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## FY2020 Outline of Overseas Construction Contracts

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This study covers overseas construction projects (worth 10 million yen or more per contract) signed for in FY2020 by the 51 member companies of the Overseas Construction Association of Japan, Inc. Figures exclude contracts between member companies (including those overseas) and between member companies based in Japan and their overseas subsidiaries (duplicates due to general contracting and subcontracting), and figures for joint-venture projects are reported according to the ratios of equity investments by the participating companies.

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### 1. Overall Trends in Contracts

Member companies signed 1,694 overseas construction contracts in FY2020, for a total value of 1,113.6 billion yen. Compared to the previous fiscal year, the numbers of contracts declined by 422, and the total contract value reduced by 947.3 billion yen.

The value of contracts signed by Parent Companies (PC) declined by 427 billion yen to 344.8 billion yen and the value of contracts signed by Overseas Affiliated Companies (OAC) also declined by 520.3 billion yen to 768.8 billion yen.

By region, the total value of contracts signed was: Asia, 645.5 billion yen; the Middle East and North Africa, 7.2 billion yen; Africa 50.1 billion yen; North America, 233.2 billion yen; Central and South America, 8.8 billion yen; Western Europe, 10.5 billion yen; Eastern Europe, 75.7 billion yen; and Oceania, 82.5 billion yen.

By type of client, contracts with public sectors totaled 311.2 billion yen in value and those with private sectors 802.5 billion yen.

By source of funding, self-funded contracts totaled 1,002.9 billion yen in value; contracts funded by grant aid, 4.7 billion yen; and those funded by ordinary yen loans, 51.6 billion yen. Overall contracts funded with ODA loans (total of grant aid and ordinary yen loans) was 56.4 billion yen, a decrease of 363.8 billion compared to the previous fiscal year (420.2 billion yen). Other contracts funded by International financial institutions including Asian Development Bank totaled 54.4 billion yen, an increase of 13.5 billion compared to the previous year (40.9 billion yen).

By type of contract, construction contracts totaled 797.1 billion yen in value; design-build contracts, 314 billion yen; PM/CM contracts, 60 million yen; technical advice contracts, 20 million yen, and other contracts, 2.4 billion yen. There were no turnkey contracts for this fiscal year.

## 2. PC and OAC Trends

By company, contracts signed by PC totaled 359 in number and 344.8 billion yen in value, representing decreases of 148 in number, and 427 billion yen in value from the previous fiscal year.

By region, the value of contracts signed by PC totaled: Asia, 267.3 billion yen; the Middle East and North Africa, 6.9 billion yen; Africa, 50.1 billion yen; North America, 2.5 billion yen; Central and South America, 5.3 billion yen; Oceania, 12.7 billion yen; there were no contracts for Western and Eastern Europe for this fiscal year.

On the other hand, contracts signed by OAC totaled 1,335 in number and 768.8 billion yen in value, representing decreases of 274 in number, and 520.2 billion yen in value from the previous fiscal year.

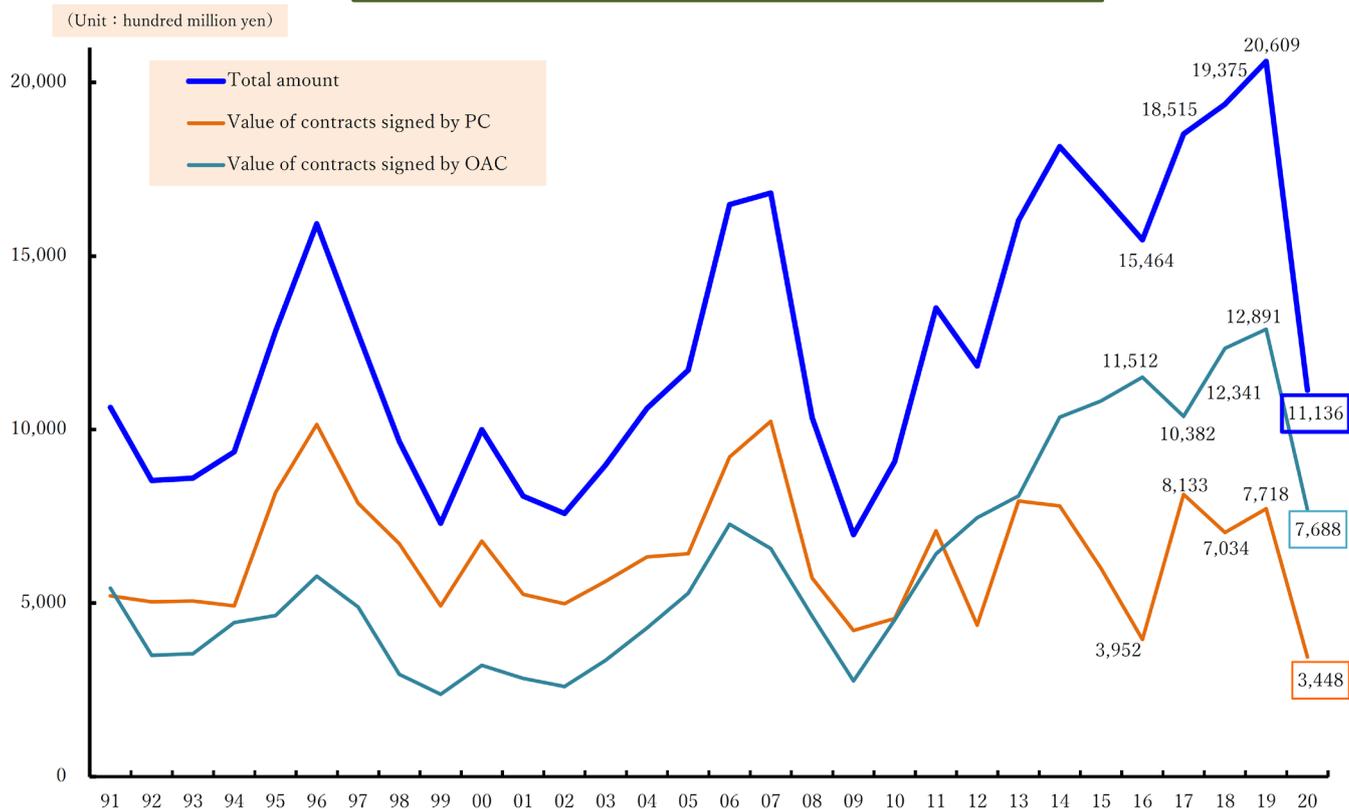
By region, the value of contracts signed by OAC totaled: Asia, 378.2 billion yen; the Middle East and North Africa, 0.3 billion yen; North America, 230.7 billion yen; Central and South America, 3.5 billion yen; Western Europe, 10.5 billion yen; Eastern Europe, 75.7 billion yen; and Oceania, 69.9 billion yen; there were no contracts for Africa for this fiscal year.

Accordingly, a comparison between the values of contracts by PC and those by OAC showed a ratio of 31:69, representing a slight decrease in the share of PC contracts and a slight increase in the share of OAC contracts from the previous fiscal year (37:63).

<Table 1 . Comparison of Contracts Signed to Previous Fiscal Year>

	FY 2019		FY 2020		Year-on-year change	
	Number	Value (100 million yen) (%)	Number	Value (100 million yen) (%)	Number	Value (100 million yen) (%)
PC	507	7,718 (37.5%)	359	3,448 (31.0%)	-148	-4,270 (-55.3%)
OAC	1,609	12,891 (62.5%)	1,335	7,688 (69.0%)	-275	-5,202 (-40.4%)
Total	2,116	20,609 (100.0%)	1,694	11,136 (100%)	-422 (-20.0%)	-9,473 (-46.0%)

Changes in Overseas Construction Contracts (from FY1991 to FY2020)



### 3. Regional Trends

#### Asia

By region, the number of contracts in Asia totaled 1,148 and 645.5 billion yen in value, representing decreases of 351 in number, and 542.8 billion yen in value from the previous fiscal year. By type of client, contracts with public sectors in Asia decreased by 268.2 billion yen to 173.1 billion yen in value; those with private sectors in the region decreased by 274.6 billion yen to 472.3 billion yen.

#### Middle East and North Africa (MENA)

Contracts in the Middle East and North Africa totaled 10 in number and 7.2 billion yen in value, representing decreases of 29 in contract number and 11.7 billion yen in value from the previous fiscal year. By type of client, contracts with public sectors in the Middle East and North Africa decreased by 12.6 billion yen to 0.1 billion yen; those with private sectors in the region increased by 0.9 billion yen to 7.1 billion yen.

#### Sub-Saharan Africa

Contracts in Africa totaled 8 in number and 50.1 billion yen in value, representing decreases of 20 in number and 41.6 billion yen in value from the previous fiscal year. By type of client, contracts with public sectors in the region decreased by 41 billion yen to 48.3 billion yen, and those with private sectors also decreased by 0.6 billion yen to 1.8 billion yen.

#### North America

Contracts in North America totaled 310 in number and 233.2 billion yen in value, representing an increase of 47 in number but a decrease of 313.1 billion yen in value. By type of client, contracts with public sectors in North America decreased by 11.5 billion yen to 60.8 billion yen; those with private sectors in the region also decreased by 301.6 billion yen to 172.4 billion yen.

**Central and South America**

Contracts in Central and South America totaled 76 in number and 8.8 billion yen in value, representing decreases of 52 in number and 18.6 billion yen in value from the previous fiscal year. By type of client, contracts with public sectors in Central and South America decreased by 5.2 billion yen to 20 million yen, and those with private sectors in the region decreased by 13.4 billion yen to 8.8 billion yen.

**Western Europe**

Contracts in Western Europe totaled 17 in number and 10.5 billion yen in value, representing decreases of 8 in number and 2.1 billion yen in value from the previous fiscal year. By type of client, there were no contracts with public sectors in this region, while those with private sectors in the region decreased by 2.1 billion yen to 10.5 billion yen.

**Eastern Europe**

Contracts in Eastern Europe totaled 67 in number and 75.7 billion yen in value, representing increases of 14 in number and 19.9 billion yen in value from the previous fiscal year. By type of client, there were no contracts with public sectors in Eastern Europe for this fiscal year, while contracts with private sectors increased by 19.9 billion yen to 75.7 billion yen.

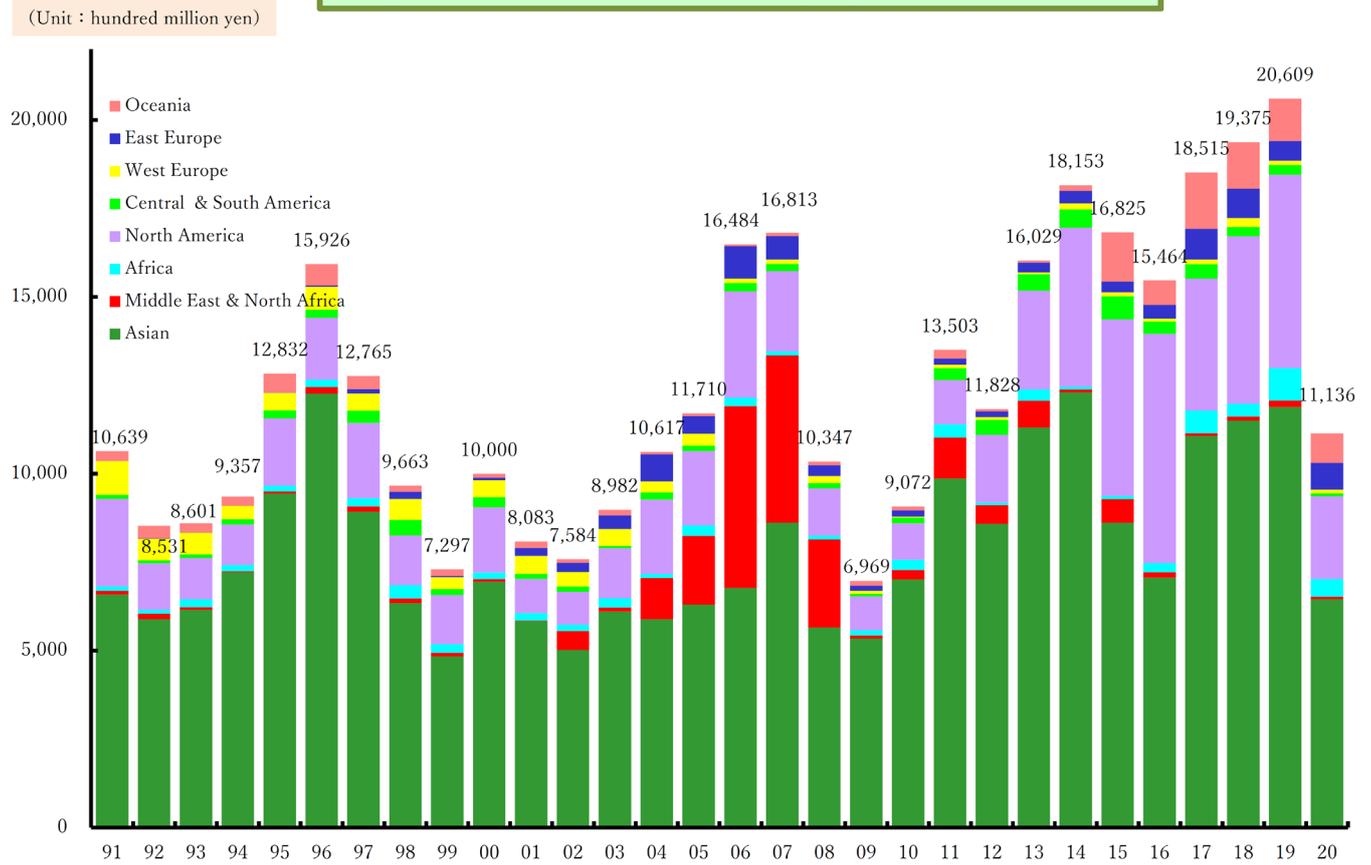
**Oceania**

Contracts in Oceania totaled 58 in number and 82.5 billion yen in value, representing decreases of 23 in number and 37.2 billion yen in value from the previous fiscal year. By type of client, contracts with public sectors in the region increased by 0.1 billion yen to 28.8 billion yen, and those with private sectors decreased by 37.3 billion yen to 53.8 billion yen.

&lt; Table 2. Year-on-Year Change of Contract Signed By Region &gt;

Region	FY2019		FY2020		Year-on-year change
	Number	Value (100 million yen) (%)	Number	Value (100 million yen) (%)	Value (100 million yen) (%)
Asian	1,499	11,883 (57.7%)	1,148	6,455 (58.0%)	-5,428 (-45.7%)
Middle East & North Africa	39	189 (0.9%)	10	72 (0.7%)	-117 (-61.8%)
Africa	28	917 (4.5%)	8	501 (4.5%)	-416 (-45.4%)
North America	263	5,463 (26.5%)	310	2,332 (20.9%)	-3,131 (-57.3%)
Central & South America	128	274 (1.3%)	76	88 (0.8%)	-186 (-67.8%)
West Europe	25	126 (0.6%)	17	105 (0.9%)	-21 (-16.6%)
East Europe	53	558 (2.7%)	67	757 (6.8%)	199 (35.6%)
Oceania	81	1,198 (5.8%)	58	825 (7.4%)	-372 (-31.1%)
Total	2,116	20,609 (100.0%)	1,694	11,136 (100.0%)	-9,473 (-46.0%)

Changes in Overseas Construction Contracts by Region(from FY1991 to FY2020)



※The figures in the text may not match the figures in the table due to rounding.

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