

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

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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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