

India Real Estate Report Q2 2014

<https://marketpublishers.com/r/IAED8A1F6E3EN.html>

Date: April 2014

Pages: 83

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

ID: IAED8A1F6E3EN

Abstracts

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BMI View: GDP growth in India drop to the lowest level in over a decade in 2013, while persistent structural issues ranging from the financial system to national infrastructure saw widespread capital flight in addition to record setting lows for the Indian Rupee against the dollar. All these factors represent a challenging environment for the commercial real estate sector.

Despite these challenges, the commercial real estate market has thus far managed to avoid significant downturns, although demand, vacancy rates and rental stability in the short term remain a cause for concern. Nevertheless, BMI shares the consensus opinion that both economic performance and aggregate demand will improve post 2014, as investors begin to return to an Indian market which continues to display solid growth potential. Despite this we have downgraded our real growth projections for private domestic demand leading us to downgrade our headline real GDP growth forecast to 5.0% for 2013/14 from 5.5% previously.

The present Indian government has attempted to induce economic reforms in addition to a national infrastructure redevelopment in the months leading to the 2014 parliamentary election. Reductions on levels of foreign project financing, in addition to more restrictive controls on international investment by domestic firms, has helped foster the emergence of new capital in addition to relieving the pressure on a government already heavily reliant on borrowing. The lack of large-scale development in 2013, especially in the office sector, had a neutralising effect on rents, which have marginally declined or seen no significant changes.

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