

Germany Real Estate Report Q2 2014

<https://marketpublishers.com/r/G2FF8FDD3BEEN.html>

Date: March 2014

Pages: 69

Price: US\$ 1,295.00 (Single User License)

ID: G2FF8FDD3BEEN

Abstracts

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BMI View: Germany's commercial real estate sector remains in a strong position in Q2 2014 as the industry continues to benefit from its status as a safe haven amid the uncertainty surrounding the rest of the eurozone. We expect some upward movement in rental rates over the year, though growth will be more noticeable in some sub-sectors and cities than others.

The Germany Q2 2014 Real Estate Report examines the commercial office, retail, industrial and construction segments throughout the country, in the context of Germany's central role in managing the ongoing eurozone debt crisis.

Commercial real estate growth is very much dependent on a healthy macroeconomic environment. The situation in Germany remains broadly robust, thanks in part to its status as a safe haven market and its comparative regional strength, factors which resulted in a significant uptick in direct investment during H213. We expect the sector to continue to outperform many of its regional rivals over the course of 2014, as economic growth starts to speed up across the country. However, we caution that many of the headwinds facing the sector in 2013 remain in place, most notably a slowing export sector due to weak demand from China and the eurozone, as well as ongoing concerns surrounding the health of the consumer sector. Nevertheless, we expect 2014 to prove a positive year for the real estate market which will reinforce its status as the strongest commercial property sector in the eurozone.

Contents

BMI Industry View

SWOT

Political

Economic

Business Environment

Industry Forecast

Office

Table: Forecast Rents - (US\$ per m²/month)

Table: Forecast Net Yield, 2011-2018 (%)

Retail

Table: Forecast Rents - (US\$ per m²/month)

Table: Forecast Net Yield, 2011-2018 (%)

Industrial

Table: Forecast Rents - (US\$ per m²/month)

Table: Forecast Net Yield, 2011-2018 (%)

Construction And Infrastructure Forecast Scenario

Table: Germany Construction And Infrastructure Industry Data, 2011-2016

Table: Germany Construction And Infrastructure Long-Term Forecasts, 2017-2022

Macroeconomic Forecasts

Economic Analysis

Table: Germany - Economic Activity

Industry Risk/Reward Ratings

Developed States Risk/Reward Ratings

Table: Real Estate Risk/Reward Ratings

Germany Risk/Reward Ratings

Rewards

Risks

Market Overview

Office

Table: Historic Rents - 2012-2013 (US\$ per m²/month)

Table: Net Yield, 2012-2013 (%)

Table: Terms Of Rental Contract/Leases, H212

Retail

Table: Historic Rents - 2012-2013 (US\$ per m²/month)

Table: Net Yield, 2012-2013 (%)

Table: Terms Of Rental Contract/Leases, H212

Industrial

Table: Historic Rents - 2012-2013 (US\$ per m2/month)

Table: Net Yield, 2012-2013 (%)

Table: Terms Of Rental Contract/Leases, H212

Competitive Landscape

Company Profile

Hochtief

Multi Development Germany GmbH

Patrizia Immobilien

TAG Immobilien

Vivacon

Demographic Forecast

Table: Germany's Population By Age Group, 1990-2020 ('000)

Table: Germany's Population By Age Group, 1990-2020 (% of total)

Table: Germany's Key Population Ratios, 1990-2020

Table: Germany's Rural And Urban Population, 1990-2020

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Ratings Methodology

Table: Real Estate Risk/Reward Ratings Indicators

Table: Weighting Of Indicators

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