

*This live webinar will begin shortly...*

# ASIA PACIFIC CAPITAL FLOWS

2020 Q1



# AGENDA

## **PART 1.** CHINA OUTBOUND & ASIA PACIFIC CAPITAL FLOWS



**James Shepherd**

Head of Research,  
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**Catherine Chen**

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## **PART 2.** Q&A



**Dennis Yeo**

Head, Investor Services,  
APAC



**Hideaki Suzuki**

Director, Research,  
Japan



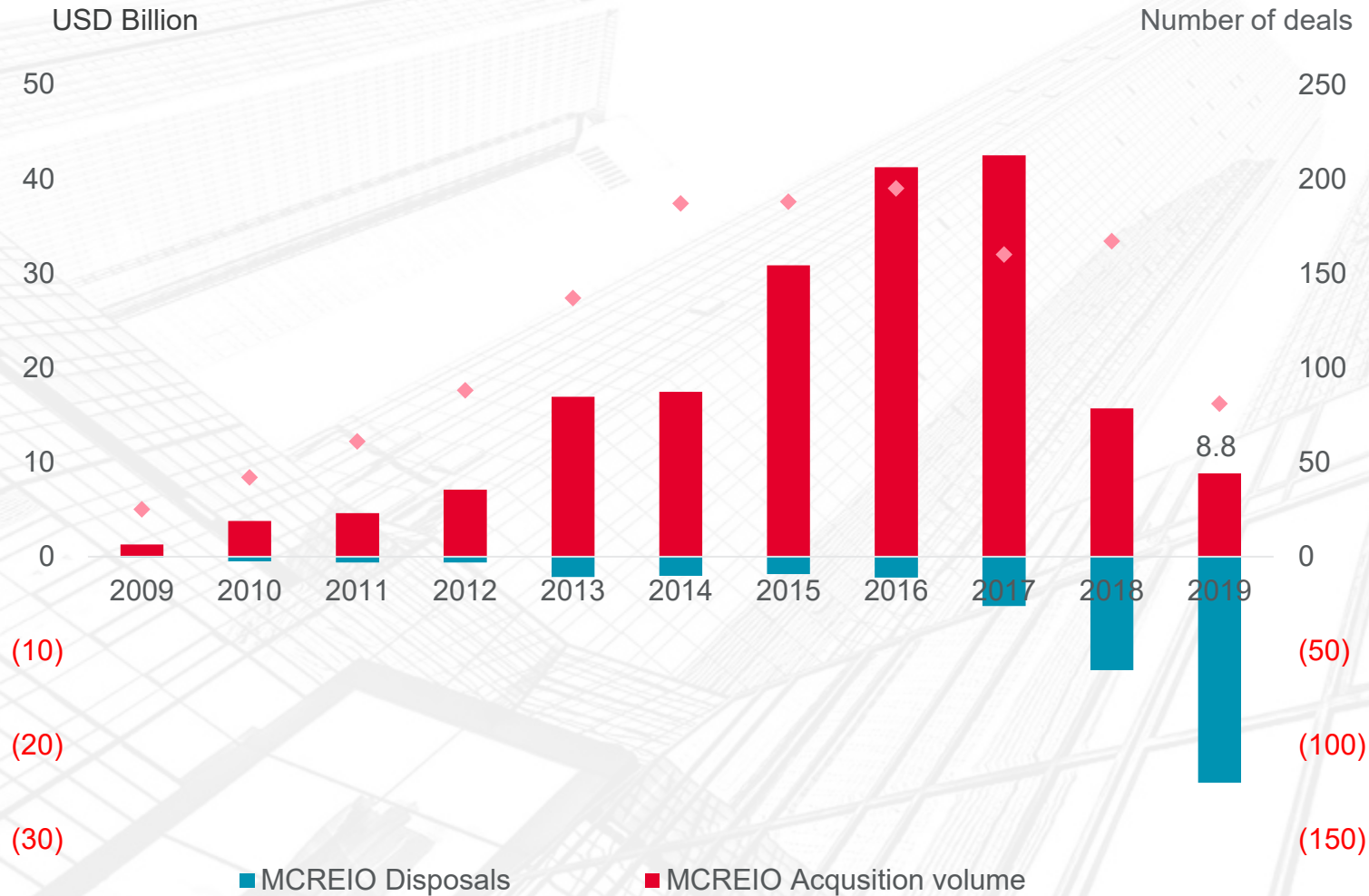
**Catherine Chen**

Director, Research,  
Greater China

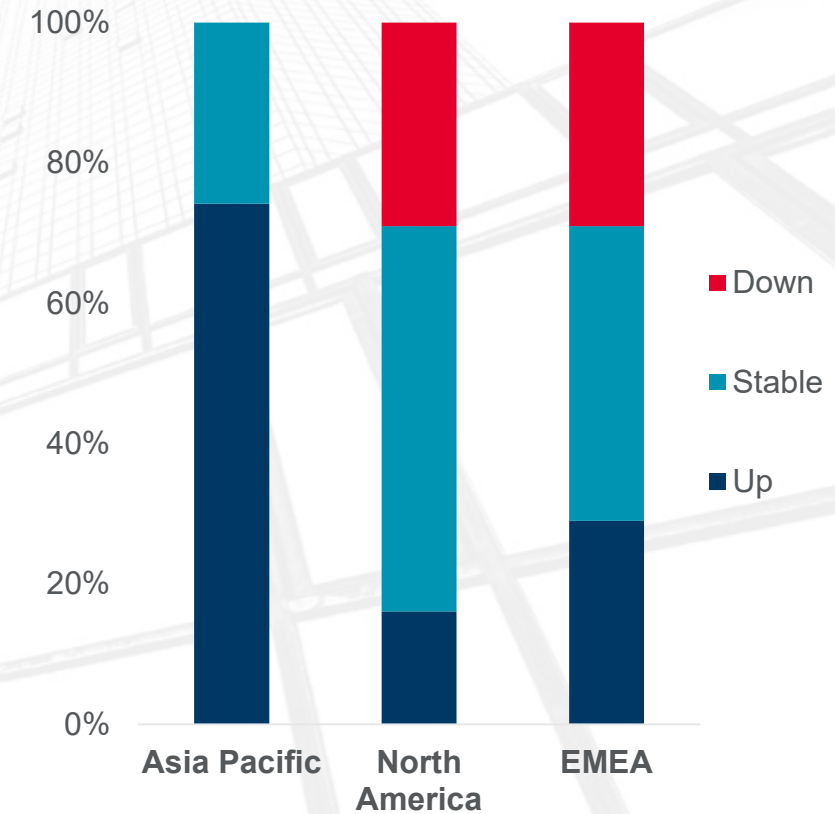
# INTRODUCTION

## Outbound Real Estate Investment From Mainland China

**Fig. 1: Annual Mainland Chinese Outbound Transaction Volume**

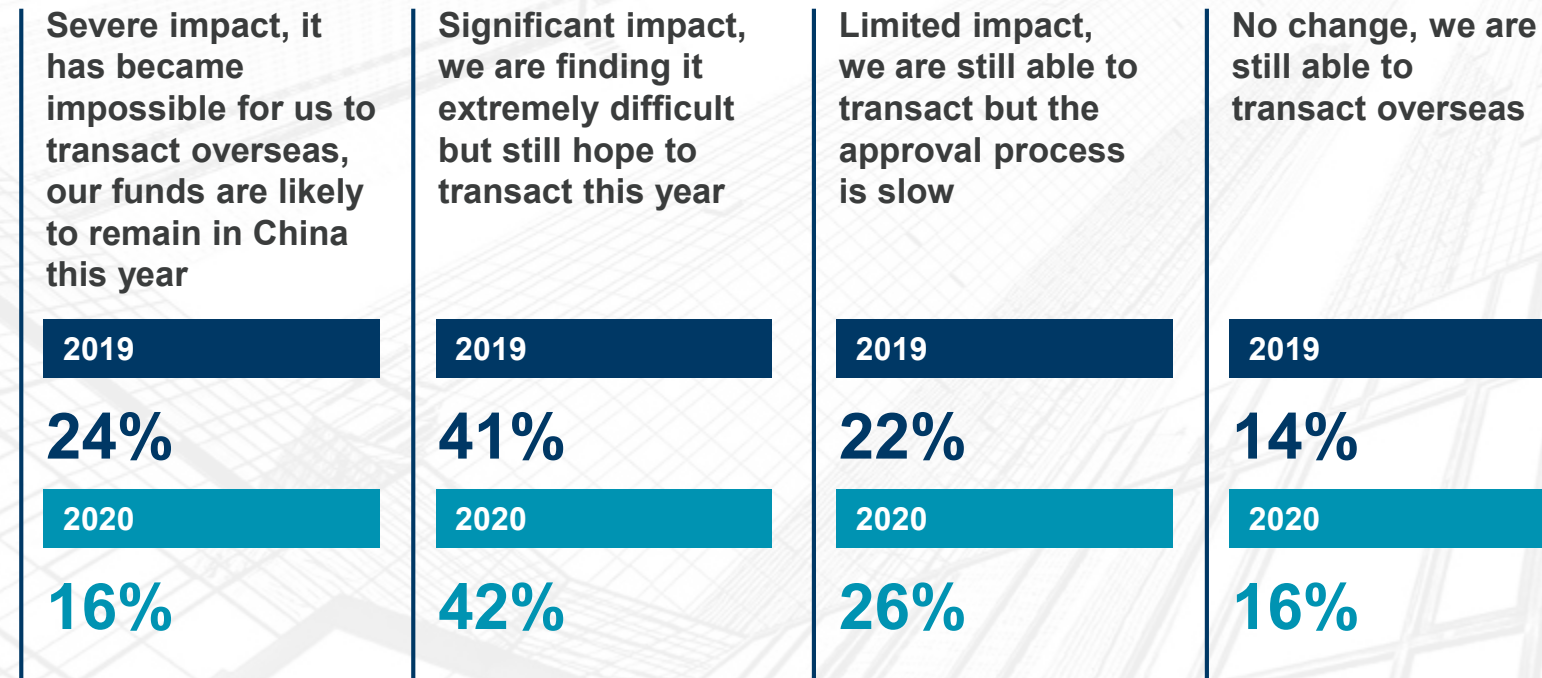


**Fig. 2: Global Investment Intentions in 2020**

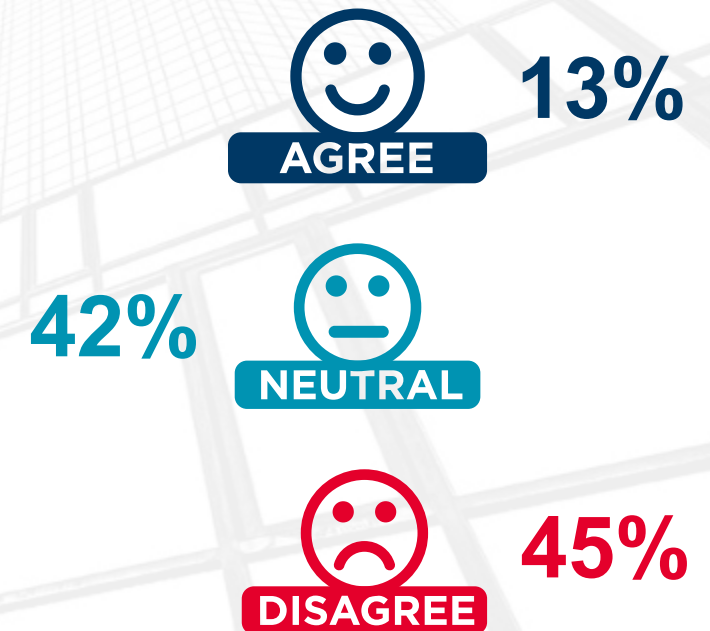




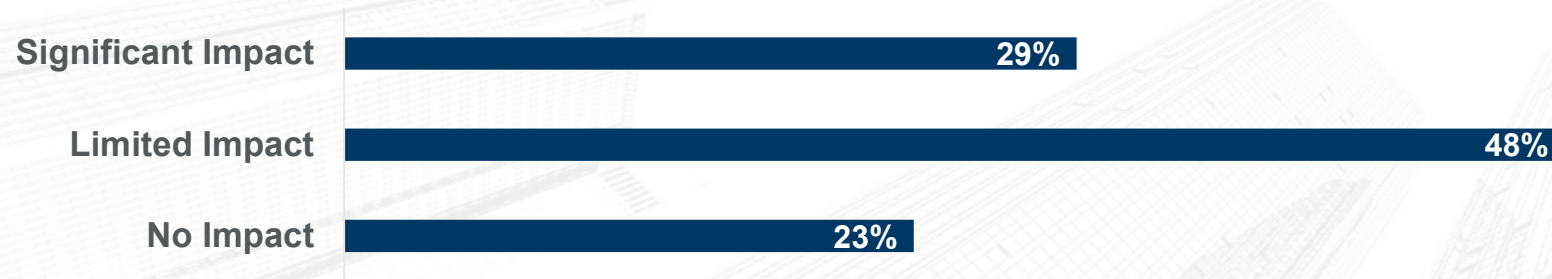
**Fig. 3: As a result of outbound investment policy control, how difficult has it become for you to convert to invest overseas?**



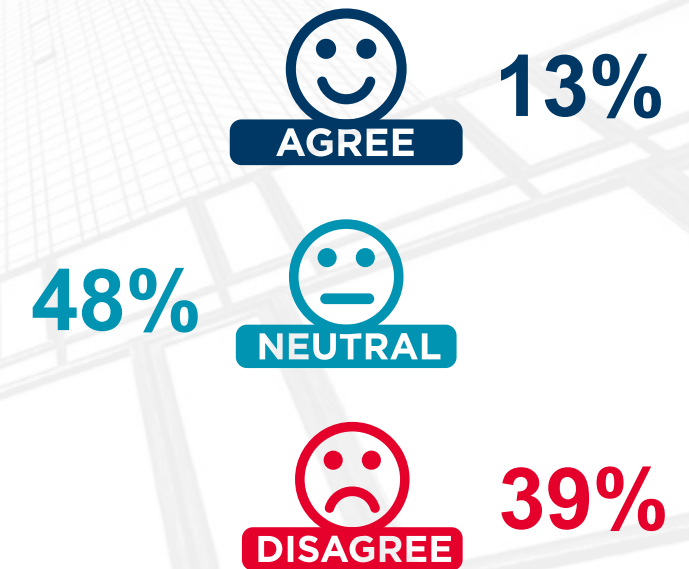
**Fig. 4: Policy restrictions will ease**



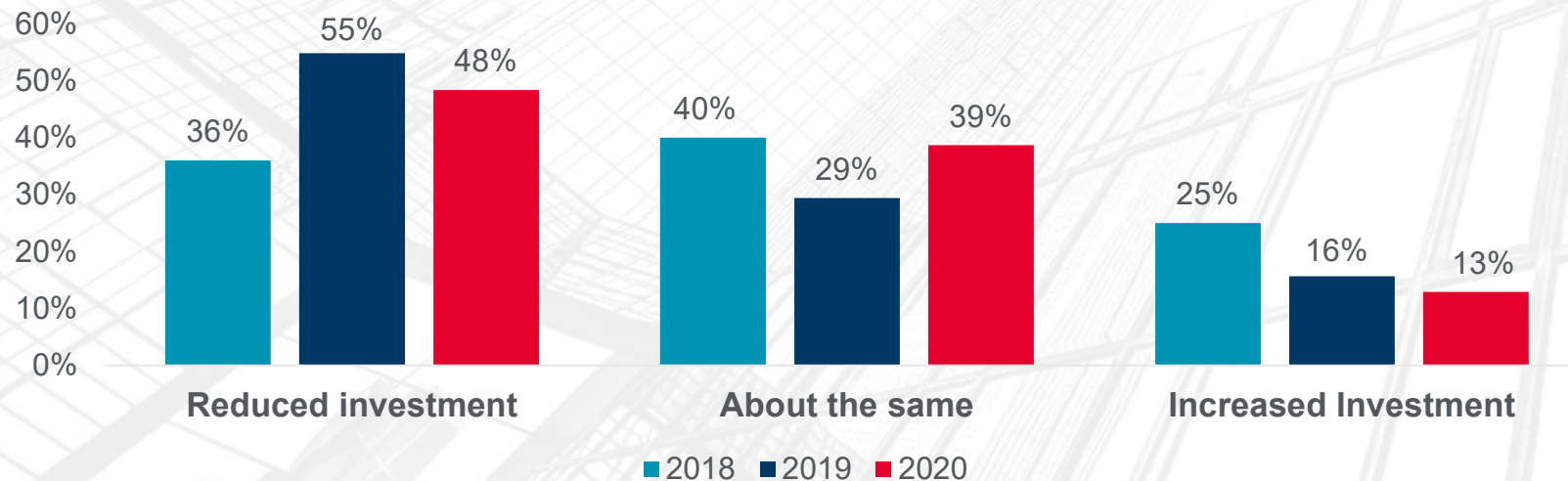
**Fig. 5: How did tight lending policy impact your global investment in 2019?**



**Fig. 6: The domestic lending environment will improve in future**



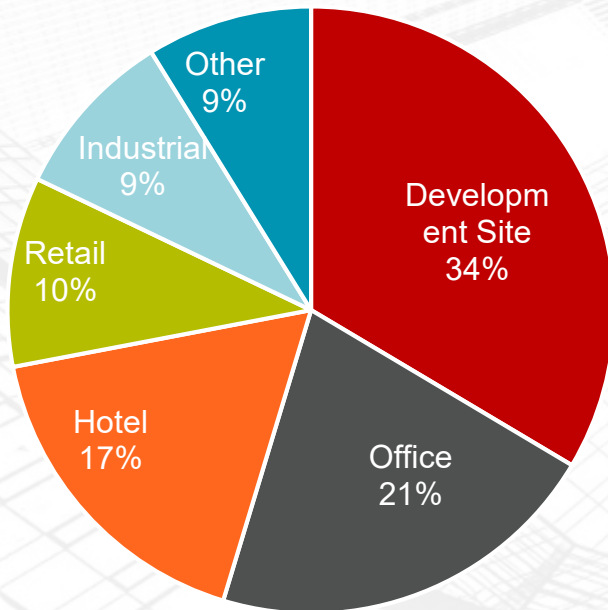
**Fig. 7: How will your fund allocation to overseas real estate change in 2020 compared to 2019?**



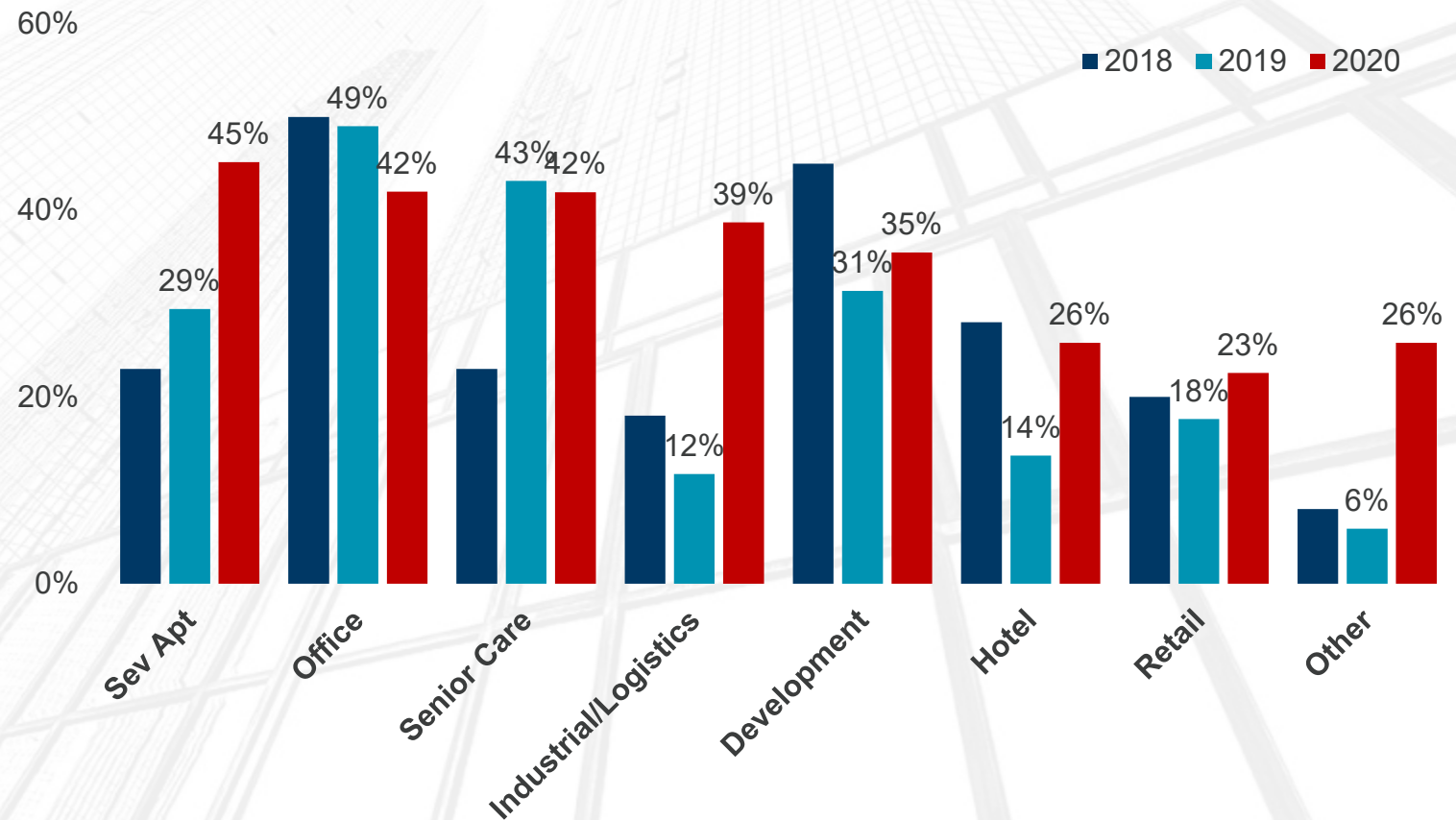
# INVESTMENT ALLOCATION

Mainland Chinese Real Estate Investment Overseas by Asset Class

**Fig. 8: Mainland Chinese Real Estate Investment Overseas by Asset Class 2019**

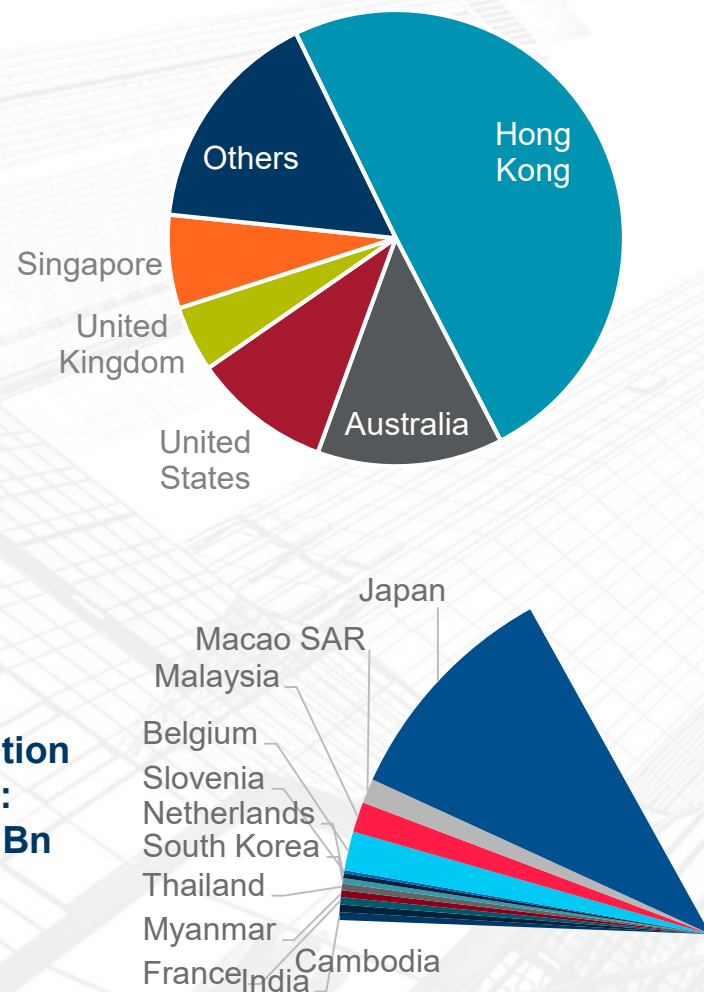


**Fig. 9: Investor Intentions by Asset Class**

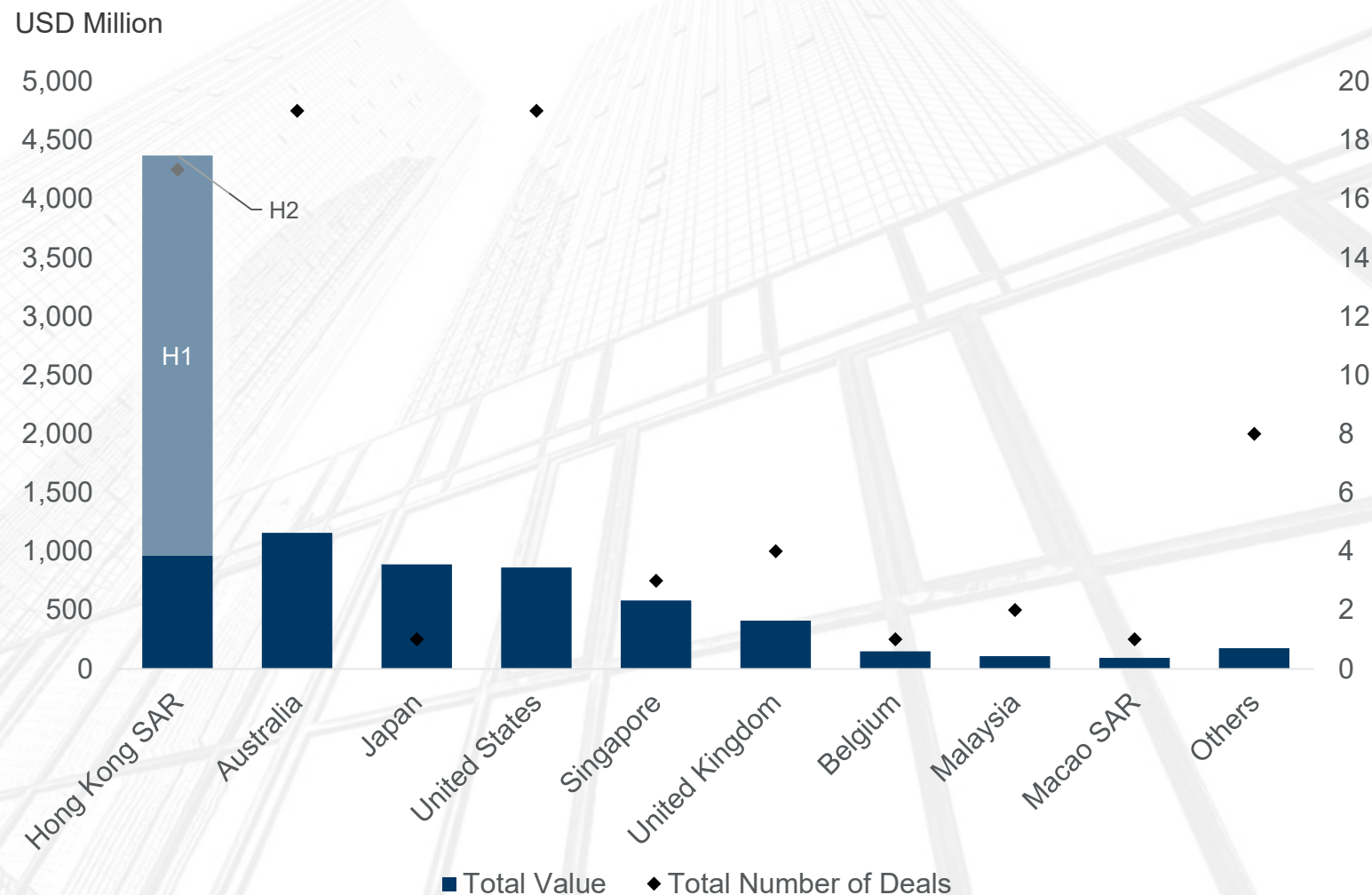




**Fig. 10: 81 Deals in 2019**

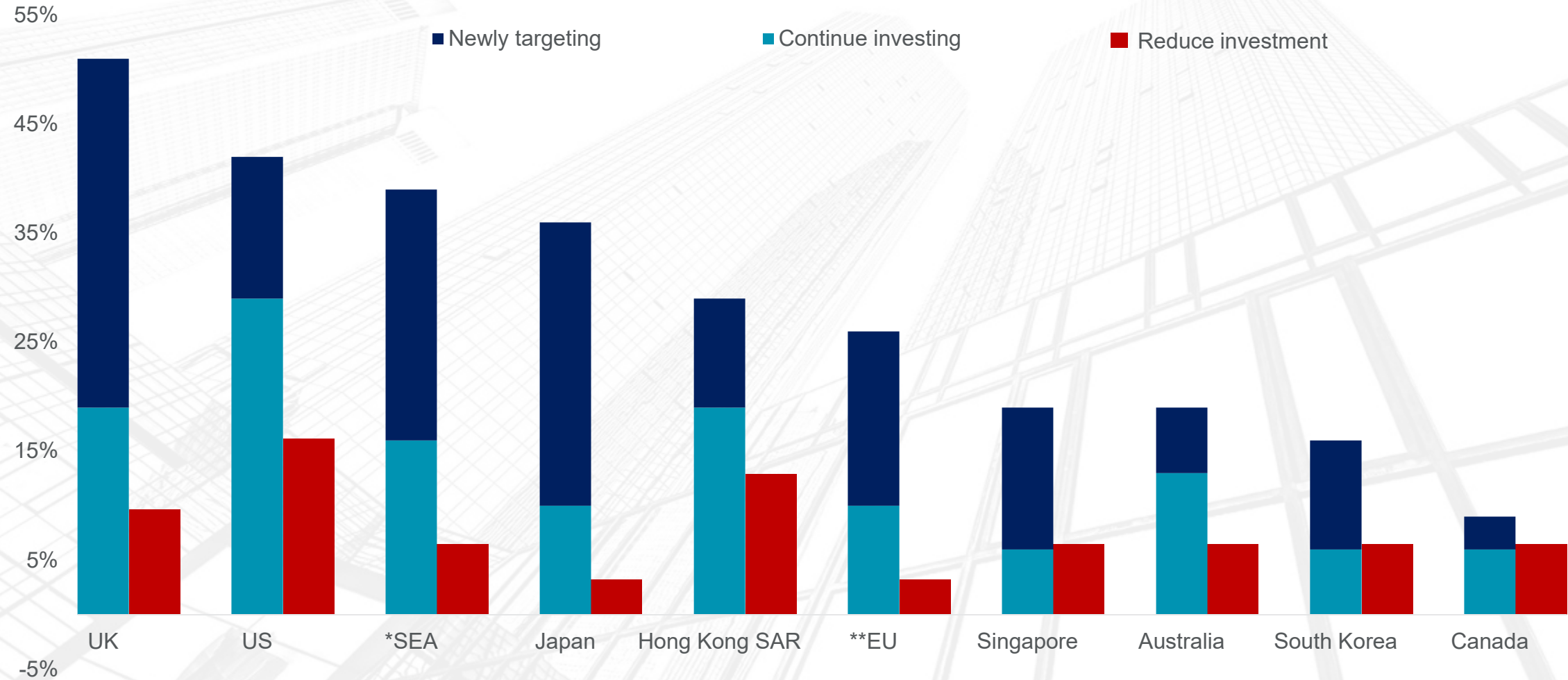


**Fig. 11: Mainland Chinese Real Estate Investment Overseas by Destination 2019**



# 2020 INVESTMENT INTENTIONS

Fig. 12: What are your investment intentions for 2020 for the following countries and regions?



\*SEA = Southeast Asian Countries excluding Singapore

\*\* EU = European Union Countries



# RISING INFLUENCE OF APAC

Increasing Capital Source and Allocation in APAC

Fig. 13:  
Ease of Doing  
Business Improved  
In the last 10 Years  
(World Bank)



Fig. 14:  
2020-2024 Job  
Increase  
Forecast  
(Oxford  
Economics)

ASIA PACIFIC



REST OF THE WORLD



Fig. 15: Investors in Real Estate by Location, 2015 vs. 2019 (Preqin)

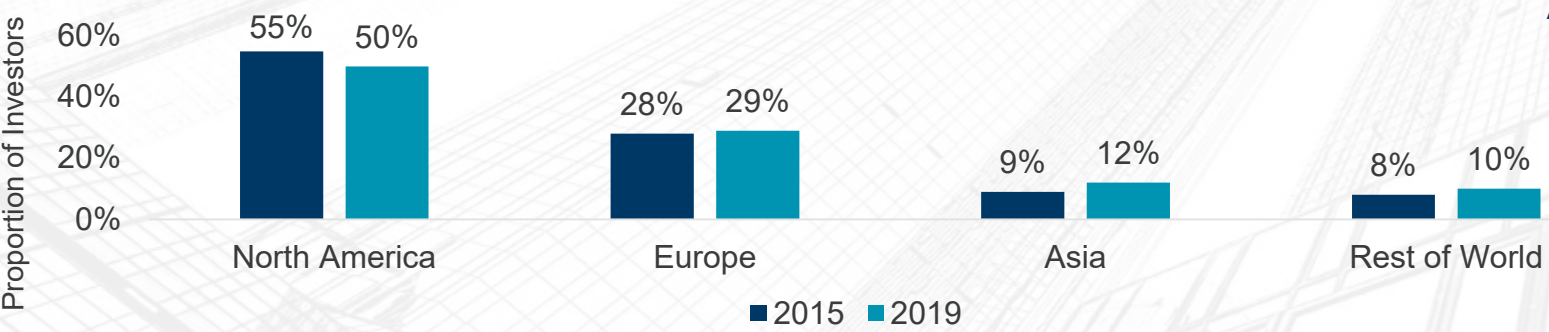


Fig. 16: Expected Change in Capital Flows into  
Asian Markets Over the Next 5 Years (PWC)

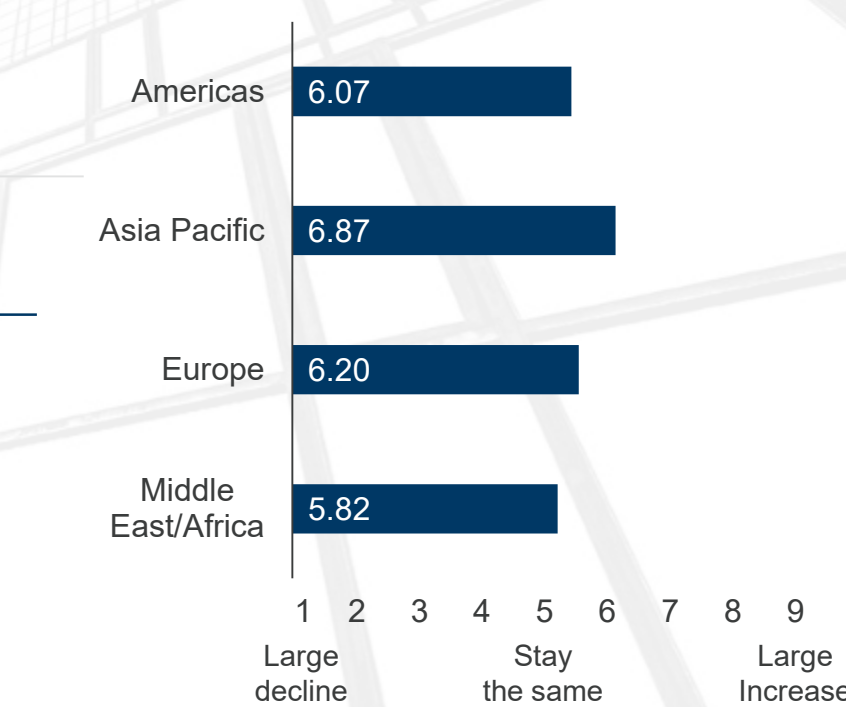
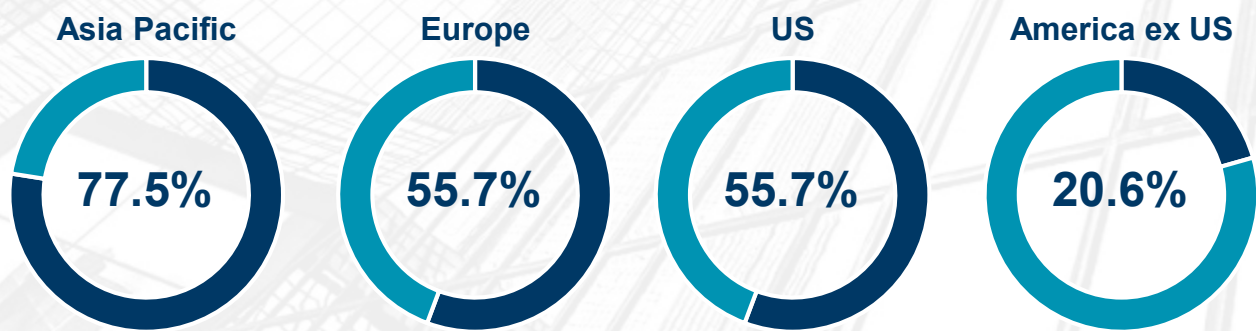


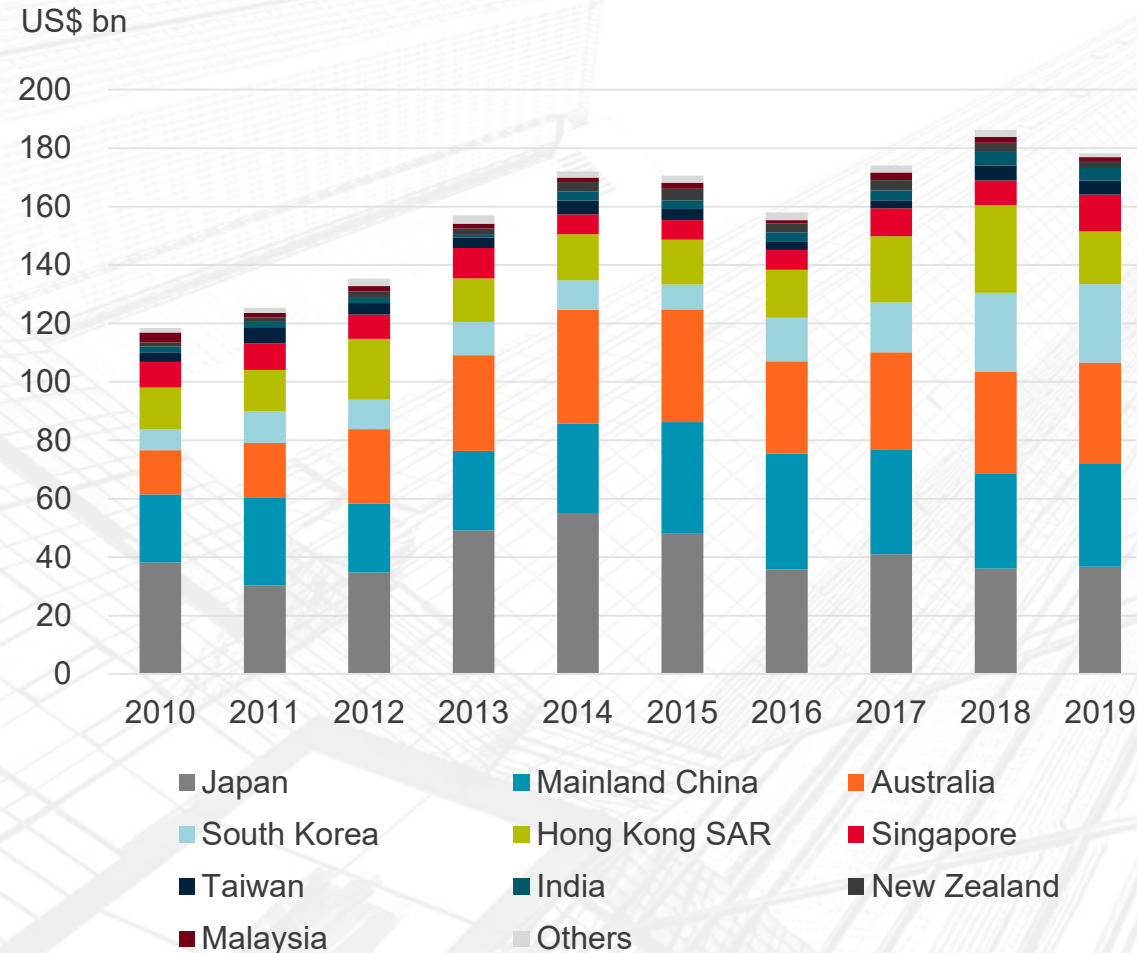
Fig. 17:  
Expectation  
to Increase  
Real Estate  
Allocation by  
Region  
(Anrev)



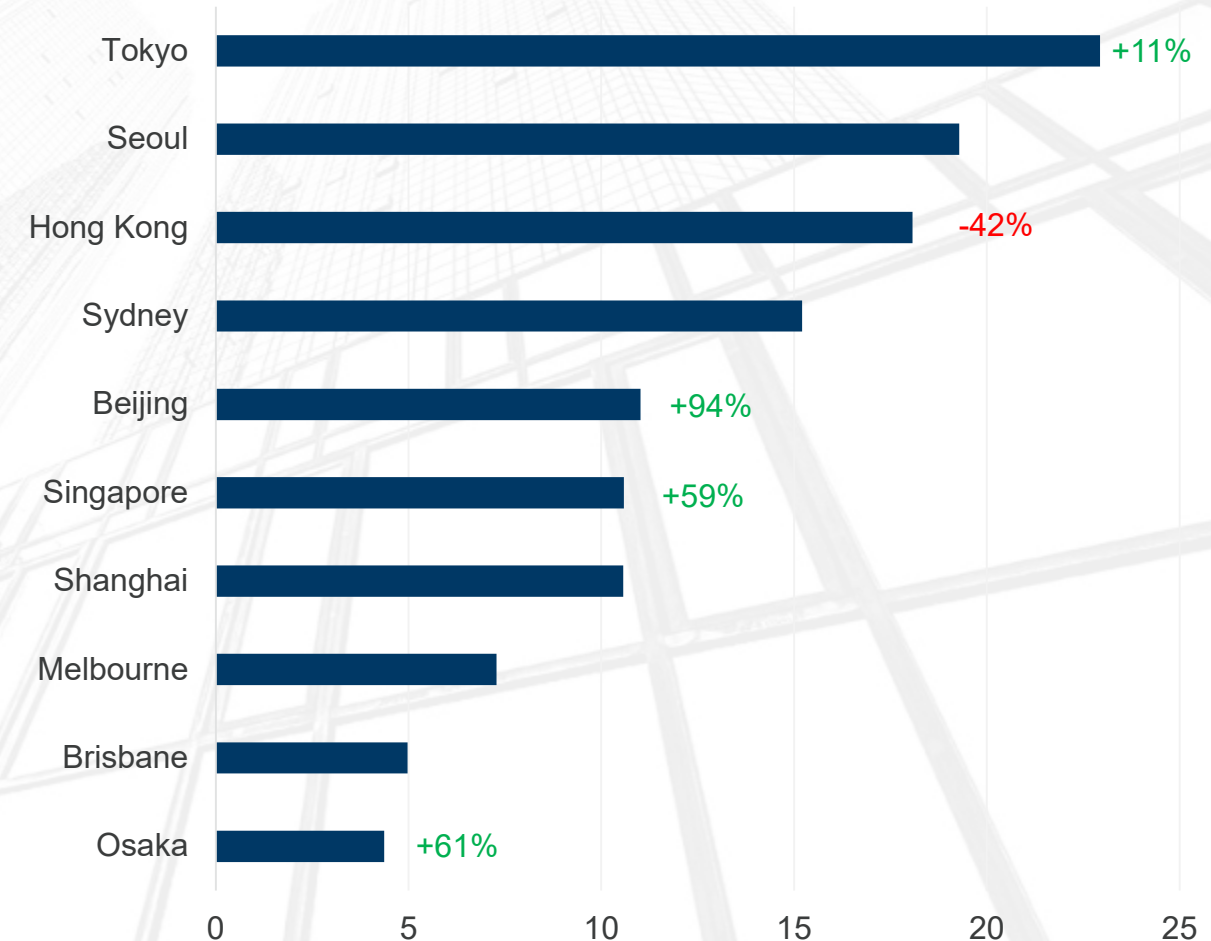
# APAC TOP INVESTMENT DESTINATION

Japan and Singapore Gain Increasing Popularity

**Fig. 18: APAC Total Transaction Volume (Excluding Land)**



**Fig. 19: 2019 Top Investment Destinations in APAC (Excluding Land)**

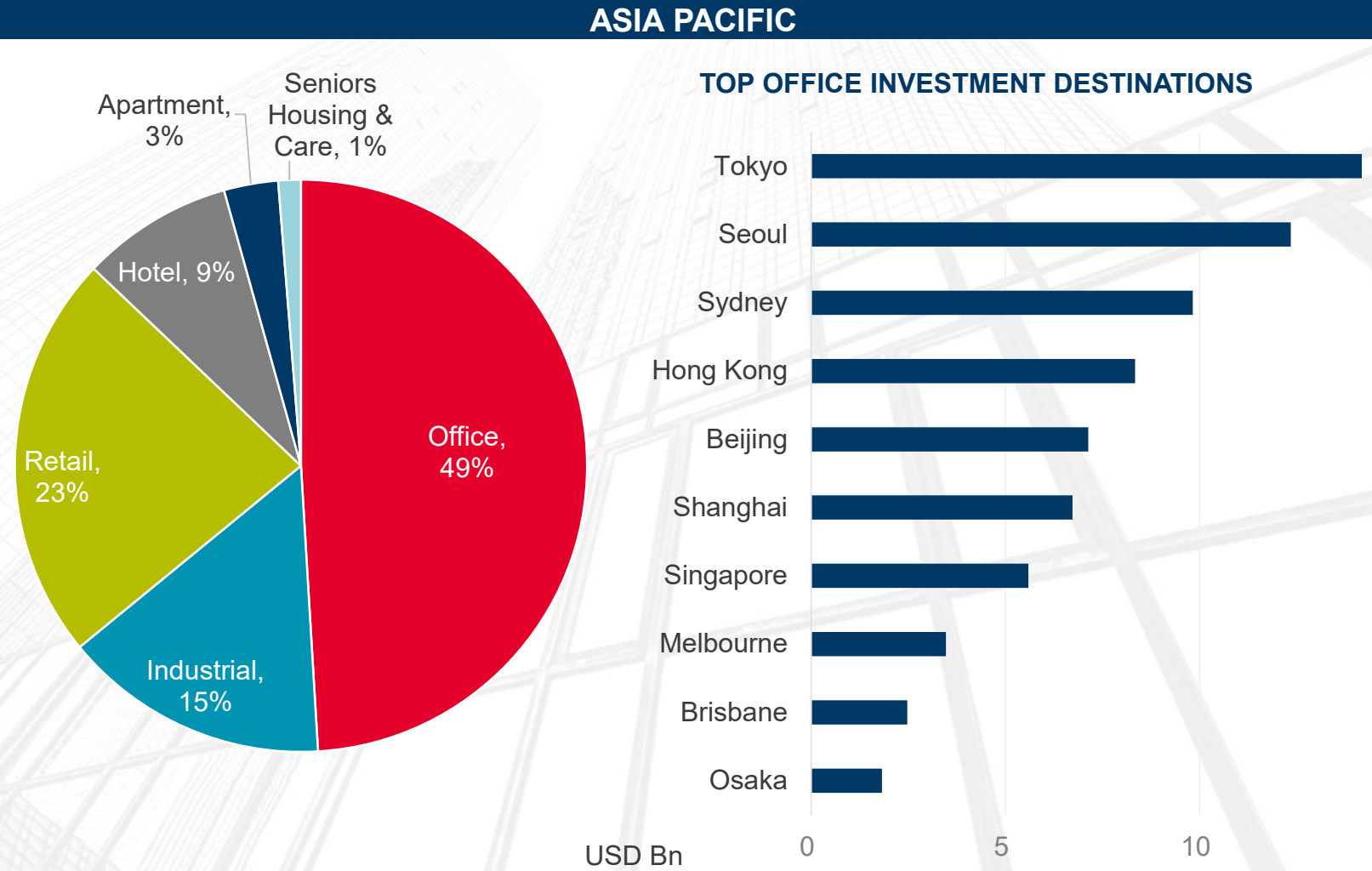
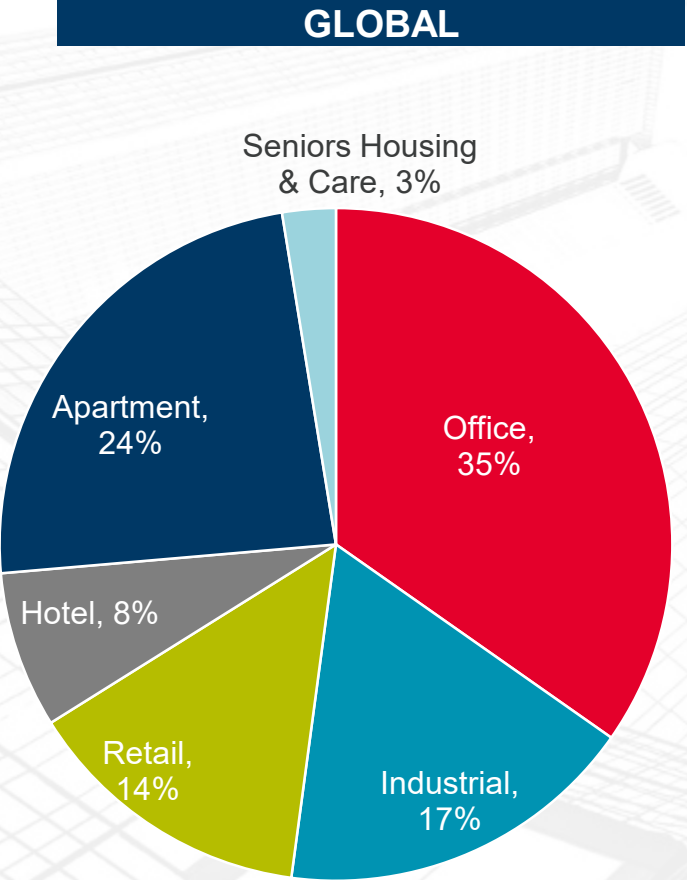




# HIGHER OFFICE AND RETAIL INVESTMENT IN APAC

Share of Total Sales by Property Type

Fig. 20: 2019 Investment Volume by Sector

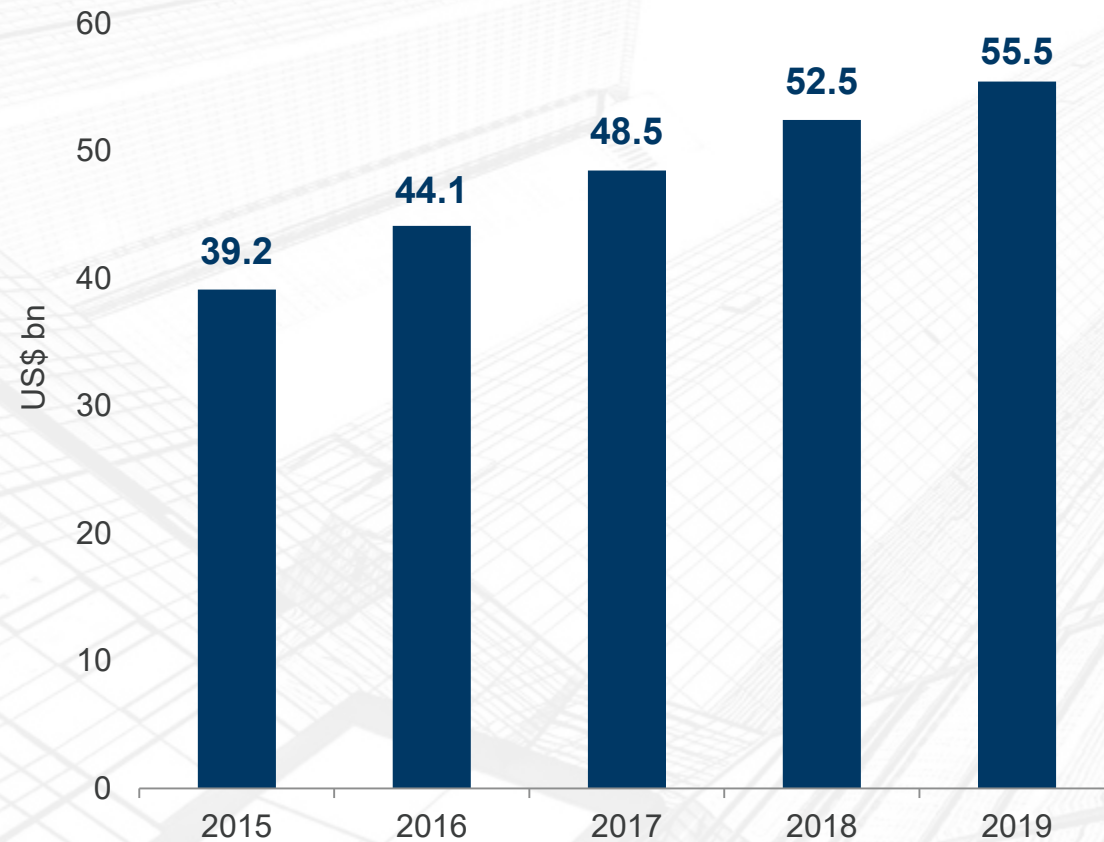


Source: Real Capital Analytics, updated on Feb 12, 2020

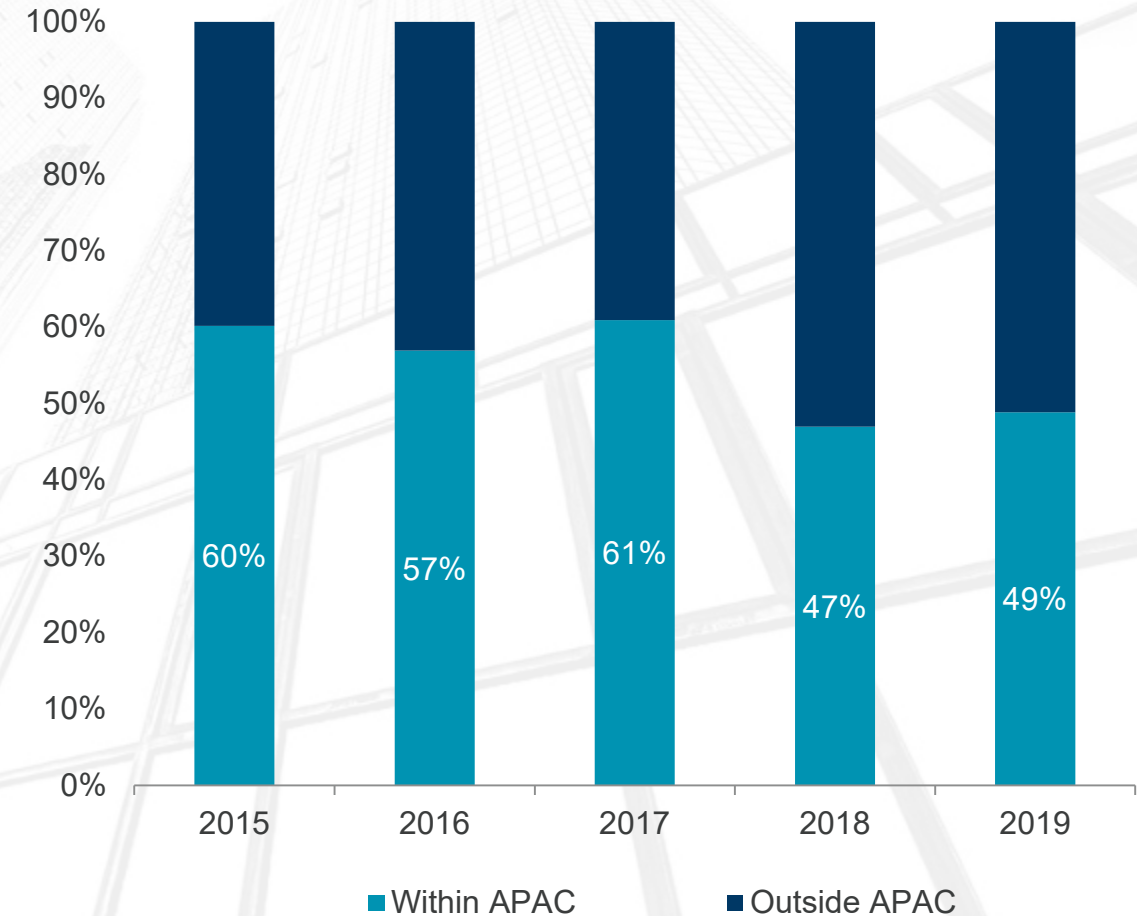
# CROSS-BORDER INVESTMENT IN APAC

Strong Level of Global Capital Participation

**Fig. 21: APAC Cross-border Investment**



**Fig. 22: Sources of Cross Border Capital in APAC**

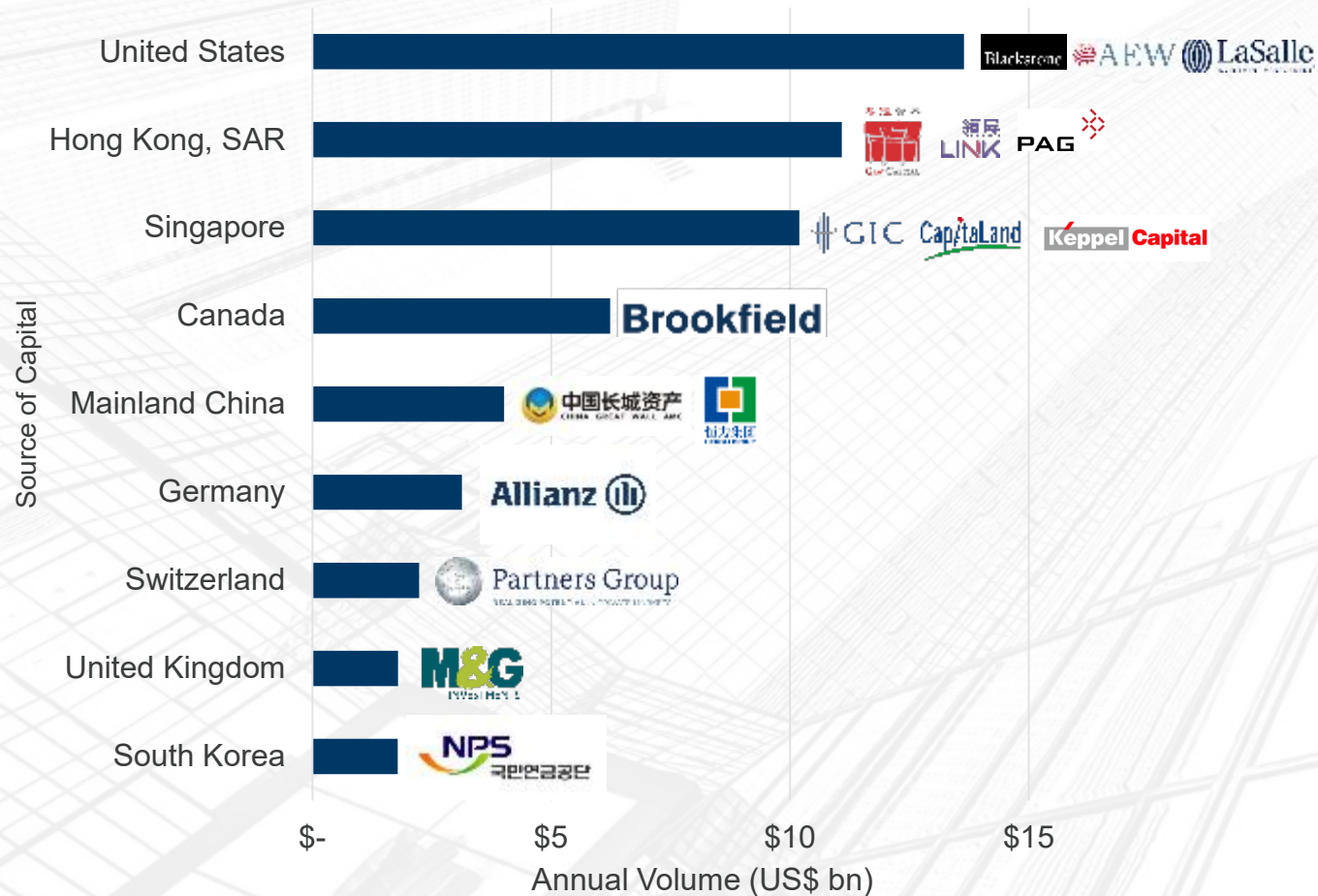




# CROSS-BORDER INVESTMENT IN APAC

U.S. Investors Most Active; Mainland China Most Popular

**Fig. 23: Sources of Cross Border Capital in 2019**



**Fig. 24: Targets of Cross Border Capital in 2019**



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**Q&A**

*Please click on the Q&A icon on the top right hand corner  
of your window to submit your questions.*





*This live webinar has now ended.*

# THANK YOU

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