

# Russia Real Estate Report Q4 2014

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## Abstracts

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**BMI View:** While we believe that there is significant potential in the long term in Russia's commercial real estate market, in the short term political and economic concerns will limit investment and growth in the sector. A history of undersupply has pushed rental rates up, and Moscow in particular has high rental rates, something we believe will continue for the foreseeable future.

Slow economic growth at present, with GDP growth only expected to reach 2.7% in 2017, will limit investment in commercial real estate in the medium term. Meanwhile, consumer and business confidence have both been dented by rising inflation and interest rates, which will have an impact on demand for and investment in commercial real estate. In international terms, the ongoing crisis in Ukraine and rouble volatility has led to investor uncertainty, and although we do not expect interest to dry up, we do expect to see some caution, which could reduce demand and delay projects. However, in the longer term, a history of significant undersupply across the market, and a notable lack of grade A space, provides significant scope for development across the country in all three sub-sectors. This will be augmented by economic development in the regions, and demand from Russia's rising middle classes.

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