

Hong Kong Real Estate Report Q3 2014

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Abstracts

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BMI View: Despite suffering the effects of the financial downturn, Hong Kong remains one of the most competitive commercial real estate markets in the world, with few locations able to rival the city in terms of price and demand for prime office, retail and industrial space. In 2014, a buoyant local economy and limited supply are expected to maintain a steady market balance, though we caution that the sector faces a number of potential headwinds, resulting from the slowdown in neighbouring China. The report, with a focus on Hong Kong's commercial office, retail and industrial sectors, covers rental market performance in terms of rates and yields over the past few years, as well as providing rental rate and net yield forecasts to 2018. BMI's in-depth analysis for each of these sectors also incorporates reports fed back to us from our in-country research teams and provides a snap-shot of the health of each market.

Robust growth in the Hong Kong economy will provide the platform for further stabilisation in the country's commercial real estate market after a period of fluctuating demand and rental rates following the 2008/09 financial crisis. Real GDP growth was estimated at 2.8% in 2013 and the economy is forecast to grow by 3.0% over 2014. Over the forecast period to 2018, average growth of 3.6% is expected, bolstered by spending growth from tourist arrivals and a highly urbanised population.

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