

CEE Property Investment MarketView

January 2014

CBRE Global Research and Consulting

CEE PROPERTY INVESTMENT VOLUME
+31% Y-O-Y

SECOND STRONGEST POST-CRISIS YEAR ON INVESTMENT MARKET CEE

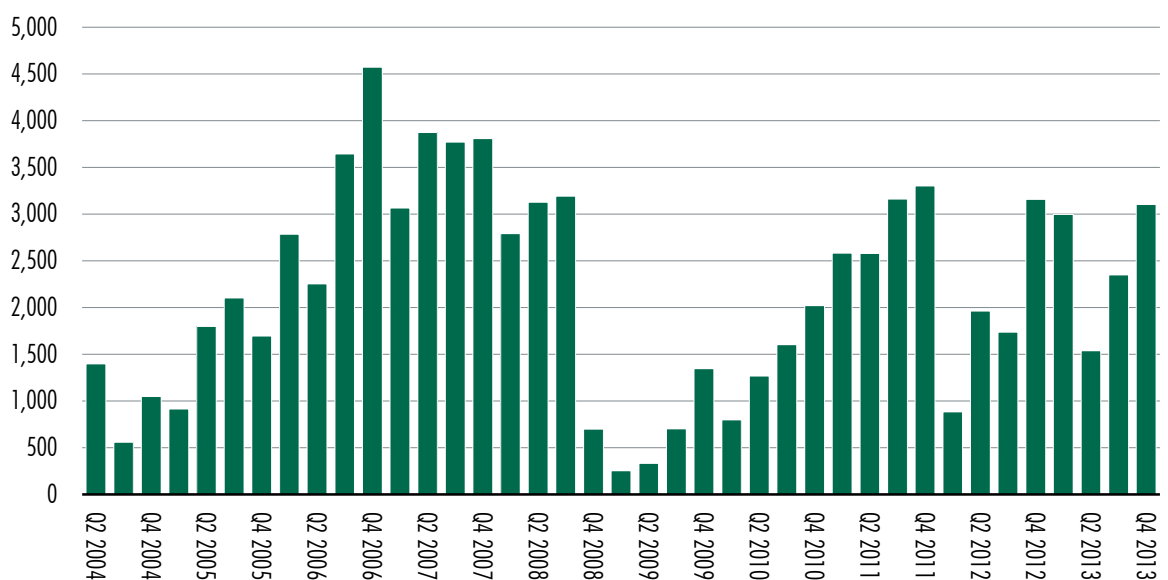
Hot Topics

- Investment market up 31% Y-o-Y
- All of CEEs major markets see substantial increases to volumes.
- Russian volumes increase by 40% Y-o-Y.
- CZ investment volumes increase 68% Y-o-Y
- Polish investment volumes increase by 9% Y-o-Y.
- HU and RO have also shown signs of recovery and investment volume increases.

Table 1: CEE Investment Market by Country (€ mln)

Market Turnover	2012	2013	Change Y-o-Y
Bulgaria	9	23	
Croatia	43	67	
Czech Republic	605	1,015	+68%
Hungary	121	225	
Poland	2,720	2,970	+9%
Romania	185	229	
Russia	3,723	5,201	+40%
Slovak Republic	16	250	
Ukraine	249	41	
Central & Eastern Europe	7,671	10,021	+31%

Chart 1: CEE Investment Market (€ mln)



Source: CBRE Research

CONTACTS

For more information about this MarketView, please contact:

CEE Research & Consulting

Jos Tromp

Senior Director

Head of CEE Research & Consulting

t: +49 (0) 89 2420 6018

e: jos.tromp@cbre.com

CEE & Poland

Mike Atwell

Senior Director

Head of CEE Capital Markets

t: +48 22 544 8070

e: mike.atwell@cbre.com

SEE & Hungary

Tim O'Sullivan

Director

Capital Markets

t: +36 1 374 3040

e: tim.o'sullivan@cbre.com

Czech Republic

Jeff Alson

Head of Capital Markets

Capital Markets

t: +420 224 814 060

e: jeff.alsen@cbre.com

Slovakia

Tomas Jandik

Associate Director

Capital Markets

t: +420 221 711 023

e: tomas.jandik@cbre.com

Russia

Ivan Gubochkin

Managing Director

Capital Markets

t: +7 495 258 3990

e: ivan.gubochkin@cbre.com

+ FOLLOW US



GOOGLE+



FACEBOOK



TWITTER

Global Research and Consulting

This report was prepared by the CBRE CEE Research & Consulting Team which forms part of CBRE Global Research and Consulting – a network of preeminent researchers and consultants who collaborate to provide real estate market research, econometric forecasting and consulting solutions to real estate investors and occupiers around the globe.

Disclaimer

CBRE GmbH confirms that information contained herein, including projections, has been obtained from sources believed to be reliable. While we do not doubt their accuracy, we have not verified them and make no guarantee, warranty or representation about them. It is your responsibility to confirm independently their accuracy and completeness. This information is presented exclusively for use by CBRE clients and professionals and all rights to the material are reserved and cannot be reproduced without prior written permission of CBRE.