



CBRE

BANGKOK'S NEW LANDMARK

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KEY FACTORS INFLUENCE REAL ESTATE TREND



Economic



Tourism



Urbanization



Infrastructure/Mass Transit Line



Changing regulations - Land & Property Tax, New City Planning



Foreign Investment in real estate

ASIAN OUTBOUND INVESTMENT H1 2017

Chinese investors still most active but buyer mix changes

TOTAL **US\$ 45.2 bn**

+98% y-o-y

EMEA
US\$ 21.9 bn
+225% y-o-y

32% New York
21% London

AMERICAS
US\$ 11.3 bn
+47% y-o-y

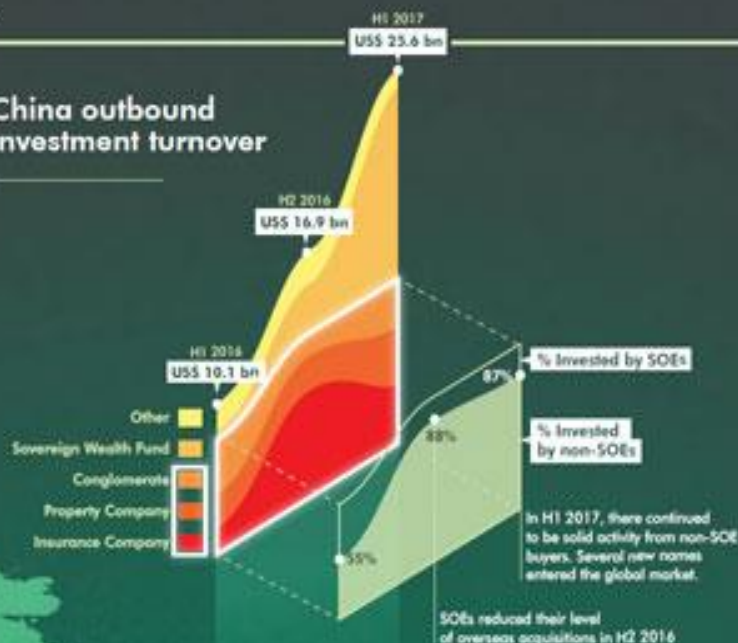
While the weight of Chinese capital seeking opportunities overseas remained considerable in H1 2017, the composition of buyers changed. Outbound investment will continue but the pace of capital deployment is likely to moderate as investors adjust to new rules and refine their investment strategies.

ASIA
US\$ 10.4 bn
+68% y-o-y

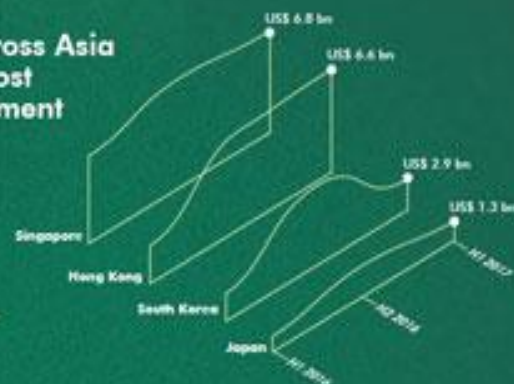
22% Hong Kong
38% Sydney

PACIFIC
US\$ 1.6 bn
-25% y-o-y

China outbound investment turnover



Capital from across Asia continued to boost outbound investment



Transactions include deals in the Office, Retail, Mixed, Industrial, Hotel, Residential and Other commercial sectors. Development sites are excluded.

Source: ICA, CBRE Research, Aug 2017

REAL ESTATE TREND

“City of Connections”

MARKET BEHAVIOR

People wants to connect more

Wellness Work/Life Balance

More single families

Less desire for ownership

DEVELOPMENT TREND

Mixed Use

Better environment, infrastructure

Smaller units, property for aging populations

More public space

More common facilities

More experience-led activities, travelling, entertaining

STATE TOWER



Located on: Silom Road, Bang Rak district
Opened: 2001
Height: 247m

BAIYOKE TOWER II



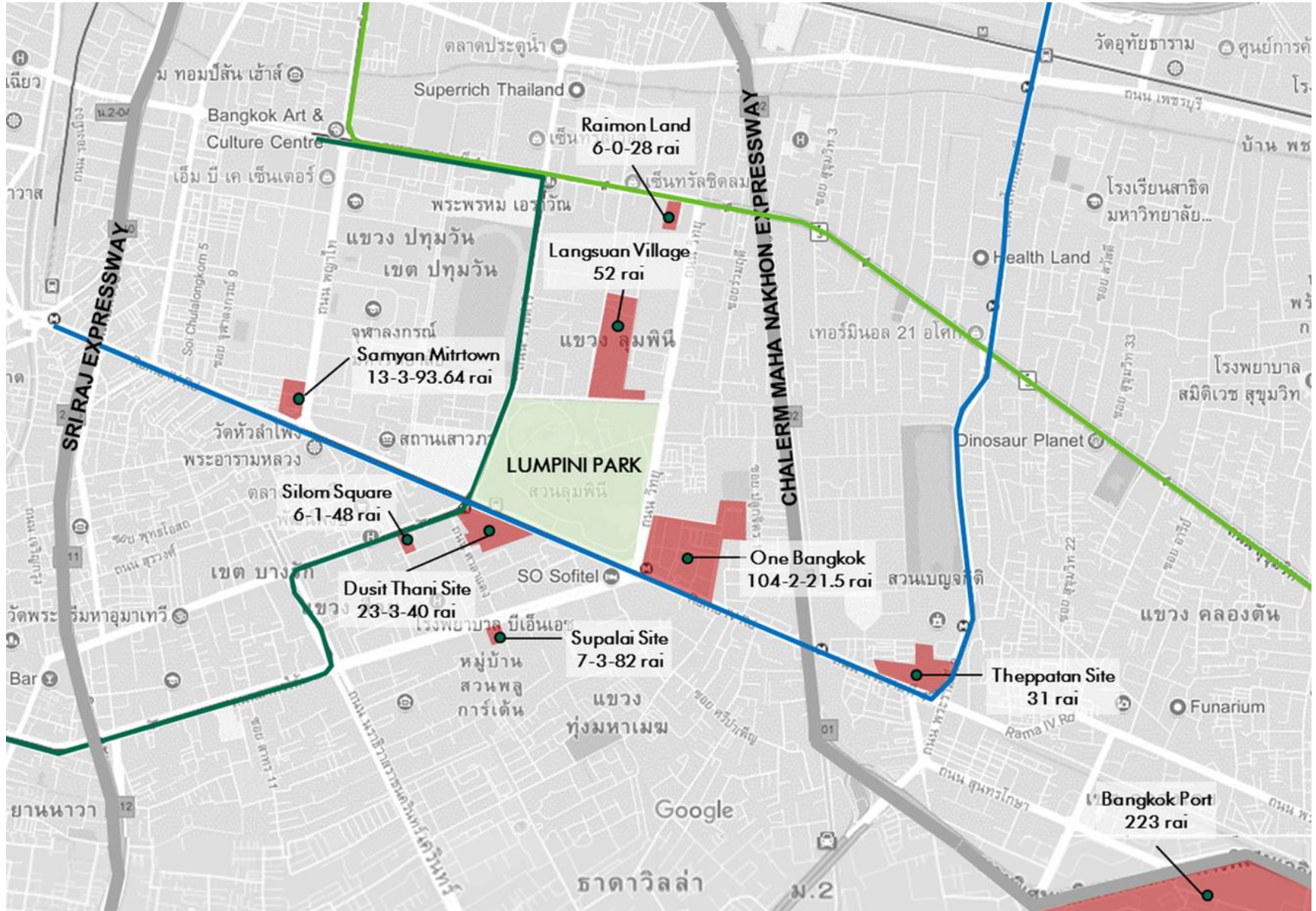
Located on: Ratchaprarop Road, Ratchathewi district
Opened: 1997
Height: 304 m.

MAHANAKHON



Located on: Naradhiwas Road, Sathorn district
Opened: 2016
Height: 314 m.

1. CENTRAL BUSINESS DISTRICT LANDMARK FUTURE DEVELOPMENTS

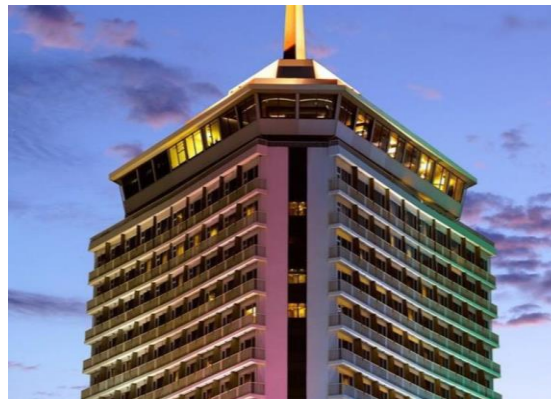


Langsuan Village



Land area: 52+4 rai
Total GFA: N/A
Component: Condominium, Hotel,
Retail, Serviced
Apartment, Office,
Health Center

Dusit Redevelopment



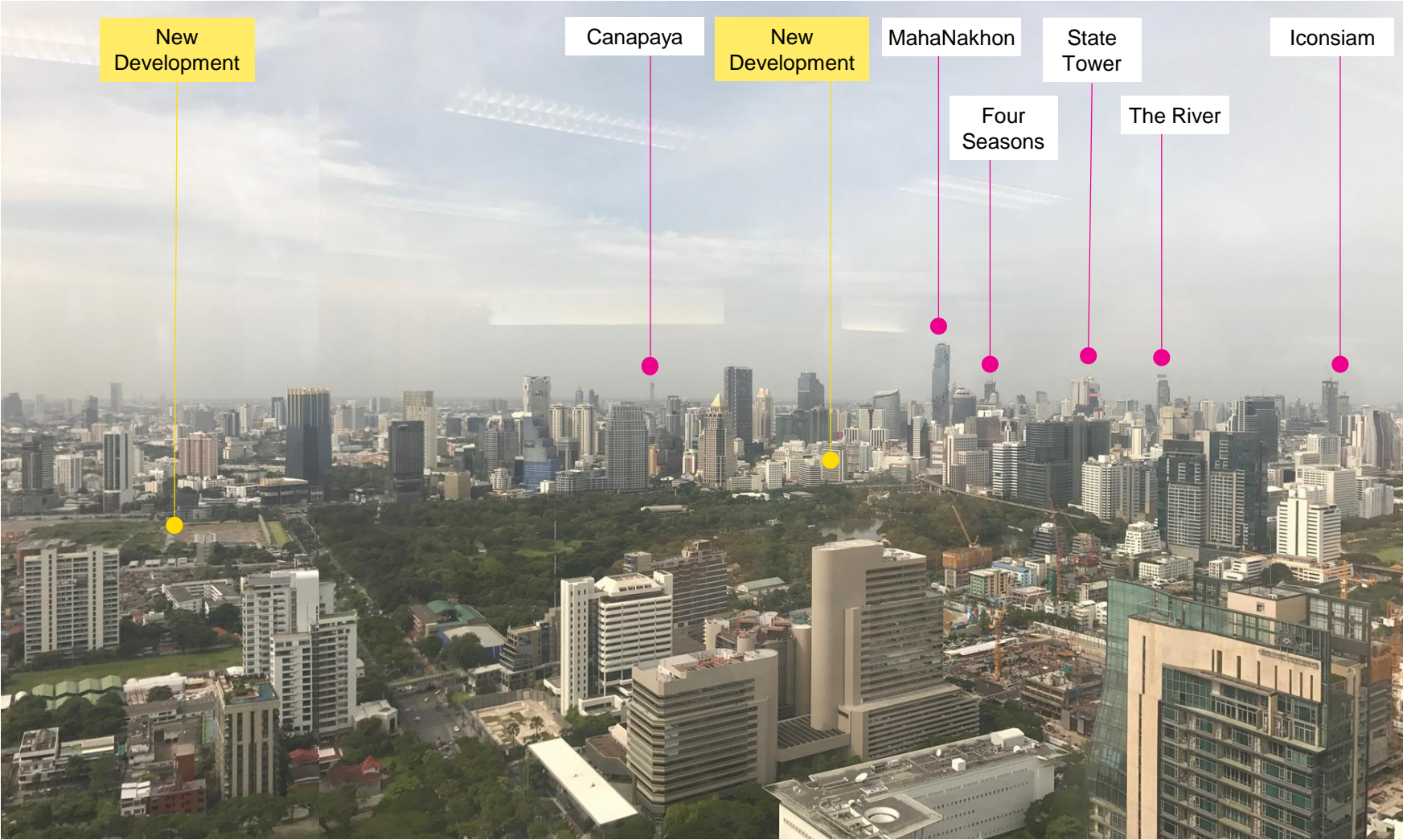
Land area: 23-3-40 rai
Total GFA: N/A
Component: Office, Condominium,
Hotel, Retail

One Bangkok

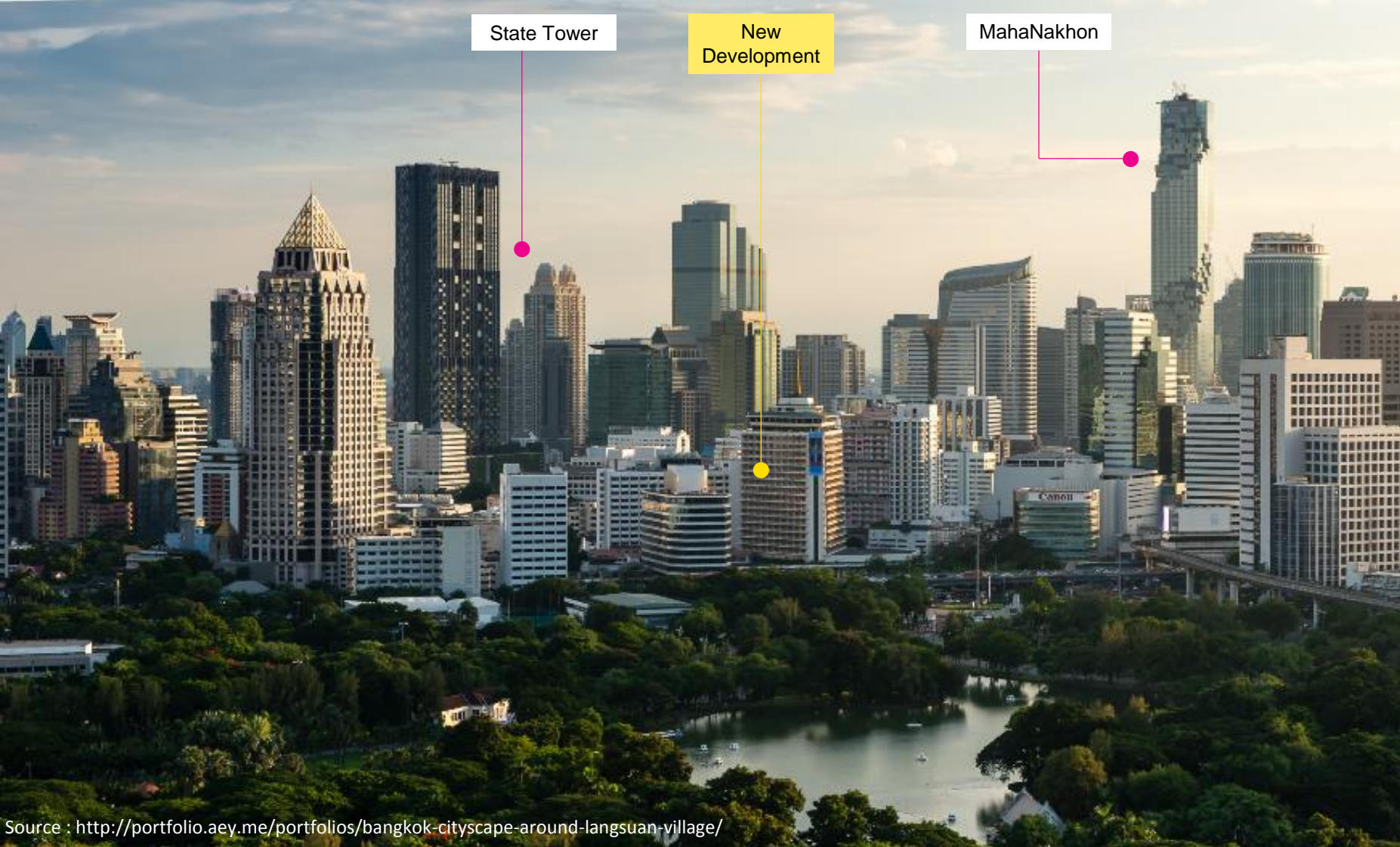


Land area: 104-2-21.5 rai
Total GFA: 1.83 million sq. m.
Component: Office, Condominium,
Hotel, Retail

THE CHANGING BANGKOK CITY SKYLINE



BANGKOK CITY SKYLINE (SILOM - SATHORN)



Source : <http://portfolio.aey.me/portfolios/bangkok-cityscape-around-langsaan-village/>

BANGKOK CITY SKYLINE (LUMPINI)

Magnolias
Ratchadamri
Boulevard

Baiyoke
Tower II

Central
Embassy

Park
Ventures

CRC Tower
at All Seasons
Place



Source : <http://portfolio.aey.me/portfolios/bangkok-cityscape-around-langsaan-village/>

SUPPLY OF COMMERCIAL DEVELOPMENTS IN DOWNTOWN BANGKOK

Central Business District remains in Lumpini, Early Part of Sathorn and Sukhumvit
Along the first mass transit lines BTS and MRTA

EXISTING SUPPLY

NEW SUPPLY IN 5 YEARS



4.4 million sq. m.

750,000 sq. m. (17% increase)



1.5 million sq. m.

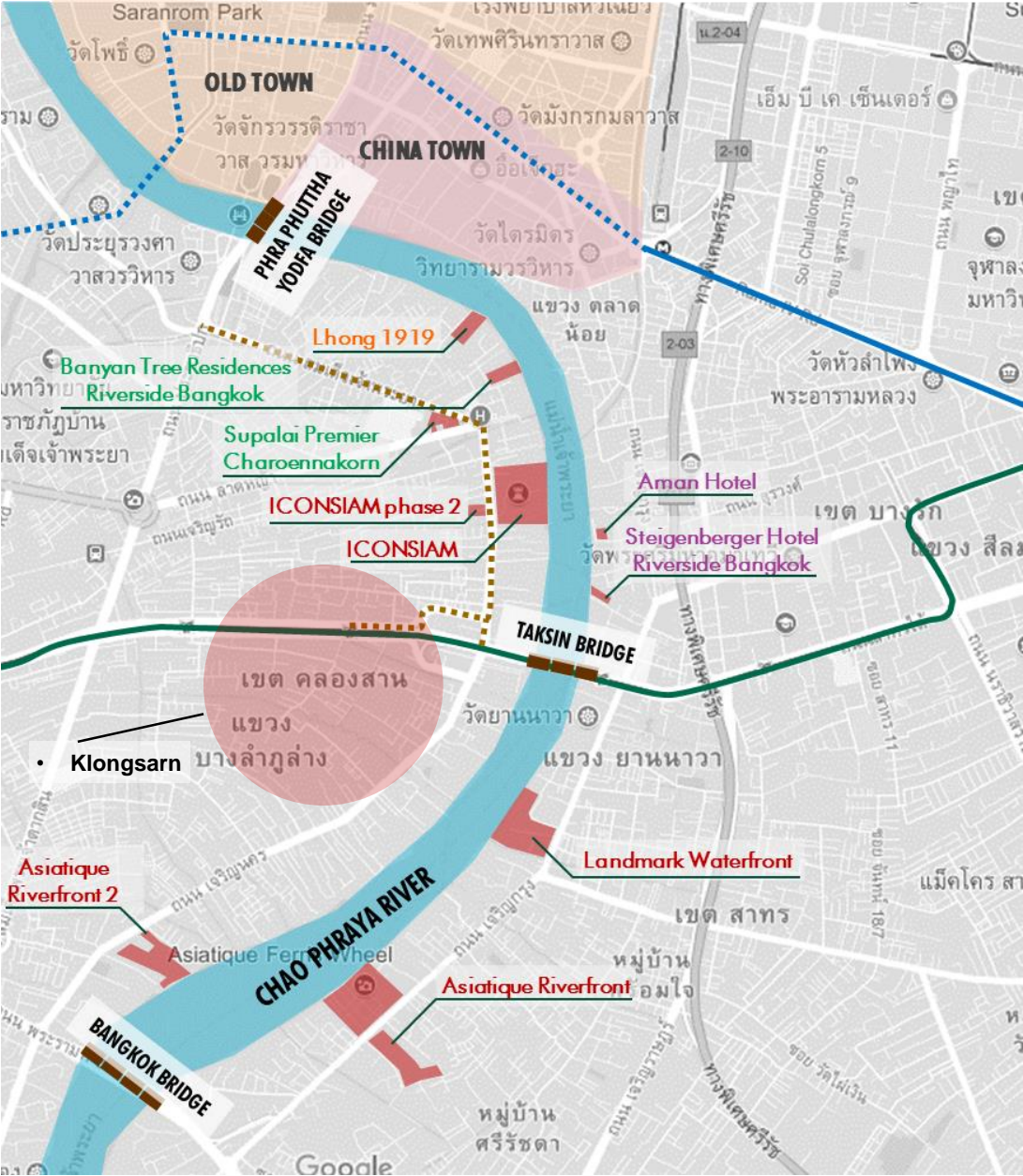
280,000 sq. m. (19% increase)



35,215 keys

6,217 keys (18% increase)

2. RIVERSIDE FUTURE DEVELOPMENTS



2. RIVERSIDE LANDMARK

Transformation of Riverside Location

“Cultural and Tourism Area”

Unique characteristic

Balance the charm of historic buildings, local communities and old town with modern buildings and facilities.

THE RIVER



OBSERVATION TOWER



BANYAN TREE RESIDENCES RIVERSIDE BANGKOK



BANGKOK CITY (RIVERSIDE)



LHONG 1919 (ล้ง 1919)

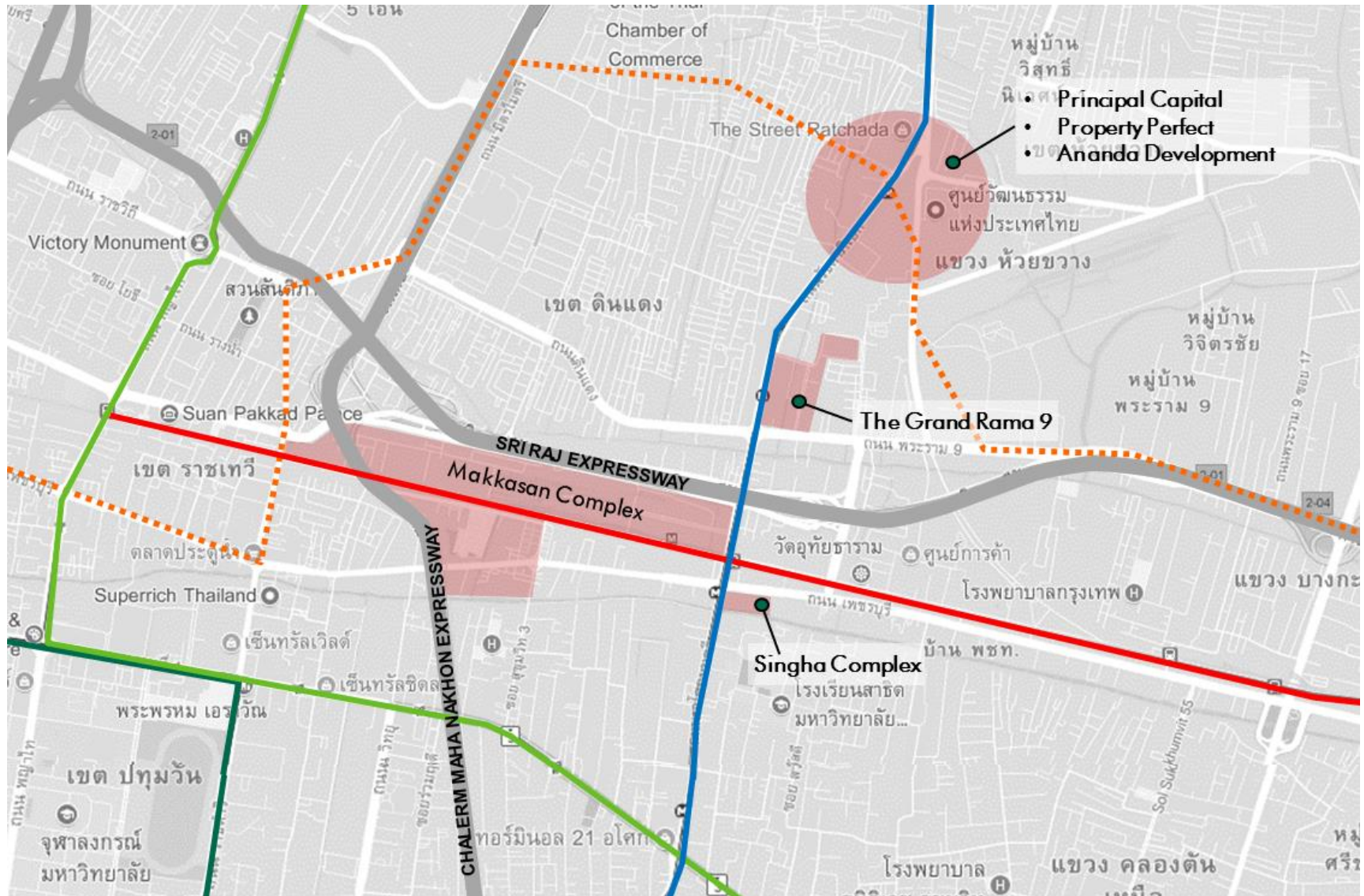


MIDTOWN LANDMARK

Extension from CBD through the four major mass transit routes

- Asoke Rachada Rama 9
- Sukhumvit Bangna Trad
- Phahol- Vibha
- Sathorn- Taksin

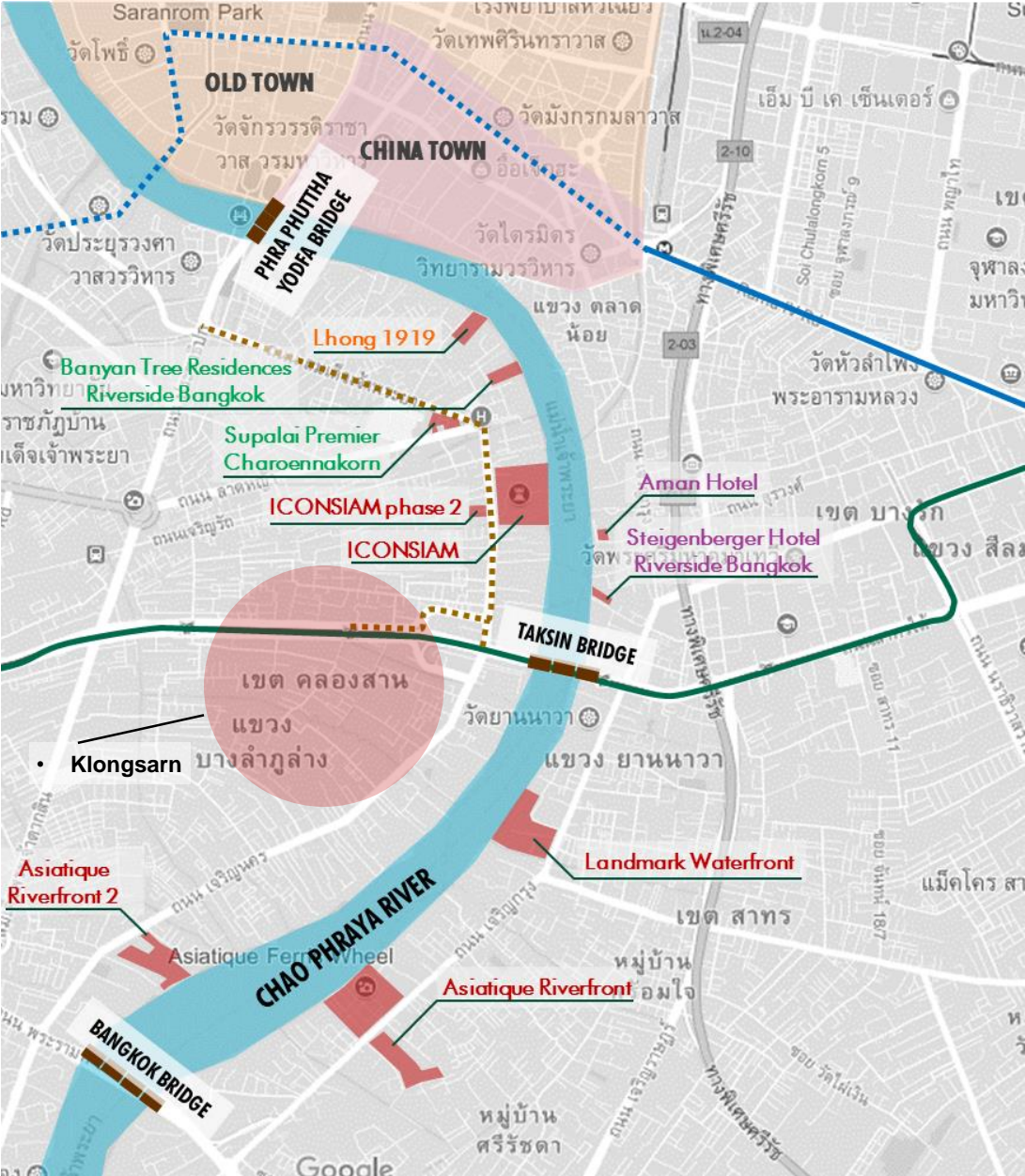
1. ASOKE RACHADA RAMA 9 LANDMARK ORANGE LINE



SUPER TOWER & G LAND TOWER NEW DEVELOPMENT



4. SATHORN TAKSIN/ THONBURI LANDMARK FUTURE DEVELOPMENTS

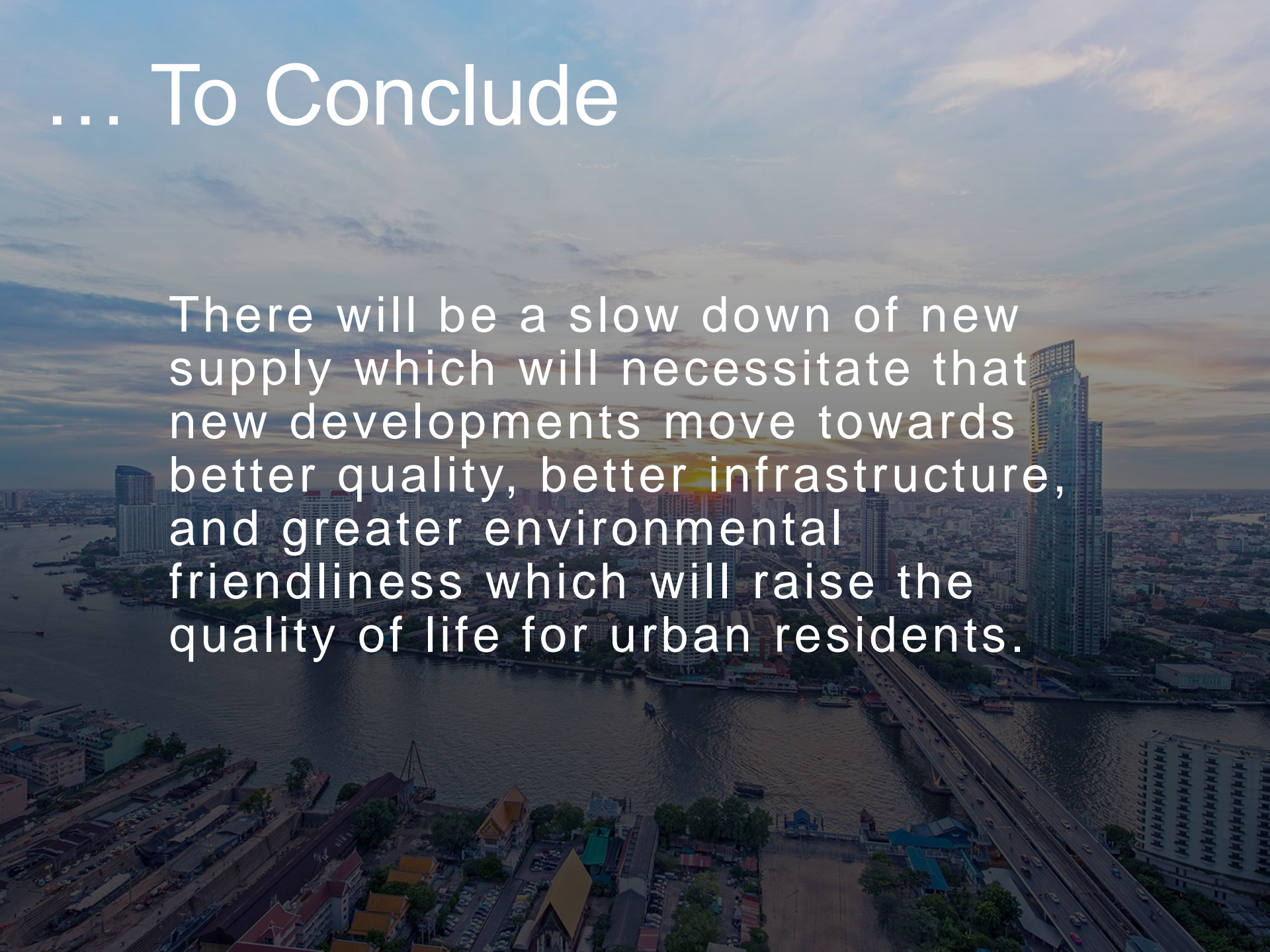


RENAISSANCE PATTAYA RESORT AND SPA



... To Conclude

There will be a slow down of new supply which will necessitate that new developments move towards better quality, better infrastructure, and greater environmental friendliness which will raise the quality of life for urban residents.





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THANK YOU