

# United States Real Estate Report Q2 2014

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## Abstracts

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There are several factors underpinning BMI's positive outlook for the Commercial Real Estate sector in 2014. Firstly, providing key support for the industrial sector is the steady increase of US domestic energy production and stronger real GDP growth in key US trade partners, including Mexico, Canada, the United Kingdom, and the eurozone, which we believe will increase external demand for US goods and services. Secondly, supporting the retail segment broad trends supporting stronger real personal consumption expenditure (PCE) growth remain in place, and as such we expect real PCE growth to continue to accelerate in 2014. Thirdly, the improved outlook for the economy and unemployment will support all three real estate segments.

Commercial real estate (CRE) expansion is dependent on a healthy macroeconomic environment. During Q413 we revised down our estimate for 2013 US real GDP growth from 2.1% to 1.8%, but we maintain that the US economy is gaining steam and is set for more rapid expansion. Indeed, we have upgraded our 2014 real GDP growth forecast from 2.7% to 2.8% with growth set to average 2.4% per year from 2013-2018. a major factor in this improving economic outlook has been the improvement in US job creation and we have revised down our end-2013 and end-2014 unemployment rate forecasts from 7.5% and 7.2% to 7.2% and 6.8% respectively on the back of stronger than expected job gains.

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