

Mexico Real Estate Report Q3 2014

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Abstracts

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BMI View: We are forecasting Mexico's commercial real estate industry to show a consistent, yet unremarkable performance over 2014, with rental rates across all sub-sectors expected to remain flat as the standoff between the market's long-term potential and macroeconomic headwinds continues. The country has one of the most stable growth outlooks in the region and an operating environment which is seeing tangible improvements and rising longer-term prospects. Nevertheless, the poor financial condition of many of the country's residential developers is a threat. As such, we are forecasting growth to remain flat in the sector in 2014, with the only obvious signs of growth coming in the office and retail real estate sectors in Tijuana.

To the detriment of the near-term growth of Mexico's real estate sector, the macroeconomic backdrop in Mexico is not as strong as it once was. Real GDP growth in 2013 arrived even lower than our expectations, at 1.1% against our forecast for 1.6%, due to a weaker-than-expected performance by the manufacturing and construction sectors in recent months. However, we forecast an acceleration in growth in 2014 to 3.1%, driven by an improvement in private consumption and investment in light of the government's ongoing reform drive and stronger US demand.

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