

European residential market overview | Q3/2022

	%	€	🏠
AUSTRIA			
Vienna	↗ 3.25	€13.50	€6,600
Graz	↗ 3.75	€10.00	€4,150
Innsbruck	↗ 3.20	€18.00	€7,600
Salzburg	↗ 3.20	€15.50	€7,400

	%	€	🏠
BELGIUM			
Antwerp	↗ 3.60	€11.50	€4,000
Liège	↗ 4.30	€9.50	€2,400
Brussels	↗ 3.50	€14.00	€4,800

	%	€	🏠
CZECH REPUBLIC			
Prague	↗ 3.40	€13.10	€3,840
Brno	↗ 4.60	€9.80	€2,900

	%	€	🏠
DENMARK			
Aarhus	↗ 3.50	€18.00	€5,250
Copenhagen	↗ 3.25	€22.50	€6,800

	%	€	🏠
ESTONIA			
Tallinn	↗ 5.20	€13.80	€2,190

	%	€	🏠
FINLAND			
Helsinki (Metropolitan area)	↗ 3.20	€21.90	€5,290
Turku	↗ 3.90	€15.20	€3,520
Tampere	↗ 3.80	€16.00	€3,740
Oulu	↗ 4.50	€13.90	€2,770
Jyväskylä	↗ 4.60	€14.60	€2,450
Lahti	↗ 4.90	€13.80	€1,940

	%	€	🏠
FRANCE			
Paris	↗ 2.20	€28.80	€10,100
Nantes	↗ 3.90	€13.70	€3,900
Montpellier	↗ 3.80	€14.40	€3,260
Lyon	↗ 3.10	€16.90	€5,360
Bordeaux	↗ 3.50	€15.90	€4,800
Toulouse	↗ 3.80	€13.60	€3,710
Marseille	↗ 3.40	€14.40	€3,290
Nice	↗ 3.50	€18.50	€4,900

	%	€	🏠
GERMANY			
Berlin	↗ 2.40	€14.70	€5,640
Cologne	↗ 3.05	€13.75	€5,100
Dusseldorf	↗ 2.90	€12.25	€5,240
Frankfurt	↗ 2.80	€16.70	€7,290
Hamburg	↗ 2.70	€14.30	€6,460
Munich	↗ 2.20	€21.10	€9,870
Stuttgart	↗ 3.10	€16.10	€5,690

	%	€	🏠
IRELAND			
Dublin	↗ 4.00	€26.10	€5,500
Cork	↗ 4.50	€18.80	€4,250

	%	€	🏠
LATVIA			
Riga	↗ 5.35	€10.00	€1,850

	%	€	🏠
LITHUANIA			
Vilnius	↗ 5.40	€11.00	€1,850

	%	€	🏠
LUXEMBOURG			
Luxembourg	↗ 3.20	€30.00	€12,000

	%	€	🏠
NETHERLANDS			
Amsterdam	↗ 3.20	€25.00	€8,250
The Hague	↗ 4.00	€17.70	€5,100
Rotterdam	↗ 4.00	€15.50	€5,500
Eindhoven	↗ 4.15	€16.00	€5,000
Utrecht	↗ 3.75	€20.50	€6,000

	%	€	🏠
NORWAY			
Oslo	↗ 2.50	€26.00	€6,920

	%	€	🏠
POLAND			
Krakow	↗ 5.25	€11.25	€2,670
Wroclaw	↗ 5.25	€13.40	€2,360
Warsaw	↗ 5.00	€14.20	€3,010

	%	€	🏠
PORTUGAL			
Lisbon	↗ 4.50	€15.70	€5,000
Porto	↗ 4.75	€12.30	€3,130

	%	€	🏠
SPAIN			
Madrid	↗ 3.25	€16.30	€3,990
Seville	↗ 4.50	€10.30	€2,090
Malaga	↗ 4.50	€11.00	€2,320
Barcelona	↗ 3.50	€17.80	€4,120

	%	€	🏠
SWEDEN			
Stockholm	↗ 1.35	€12.80	€7,790
Malmo	↗ 2.30	€12.00	€3,420
Gothenborg	↗ 2.10	€12.90	€5,225

	%	€	🏠
SWITZERLAND			
Zurich	↗ 1.40	€28.00	€13,920
Bern	↗ 1.70	€20.10	€8,970
Geneva	↗ 1.60	€31.00	€15,430

	%	€	🏠
UNITED KINGDOM			
London	↗ 3.50	€32.25	€13,750
Birmingham	↗ 4.25	€20.20	€4,120
Manchester	↗ 4.00	€23.10	€4,810
Leeds	↗ 4.25	€19.10	€3,900

	%	€	🏠
EUROPEAN AVERAGE			
	↗ 3.60	€16.83	€5,309

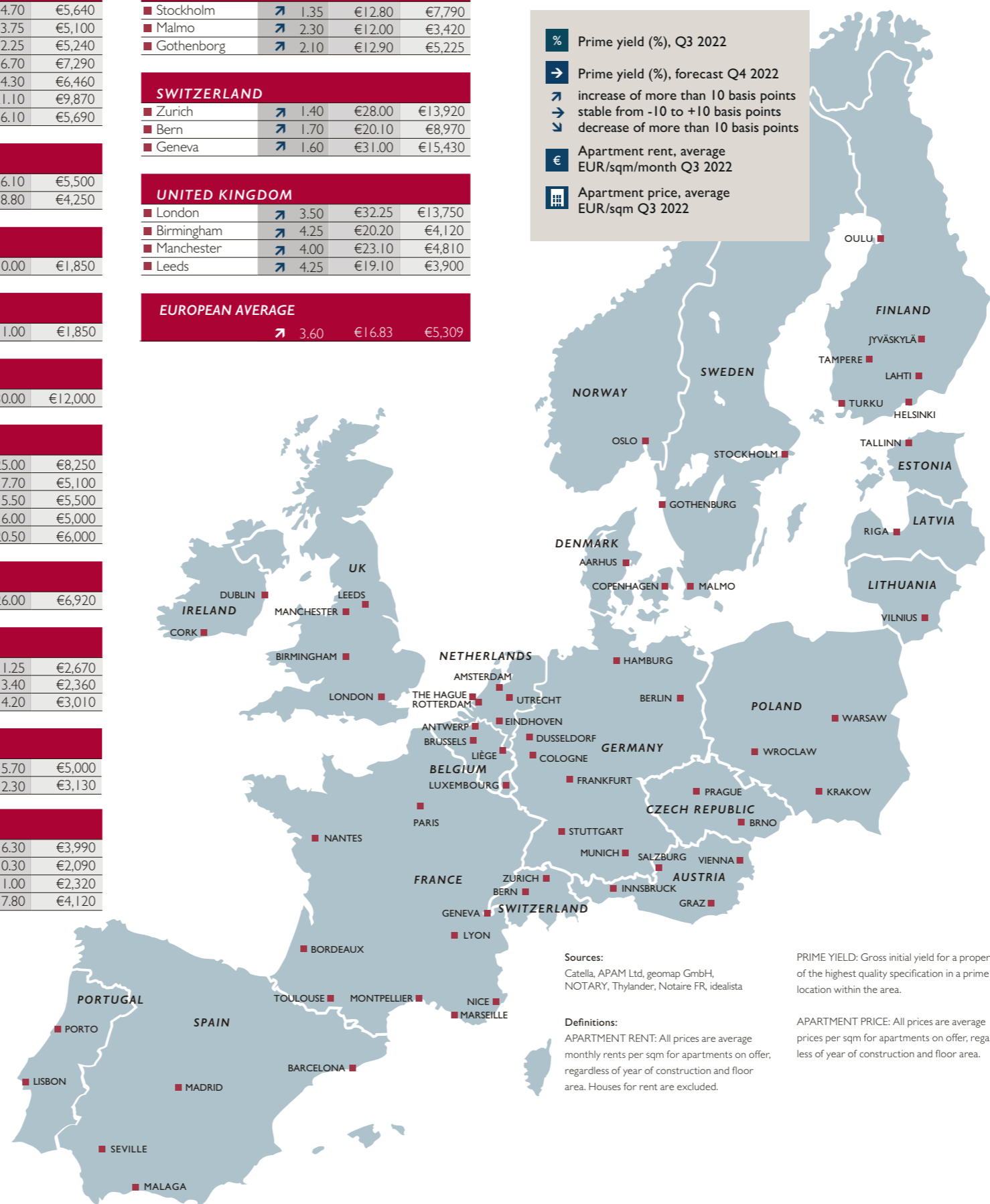
% Prime yield (%), Q3 2022

→ Prime yield (%), forecast Q4 2022

- ↗ increase of more than 10 basis points
- stable from -10 to +10 basis points
- ↘ decrease of more than 10 basis points

€ Apartment rent, average EUR/sqm/month Q3 2022

🏠 Apartment price, average EUR/sqm Q3 2022

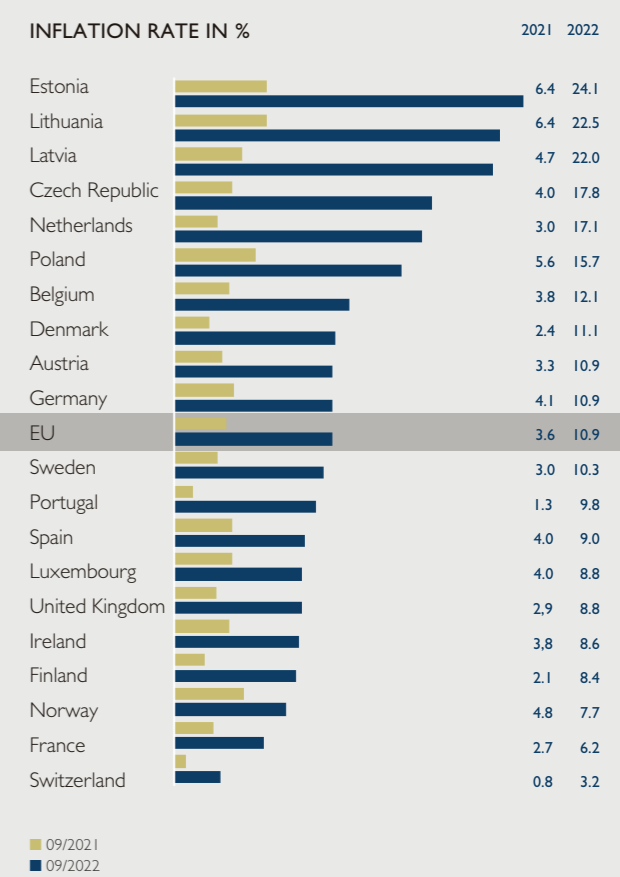
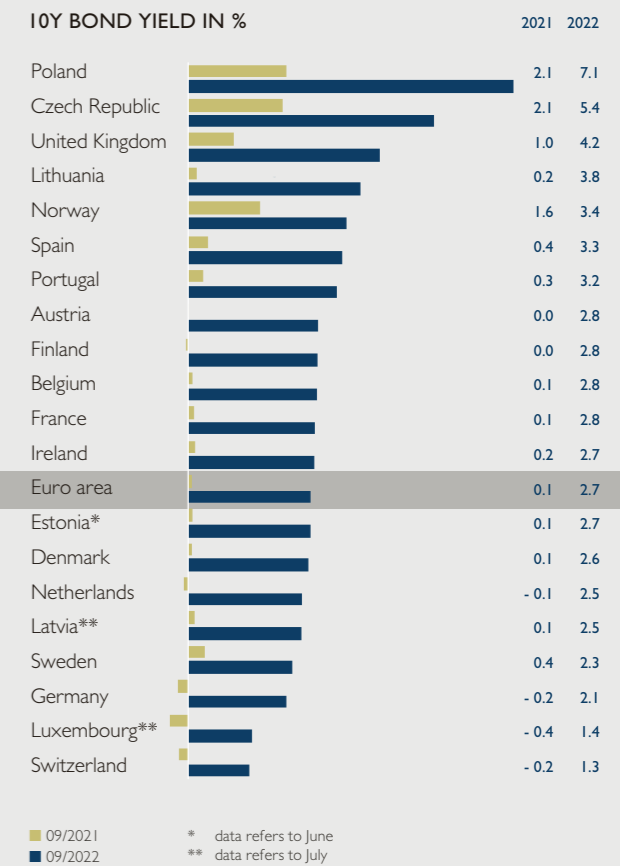


Sources:
Catella, APAM Ltd, geomap GmbH, NOTARY, Thylander, Notaire FR, idealista

Definitions:
APARTMENT RENT: All prices are average monthly rents per sqm for apartments on offer, regardless of year of construction and floor area. Houses for rent are excluded.

PRIME YIELD: Gross initial yield for a property of the highest quality specification in a prime location within the area.

APARTMENT PRICE: All prices are average prices per sqm for apartments on offer, regardless of year of construction and floor area.



About Catella

Catella is a leading specialist in property investments and fund management, with operations in 13 countries. The group has EUR 13 billion in assets under management. Catella is listed on Nasdaq Stockholm in the Mid Cap segment.

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Source: eurostat; Office for National Statistics