

# Japan Real Estate Report Q2 2014

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## Abstracts

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BMI View: Japan's commercial real estate sector remains a regional outperformer, bolstered by substantial foreign capital inflows and ultra-loose monetary policy. However, with consumer spending levels and economic growth starting to show signs of retreating, we caution that the sector is likely to experience a more moderate growth trend in 2014. 2014 is shaping up to be a more sedate year for Japan's real estate market as the sector reacts to a more conservative business environment. The rapid economic growth witnessed in H113 has already started to slow with Q313 GDP growth estimated at 1.1% quarter-on-quarter (q-o-q), compared with the 3.5% q-o-q pace recorded in Q213.

Consumer spending growth is also expected to trend below the high levels witnessed in 2013 the cost of food and energy rises, eroding household incomes. Indeed, we expect the pace of growth in private consumption to continue in its downward trajectory, and even fall into contraction in Q214, given that the consumption tax hike to 8% from the current 5% is set to be implemented in April 2014.

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