

# European residential market overview Q3 2020

	%	€	🏠
<b>AUSTRIA</b>			
■ Vienna	3.25	13.60 €	5,160 €
■ Innsbruck	3.30	16.70 €	6,400 €
■ Salzburg	3.30	13.90 €	5,850 €
■ Graz	3.65	11.40 €	3,750 €

	%	€	🏠
<b>BELGIUM</b>			
■ Brussels	3.40	13.00 €	4,500 €
■ Antwerp	3.70	10.00 €	3,850 €
■ Liège	3.90	9.00 €	2,300 €

	%	€	🏠
<b>CZECH REPUBLIC</b>			
■ Prague	3.20	12.40 €	3,350 €
■ Brno	4.30	9.60 €	2,560 €

	%	€	🏠
<b>DENMARK*</b>			
■ Copenhagen	3.25	20.50 €	5,863 €
■ Aarhus	3.75	16.50 €	4,607 €

	%	€	🏠
<b>ESTONIA</b>			
■ Tallinn	5.00	11.00 €	2,100 €

	%	€	🏠
<b>FINLAND</b>			
■ Helsinki (Metropolitan area)	3.40	20.20 €	4,951 €
■ Turku	4.10	14.40 €	3,187 €
■ Tampere	4.10	15.30 €	3,436 €
■ Oulu	4.70	13.30 €	2,408 €
■ Jyväskylä	4.70	14.40 €	2,412 €
■ Lahti	5.00	13.50 €	1,938 €

	%	€	🏠
<b>FRANCE</b>			
■ Paris	2.70	28.60 €	10,540 €
■ Bordeaux	3.70	13.70 €	4,446 €
■ Marseille	3.80	12.20 €	2,929 €
■ Lyon	3.80	13.30 €	4,969 €
■ Nice	3.90	15.50 €	4,422 €
■ Montpellier	4.20	12.90 €	2,990 €
■ Toulouse	4.20	12.00 €	3,363 €
■ Nantes	4.30	11.70 €	3,461 €

	%	€	🏠
<b>GERMANY</b>			
■ Munich	2.20	20.50 €	8,800 €
■ Berlin*	2.30	11.90 €	5,000 €
■ Hamburg	2.70	13.00 €	5,850 €
■ Frankfurt	2.90	16.00 €	6,600 €
■ Düsseldorf	3.20	12.00 €	4,650 €
■ Cologne	3.40	12.80 €	4,500 €
■ Stuttgart	3.00	15.60 €	5,090 €

	%	€	🏠
<b>IRELAND</b>			
■ Dublin	3.60	25.90 €	5,262 €
■ Cork	4.00	17.20 €	3,900 €

	%	€	🏠
<b>LATVIA</b>			
■ Riga	5.40	10.00 €	1,650 €

	%	€	🏠
<b>LITHUANIA</b>			
■ Vilnius	5.40	10.50 €	1,750 €

	%	€	🏠
<b>LUXEMBOURG</b>			
■ Luxembourg	3.00	25.00 €	10,000 €

	%	€	🏠
<b>NETHERLANDS</b>			
■ Amsterdam	3.10	23.00 €	7,000 €
■ Utrecht	3.60	20.50 €	5,400 €
■ The Hague	3.90	18.30 €	4,650 €
■ Rotterdam	3.90	15.50 €	4,750 €
■ Eindhoven	4.00	15.00 €	4,400 €

	%	€	🏠
<b>NORWAY</b>			
■ Oslo	3.10	25.60 €	6,300 €

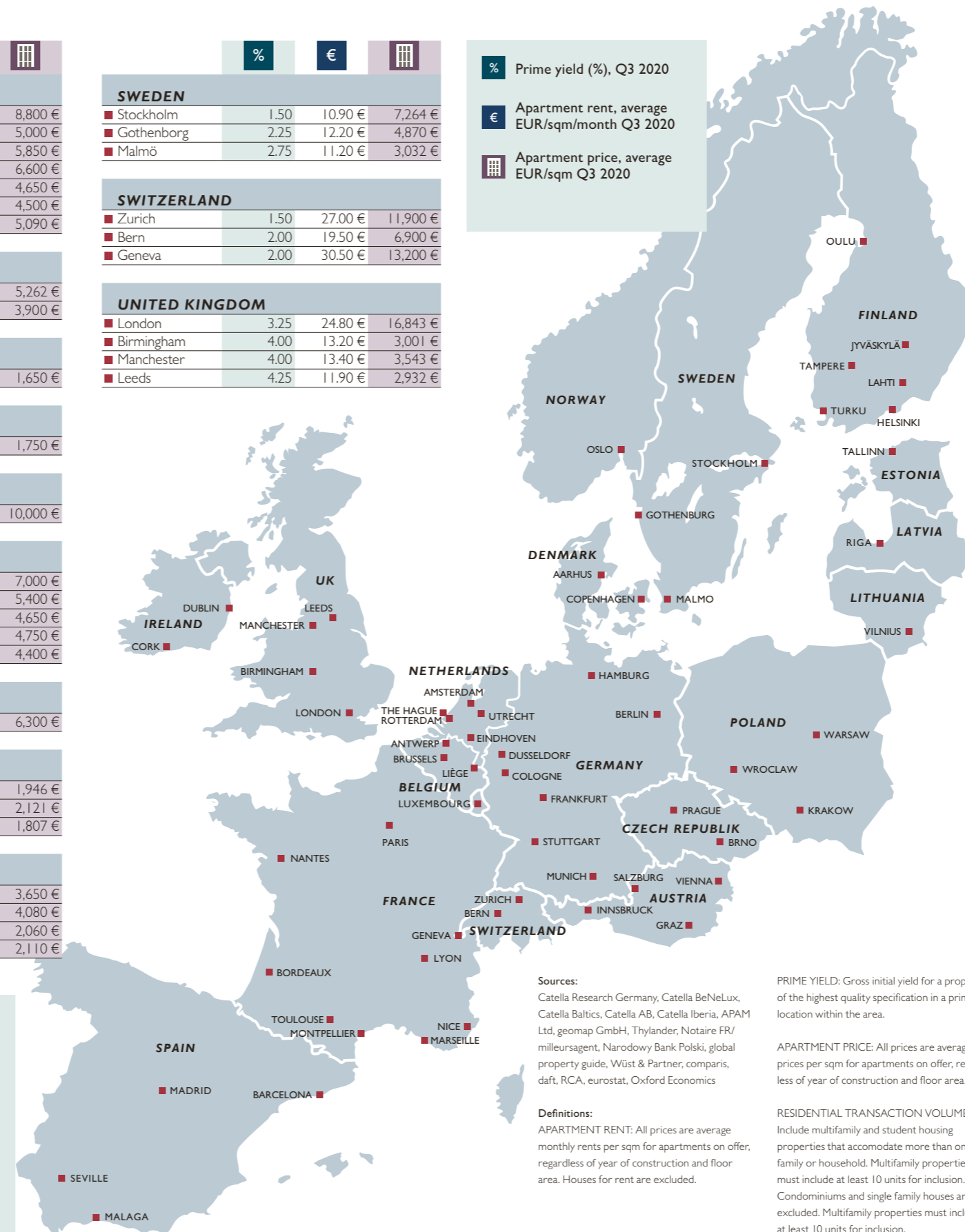
	%	€	🏠
<b>POLAND</b>			
■ Krakow	5.10	11.00 €	1,946 €
■ Warsaw	5.20	13.20 €	2,121 €
■ Wroclaw	5.90	11.90 €	1,807 €

	%	€	🏠
<b>SPAIN</b>			
■ Madrid	3.75	15.70 €	3,650 €
■ Barcelona	4.15	15.70 €	4,080 €
■ Seville	4.40	10.00 €	2,060 €
■ Malaga	4.50	9.90 €	2,110 €

	%	€	🏠
<b>SWEDEN</b>			
■ Stockholm	1.50	10.90 €	7,264 €
■ Gothenburg	2.25	12.20 €	4,870 €
■ Malmö	2.75	11.20 €	3,032 €

	%	€	🏠
<b>SWITZERLAND</b>			
■ Zurich	1.50	27.00 €	11,900 €
■ Bern	2.00	19.50 €	6,900 €
■ Geneva	2.00	30.50 €	13,200 €

	%	€	🏠
<b>UNITED KINGDOM</b>			
■ London	3.25	24.80 €	16,843 €
■ Birmingham	4.00	13.20 €	3,001 €
■ Manchester	4.00	13.40 €	3,543 €
■ Leeds	4.25	11.90 €	2,932 €



**% Prime yield (%), Q3 2020**

**€ Apartment rent, average EUR/sqm/month Q3 2020**

**🏠 Apartment price, average EUR/sqm Q3 2020**

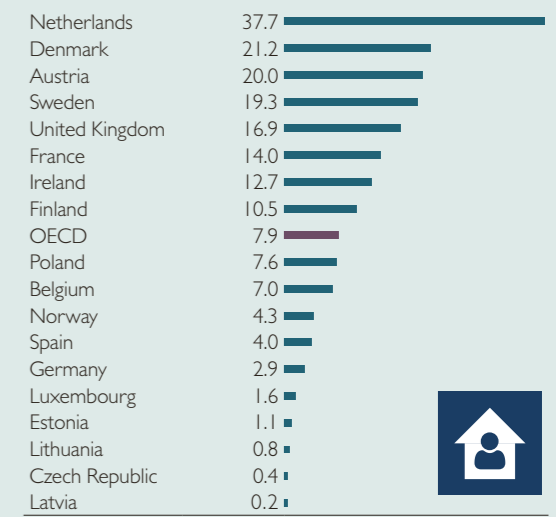
**Sources:**  
Catella Research Germany, Catella BeNeLux, Catella Baltics, Catella AB, Catella Iberia, APAM Ltd, geomap GmbH, Thylander, Notaire FR/ milleursagent, Narodowy Bank Polski, global property guide, Wüst & Partner, comparis, daft, RCA, eurostat, Oxford Economics

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

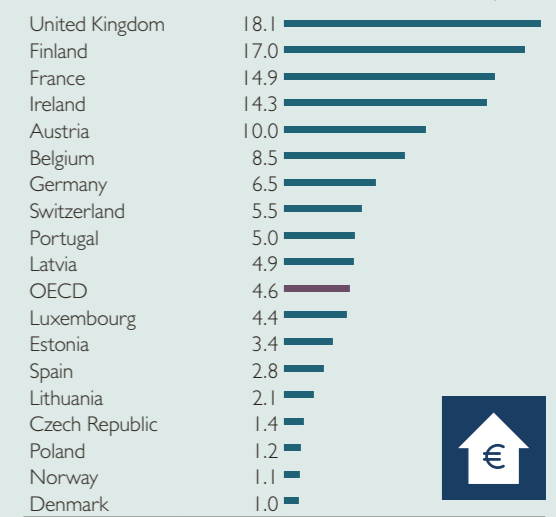
**APARTMENT PRICE:** All prices are average prices per sqm for apartments on offer, regardless of year of construction and floor area.

**RESIDENTIAL TRANSACTION VOLUME:** Include multifamily and student housing properties that accommodate more than one family or household. Multifamily properties must include at least 10 units for inclusion. Condominiums and single family houses are excluded. Multifamily properties must include at least 10 units for inclusion.

## SOCIAL RENTAL HOUSING STOCK IN %



## RENT AT REDUCED/SUBSIDISED PRICE IN %



## RESIDENTIAL TRANSACTION VOLUME Q1-3 2020 IN EUR MILLION



Catella is a pan-European organization with strong local expertise and access to global capital. A leading specialist in property and alternative investments with operations in 14 countries. Our vision is to be the preferred European partner for investors – together shaping the future in property and alternative investments. The operations are divided into three business areas that cooperate closely throughout Europe, as well as locally in each market, to develop customized solutions for our customers.

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