

Indonesia Real Estate Report Q2 2014

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Abstracts

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BMI View: We believe a large, youthful and growing population and a strong economic trajectory give Indonesia's real estate sector strong fundamentals which bode exceptionally well over the long term. However, there are a number of short-term risks which will subdue yield growth over the coming quarters. Increased interest rates to combat wider economic issues will see borrowing costs increases, subsequently subduing consumer demand in the retail sector. Additionally, office and factory expansion plans under consideration will increasingly put on hold as the increased costs make projects more expensive for companies to execute. Given the external risks to Indonesia's economy, although not as pertinent as some of its regional peers; we expect that rents will remain broadly neutral as landlords fear increasing rents may drive out businesses. We do, however, see opportunities for investors in new property, who may capitalise on lower prices, especially in the government's special economic zones.

Indonesia's real estate potential growth areas are driven by increasing activity on the part of international investors, favourable fundamentals and the potential of the archipelago's consumption-driven economy, alongside corporate growth strategies looking to both domestic and international channels for growth.

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