



一般社団法人日本コンストラクション・マネジメント協会
Construction Management Association of Japan

Construction Market and CM Development Trends in Japan

Presentation for Cons Ma 2014
Presented by Takehiko Miyazaki

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Construction Market and CM Development Trends in Japan

CONTENTS OF THE PRESENTATION

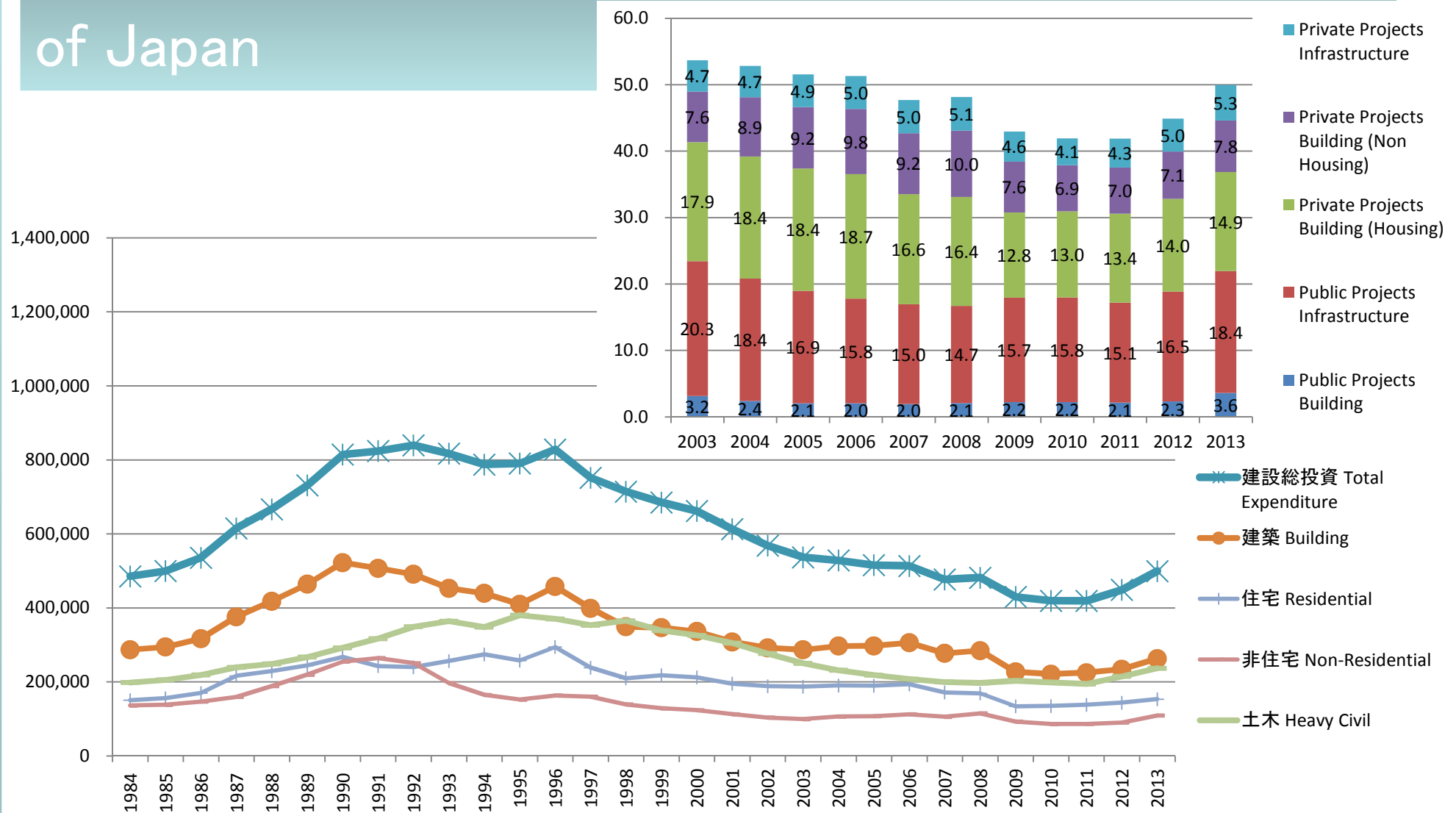
CONSTRUCTION MARKET TRENDS

TOHOKU RECOVERIES FROM CMAJ PERSPECTIVE

CMAJ ACTIVITIES IN 2013

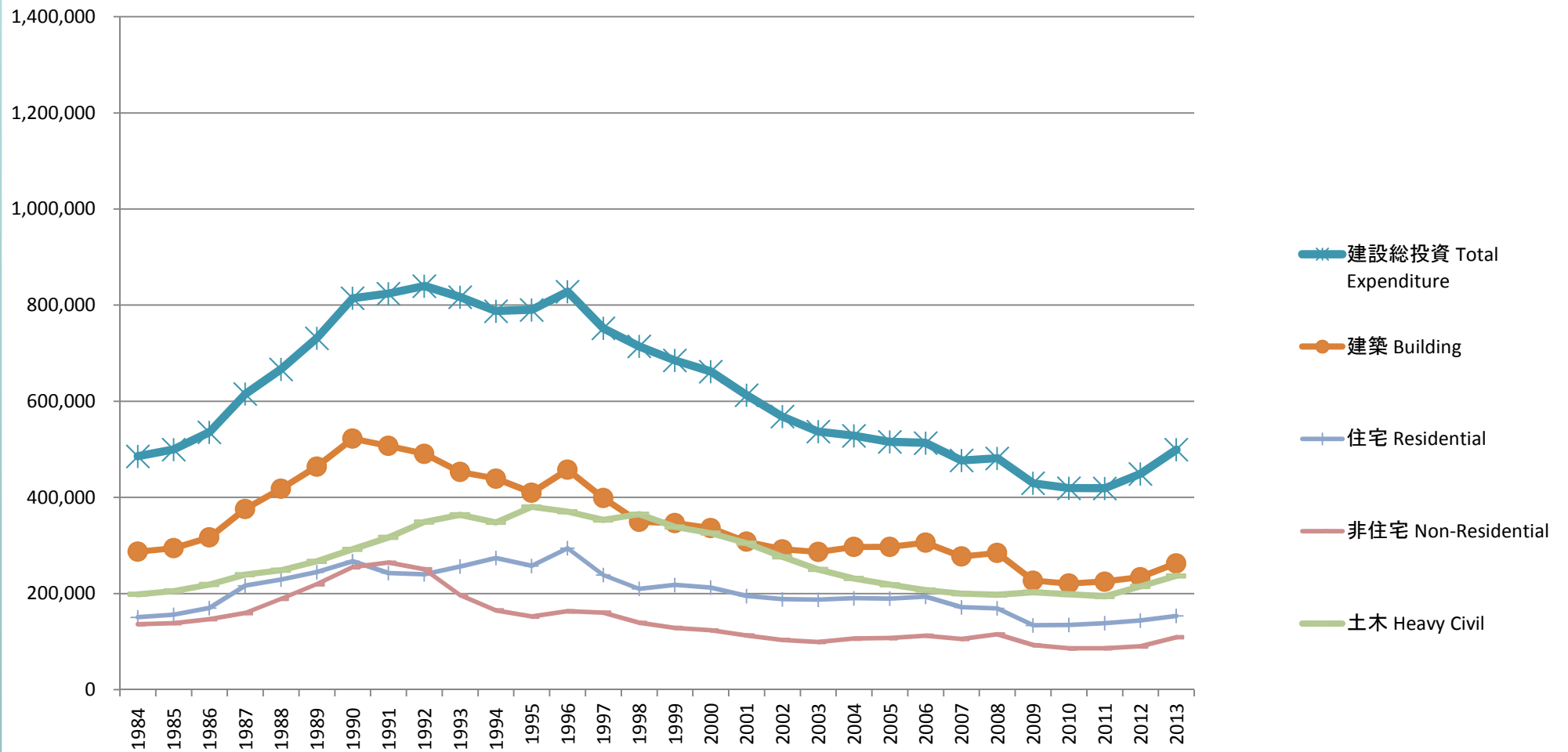
CONSTRUCTION MARKET TRENDS

Construction Expenditure of Japan



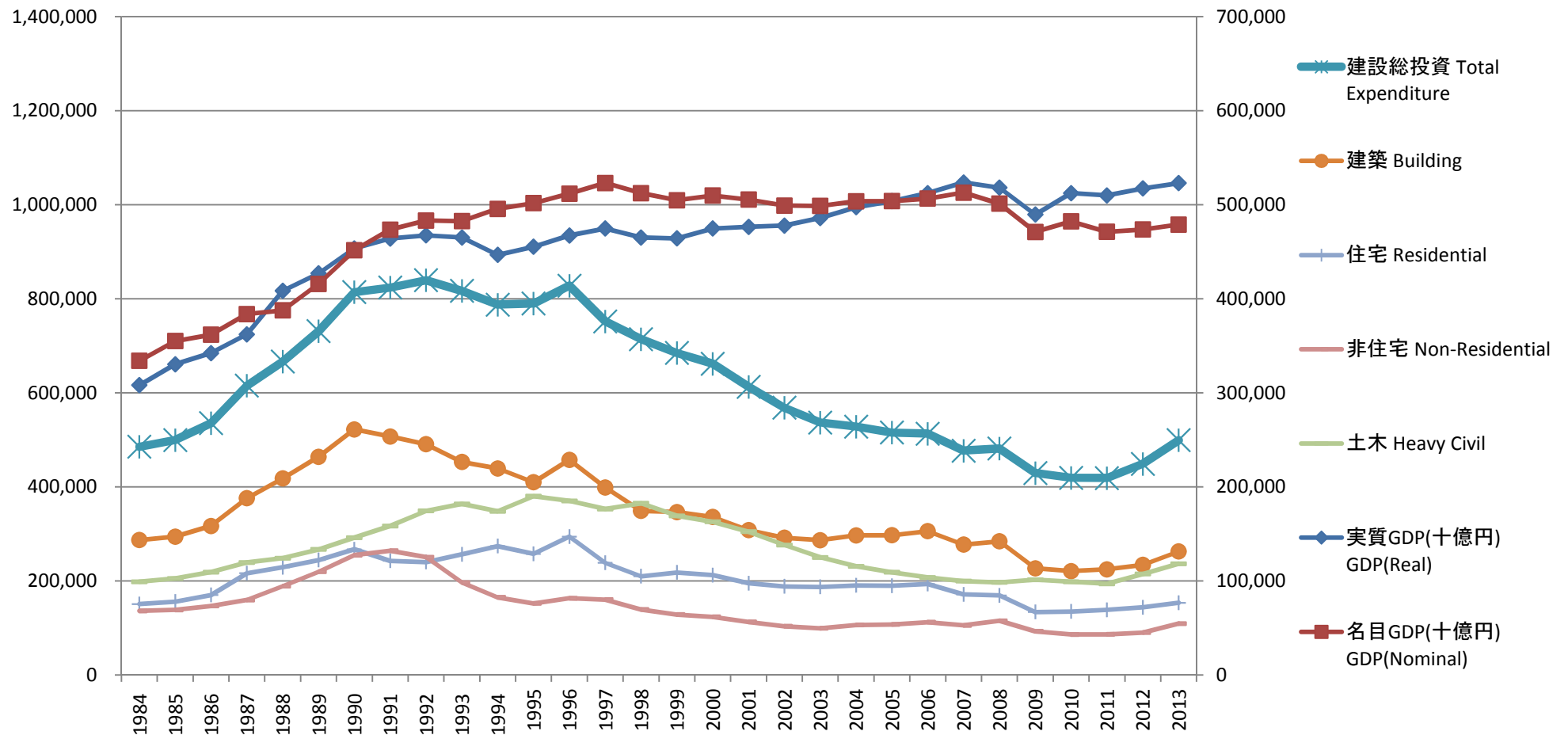
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Construction Expenditure of Japan



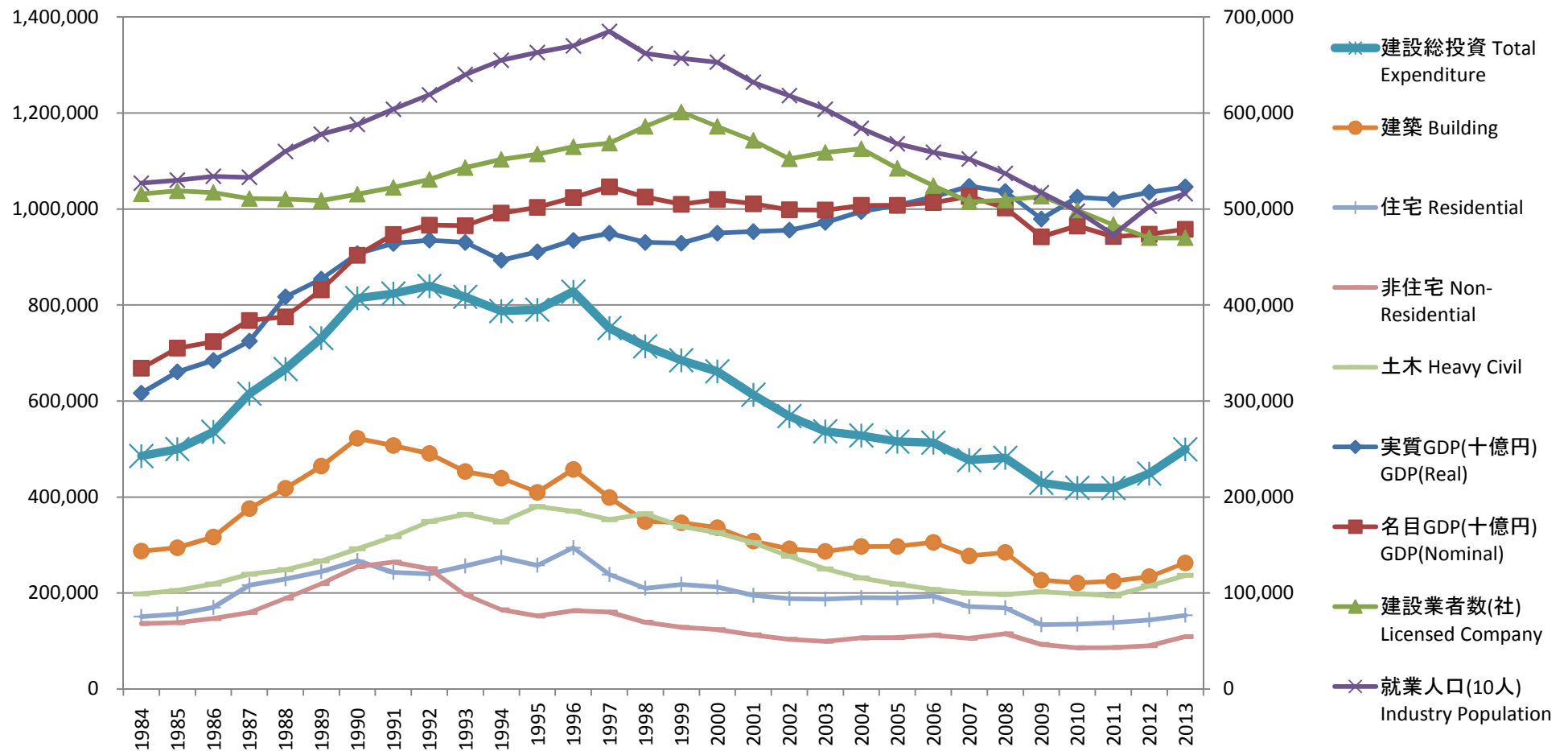
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Construction Expenditure – GDP



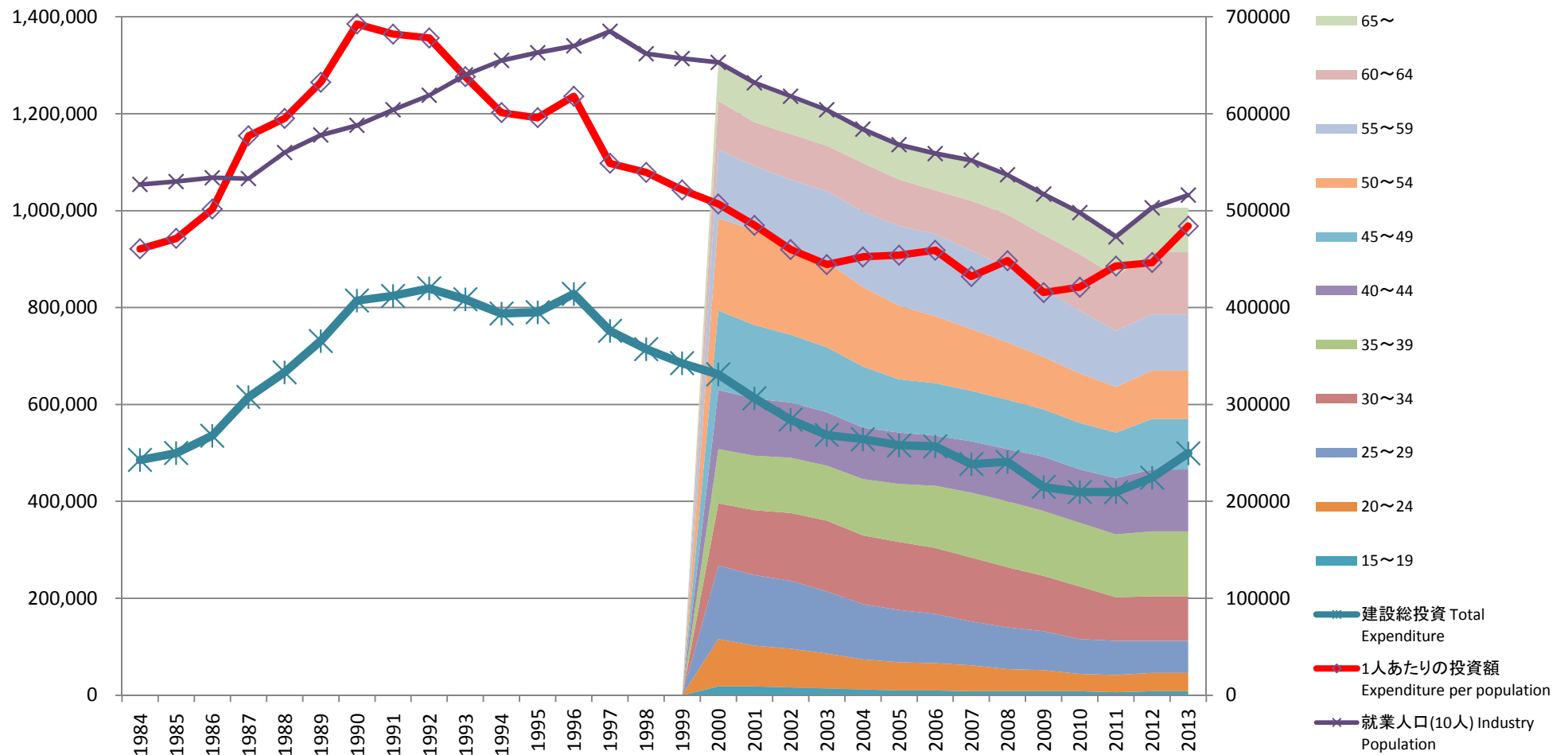
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Construction Expenditure – GDP – Licensed Construction Companies – Industry Population



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Construction Expenditure/Population – Population by generation



General Contractors Ranking by Daily Engineering and Construction News (Japan)

(第3種郵便物認可)

2013年(平成25年)10月9日(水曜日)

(1)

建設工業新聞

速報版

最近1年間の完

売上高増加も経常利益減 受注高 下位区分で伸びる

日刊建設工業新聞社はこのほど、最近一年間の完成工事高等調査結果(決算期ベース、アンケート方式)をまとめた。

今回は「2013年上期調査」として2012年10月から2013年3月までの決算期分を対象としたもので、9月30日までに回答を得た445社の業績を速報として集計した。集計の都合上、総合建設業223社、道路・舗装工事業26社、鉄骨・橋梁工事業10社、電気・通信工事業22社、設備工事業148社のほか、いずれにも分類できない16社については建設関連としてまとめ、次ページ以降に完成工事高順等でランキング掲載した。調査票に完成工事高が未記入の会社は各分類の末尾に参考として掲載している。また、変則決算会社についてもランク外として各分類の最後尾に掲載している。

集計対象のうち、12年4月から12年9月までに決算期を迎えた会社のデータは、前回集計の「2012年下期調査」(13年4月26日掲載)と同じ数値となっている。今回は主に12年10月から13年3月までに決算期を迎えた会社のデータを更新した。

回答445社の業績傾向を見る上で、完成工事高が売上高の50%以上を占める会社418社を抽出し、これをもとに売上高、経常利益、完工高、完工利益、受注高等を別途ランキングした。

また、この再集計から総合建設業、鉄骨・橋梁工事業を「土木・設備工事業と電気・通信工事業」それぞれ完成工事高上位を各区分に取りまとめ、下表に掲載した。傾向を把握するため、売上高、経常利益等の区分で前期より業績が改善した会社の数、対象総数の割合で見ると、会社数の割合(%)として示した。

今回の調査対象のうち上位の多いため、13年3月期決算の結果は、総合集計は、前期決算に相当する「2012年上期調査」結果との対比した(調査対象会社は一部変わった)。

土木・建築関係を見ると、すべては増加したが、大手・準大手クラスは減少。労務費・資材価格の高騰が影響した。受注高は、も下位のほうから伸びが大きい。

設備関係は、売上高がほぼすべての会社で増加した。完成工事高は60%増だった。決算期の変更に伴う変則決算は、ハザマ(現安藤ハザマ)、安藤建設は合併前の業績を合算せず個別に計

完工高上位のゾーン別業績集計

区 分	大手5社	6~30位	31~100位	101~200位
売上高	5,246,357	5,469,405	3,550,098	1,276,904
前年比	3.2 %	2.6 %	5.4 %	3.0 %
伸びた会社の割合	60.0 %	64.0 %	69.0 %	64.0 %
経常利益	77,846	79,293	70,290	25,967
前年比	-24.8 %	-43.8 %	0.6 %	5.5 %
伸びた会社の割合	0.0 %	40.0 %	59.2 %	54.0 %
完工利益	263,344	390,628	221,216	84,818
前年比	-27.1 %	-18.2 %	-2.5 %	-2.7 %
伸びた会社の割合	0.0 %	28.0 %	50.7 %	49.0 %
売上高経常利益率 平均	1.5 %	2.0 %	1.9 %	2.0 %

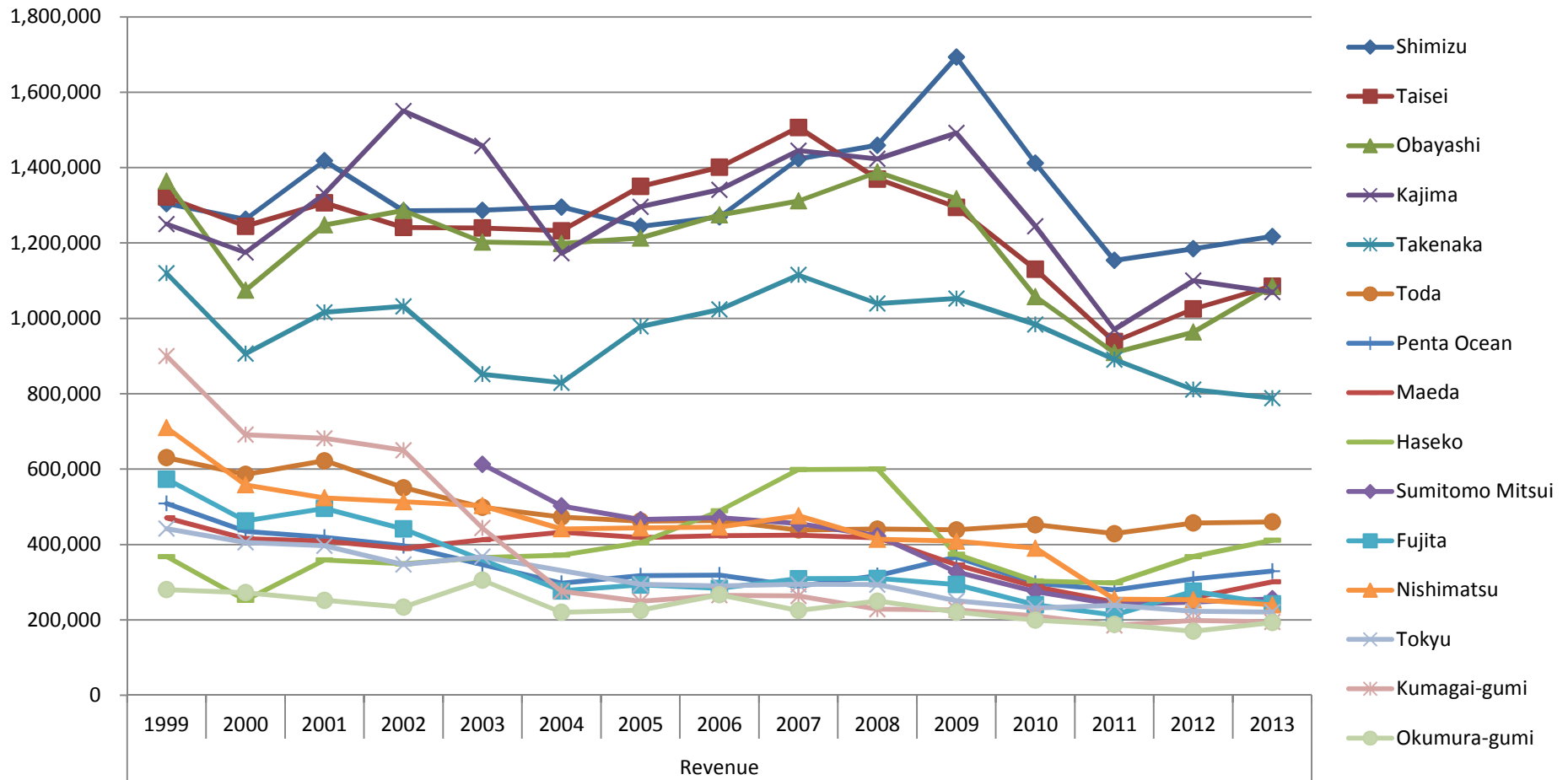
総合建設業

順位	社 名	本社所在地	決算期	資本金	売上高	経常利益	税引利
	清水建設	東京・中央区	13/03	74,365	1,217,341	12,115	5,68
	大成建設	東京・新宿区	13/03	112,448	1,085,624	22,431	12,42
	大林組	東京・港区	13/03	57,752	1,085,125	24,563	6,03
	鹿島	東京・港区	13/03	81,447	1,069,925	12,214	8,72
	竹中工務店	大阪市	12/12	50,000	788,342	6,523	3,96
	大東建託	東京・港区	13/03	29,060	508,404	57,029	34,55
	戸田建設	東京・中央区	13/03	23,001	460,293	-46,270	-66,33
	五洋建設	東京・文京区	13/03	30,449	329,510	6,384	2,32
	前田建設	東京・千代田区	13/03	23,454	301,197	-8,035	-8,61
10	長谷工コーポレーション	東京・港区	13/03	57,500	411,436	14,540	15,95
	三井住友建設	東京・中央区	13/03	12,003	256,117	1,200	50
	フジタ	東京・渋谷区	13/03	14,002	242,701	-1,384	-2,96
	西松建設	東京・港区	13/03	23,513	239,979	2,989	2,84
	東急建設	東京・渋谷区	13/03	16,354	221,015	1,358	-1,37
	熊谷組	東京・新宿区	13/03	13,341	194,918	-2,053	-2,38
	奥村組	大阪市	13/03	19,838	192,941	3,382	2,54
	ハザマ(現・安藤ハザマ)	東京・港区	13/03	12,000	182,847	4,661	1,98
	鴻池組	大阪市	12/09	5,250	177,524	2,078	20
20	東亜建設工業	東京・新宿区	13/03	18,976	152,643	1,911	14
	安藤建設(現・安藤ハザマ)	東京・港区	13/03	8,985	160,792	-902	-1,34
	鉄建	東京・千代田区	13/03	18,293	125,189	-1,078	-1,32
	浅沼組	大阪市	13/03	8,419	119,597	-4,308	-4,05
	東洋建設	東京・江東区	13/03	10,683	113,302	1,622	86
	太平工業	東京・千代田区	13/03	5,468	119,078	3,464	4,92
	銭高組	大阪市	13/03	3,695	113,411	-4,516	-4,60
	飛島建設	川崎市	13/03	5,519	110,029	544	42
	東建コーポレーション	名古屋市中	12/04	4,800	120,143	2,491	95
	大鉄工業	大阪市	13/03	1,232	90,183	2,559	1,60
	東鉄工業	東京・新宿区	13/03	2,810	85,321	5,325	3,30
30	ビーエス三菱	東京・中央区	13/03	4,218	81,766	-594	-74
	大豊建設	東京・中央区	13/03	5,100	76,367	396	-71
	松井建設	東京・中央区	13/03	4,000	74,426	338	21

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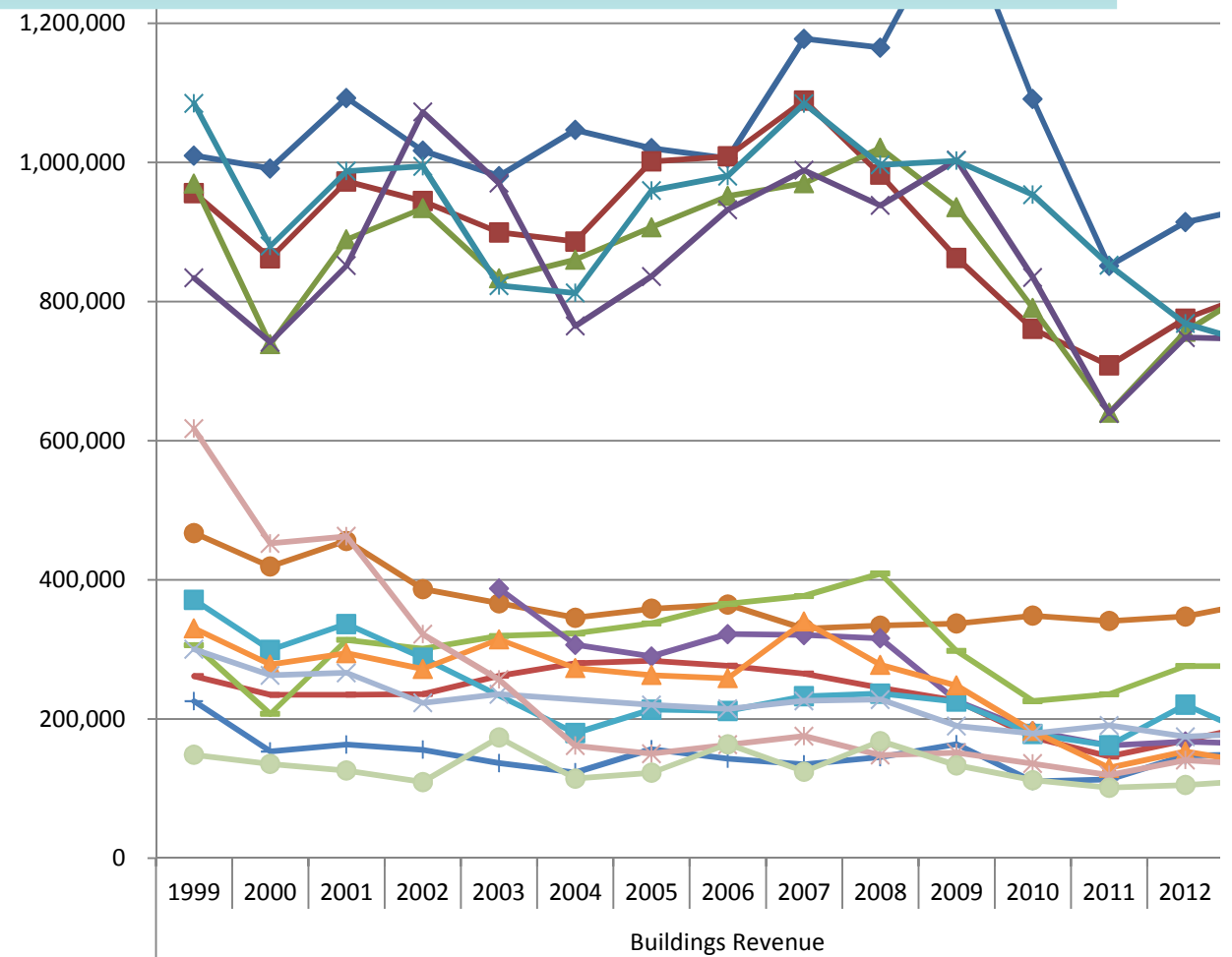
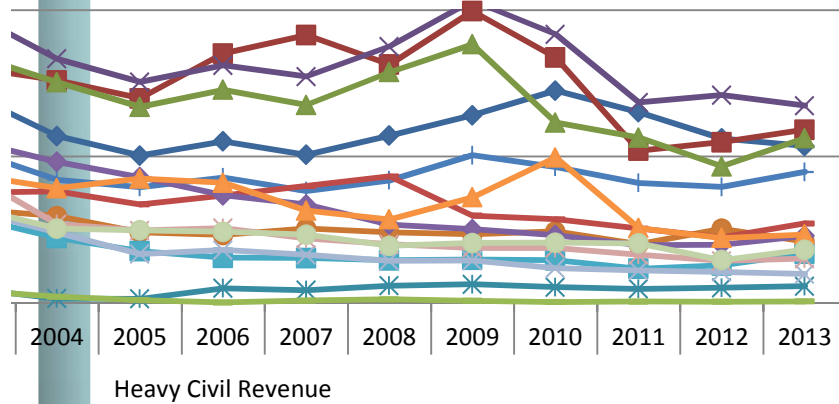
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Revenue of Top 15 Contractors

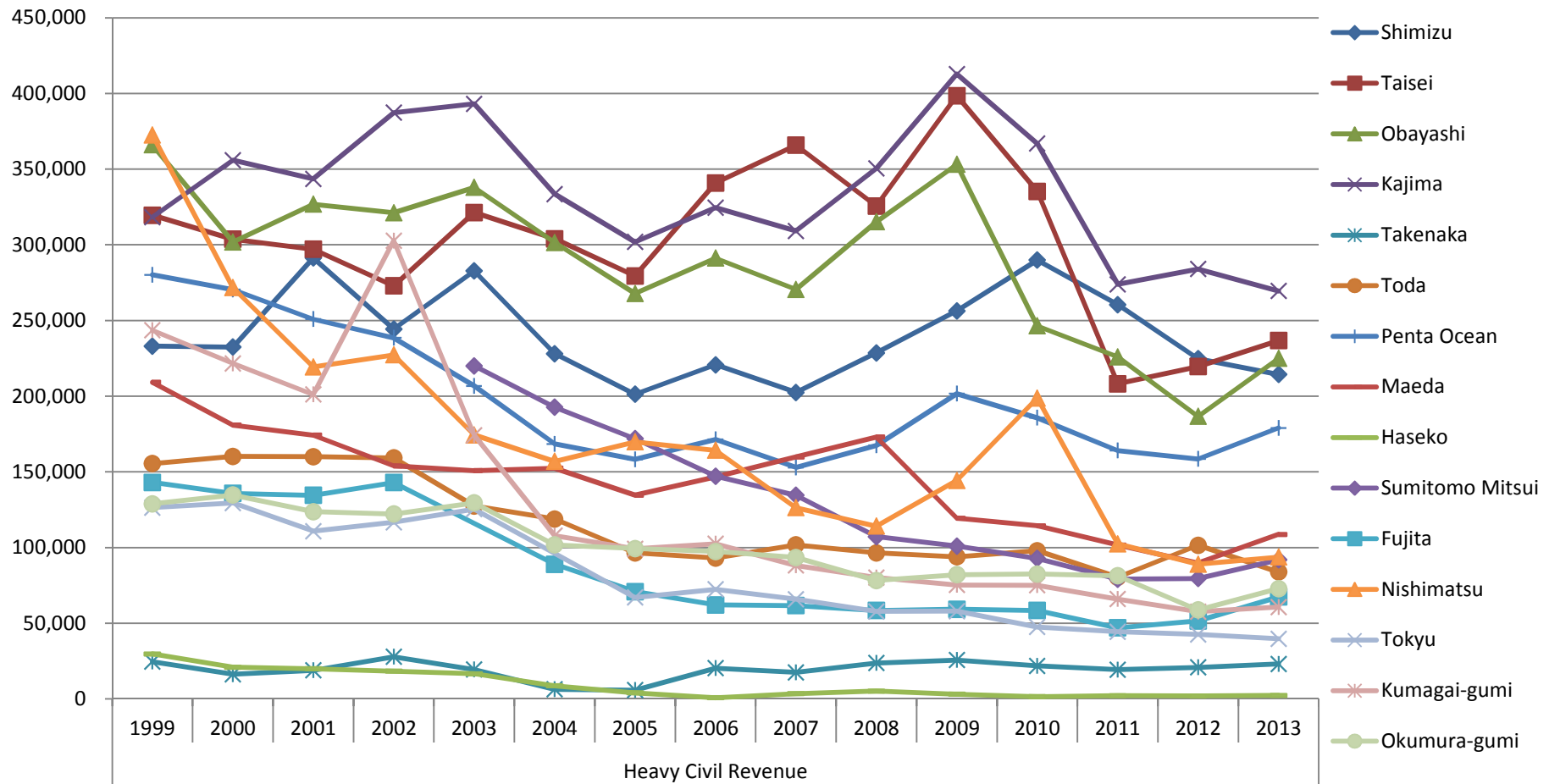


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Revenue by Discipline of Top 15 Contractors

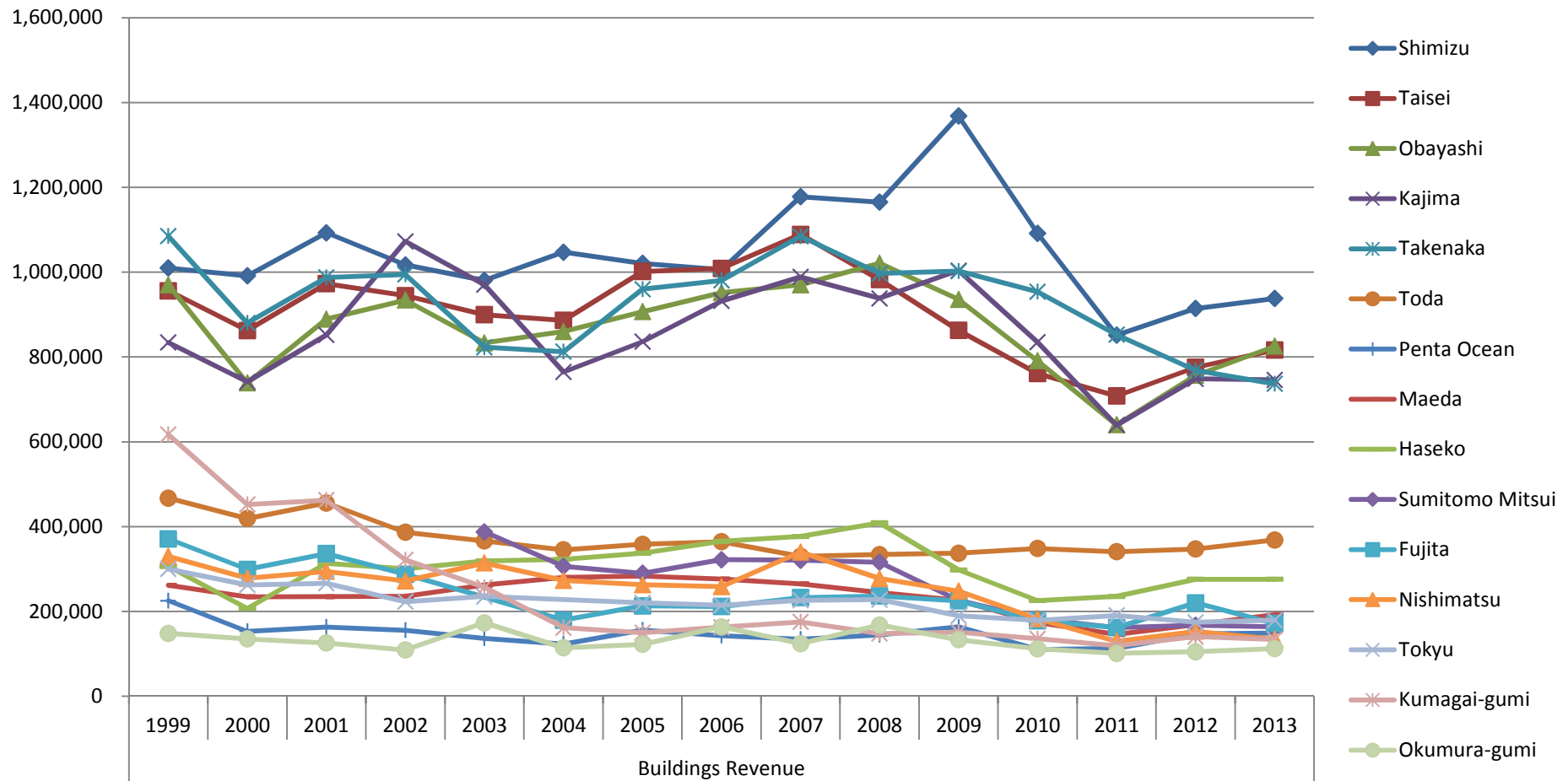


Heavy Civil Revenue of Top 15 Contractors



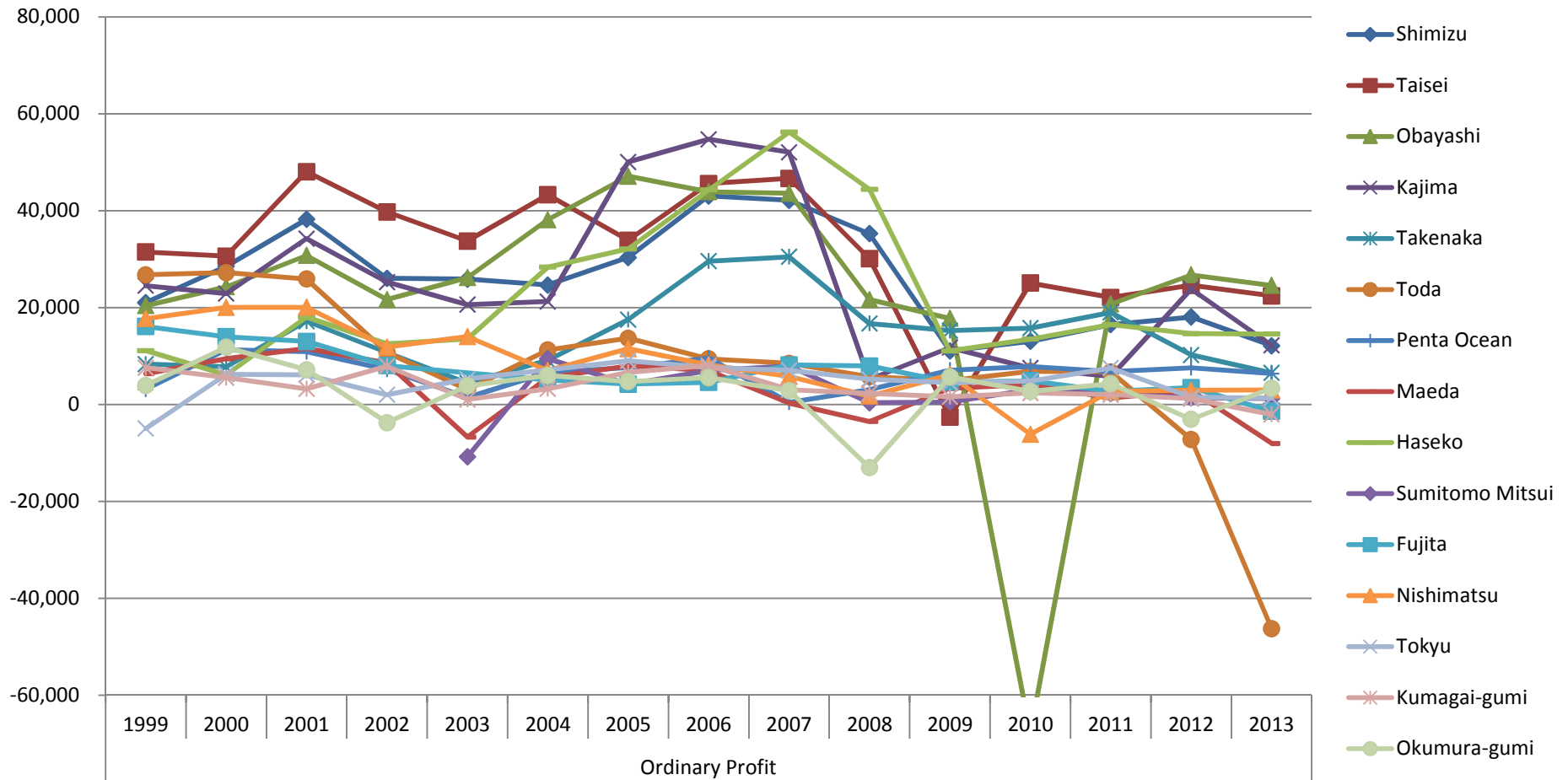
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Buildings Revenue of Top 15 Contractors



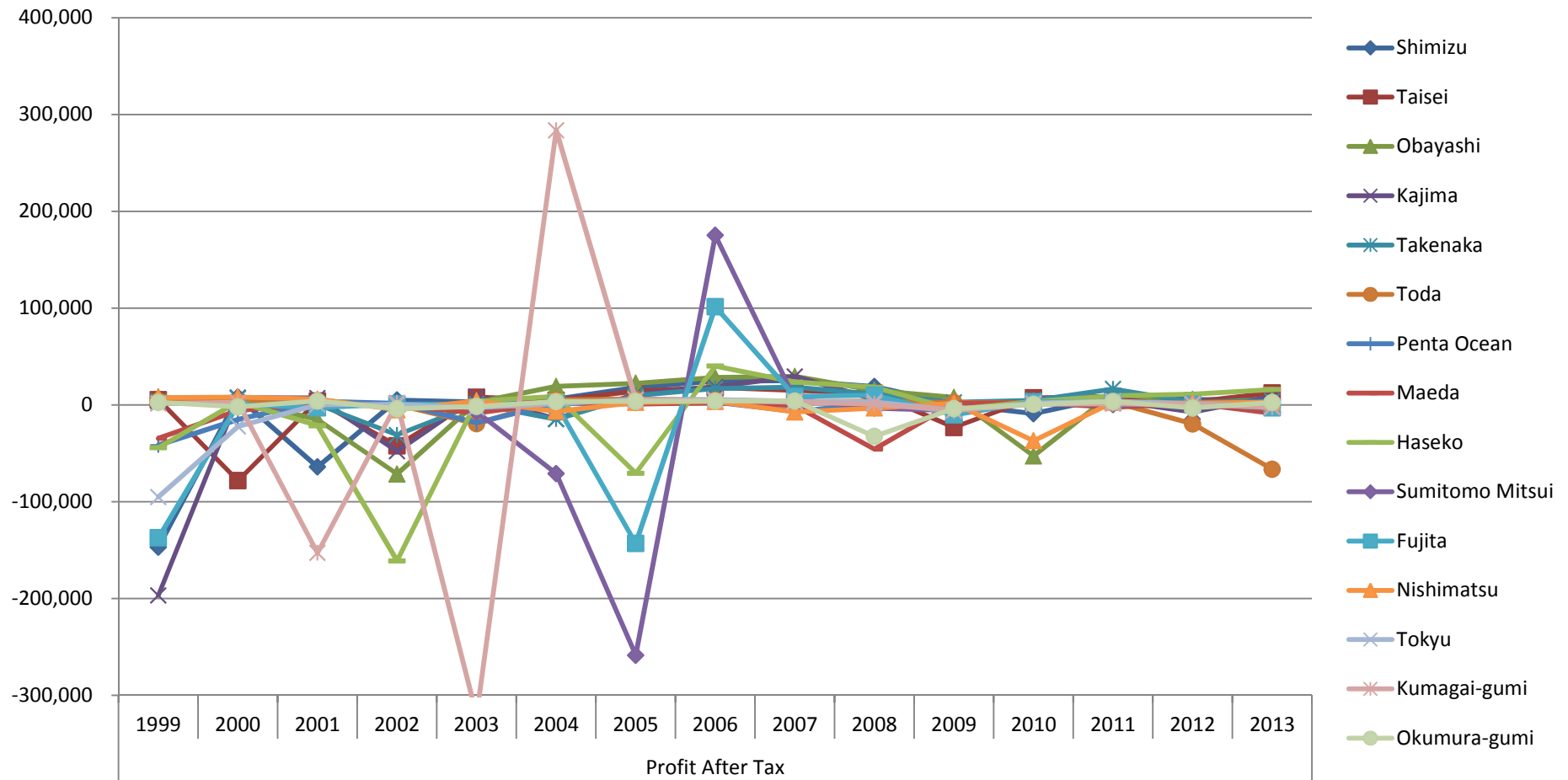
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Ordinary Profit of Top 15 Contractors



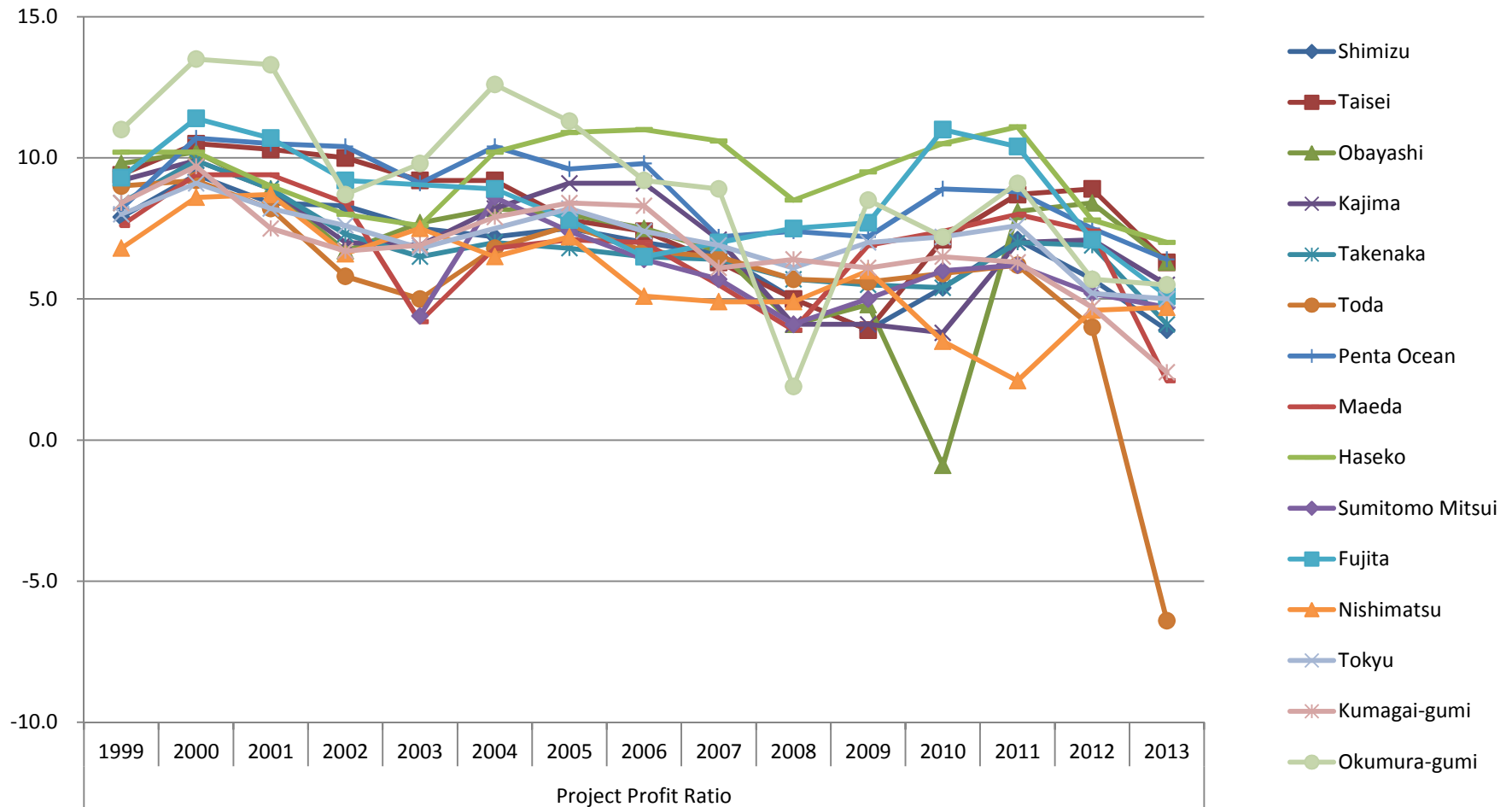
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Profit After Tax of Top 15 Contractors



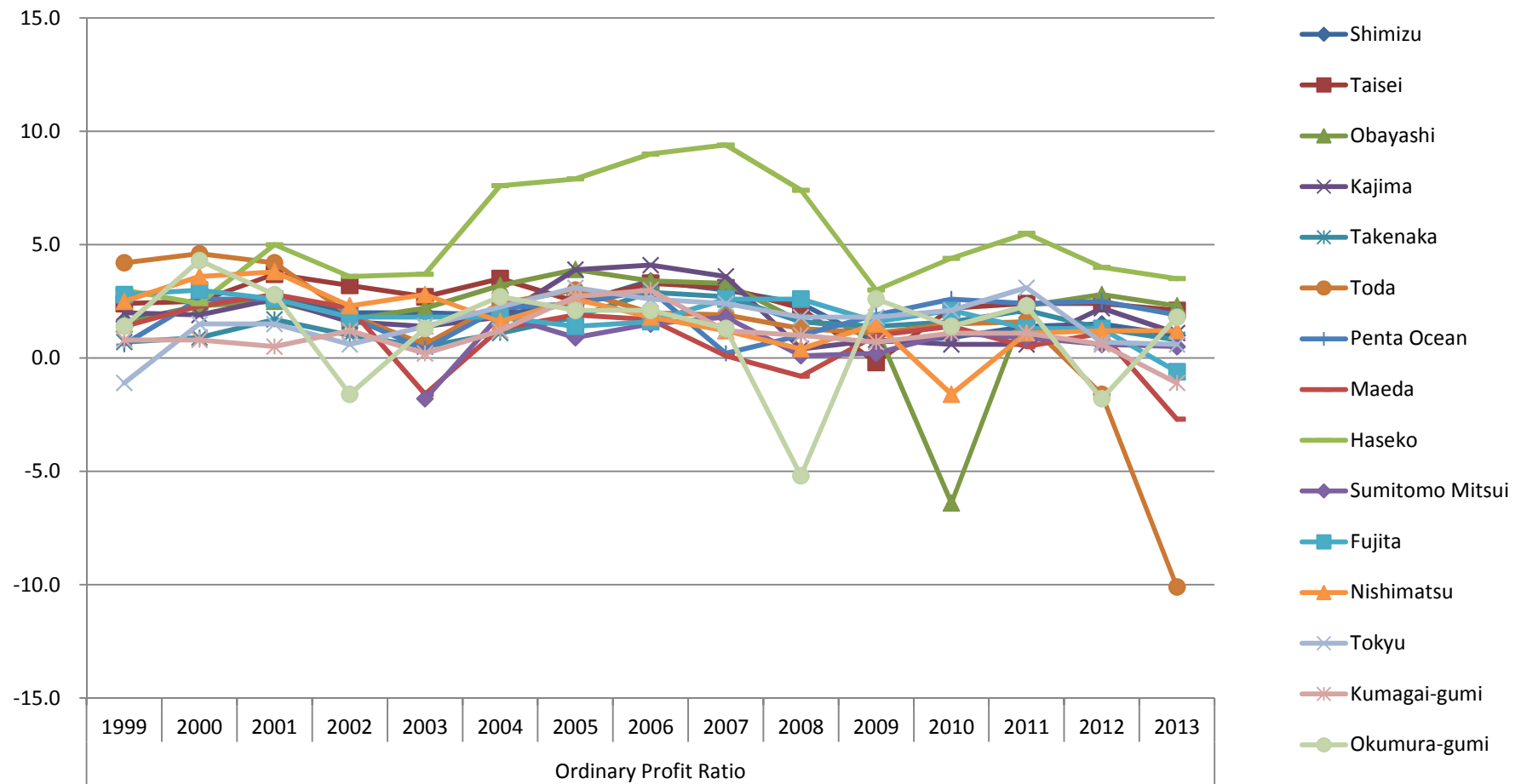
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Project Profit Ratio of Top 15 Contractors



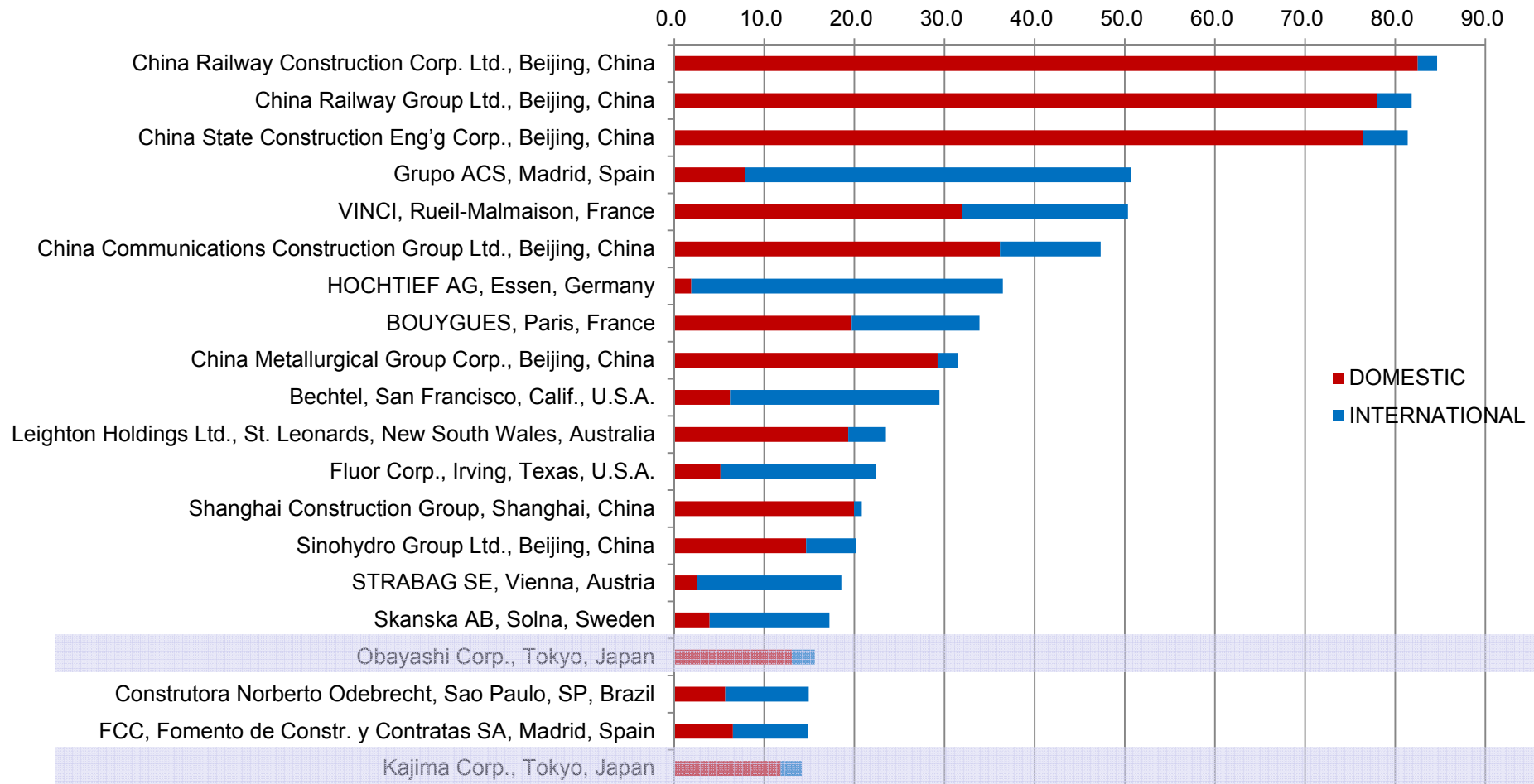
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Ordinary Profit Ratio of Top 15 Contractors

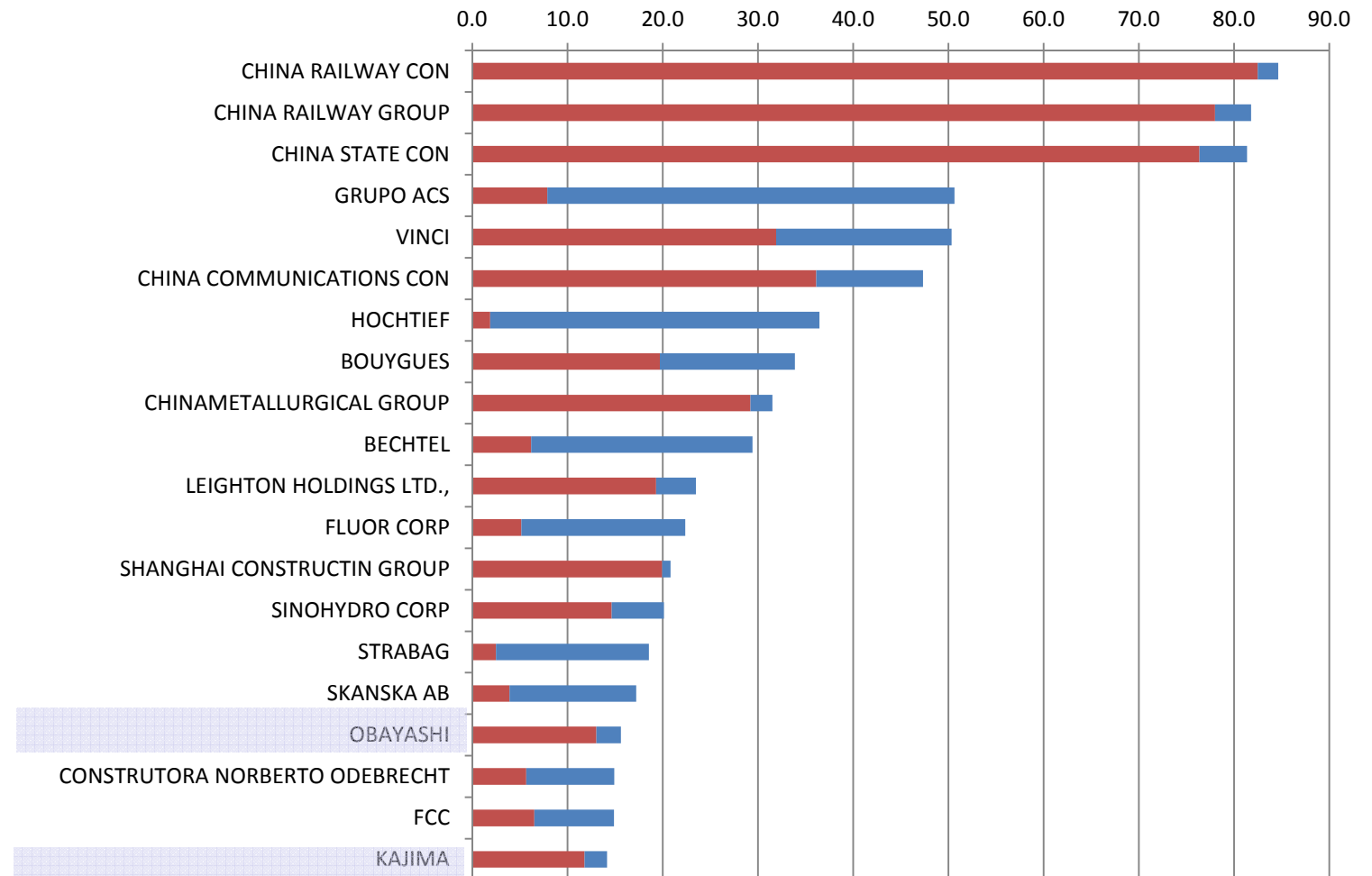
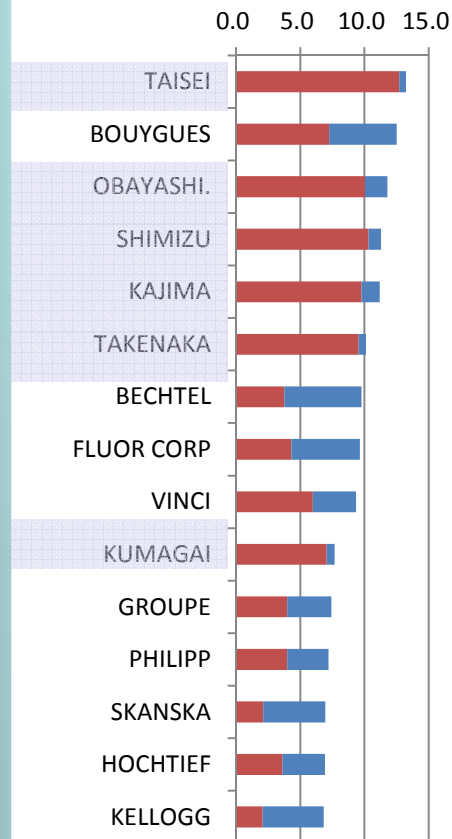


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ENR Ranking 2013 – Global Contractors

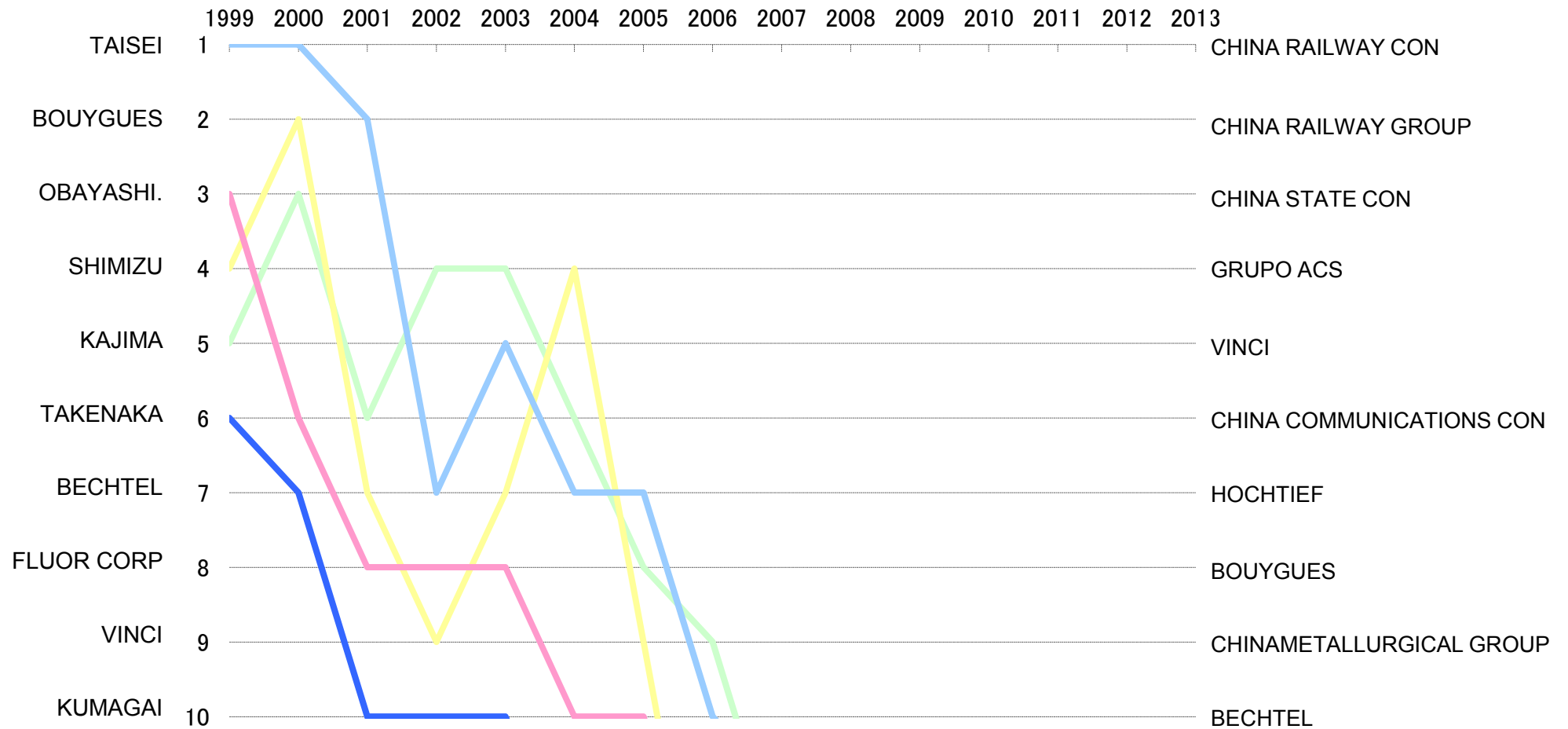


ENR Ranking 1999–2013



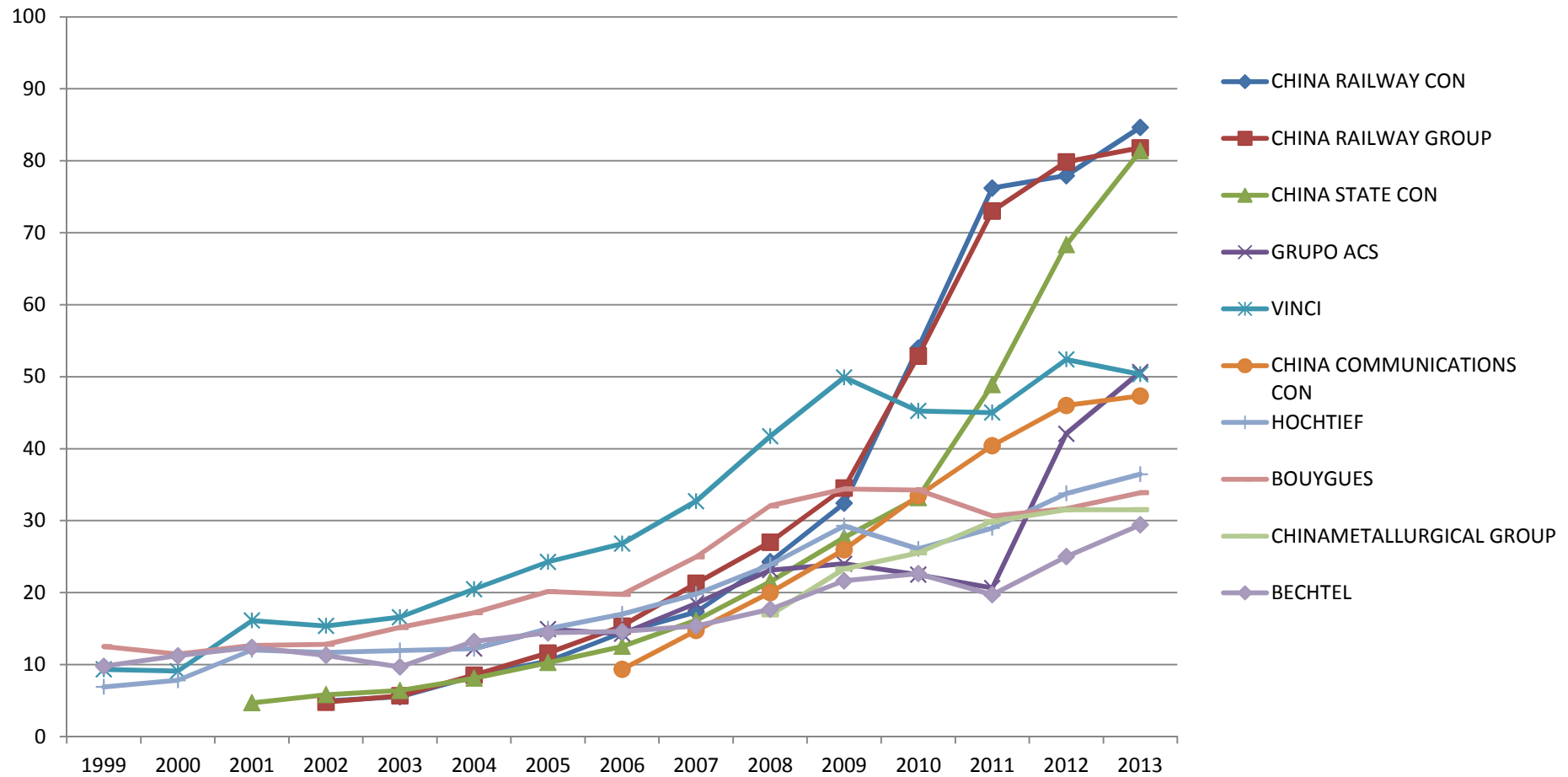
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ENR Ranking 1999–2013



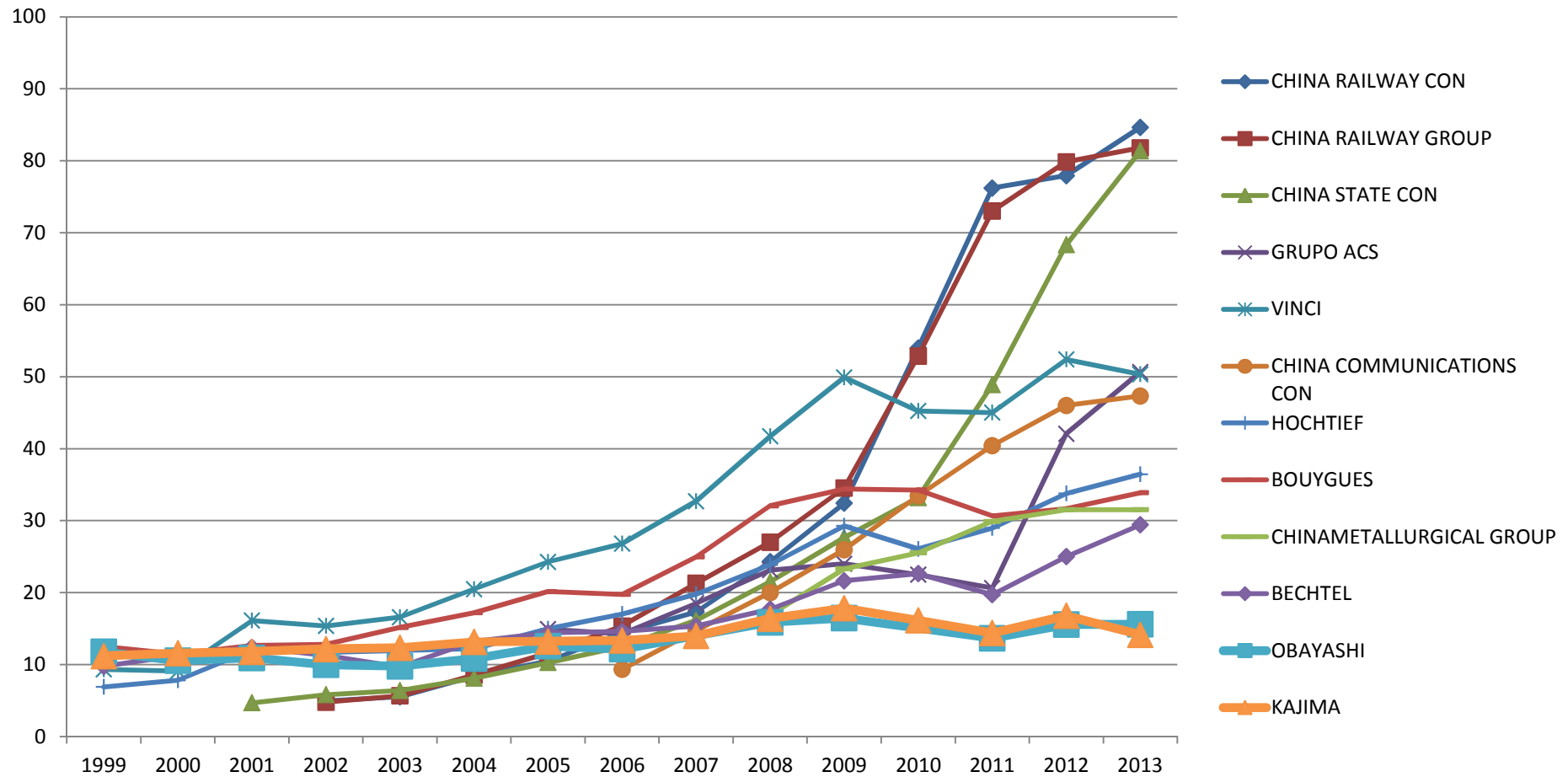
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ENR Ranking 1999–2013



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ENR Ranking 1999–2013



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FROM CMAJ PERSPECTIVE

TOHOKU RECOVERIES

2011 Tohoku Earthquake

The 2011 earthquake off the Pacific coast of Tohoku

- March 11, 2011, at 14:46 JST
- Epicenter; approximately 70 kilometers east of the Ooshika Peninsula of Tohoku
- Hypocenter; depth of approximately 30 km underwater
- The world Fifth most powerful earthquake (since modern record-keeping began in 1900)
- Powerful Tsunami waves, triggered by the earthquake, reached heights of up to 40.5 meters in Miyako in Tōhoku's Iwate Prefecture, and which, in the Sendai area, travelled up to 10 km inland.

2011 Tohoku Earthquake Damages

The 2011 earthquake off the Pacific coast of Tohoku

- Human Damages as of Sep 2012, across twenty prefectures
 - Death; 15,883
 - Missing; 2,643
 - Injured; 6,150
- Infrastructure Damages
 - Collapsed; 129,225 buildings
 - Half Collapsed; 254,204 buildings
 - Partially Damaged; 691,766 buildings
 - Heavy damages on Roads, Railways, Airports, Ports, and Dams

Recoveries by individuals and locals

9 Prefectures and 227 cities, towns, and villages are required to establish own Recovery Plan

- Individuals need to re-start by them selves with limited supports from Government.
- Municipalities' recovery plan with relocation idea to higher altitude delayed.
- Industries are utilizing Government support funds to re-start their works. Further supports are needed.
- Anti Tsunami Seawalls; Prefectures to build anti-Tsunami seawall along the Pacific coast, approx. 370 km long
- After 3 years, still not fully recovered yet.

Recoveries by Ministry of Land, Infrastructure, Transport and Tourism

MLIT has commenced their own recovery programs through Tohoku Regional Development Bureau.

- Anti Tsunami Seawall; On behalf of Miyagi Prefecture, MLIT is managing 32 km seawall construction at South Sendai Bay area.
- Sanriku Coastal Expressway; under Tohoku Recovery Road program, MLIT applied Project Acceleration PPP, an innovative procurement method, to this 391 km new expressway construction, connecting Sendai and Hachinohe

Recoveries under Urban Renaissance Agency

Urban Renaissance Agency; One of Incorporated Administrative Agencies under MLIT

- MOU/Cooperative Agreement with 20 disaster-affected municipalities and Fukushima prefecture
- Provides Client Agent services on Recovery programs
- 24 Urban Zone Redevelopment program and 45 Disaster Recovery Public Housing program (total 2,969 units) have been commenced to date.
- Awarded 13 “Construction Management At Risk” projects, and 2 Agent CM programs on Urban Zone Redevelopment program to date

CMAJ ACTIVITIES IN 2013

CMAJ Award

CMAJ Award; Only one CM services award in Japan, started in 2013

- Awarded a First Prize, a Special Prize, and 16 prize winners in 2013
- Projects using CM practice are eligible for CMAJ award
- Applicant team may include CMr, Client, Designer, Engineer, and Contractor
- Independent judging committee, consists of 9 members, established for the program
- CMAJ Award 2014 is under examination, to be publicized in May 2014

CCMJ Certification Program

Certified Construction Manager of Japan; Certification issued by CMAJ through qualification exam

- Only one CM certification in Japan
- First license issued in 2004
- 591 license holders to 2013, and 47 license holders newly added in 2014
- Annual Qualification Exam held in August
- 175 candidates participated in 2013, and 58 passed the exam
- CPD(Continuing Professional Development) is required to maintain CCMJ certification

CM School Program

Restarted in 2012, after 3 years closure.

“New” CM School focused on following points;

- Targets = personal participation, not company client.
- Target level = 3-5 years experienced CMs, not beginners or experts
- Style = 1 full day course on weekend, not on weekday
- Frequency = Once a month, total 9 courses a year.
- Themes = One theme on each course
- Contents = Simulations of “professional” experiences, through “Workshop” style discussion

CMAJ Forums

CMAJ Forum; a lecture meeting hosted by CMAJ, started in 2006.

- Initial purpose; Providing CM skills & knowledge, networking opportunities, and other services to CMAJ members (started “member only” event)
- Hosted 48 lectures to date, accepting non-members as well
- Most recent CMAJ Forum on Feb 24; Dr. Ozawa of University of Tokyo presented his involvements on Tohoku Recoveries CM at Risk program.
- 40 – 100 attendees per each, including branch members through internet TV conference system

CMAJ Member Interaction Program

Members' Networking event started in 2013.

- 3 events have been held to date.
- Plan to have 5-9 events in 2014.
- Applying “World Café” style dialogue, which is an innovative way to host a dialogue on selected theme with many attendees
- Encouraging new members to join
- Expecting attendees having further involvements in other CMAJ events

CM Liability Insurance Program

Insurance program custom made for CMAJ members who provide CM services to their clients.

- Only one Insurance program for CM services in Japan
- Established by CMAJ, with cooperation of Tokio Marine & Nichido Fire Insurance Co., Ltd. and other insurance companies
- Covering CM triggered risks, re-work of project participants, indemnities for delay in operation of Client, and third party liabilities
- Limited to the CM services equivalent to CMAJ's standard 'Scope of Work' specified in 'CMAJ Standard CM Contract'