

Malaysia Real Estate Report Q3 2014

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Abstracts

Overall, BMI has a positive outlook for the Malaysian commercial real estate sector and we expect the market to remain relatively stable over the next two years. The main risk to our short term forecasts stems from a slow-down in China affecting export oriented sectors and employment which would flow on to impact rental rates in both the industrial and retail sectors in particular. Additionally, local sources are reporting a mismatch of investor specifications and new developments as well as an over-supply of office space. Over the longer term positive demographic factors and increased tourism are looking to support the retail segment.

There are strong downside risks to our forecasts; with an estimated 17mn square feet coming online between 2015-2017 demand would have to double to absorb this supply. The over-supply of commercial real estate could result in depressed rentals and yields. Additional downside risks to the market are the vacancies resulting from a mismatch of specifications and tenant's needs. According to an analyst at Savills Research, there is a trend of tenants leaving buildings that are 10-15 years old as a result of poor maintenance standards. On the bright side we are witnessing an increasing trend of owners of old buildings refurbishing and developing to compete with newer buildings.

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