

South Africa Real Estate Report Q2 2014

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Abstracts

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BMI View: We believe that the real estate sector in South Africa will remain stable throughout 2014 because of a lack of change in the supply demand dynamic and enough new projects in the pipeline to satisfy strong demand. Net yields will remain consistent in all sectors, and we will see only a couple changes in rental rates. The sector does face some headwinds in the forms of faltering macroeconomic conditions, a volatile currency, and inflation concerns, but the country is still one of the brightest commercial real estate prospects in the region.

South Africa's economic prospects have deteriorated amid rapid currency depreciation and rising tensions in the critical mining sector. We are forecasting real GDP growth of 3.3% for 2014, with risks weighted firmly to the downside. Poor economic growth affects the sector as it dampens both property fundamentals and capital markets, putting downwards pressure upon tenant retentions, rental growth, yields, development activity, financing and asset values. In general, demand is stable as South Africa due to its position as an attractive regional base, resulting in high occupancy rates and increasing rents. Nevertheless the development pipeline remains well below pre-2010 levels before the country hosted the World Cup. As such, we expect favourable absorption/completion dynamics will buoy the leasing sector in the short term, but unless development activity picks up this indicator will serve as a hindrance to long term growth.

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