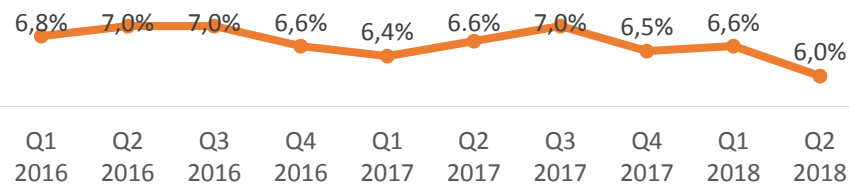






Philippine economy slowed down to 6.0% in the second quarter of 2018



Although the economy decelerated in the second quarter, **growth nevertheless remained robust**, supported by continued fiscal stimulus measures—notably a public infrastructure push, which bolstered the services and construction sectors



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CONSTRUCTION DEMAND

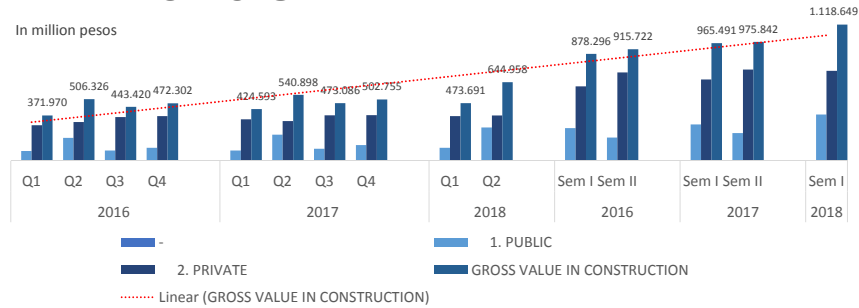


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Philippine Construction industry grew by 13.5% in the second quarter of 2018

In million pesos



Driven by the increase both in Public Construction
and Private Construction

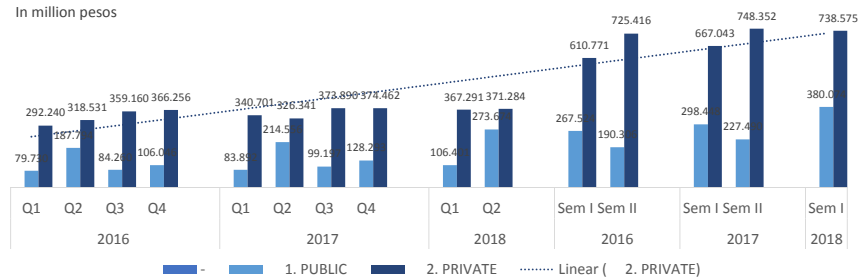


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Investments in Construction grew by 12.9% in the second quarter of 2018

In million pesos



Private Construction at 59.5% that grew by 7.9% while
Public grew by 21.0%



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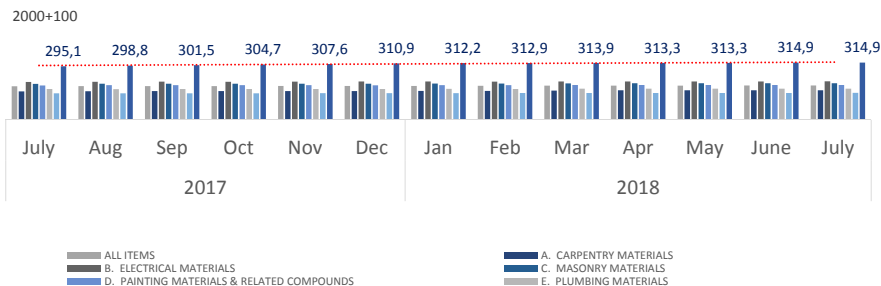
CONSTRUCTION MATERIALS DEMAND



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Annual growth of the CMRPI in the NCR decelerated to 2.5 percent in July 2018



Slower annual mark-ups were registered in the indices of Masonry Materials 1.9%; Painting Materials and Related Compounds 1.1%; Plumbing Materials 1.4%; and Miscellaneous Construction Materials 6.7%



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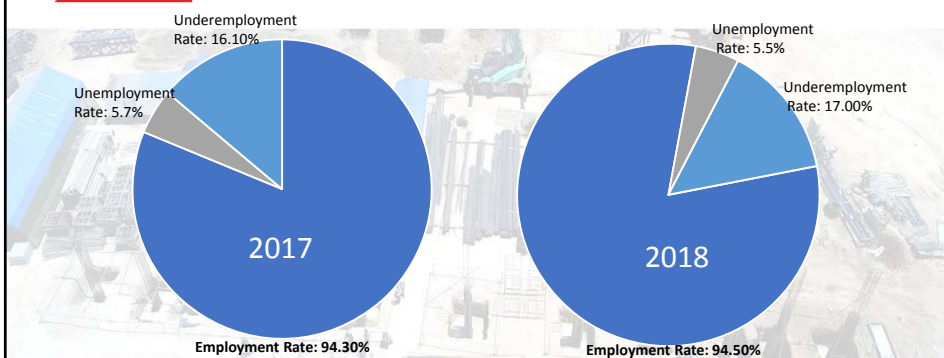
LABOR AND EMPLOYMENT



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Employment rate grew from 94.5% in April 2018 from 94.3% in April 2017



Industry sector at 19.7% of the total employed with construction accounting for 49.9% of the sector



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GOVERNMENT MEASURES, POLICIES & PROCEDURES



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TRAIN TAX LAW



Lowering the
Personal Income
Tax (PIT)



Simplifying the
Estate and
Donor's Tax



Expanding the
Value-Added Tax
(VAT) Base



Increasing the
Excise Tax of
Petroleum Products



Increasing the
Excise Tax of
Automobiles



Introducing the
Increase the Tax of
Sugar-Sweetened
Beverages

TAX REFORM FOR ACCELERATION AND INCLUSION



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STATUS OF THE BUILD3X PROGRAM

NEW CLARK INTERNATIONAL AIRPORT EXPANSION PROJECT



Estimated Construction Cost: USD 180M

Consortium Contractors: Megawide-GMR

Overview

- Implementing Agency: BCDA
- Project Description:
 - 82,600 sm Terminal Building
 - 80M Passengers Per Annum (ult.)
 - Area: 2400 hectares
- EPC Contract Signed: 29 Jan. 2018
- Procurement Mode: Solicited
- PPP Structure: Build and Transfer
- Construction Period: 2018-1st Q 2020

Project Status

- 11.91% Complete as of 30 June 2018



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NEW CLARK GREEN CITY PROJECT



Estimated Project Development Cost: USD 14 B

Developers: BCDA and Surbana Jurong

Full Development Period: 3 Decades

Overview

- Total Area: 36 square mile
- Development Profile in 5 Districts
 - Government
 - Business
 - Education
 - Agriculture
 - Recreation
- 2/3 Reserved areas for:
 - Farm lands
 - Parks
 - Other green spaces



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SUBIC-CLARK RAILWAY PROJECT



Estimated Project Cost: USD 962 M

Project Developer: BCDA

Expected Completion Date: Oct 2022

Overview

- Coverage: Bataan and Pampanga
- Alignment: SCTEx
- Total Length: 71 km
- Funding Source: China ODA and GAA



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THE SLEX-NLEX CONNECTOR ROAD PROJECT



Estimated Construction Cost: USD 448 M

Project Developer: MPIC Holdings

Overview

- Implementing Agency: DPWH
- Procurement Mode: Unsolicited
- PPP Structure: BOT

Status

- On-going pre-construction activities



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CAVITE-LAGUNA EXPRESSWAY PROJECT



Overview

- **Operator:** MPCALA Holdings Incorporated
- **Concession starting date:** 2017
- **Concession ending date:** 2052
- **Length:** 42 km
- **Highway exits:** 8
- **Lanes:** 4 Lanes (2 Lanes each direction)
- **Toll plazas:** 1
- **Rest and Service Areas:** TBA

Segments

- Cavite segment – 27 km
- Laguna Segment -18 km

Estimated Construction Cost: USD 686.2 M

Contractors: Leighton Contractors
DM Consunji, Inc.



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Ayala Laguna Blvd. Expressway Bridge 3 (EB – 13)



PROJECT UPDATES

Greenfield Expressway Bridge (EB – 14)



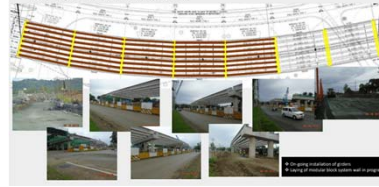
PROGRESS PHOTOS OF ROADWORKS, BRIDGES, VIADUCT & OTHERS

Ayala Laguna Blvd. Expressway Bridge 11 (EB – 11)



PROJECT UPDATES

Ayala Laguna Blvd. Viaduct (Viaduct – 2)



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MANILA METRO RAIL TRANSIT SYSTEM LINE 7



Estimated Construction Cost: USD 1.54 Billion

Project Developer: Universal LRT Corp (BLV)
San Miguel Corporation

Consortium Contractors: EEI Corporation
Hyundai Rotem



Philippine
Constructors
Association Inc.

Overview	
Type	Rapid transit
Status	Under construction
Locale	Metro Manila and Bulacan
Termini	San Jose del Monte North Avenue
Stations	14
Services	1
Daily ridership	300,000 (initial) 800,000 (design capacity)
Operation	
Opened	2020 (estimated)
Owner	Department of Transportation
Operator(s)	Universal LRT Corp BVI (ULC)
Rolling stock	Hyundai Rotem (108 train cars) ^[1]
Technical	
Line length	22.8 km
Track gauge	1,435 mm (4 ft 8½ in) standard gauge

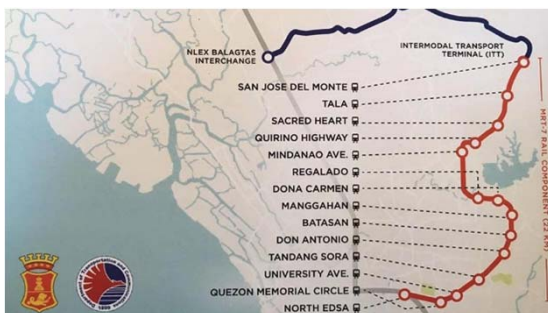
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Detailed Engineering Design completed

Built-up of Stations On-Going

Tunneling Works On-Going

Right-of-Way Issues being resolved



Philippine
Constructors
Association Inc.

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Expansion of the NAIA International Airport Terminal



Overview

- Proposed increase in Design Capacity : 65 M ppa
- Concession Period: 15 Years

Procurement Mode

- Unsolicited Proposal

Estimated Project Cost: USD 2 Billion
 Consortium granted Original Proponent Status



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PROPOSED BULACAN INTERNATIONAL AIRPORT



Overview

- Implementing Agency: DOTr
- Area Covered: 2,500 Ha.
- No. of Runways: 4
- Design Capacity 200M ppa

Procurement Mode

- Unsolicited Proposal

Estimated Project Cost: USD 13.4 B
 Project Proponent: San Miguel Corporation



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OTHER INFRASTRUCTURE PROJECTS IN THE PIPELINE IN LUZON

1. Binondo-Intramuros Bridge Project in Manila

Estimated Cost: USD 26.35



2. Estralla-Pantaleon Bridge in Manila

Estimated Cost: USD 88.65 M



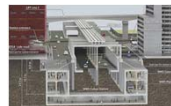
3. Chico River Pump Irrigation Project

Estimated Project Cost: USD 60.4 M



4. Mega Manila Subway Project

Estimated Cost : USD 4.365 B



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CEBU-CORDOVA LINK EXPRESWAY PROJECT



Estimated Construction Cost : USD 600 Million

Civil Works Contractors: Acciona Construction S.A
First Balfour, Inc
DM Consunji, Inc.

Crosses	Mactan Channel
Locale	Metro Cebu
Official name	Cebu-Cordova Link Expressway
Other name(s)	Cebu-Cordova Bridge Sto. Niño Bridge ^[1] Third Mactan-Cebu Bridge
Maintained by	Metro Pacific Tollways Development Corp.
Characteristics	
Design	Cable-stayed bridge
Total length	8,000 m (26,247 ft)
Width	27 m (89 ft)
Height	145 m (476 ft)
Traversable?	Yes
Clearance below	60 m (197 ft)
History	
Architect	Dissing+Weitling Architecture
Engineering design by	DCCD Engineering Corp. COWI
Constructed by	Metro Pacific Tollways Development Corp.



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Detailed Engineering Design for Finalization
 Right-of-Way almost completed
 Strategic Mobilization of Resources On-Going



CLIV P Barge located at station T1 of the New Bridge



CLIV P Barge located at station T1 of the New Bridge



CLIV P Barge located at station T1 of the New Bridge



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APPROVED INFRASTRUCTURE PROJECTS IN VISAYAS

1. Iloilo International Airport Expansion Project Estimated Cost: USD 585 M



2. Cebu International Container Port Estimated Cost: USD 200 M



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APPROVED PROJECTS IN MINDANAO

- 1. Malitubog-Maridagao Irrigation Project**
Estimated Cost: USD 105 M
Location: Maguindanao and North Cotabato



- 2. Davao International & Laguindingan Airport**
Estimated Cost: USD 1.08 B
Location: Davao City and Misamis Oriental



- 3. Panguil Bay Bridge Project**
Estimated Cost: USD 95 M
Location: Lanao and Misamis Occidental



- 4. Tagum-Davao-Digos Railway Project**
Estimated Cost: USD 680 M



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Things are looking good for the Philippines



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