

Brazil Real Estate Industry Outlook to 2017 - Infrastructure Deficit and Rising Middle Class to Drive the Market

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Abstracts

The report titled 'Brazil Real Estate Industry Outlook to 2017 – Infrastructure Deficit and Rising Middle Class to Drive the Market' provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the Residential, Retail, Hotel and Commercial Real Estate as key segments of the market. The report discusses the market share of major real estate developers in Brazil along with the detailed explanation of the various macro and industry factors which are driving the growth of the market for these three segments of Real Estate Market.

The Brazilian real estate industry has emerged out with a significant expansion over a prolonged period of stagnation for past several years. Due to the introduction of various economic reforms during 2002-2005, the country has transformed into a stable economy with a political and legal environment which is conducive for the growth of the real estate industry. The Brazilian real estate market was valued at USD ~ million in 2012 which has grown from USD ~ million in 2006. The market has been growing at a CAGR of 44.0% during the period of 2006-2012. The residential real estate segment is the largest segment of the market. The size of the Brazil residential real estate market in terms of units launched was ~ units as of 2012 which has grown at a CAGR of 10.3% during the period of 2006-2012 with ~ units launched in 2006. The country's largest and expanding domestic residential real estate market is appealing as it has been booming over the last few years and has been offering great return to its investors

Over the years, Sao Paulo has been the largest contributor among the cities to the residential real estate market of the country contributing 38.5% in the year 2012 in terms of residential units sold. The Sao Paulo Residential real estate market is

projected to grow at a CAGR of 6.4% for the period of 2012-2017.

The Brazilian federal government in 2009 had launched MINHA CASA, MINHA VIDA (My House, My Life) program which was directed to transform the dream of owning a house into a reality for many Brazilian families. The government plans to invest BRL 150 billion by 2014 to attain the goal of building 2.4 million houses and apartments for Minha Casa, Minha Vida 2.

The Retail real estate has played a crucial role in the country's economy in recent years. Presently there are ~ shopping centers in Brazil which encompass a gross leasable area of approximately ~ million square meters. The area has grown with a CAGR of 7.3% since 2006. The country is also expected to witness a number of shopping centers being developed in cities other than Sao Paulo and Rio de Janeiro. The retail real market in the country in terms of shopping centres is expected to escalate at a CAGR of 15.3% during the period of 2012-2017.

The hotel real Estate of Brazil is mainly segmented into three types of hotels which are Independent Hotels; Hotel and Condo Hotel International Chains; and Hotel and Condo Hotel National Chains. The independent hotels have been the largest segment of Brazil hotel real estate market accounting for 92.1% market share in 2012. The size of independent hotel real estate market in Brazil by number of hotels is ~ units in 2012 which increased from ~ units in the year 2006. In the context of hosting two major sporting events - the FIFA World Cup 2014 and the Summer Olympics 2016, the hotel real estate in the country is experiencing a boom and the trend is expected to continue till 2017. The market is expected to witness the development of ~ hotels in the year 2013 with ~ rooms across all the segments of hotels during the period of 2012-2017. The number of hotels in the country will grow at a CAGR of 25.6% and hotel rooms supply will grow at a CAGR 17.6% in the next 5 years.

The commercial real estate in Brazil in terms of existing inventory is ~ thousand Sq.m which has grown from ~ thousand Sq.m in the year 2006. It has been growing at a CAGR of 17.4% during the years 2006-2012. The Brazilian commercial real estate market in terms of existing inventory is anticipated to grow at a CAGR of 35.8% during the period of 2012-2017. The existing inventory is estimated to reach ~ thousand Sq.m in the year 2017 from ~ thousand Sq.m in 2012. The existing inventory will grow annually at a rate ~ in 2013 and will reach ~ thousand Sq.m in 2013.

The Brazil Real Estate market in terms of value is expected to reach USD ~ million in 2017 from USD ~ million in 2012. The market is projected to grow at a CAGR of 42.7%

for the period of 2012-2017. It is expected to reach USD ~ million in the year 2013 with an annual growth rate of 63.50%.

Key Topics Covered in the Report:

The market size of the Brazilian Real Estate Industry on the basis of units sold and launched.

The market segmentation of Brazil Real Estate Market on the basis of Residential, Retail, Hotel and Commercial Real Estate

The market segmentation of the Residential real estate market by city

The market size of cities such as Sao Paulo, Rio De Janerio, Fortaleza, Porto Alegere and Belo Horizonte on the basis of Residential Units Launched and sold.

The market size of the retail real estate on the basis of number of existing shopping centres and their gross leasable area.

The market segmentation of retail real estate on the basis of new shopping centres introduced in major cities which are Sao Paulo, Rio De Janerio, Salvador, Belo Horizonte and Brasilia.

The market size of Brazil Hotel real estate at the base of number of existing rooms and hotels

The market segmentation on the basis of types of hotels i.e. Independent Hotels, Hotel and Condo Hotel National Chains and Hotel and Condo Hotel International Chains

The market size of commercial real estate on the basis of existing inventory and net absorption.

The market segmentation on the basis of commercial office space segment and industrial office space segment.

The Future Outlook of residential real estate, retail real estate, hotel real estate and commercial real estate.

The Future Outlook of Brazil Real estate on the basis of value, 2013-2017

Contents

1. BRAZIL REAL ESTATE MARKET INTRODUCTION

2. BRAZIL REAL ESTATE MARKET SIZE BY VALUE, 2006-2012

3. BRAZIL RESIDENTIAL REAL ESTATE MARKET INTRODUCTION

3.1 Brazil Residential Real Estate Market Size by Residential Units Launched and Sold, 2006-2012

3.2 Brazil Residential Real Estate Market Segmentation by City, 2006-2012

3.2.1. Sao Paulo Residential Real Estate Market

3.2.1.1. Sao Paulo Residential Real Estate Market Size and Future Projections, 2006-2017

3.2.2. Rio De Janerio Residential Real Estate Market

3.2.2.1. Rio De Janerio Residential Real Estate Market Size and Future Projections, 2006-2017

3.2.3. Fortaleza Residential Real Estate Market

3.2.3.1. Fortaleza Residential Real Estate Market Size and Future Projections, 2006-2017

3.2.4. Porto Alegre Residential Real Estate Market

3.2.4.1. Porto Alegre Residential Real Estate Market Size and Future Projections, 2006-2017

3.2.5. Belo Horizonte Residential Real Estate Market

3.2.5.1. Belo Horizonte Residential Real Estate Market Size and Future Projections, 2006-2017

3.2.6. Other Cities Residential Real Estate Market Size and Future Projections,

2006-2017

3.3. Housing Deficit in Brazil

3.3.1. Minha Casa Minha Vida

3.4. Trends And Developments in Brazil Residential Real Estate Market

Lower Mortgage interest rates

Demand and Supply disparity in Residential Units

3.5. Brazil Residential Real Estate Market Future Outlook and Projections, 2013-2017

4. BRAZIL RETAIL REAL ESTATE MARKET

4.1 Brazil Retail Real Estate Market Introduction

4.2. Brazil Retail Real Estate Market Size by New shopping centers Introduced and

Gross Leasable Area, 2006-2012

4.3. Brazil Retail Real Estate Market Segmentation by City, 2006-2012

4.3.1. Rio De Janerio Retail Real Estate Market Introduction And Size, 2006-2012

4.3.2. Rio De Janerio Retail Real Estate Future Projections, 2013-2017

4.3.3. Sao Paulo Retail Real Estate Market Introduction and Size, 2006-2012

4.3.4. Sao Paulo Retail Real Estate Market Future Projections, 2013-2017

4.3.5. Belo Horizonte Retail Real Estate Market Size and Future Projections, 2006-2012

4.3.6. Salvador Retail Real Estate Market Size and Future Projections, 2006-2017

4.3.7. Brasilia Retail Real Estate Market Size and Future Projections, 2006-2017

4.4. Trends and Developments in Brazil Retail Real Estate Market

Migration Of Class C Income Segment People into Class A & B Creating New Growth Opportunities for Shopping Centers

Under served Shopping Centre Market

Additional capital being deployed into Retail Real Estate Through IPOs

4.5. Brazil Retail Real Estate Market Future Outlook and Projections, 2013-2017

5. BRAZIL HOTEL REAL ESTATE MARKET

5.1. Brazil Hotel Real Estate Market Introduction and Size by Number of Hotels and Number of Rooms, 2006-2012

5.2. Brazil Hotel Real Estate Market Segmentation by Types of Hotels, 2006-2012

5.2.1. Brazil Hotel and Condo Hotel National Chains Market Size and Future Projections, 2006-2017

5.2.2. Brazil Hotel and Condo Hotel International Chains Market Introduction and Size, 2006-2012

5.2.3. Brazil Hotel and Condo Hotel International Chains Market Future Projections, 2013-2017

5.2.4. Brazil Independent Hotels Real Estate Introduction and Size, 2006-2012

5.2.4.1. Brazil Independent Hotels Real Estate Market Segmentation, 2006-2012

5.2.4.1.1. Brazil Independent Hotels with more than 20 Rooms Real Estate Market Size and Future Projections, 2006-2017

5.2.4.1.2. Brazil Independent Hotels Up To 20 Rooms Market Size and Future Projections, 2006-2017

5.2.5. Brazil Independent Hotels Real Estate Future Projections, 2013-2017

5.3. Trends and Developments in Brazil Hotel Real Estate Market

Increase in domestic travellers

Entry of international investors

Expansion in the budget category hotels

Investment in smaller cities

5.4. Brazil Hotel Real Estate Market Future Outlook and Projections, 2013-2017

6. BRAZIL COMMERCIAL REAL ESTATE MARKET

6.2. Brazil Commercial Real Estate Market Introduction and Size, 2006-2012

6.3. Brazil Commercial Real Estate Market Segmentation by Offices and Industrial Parks, 2006 - 2012

6.3.4. Brazil Offices Space Real Estate Market Introduction and Size, 2006-2012

6.3.5. Brazil Office Space Market Segmentation by Cities, 2006-2012

6.3.5.1. Sao Paulo Office Space Real Estate Market Introduction and Size, 2006-2012

6.3.5.2. Sao Paulo Office Space Real Estate Market Future Projections, 2013-2017

6.3.5.3. Rio De Janeiro Office Space Real Estate Introduction And Market Size, 2006-2012

6.3.5.4. Rio De Janeiro Office Space Real Estate Market Future Projections, 2006-2012

6.3.6. Brazil Industrial Parks Introduction and Market Size, 2006-2012

6.3.7. Brazil Industrial Parks Real Estate Market Future Projections, 2013-2017

6.4. Trends and Developments in Brazil Commercial Real Estate Market

Escalating Rental Prices

Development of Industrial parks

6.5. Brazil Commercial Real Estate Market Future Outlook and Projections, 2013-2017

7. MARKET SHARE OF MAJOR REAL ESTATE DEVELOPERS IN BRAZIL, 2006-2012

7.1. Company Profiles of Major Players in Brazilian Real Estate Market

7.1.1. Cyrela Brazil Realty

Company Overview

Business Strategies

Financial Performance, 2006-2012

7.1.2. PDG

Company Profile

Financial Performance, 2006-2012

7.1.3. MRV Engenharia

Company Profile

Business Strategies

Financial Performance, 2006-2012

7.1.4. Gafisa S.A.

Company Overview

Business Strategies

Financial Performance, 2006-2012

7.1.5. Rossi Residencial

Company Overview

Business Strategies

Financial Performance, 2006-2012

7.1.6. Brookfield S.A

Company Overview

Business strategies

Financial Performance, 2006-2012

7.1.7. Even Constructions

Company Overview

Business Strategies

Financial Performance, 2006-2012

7.1.8. BR Malls

Company Profile

Business Strategies

Financial Performance, 2006-2012

7.1.9. Multiplan Empreendimentos Imobiliários S.A

Company Overview

Business Strategies

Financial Performance, 2006-2012

7.1.10. Aliansce Shopping Centers

Company Overview

Business Strategies

Financial Performance, 2006-2012

8. BRAZIL REAL ESTATE MARKET FUTURE OUTLOOK

8.1. Cause and Effect Relationship Prevailing Between Dependent and Independent Factors Prevailing in the Brazil Real Estate Market

8.1 Brazil Real Estate Market Future Projections, 2013-2017

9. MACROECONOMIC FACTORS

9.1. Population, 2006-2017

9.2. Personal Disposable Income, 2006-2017

9.3. Gross Domestic Product, 2006-2017

9.4. Real Estate Credit, 2006-2017

9.5. Housing Deficit, 2006-2017

9.6. Inbound Tourists, 2006-2017

10. APPENDIX

10.1. Market Definition

10.2. Abbreviations

10.3. Research Methodology

Data Collection Methods

Approach

Variables (Dependent and Independent)

Multi Factor Based Sensitivity Model

Final Conclusion

10.4. Disclaimer

List Of Figures

LIST OF FIGURES

- Figure 1: Brazil Real Estate Market Size by Value in USD Million, 2006-2012
- Figure 2: Brazil Residential Real Estate Market Size by Units Sold, 2006-2012
- Figure 3: Brazil Residential Real Estate Market Size by Units Launched, 2006-2012
- Figure 4: Brazil Residential Real Estate Market Segmentation by City on The Basis of Residential Units Sold in Percentage (%), 2006-2012
- Figure 5: Sao Paulo Residential Real Estate Market Size by Units Launched and Units Sold, 2006-2012
- Figure 6: Sao Paulo Residential Real Estate Market Future Projections by Number of Units Sold, 2013-2017
- Figure 7: Rio De Janerio Residential Real Estate Market Size by Units Sold and Launched, 2006-2012
- Figure 8: Rio De Janerio Residential Real Estate Market Future Projections by Number of Units Sold, 2013-2017
- Figure 9: Fortaleza Residential Real Estate Market Size by Units Launched and Units Sold, 2006-2012
- Figure 10: Fortaleza Residential Real Estate Market Future Projections by Number of Units Sold, 2013-2017
- Figure 11: Porto Alegre Residential Real Estate Market Size by Units Sold and Launched, 2006-2012
- Figure 12: Porto Alegre Residential Real Estate Market Future Projections by Number of Units sold, 2013-2017
- Figure 13: Belo Horizonte Residential Real Estate Market Size by Units Sold, 2006-2012
- Figure 14: Belo Horizonte Residential Real Estate Market Future Projections by Number of Units sold, 2013-2017
- Figure 15: Other Cities Residential Real Estate Market Size by Units Sold, 2006-2012
- Figure 16: Other Cities Residential Real Estate Market Future Projections by Number of Units Sold, 2013-2017
- Figure 17: Brazil Residential Real Estate Market Future Projections by Number of Units Sold, 2013-2017
- Figure 18: Brazil Retail Real Estate Market Size by Existing Shopping Centers and New Shopping Centers Introduced in Units, 2006-2012
- Figure 19: Brazil Retail Real Estate Market Size by Gross Leasable Area in Million Square Meters, 2006-2012
- Figure 20: Rio De Janerio Retail Real Estate Market Size by Existing Shopping Centers

and New Shopping Centers Introduced in Units, 2006-2012

Figure 21: Rio De Janerio Retail Real Estate Market Size by Gross Leasable Area in Square Meters, 2006-2012

Figure 22: Rio De Janerio Retail Real Estate Market Future Projections by Gross Leasable Area in Square Meter, 2013-2017

Figure 23: Sao Paulo Retail Real Estate Market Size by Existing Shopping Centers and New Shopping Centers Introduced in Units, 2006-2012

Figure 24: Sao Paulo Retail Real Estate Market Size by Gross Leasable Area in Square Meters, 2006-2012

Figure 25: Sao Paulo Retail Real Estate Market Future Projections by Gross Leasable Area in Square Meters, 2013-2017

Figure 26: Belo Horizonte Retail Real Estate Market Size by Existing Shopping Centers and New Shopping Centers Introduced in Units, 2006-2012

Figure 27: Belo Horizonte Retail Real Estate Market Size by Gross Leasable Area in Square Meters, 2006-2012

Figure 28: Belo Horizonte Retail Real Estate Market Future Projections by Gross Leasable Area in Square Meters, 2013-2017

Figure 29: Salvador Retail Real Estate Market Size by Existing Shopping Centers and New Shopping Centers Introduced in Units, 2006-2012

Figure 30: Salvador Retail Real Estate Market Size by Gross Leasable Area in Square Meters, 2006-2012

Figure 31: Salvador Retail Real Estate Market Future Projections by Gross Leasable Area in Square Meters, 2013-2017

Figure 32: Brasilia Retail Real Estate Market Size by Existing Shopping Centers and New Shopping Centers Introduced in Units, 2006-2012

Figure 33: Brasilia Retail Real Estate Market Size by Gross Leasable Area in Square Meters, 2006-2012

Figure 34: Brasilia Retail Real Estate Market Future Projections of by Gross Leasable Area in Square Meters, 2013-2017

Figure 35: Brazil Retail Real Estate Market Future Projections Size by New Shopping Centers Introduced in Units, 2013-2017

Figure 36: Brazil Retail Real Estate Market Future Projections Size by Gross Leasable Area in Million Square Meters, 2013-2017

Figure 37: Brazil Hotel Real Estate Market Size by Number of Hotels and Number of Rooms in Units, 2006-2012

Figure 38: Brazil Hotel Real Estate Average Daily Rate, Revenue per Available Room in Brazilian Real; and Occupancy Rate in Percentage (%), 2006-2012

Figure 39: Sao Paulo Hotel Real Estate Average Daily Rate, Revenue per Available Room in Brazilian Real; and Occupancy Rate in Percentage (%), 2006-2012

Figure 40: Rio De Janerio Hotel Real Estate Average Daily Rate, Revenue per Available Room in Brazilian Real; and Occupancy Rate in Percentage (%), 2006-2012

Figure 41: Brazil Hotel Real Estate Market Segmentation by Independent Hotels; Hotel and Condo Hotel International Chains; and Hotel and Condo Hotel National Chains in Percentage (%), 2006-2012

Figure 42: Brazil Hotel and Condo Hotel National Chains Real Estate Market Size by Number of Hotels and Number of Rooms in Units, 2006-2012

Figure 43: Brazil Hotel and Condo Hotel National Chains Real Estate Market Future Projections by Number of Hotels and Number of Rooms in Units, 2013-2017

Figure 44: Brazil Hotel and Condo Hotel International Chains Real Estate Market Size by Number of Hotels and Number of Rooms in Units, 2006-2012

Figure 45: Brazil Hotel and Condo Hotel International Chains Real Estate Future Projections by Number of Hotels and Number of Rooms in Units, 2013-2017

Figure 46: Brazil Independent Hotels Real Estate Market Size by Number of Hotels and Number of Rooms in Units, 2006-2012

Figure 47: Independent Hotels Segmentation by Independent hotel chains up to 20 Rooms and Independent hotel chains with more than 20 Rooms in Percentage (%), 2006-2012

Figure 48: Brazil Independent Hotels with more than 20 Rooms Real Estate Market Size by Number of Hotels and Number of Rooms in Units, 2006-2012

Figure 49: Brazil Independent Hotels with more than 20 Rooms Real Estate Future Projections by Number of Hotels and Number of Rooms in Units, 2013-2017

Figure 50: Brazil Independent Hotels up to 20 Rooms Market Size by Number of Hotels and Number of Rooms in Units, 2006-2012

Figure 51: Brazil Independent Hotels up to 20 Rooms' Real Estate Future Projections by Number of Hotels and Number of Rooms in Units , 2013-2017

Figure 52: Future Projections of Independent Hotels by Number of Hotels and Number of Rooms in Units, 2013-2017

Figure 53: Brazil Hotel Real Estate Future Projections by Number of Hotels and Number of Rooms in Units, 2013-2017

Figure 54: Brazil Commercial Real Estate Market Size by Existing Inventory and Net Absorption in Thousand Square Meter, 2006-2012

Figure 55: Brazil Commercial Real Estate Market Segmentation by Offices and Industrial Parks on the basis of Existing Inventory, 2006-2012

Figure 56: Brazil Office Space Real Estate Market Size by Existing Inventory and Net Absorption in Thousand Square Meters, 2006-2012

Figure 57: Brazil Office Space Real Estate Market Segmentation by Sao Paulo and Rio De Janerio in Percentage (%), 2006-2012

Figure 58: Sao Paulo Office Space Real Estate Market Size by Existing Inventory and

Net Absorption in Thousand Square Meters, 2006-2012

Figure 59: Sao Paulo Office Space Real Estate Future Projections by Existing Inventory and Net Absorption in Thousand Square Meters, 2006-2012

Figure 60: Rio De Janerio Office Space Real Estate Market Size by Existing Inventory and Net Absorption in Thousand Square Meters, 2006-2012

Figure 61: Rio De Janerio Office Space Real Estate Market Size by Existing Inventory and Net Absorption in Thousand Square Meters, 2006-2012

Figure 62: Brazil Industrial Parks Real Estate Market Size by Existing Inventory and Net Absorption in Thousand Square Meters, 2006-2012

Figure 63: Brazil Industrial Parks Real Estate Future Projections by Existing Inventory and Net Absorption in Thousand Square Meters, 2006-2012

Figure 64: Brazil Commercial Real Estate Market Future Projections by Existing Inventory and Net Absorption in Thousand Square meters, 2006-2012

Figure 65: Brazil Real Estate Major Developers Market Share of in Percentage (%), 2006-2012

Figure 66: Cyrela Total Revenue in USD Million, 2006-2012

Figure 67: PDG Total Revenue in USD Million, 2006-2012

Figure 68: MRV Engenharia Total Revenue in USD Million, 2006-2012

Figure 69: Gafisa's Total Revenue in USD Million, 2006-2012

Figure 70: Rossi Residencial Total Revenue in USD Million, 2006-2012

Figure 71: Brookfield S.A. Total Revenue in USD Million, 2006-2012

Figure 72: Even Construccoes Total Revenue in USD Million, 2006-2012

Figure 73: BR Malls Total Revenue in USD Million, 2006-2012

Figure 74: Multiplan Total Revenue in USD Million, 2006-2012

Figure 75: Aliansce Total Revenue in USD Million, 2006-2012

Figure 76: Brazil Real Estate Market Future Projections by Value in USD million, 2013-2017

Figure 77: Total Population in Million, 2006-2017

Figure 78: Personal Disposable Income in USD Million, 2006-2017

Figure 79: Gross Domestic Product at Current Prices in USD Million, 2006-2017

Figure 80: Real Estate Credit in USD Million, 2006-2017

Figure 81: Housing Deficit in Million, 2006-2017

Figure 82: Inbound Tourists in Million, 2006-2017

About

Brazil Retail Real Estate Market Size by New Shopping Centers Introduced and Gross Leasable Area, 2006-2012

The size of the retail real estate industry in Brazil in 2012 stood at ~ units in terms of the number of new shopping centers introduced. The market has grown at a CAGR of ~% during 2006-2012 with the introduction of just ~ shopping centers in the year 2006 in the country. The highest growth was observed in years 2011 and 2012 ...

The total operating shopping centers in Salvador stood at ~ units in 2012 from 8 units in the year 2006 registering a CAGR of ~ during the year 2006-2012. The City's retail real estate stood at ~unit in terms of new shopping centers in the year 2012 with no shopping centre introduced in 2006.

The gross leasable area of total malls during 2013-2017 is expected to grow at a CAGR of ~% registering an increase of ~ Sq.m in 2017 from ~ Sq.m in 2012. It is estimated to reach ~ Sq.m in 2013 at an annual growth rate ...

Brazil Hotel Real Estate Market Segmentation by Types of Hotels, 2006-2012

The Hotel Real Estate of the Country is mainly segmented into three types of hotels which are Independent Hotels; Hotel and Condo Hotel International Chains; and Hotel and Condo Hotel National Chains. The Independent Hotels are largest contributing segment to the Country's Hotel Real estate which contributes ~%. Following the Independent Hotels are Hotel and Condo Hotel International Chains which contribute ~% and lastly is the segment ...

The market is expected to witness the development of ~ hotels in the year 2013 with ~ Rooms across all the segments of hotels. The gap in the number of hotels across the country...During the period of 2013-2017 the Number of Hotels will grow at a CAGR of ~% and the Number of Rooms will grow at a CAGR ~% during 2012-2017. The Number of Hotels in 2017 is estimated to reach ~ units while the Number of Rooms in 2017 is expected to reach ~ units.

Brazil Commercial Real Estate Market Segmentation by Offices and Industrial Parks

The largest contributor to the Segment on the basis of Existing Inventory has been Industrial Parks with a percentage contribution of ~% in the year 2012 followed by Office space segment with a contribution of ~%. Despite being of the largest contributor the industrial sector of the country faces the problem of shortfall in the supply of the industrial parks. However in context of demand the office spaces dominate ...

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