

United States Real Estate Report Q3 2014

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Abstracts

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BMI maintains a bullish view on the US's Commercial Real Estate sector. There are several factors underpinning BMI's positive outlook for the upcoming quarters. Firstly, providing key support for the real estate sector is the growth of the energy and technology sectors. These industries are leading the demand for office real estate. Secondly, supporting the retail segment broad trends supporting stronger real personal consumption expenditure (PCE) growth remain in place, and as such we expect real PCE growth to continue to accelerate in 2014. Thirdly, the improved outlook for the economy and recovering unemployment figures will support all three real estate segments. Jones Lang LaSalle reports that while 1.7mn office jobs were lost during the recession, 2.8mn were regained during the recovery. Areas such as San Francisco, Texas and the Sun Belt are recording the strongest job growth numbers at 4%.

Commercial real estate (CRE) expansion is dependent on a healthy macroeconomic environment. During Q413 we revised down our estimate for 2013 US real GDP growth from 2.1% to 1.8%, but we maintain that the US economy is gaining steam and is set for more rapid expansion. We have upgraded our 2014 real GDP growth forecast from 2.7% to 2.8% with growth set to average 2.4% a year from 2013-2018. A major factor in this improving economic outlook has been the improvement in US job creation and we have revised down our end-2013 and end-2014 unemployment rate forecasts from 7.5% and 7.2% to 7.2% and 6.8% respectively on the back of stronger than expected job gains.

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