

Israel Real Estate Report Q2 2014

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Abstracts

BMI View: We believe that the real estate sector in Israel will remain stable across all subsectors due to the consistent but slow growth of the Israeli economy. We have predicted some small changes, including a 5-10% rental increase in the Jerusalem office sector due to overcrowding in the main business area, as well as a 4-5% decrease in rental rates for the Haifa industrial market due to an excess of available space.

Commercial real estate expansion is dependent upon a healthy macroeconomic environment. We project real GDP growth in Israel to come in at 3.8% in 2014. Although the beginning of natural gas production in the Tamar gas field will ensure that growth accelerates compared with prior years, the domestic economy will remain in a soft patch, with austerity measures hitting private consumption hard. Poor economic growth will adversely impact the sector as it serves to dampen both property fundamentals and capital markets placing downwards pressure upon tenant retentions, rental growth, yields, development activity, financing and asset values.

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