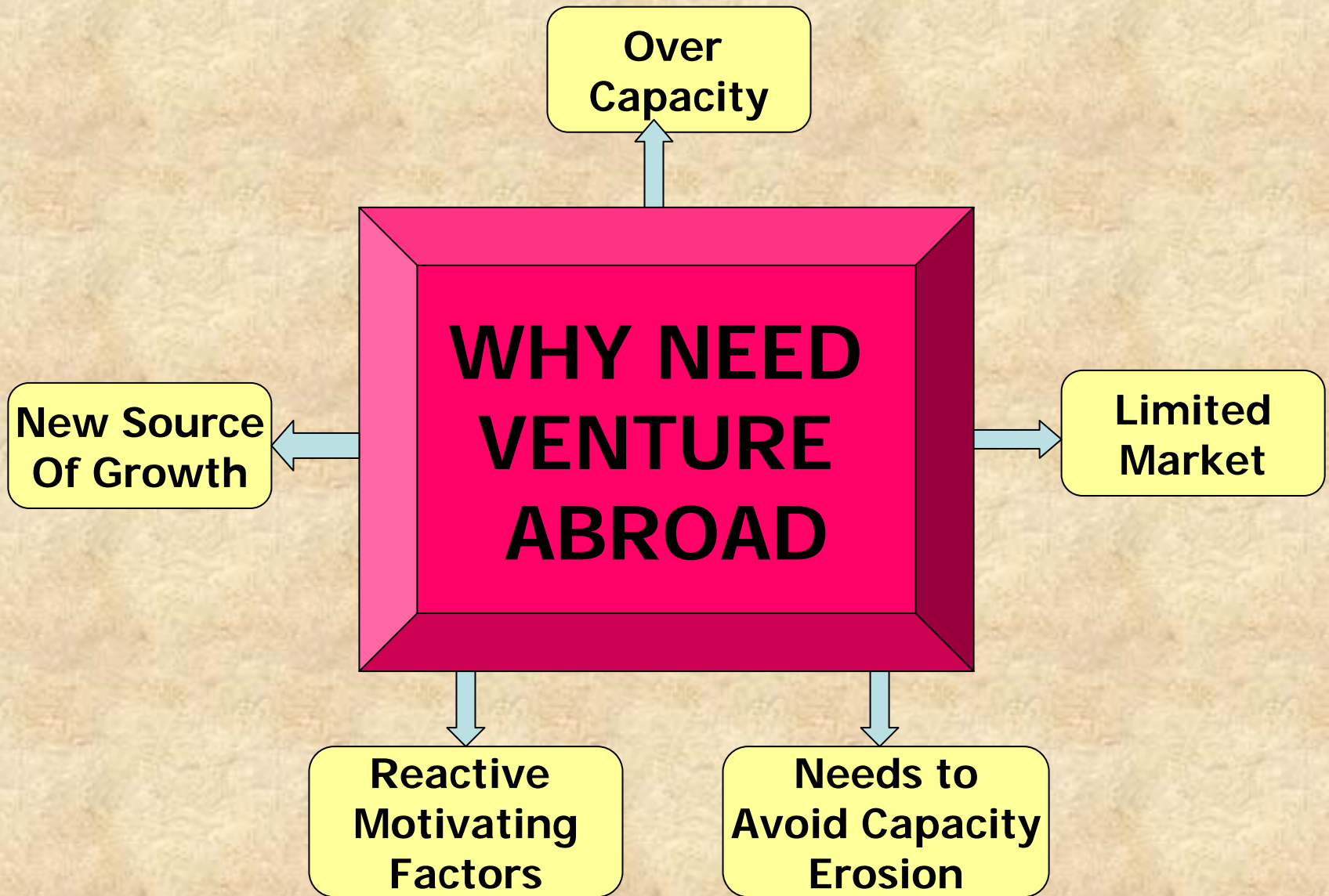
➤ **Forecast 2005** 
6.0%  **RM 41.80 b**

➤ **Forecast 2006**

53% Government Project	= RM 21 b
47% Private Project	= RM 19 b
	RM 40 b

CHANCES OF SECURING PROJECTS

No. of Contract	2001	2002	2003	2004
Less 3	2,306	2,588	2,264	1,943
3 to 5	387	388	253	263
6 to 10	73	64	65	76
11 to 15	10	15	7	11
16 to 20	5	3	3	2
More 20	3	-	3	2
No. of Contractor	2,784	3,058	2,595	2,297
Percentage of Success	18.9%	17.5%	13.5%	11.2%
No. of Registered Contractor (G3-G7 & Foreign)	14,694	17,508	19,162	20,572





Thank You