

# Australia Real Estate Report Q3 2014

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## Abstracts

**BMI View:** While Australia's commercial real estate market remains an attractive destination for local and regional investors, the sector has not been immune from the slowdown in the wider economy, with weakened business sentiment and rising unemployment in particular having a negative impact on demand for office and retail space. Nevertheless, we believe that the worst of the downturn is over with rental rates beginning to grow over H214 and into 2015.

The Q3 2014 Australia Real Estate report examines the commercial office, retail, industrial and construction segments in the context of a sector with muted growth prospects in the medium term. With a focus on the principal cities of Melbourne, Sydney, Brisbane and Perth, the report covers rental market performance in terms of rates and yields over the past 24 months and looks at the prospects for the sector during 2014 and 2015.

With the Australian economy experiencing the fall-out from China's economic rebalancing, the immediate outlook for the sector in terms of both rental rates and yields is one of stabilisation rather than growth. Job uncertainty and weak business sentiment are expected to continue to undermine demand for office space in the country's major cities with vacancy rates across the country currently averaging around 9%. Meanwhile, a lack of modern retail stock should help to maintain a relatively healthy supply-demand balance in the retail segment, despite slower growth in consumer spending which is forecast this year. The industrial segment is also relatively undersupplied with demand expected to be boosted by an acceleration in export growth following the depreciation of the Australian dollar in H114.

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