2022 Market Update & Development Pre / Review

莱坊英国 中国业务部



Your partners in property for 125 years

Agenda

09:00	Introduction & Prime Central London Market Update
09:10	Development Pre / Review – Core Market
09:30	Development Pre / Review – Prime Market
09:50	Q & A

Your partners in property for 125 years

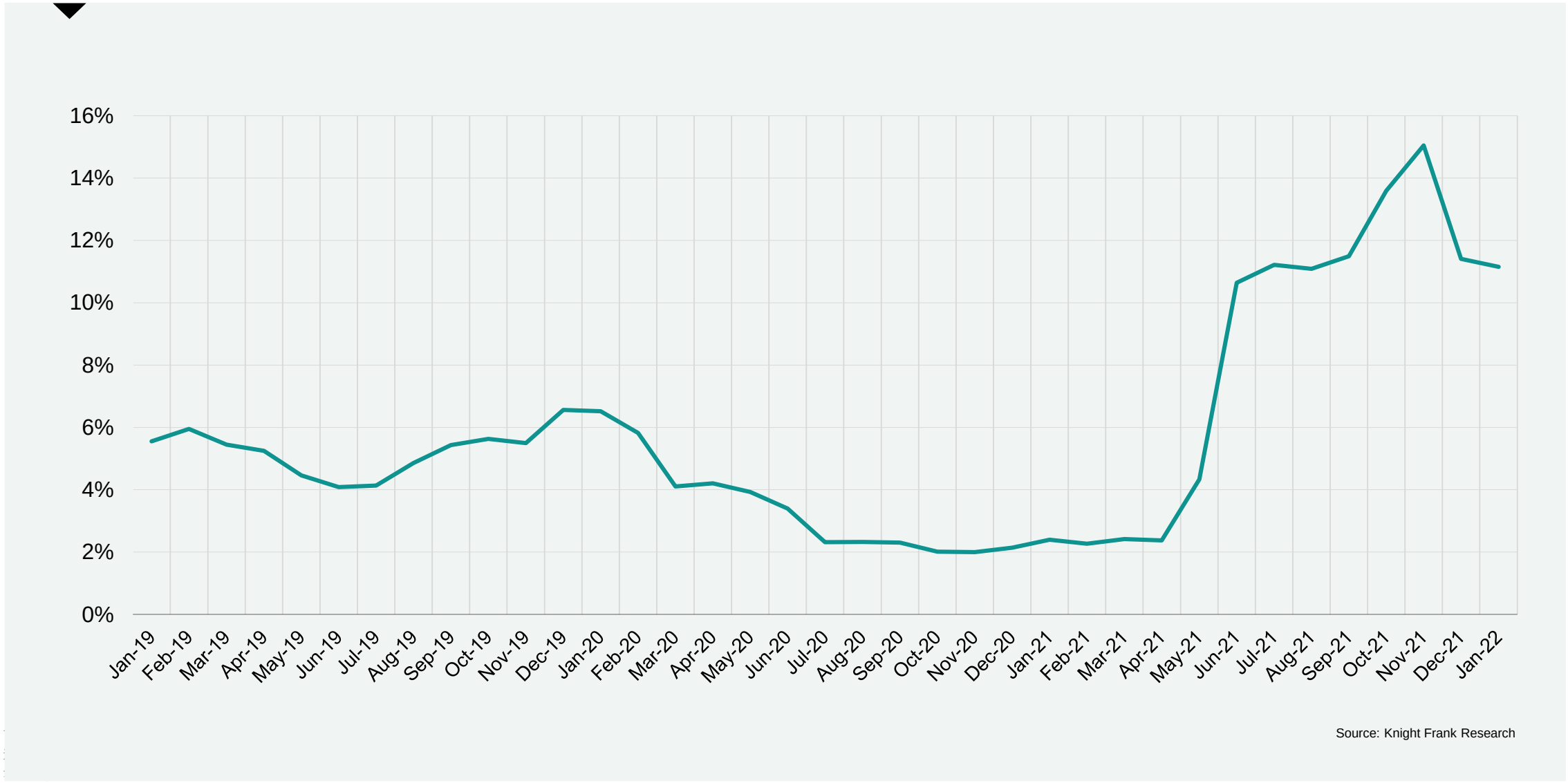
Prime Central London Market Update

February 2022

Your partners in property for 125 years

Rise in buyer demand for Prime London flats

% of new prospective buyers based outside of the capital seeking Prime London flats, rolling 3-month average

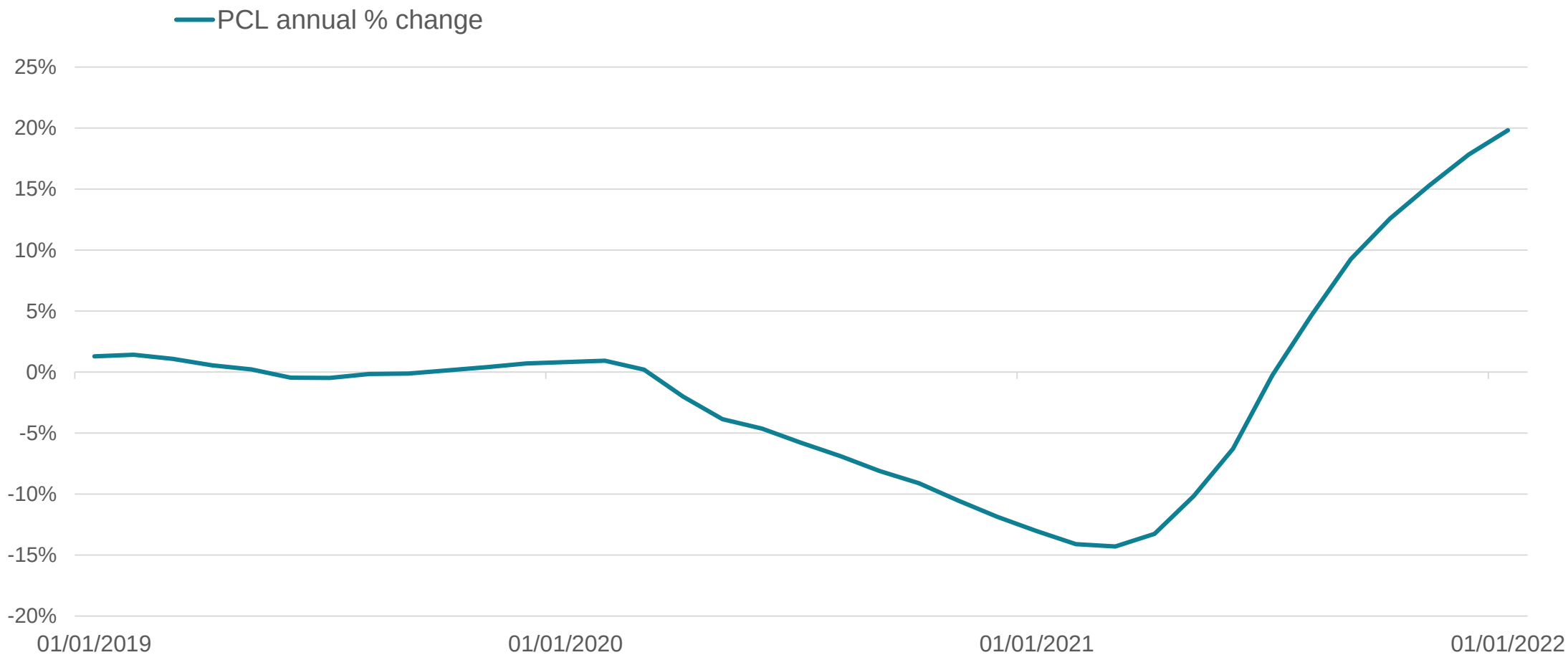


Source: Knight Frank Research

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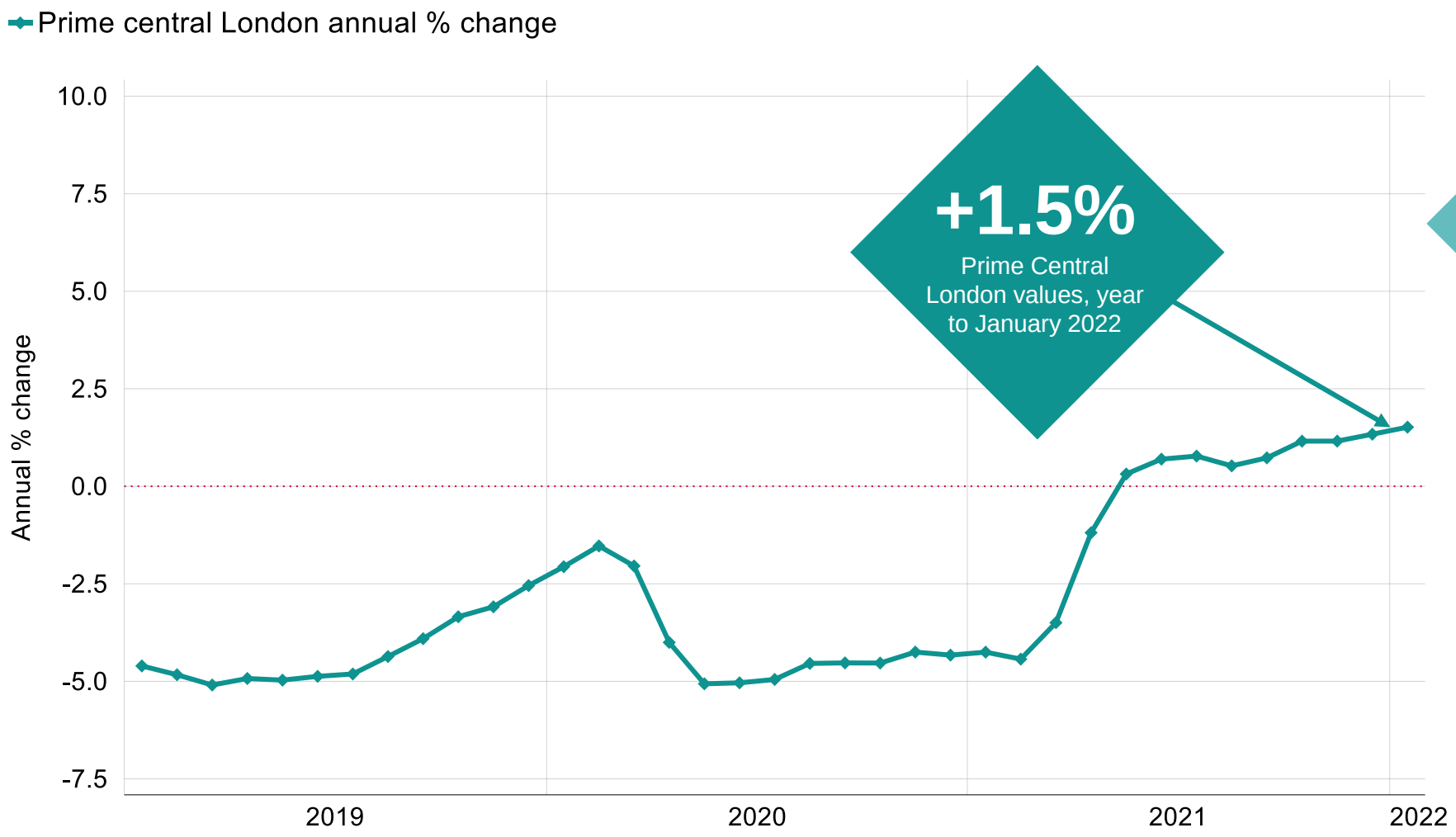
A recovery in rental values…

% change in prime central London values



Prime London property prices continue recovery…

% change in average prices



+1.5%
Prime Central London values, year to January 2022

+4%
Annual change in prime central London **HOUSE** values (January 2022)

1%
Annual change in prime central London **FLAT** values (January 2022)

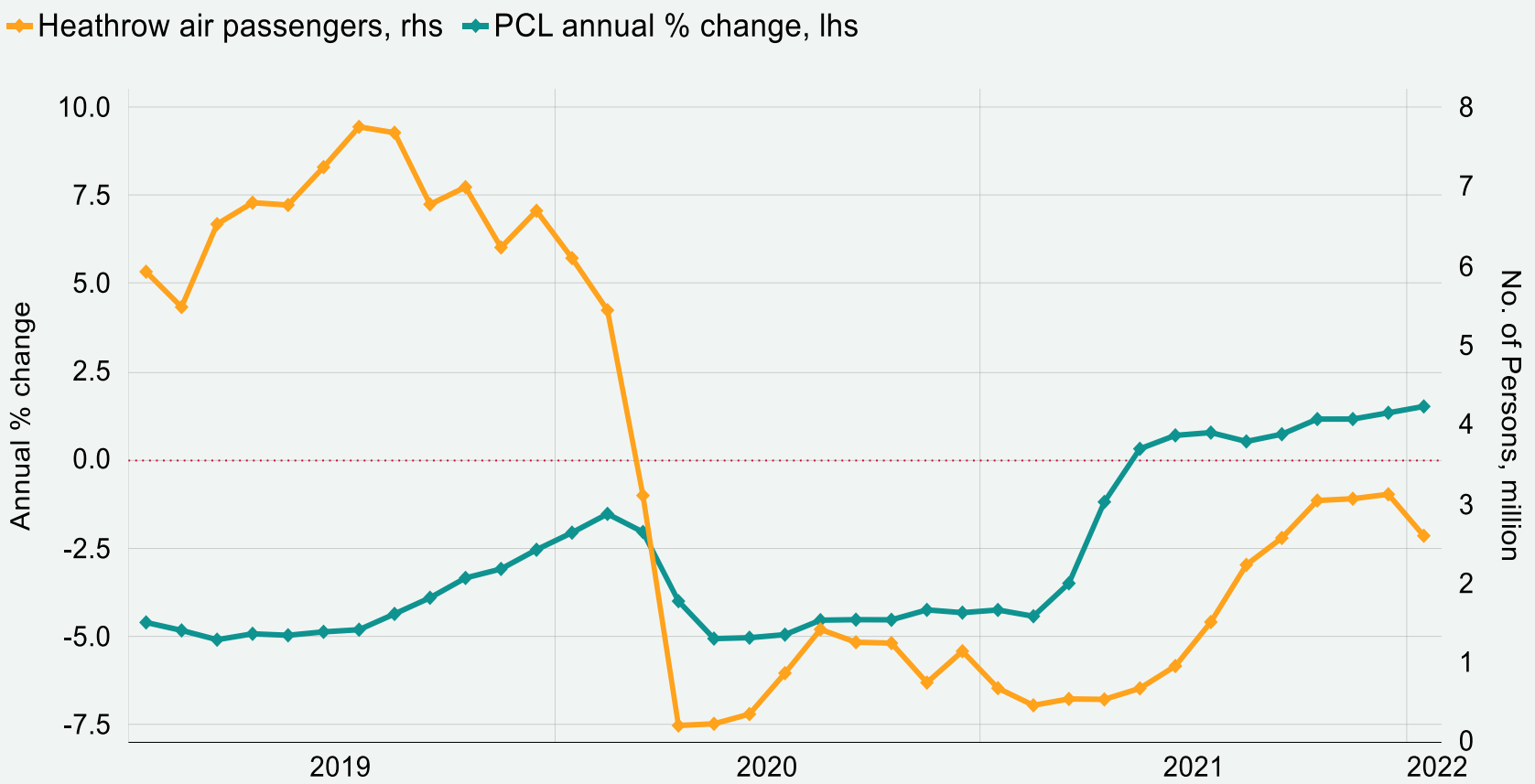
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Source: Knight Frank Research

…are overseas buyers back?

Knight Frank

% change in average prices v monthly Heathrow passenger numbers



Source: Knight Frank Research, Heathrow

-76%
Change in total passenger numbers in 2021 vs 2019 (pre-pandemic)

-12%
Change in total passenger numbers in 2021 vs 2020

Trends to watch

Knight Frank

Covid impact → Overseas arrivals → Spring surge? → PCL vs Greater London and the UK

Development Pre/Review
– *Core Market*

Your partners in property for 125 years



Oxbow
E14



Developer: Eco-world
Location: Zone 2/3, East India DLR Station

Estimated Completion:
Block Gabriel court: Q4-2021-Q1 2022
Block Johanna court: Q2/3 2022

Total No. of units: 180

Prices from:
- 1 beds from £431,000
- 2 beds from £561,000

Blended pricing: £780 per sq. ft

Help to Buy available NOW



Upton Gardens E13



Developer: Barratt Homes
Location: Zone 3, 6 mins walk to Upton Park underground Station

Estimated Completion:
Q1 /March 2022

Total No. of units: 180

Prices from:
- 1 beds from £320,000
- 2 beds from £475,000
- 3 beds from £529,000

Blended pricing: £650 per sq. ft

Help to Buy available NOW



Abbey Quay

Barking
IG11



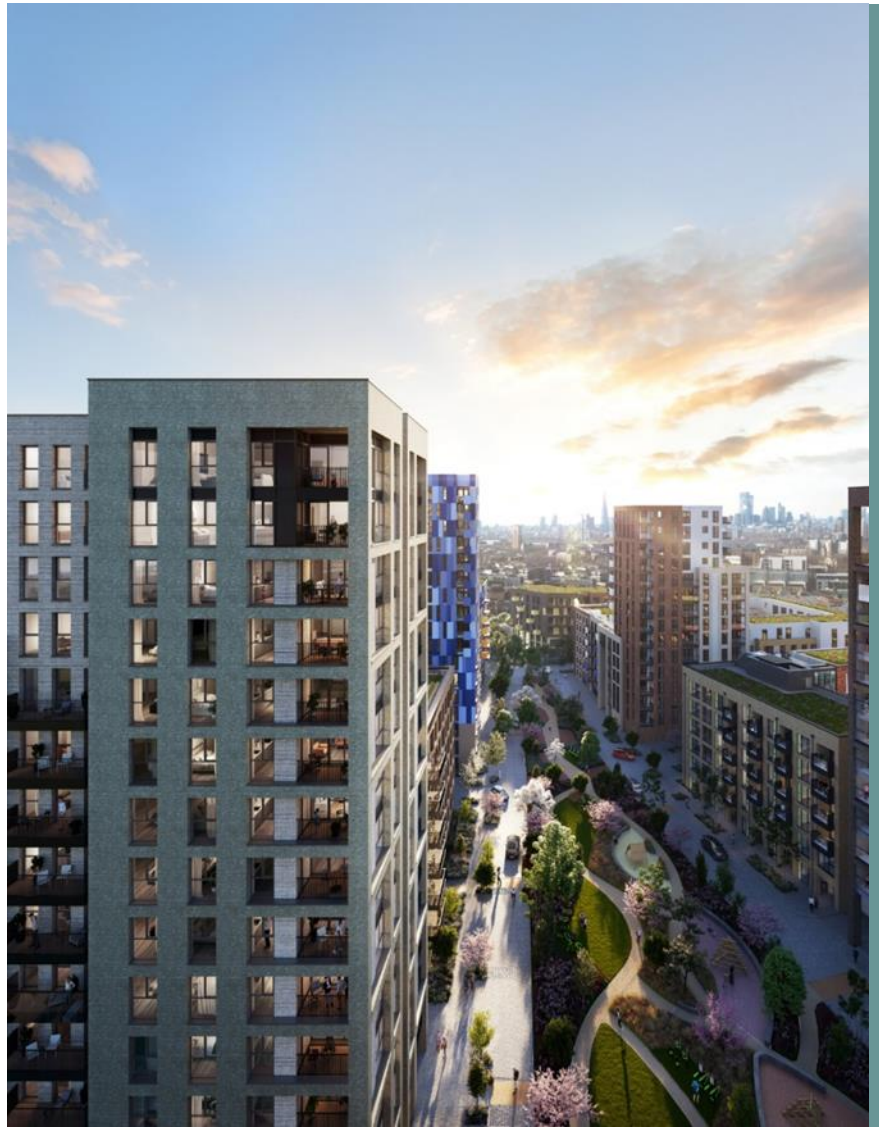
Developer: Weston Homes
Location: Zone 4, East London, Barking

Estimated Completion:
Phase 1: Q3/Q4 2023

Total No. of units: 1,089
Phase 1: 128 units

Prices from:
1 beds: £299,000-£ 347,500
2 beds: £397,500-£437,500
3 beds: £445,000-460,000
Blended pricing: £570 per sq. ft

Average estimated rental yield of 4.23%



Arden

Greenwich & Lewisham, SE10



Developer: Peabody
Location: Zone 2/3, Elverson Road

Estimated Completion:
Q3 2022- Final Phase 5&6

Total No. of units: 219

Prices from:
- 1 beds from £400,000
- 2 beds from Sold out
- 3 beds from £770,000 (Duplex)

Help to Buy Now available



London Square

Greenwich, SE10



Developer: London Square
Location: zone 2/3 , Greenwich Rail & DLR station
Estimated Completion:
From Q2 2022

Total No. of units: 46

Prices from:

- 1 beds from £500,000 Sold out
- 2 beds from £675,000
- 3 beds from £795,000 last one

Blended pricing: £870 PSF



One /10 Park Drive

Canary Wharf, E14



Developer: Canary Wharf Group

Location: Zone 2, Canary Wharf

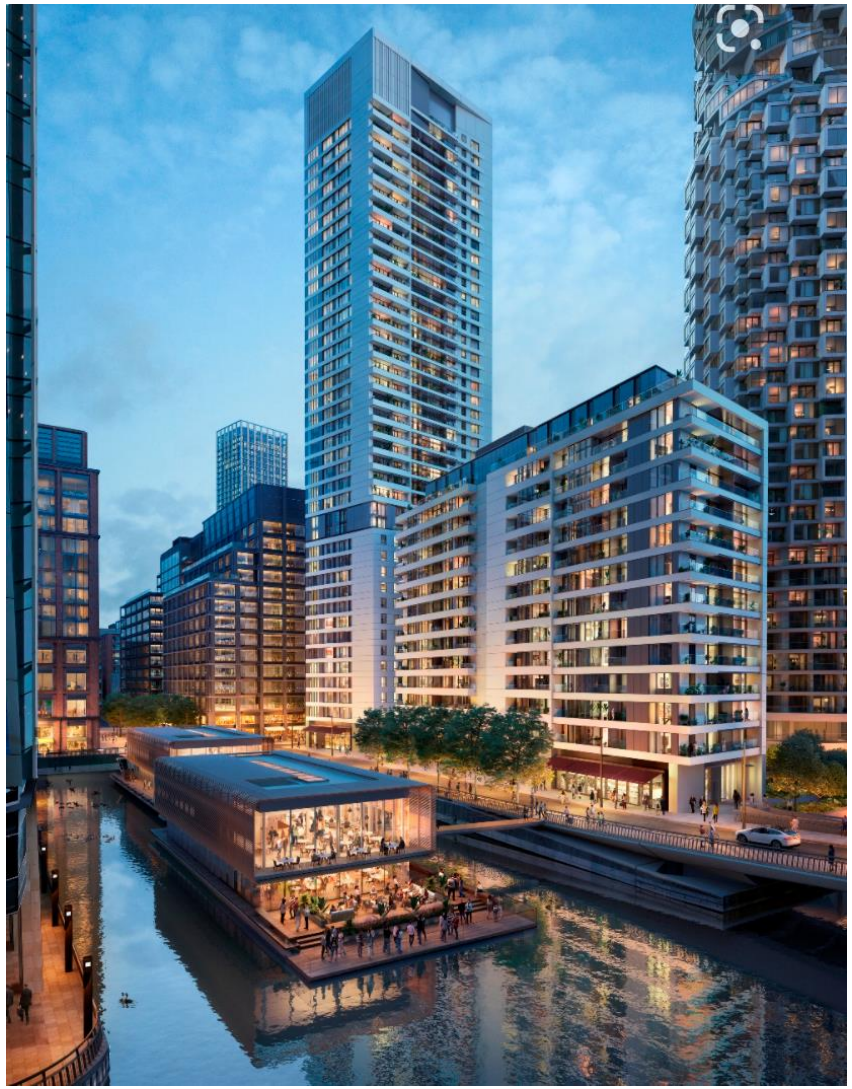
Estimated Completion:
Completed

Total No. of units: 483

Prices from:

- 1 beds from £840,000
- 2 beds from £1,155,000
- 3 beds from £1,675,000

Blended pricing: £1350 psf



Developer: Canary Wharf Group

Location: Zone 2, Canary Wharf

Estimated Completion:
Completed

Total No. of units: 345

Prices from:

- Studio from £715,000
- 1 beds from £785,000
- 2 beds from £1,080,000
- 3 beds from £1,400,000

Blended pricing: £1,150 PSF



8 Harbord Square

Canary Wharf, E14



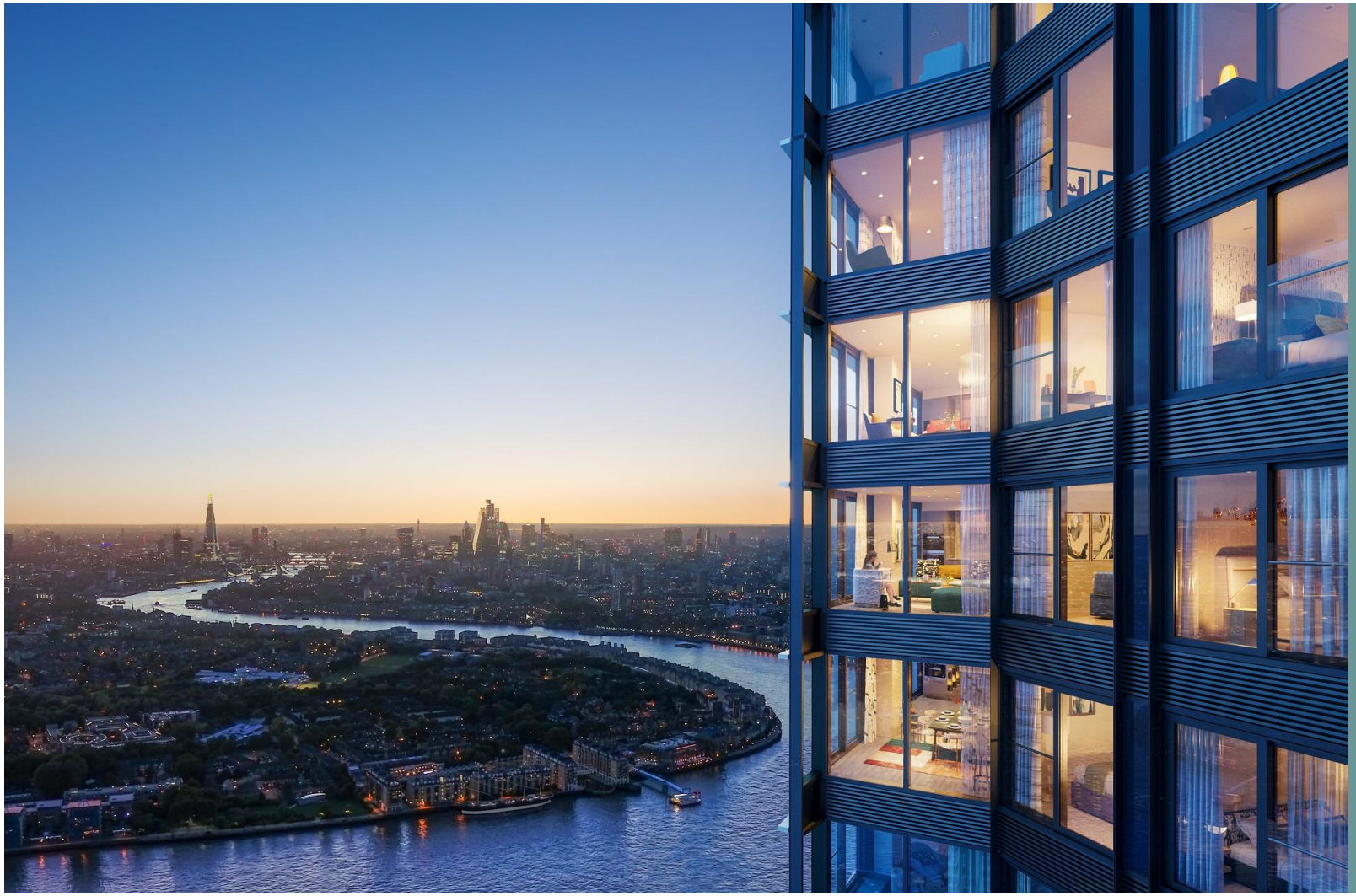
Developer: Canary Wharf Group

Location: Zone 2, Canary Wharf

Estimated Completion:
December 2023
Total No. of units: 82

Prices from:

- Small: 74 sqm/801 sq ft from £775,000
- Large: 96 sqm/ 1037sq ft from £990,000
- Blended pricing: £1,100 PSF



Aspen
E14



Developer: Far East Consortium

Estimated Completion: From Q4 2023

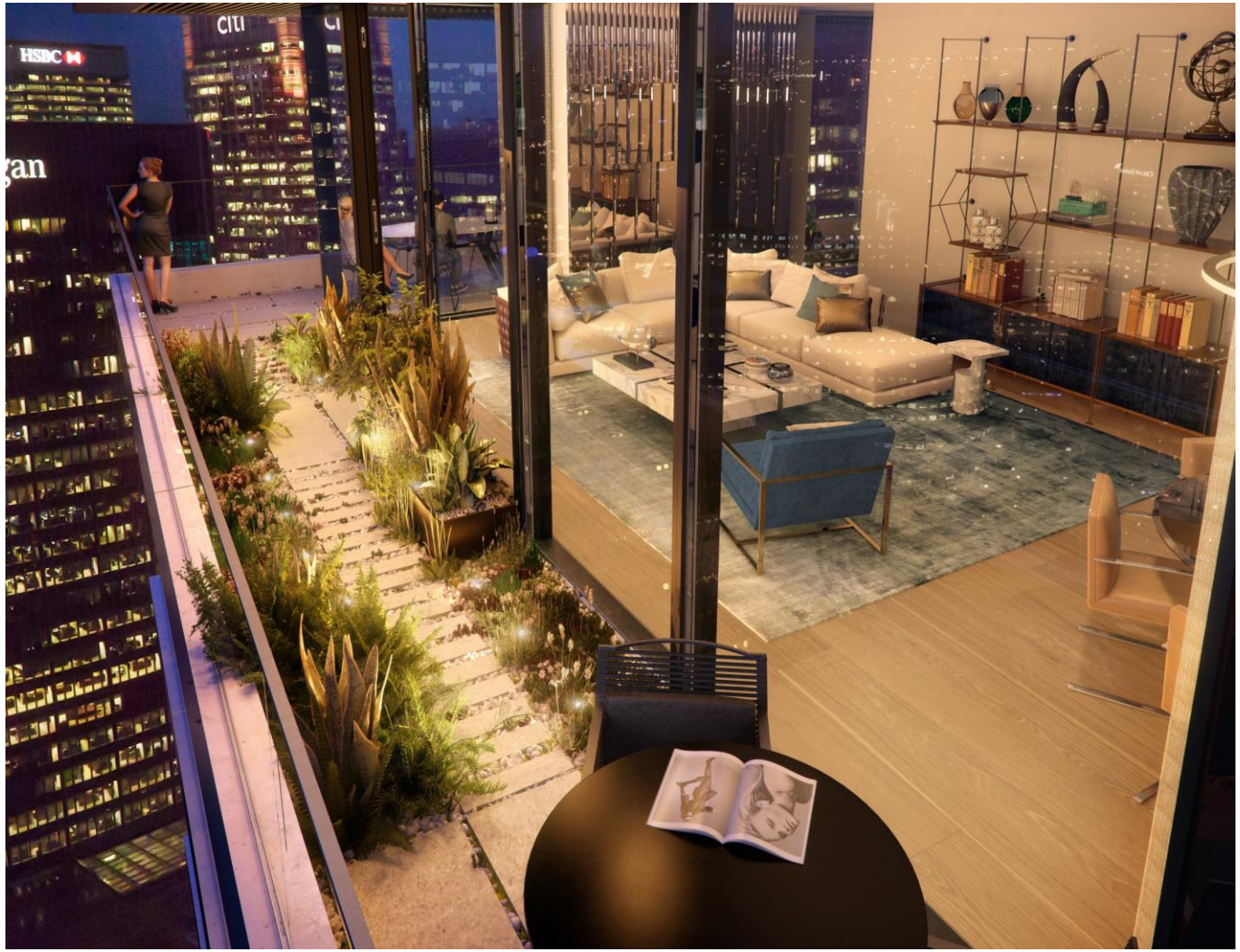
Total No. of units: 495

Prices from:
Studio - £554,500
1 beds - £599,000
2 beds – 799,000
3 beds - £1,330,000

Blended pricing: £1200 PSF



Wardian E14



Developer: Ballymore & Ecoworld

Estimated Completion:
Completed

Total No. of units:

Prices from:
- Studio from £585,000
- 1 beds from £760,000
- 2 beds from £1,050,000

Blended pricing: £1300 PSF



Landmark Pinnacle E14

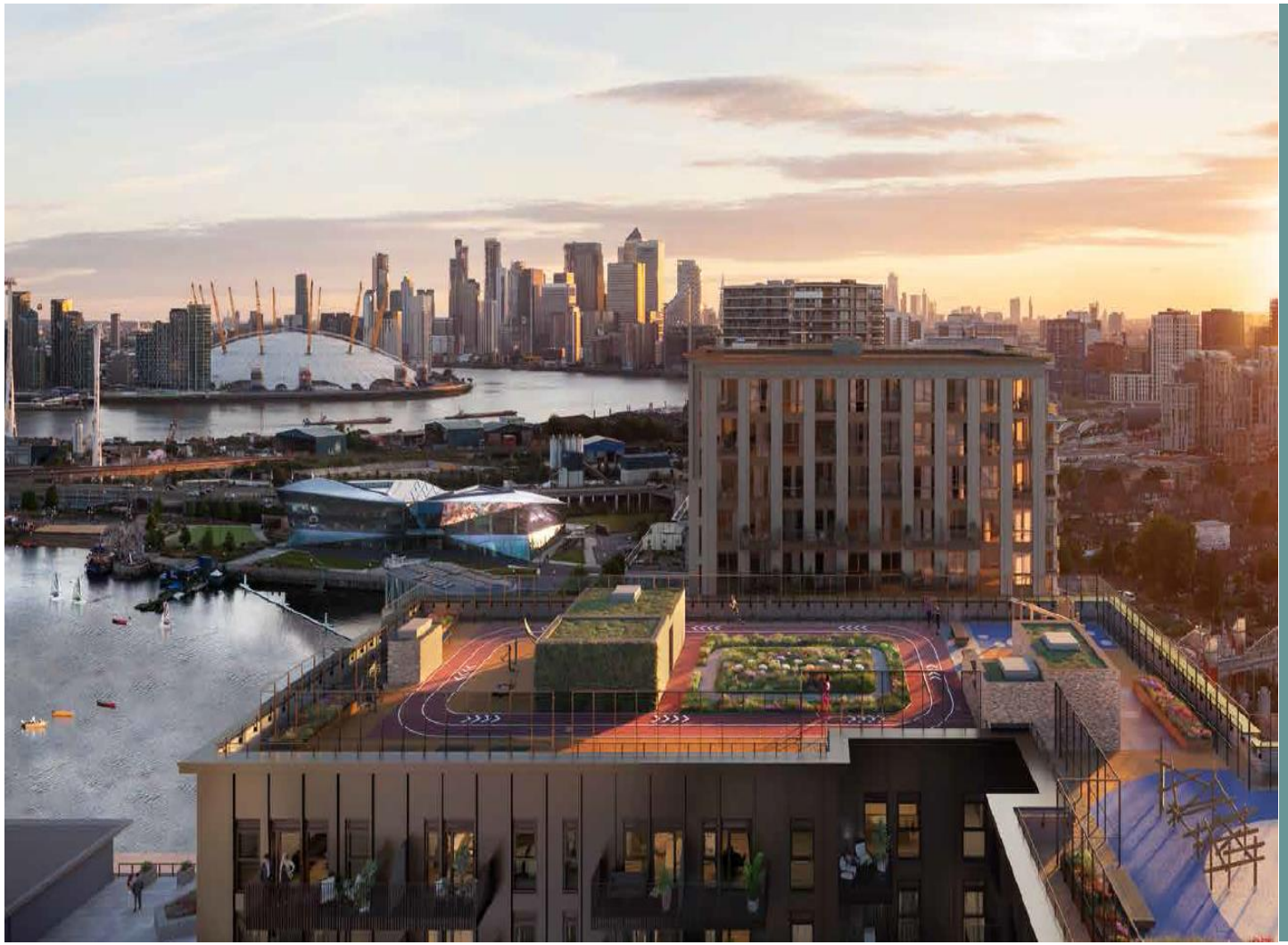


Developer: CPL
Location: Zone 2, South quay
Estimated Completion:
Completing now

Total No. of units: 752 in total, circa 80 remain

Prices from:
Studio - £607.750
1 beds - £620,000
2 beds – 940,500
3 beds - £1,596,250

Blended pricing: £1150 PSF



Royal Eden Docks E16



Developer: A partnership between Mount Anvil and ExCeL London

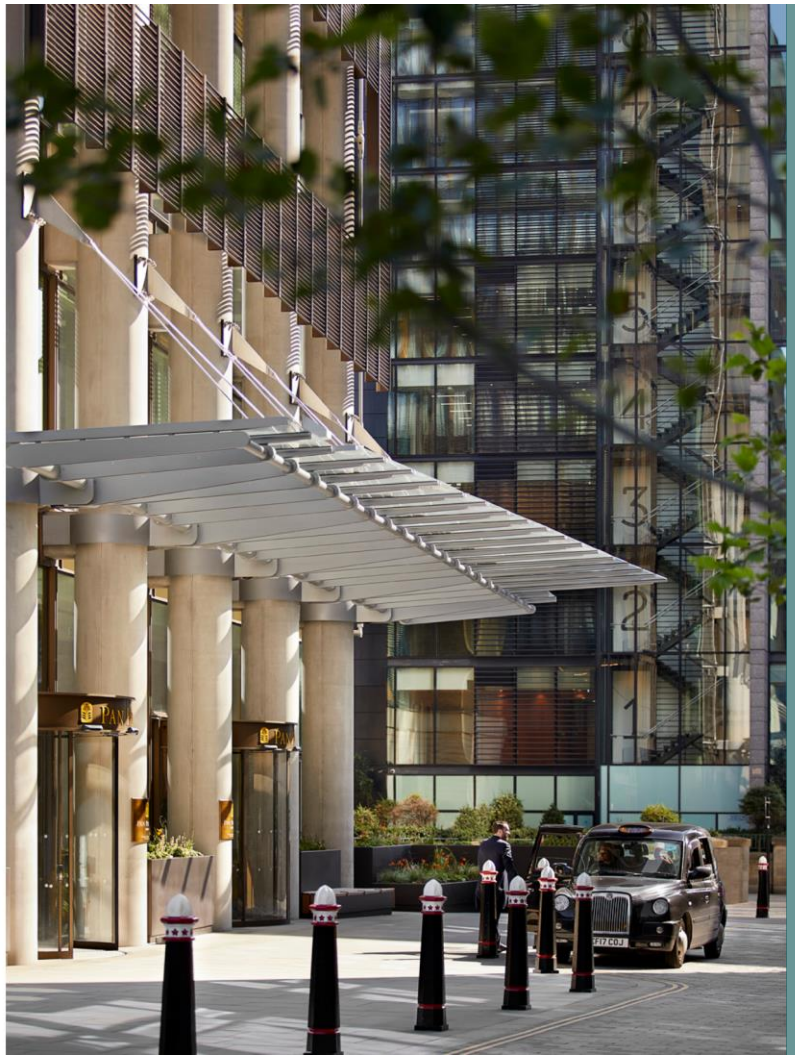
Estimated Completion: Q1 / Q2 2025

Total No. of units: 117 private

Prices from: £TBC

Blended pricing: £TBC





One Bishopgate Plaza EC3A



Developer: UOL Group
Location: Zone 1, 1 mins walk to Liverpool st station

Estimated Completion: Completed

Total No. of units: 160

Prices from:
1 beds - £1,300,000
2 beds - £1,800,000
3 beds - £3,100,000

Blended pricing: £2150 PSF



The Arc EC1



Developer: Ghelamco
Location: Zone 1, Old street

Estimated Completion:
Q1 2023

Total No. of units: 100

Prices from:
Studio - £728,000
1 beds - £822,000
2 beds – 1,061,000
3 beds - £3,264,000

Blended pricing: £1600 PSF



Cadence
King's Cross, N1C



Developer: Argent
Location: Zone 1, King's cross & St Pancras

Estimated Completion:
Q4 2022

Total No. of units: 103 private

Prices from:
Studio – sold out
1 beds – sold out
2 beds – 1,720,000
3 beds - £1,970,000

Blended pricing: £1550 PSF



Gasholder
King's Cross, N1C



Developer: Argent
Location: Zone 1, King's cross & St Pancras

Estimated Completion: Completed

98% Sold
Final apartments and penthouses
£7,400,000
11-103 penthouse show apartment dressed by Suna now available to view

Blended pricing: £1850 PSF

Coming Soon

Capella

Kings Cross N1C





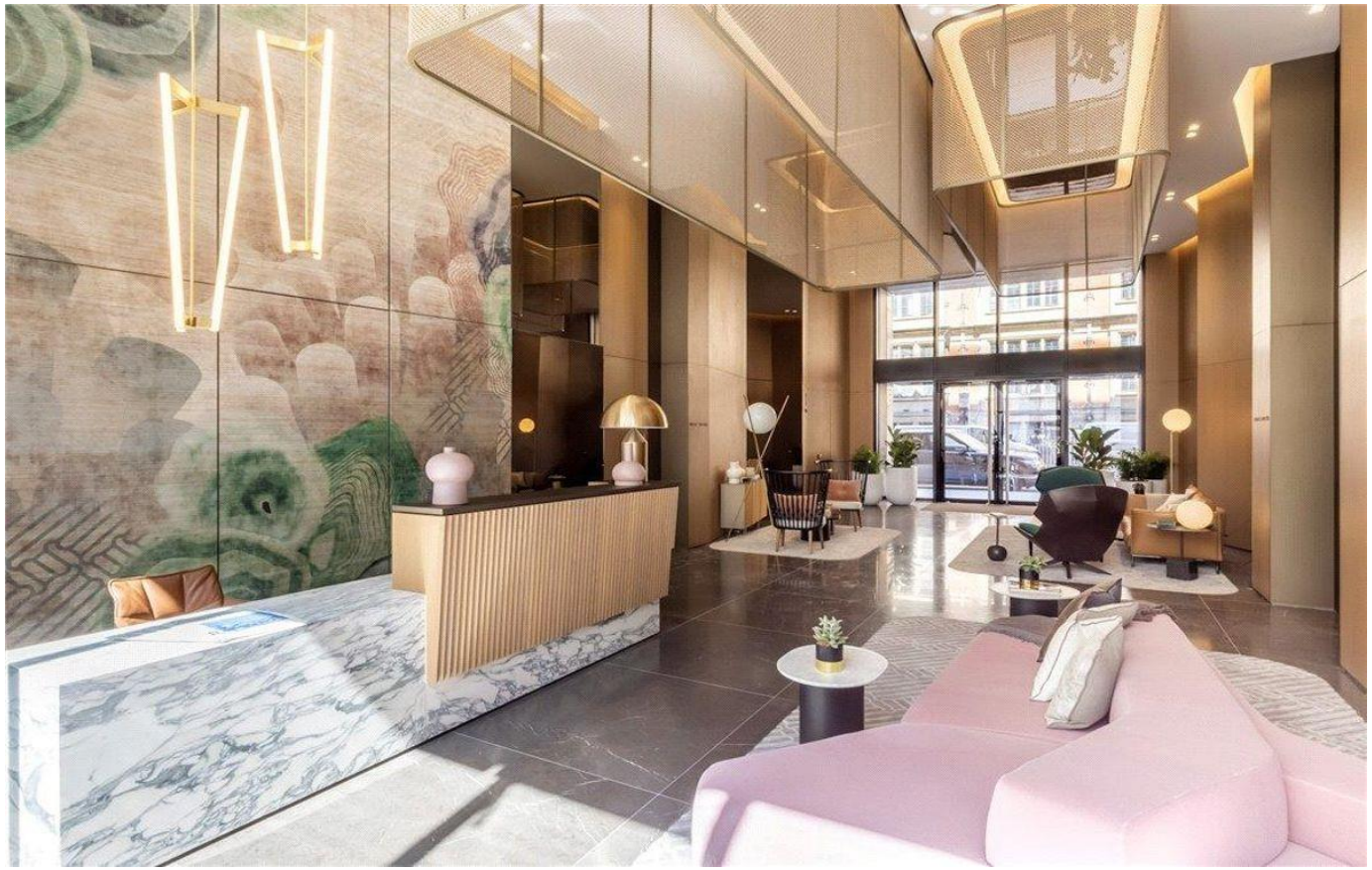
Developer: Argent
Location: Zone 1, King's cross & St Pancras

Estimated Completion:
Est. Completion: Q1 2024

Total units: 120
Studio starting from £650,000



Lincoln Square WC2A



Developer: Lodha UK
Location: Zone1, Holborn
Estimated Completion: Complete

Total No. of units: 200 (5 units remaining)

Prices from:
2 beds - £2,850,000
3 beds – £4,500,000

6 x 1 bed flat tenanted portfolio also available as an investment either individually or on a bulk basis (passing rents and yields available on request)

Blended pricing: c.£2,350 psf

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TwentyFive Marylebone W1



Developer: JV between Native Land and the Portman Estate

Nearest Station: Marble Arch Station(7mins walking distance)

Estimated Completion: Completed

Total No. of units: 25 private (10 remaining)

Prices from: £1.400,000

Blended pricing: c. £2,400 PSF

Knight Frank



96- 98 Baker Street

W1U



Developer: Select Group

Estimated Completion:
Q4 2022

Total No. of units: 8 (5 remaining)

Prices from:
1 beds - £850,000
2 beds - £1,950,000
3 beds – All sold

Blended pricing: £2,200 PSF

Coming Soon

Cosway Street

NW1



Developer: City of Westminster

Nearest Station: Marylebone Station (5-min walk)

Estimated Completion: Spring 2023

Total No. of units: 49 private

Prices from: £799,995

Blended pricing: c. £1,523 PSF

MARYLEBONE

COSWAY ST.

LONDON NW1



Venice Court W2

Venice Court, W2



Developer: City of Westminster

Nearest Station: Edgware Road

Estimated Completion: Feb 2022

Total No. of units: 41private (15 remaining)

Prices from: £595,000

Blended pricing: c. £1,240 PSF



Southbank Place SE1

Southbank Place, SE1



Developer: Canary Wharf Group and Qatari Diar

Nearest Station: Waterloo

Estimated Completion: Completed

Total No. of units: 868 units

Prices from: £880,000

Blended pricing: c. £2,100 PSF

Knight Frank



Lillie Square SW6



Developer: CAPCO

Nearest Station: West Brompton

Estimated Completion: Completed

Total No. of units: 185 private

Prices from: £830,000

Blended pricing: c. £1,500 PSF



Chelsea Waterfront SW10



Developer: Cheung Kong Property Holdings

Nearest Station: Imperial Wharf

Estimated Completion: Completed

Total No. of units: 709 units

Prices from: £1,400,000

Blended pricing: c. £2,000 PSF

Knight Frank



The Verdean (Phase 2, B3) W4

Coming Soon



Developer: JV between Mount Anvil and Catalyst

Estimated Completion: TBC

Total No. of units: 240 private

Prices from:
Studios: £TBC
1 beds: £TBC
2 beds: £TBC

Blended pricing: c. £TBC

Knight Frank



Chiswick Green
W4

Coming Soon



Developer: Great Marlborough Estates

Estimated Completion:
October 2023

Total No. of units: 121 private

Prices from:
1 beds: £TBC
2 beds: £ TBC
3 beds: £ TBC
Townhouses: £TBC

Blended pricing: c. £TBC



Hanwell Square W7



Developer: Joint venture between FABRICA by A2Dominion and Higgins

Estimated Completion: Q1 2023

Total No. of units: 216 private sale in total (104 in Phase 1)

Prices from:
Studios: £305,000
1 beds: £405,000
2 beds: £540,000

Blended pricing: £735 PSF



The Brentford Project
TW8



Developer: Ballymore

Nearest Station: Brentford

Estimated Completion: Q3 2022-Q2 2023

Total No. of units: 876 units

Prices from: £445,000

Blended pricing: c. £850 PSF

Coming Soon



Kings Riverside

Deptford SE8

Coming Soon



Chelsea Botanical

Chelsea, Fulham & Parsons Green
SW6

Development Pre/Review
– *Prime Market*

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The OWO SW1A



Developer: Hinduja Group

Estimated Completion:
Q4 2022

Total No. of units: 85

Prices from:
Studios from £1,695,000
1 Bedrooms from £2,625,000
2 Bedrooms from £5,775,000
3 Bedrooms from £9,200,000
4 Bedrooms from £17,325,000



The Residences at The Mandarin Oriental W1



Developer: Clivedale

Estimated Completion:
Summer 2022

Total No. of units: 80

Prices from:
1 Bedroom – All sold
2 Bedrooms from £4.03m
3 Bedrooms from £10.35m



Regent Crescent W1



Developer: CIT

Estimated Completion:
Completed

Total No. of units: 67, 70% Sold

Prices from:
Mew House 2 – 3 bedrooms from £5.15m
2 Bedrooms from £4.8m
3 Bedrooms from £7.8m
4 Bedrooms from £15.2m
5 Bedrooms from £15.9m



Park Morden W2



Developer: Cheyne Capital & Fenton Whelan

Estimated Completion:
Q1 2023

Total No. of units: 55

Prices from:
1 Bedrooms from £2.25m
2 Bedrooms from £3.25m
3 Bedrooms from £7.75m
4 Bedrooms from £13.75m
Mew House (4 beds) £4.15m



The Whiteley W2



Developer: MARK and CC Land

Estimated Completion:
Q4 2023

Total No. of units: 139
Prices from:

1 Bedrooms from £1,550,000
2 Bedrooms from £2,350,000
3 Bedrooms from £6,500,000
4 Bedrooms from £8,750,000



80 Holland Park
W11



Developer: CPC Group Ltd

Estimated Completion: Completed

Total No. of units: 25

Prices from:
One bed starting from £2,500,000
Two bed starting from £3,500,000
Three bed starting from £6,750,000
Four / Five bed starting £14,750,000

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One Kensington Gardens W8



Developer: De Vere Estates

Estimated Completion:
Completed

Total No. of units: 97

Prices from:
2 Bedrooms from £3,150,000
3 Bedrooms from £7,750,000



Lancer Square
W8



Developer: CIT

Estimated Completion: Completed

Total No. of units: 36

Prices from:

2 Bedrooms from £4.86m
3 Bedrooms from £4.96m



Bryanston Hyde Park W1H



Developer: Almacantar

Estimated Completion:
Completed

Total No. of units: 54 units

Prices from:
One bed starting from £2,400,000
Two bed starting from £4,800,000
Three bed starting from £6,450,000
Four bed starting £13,450,000



Harcourt House

Marylebone
W1G



Developer: Centreland

Estimated Completion: Completed

Total No: 25 units

Prices from:
1 x Two bed starting from £3,100,000

3 x Three bed starting from £7,300,000



Chelsea Barracks - Nine Mulberry SQ

Belgravia
SW1



Developer: Qatari Diar UK

Estimated Completion: Q4 2023

New Phase,Total No: 46 units

Tenure: 999

Prices from:
1 beds, price start from: £3,300,000
2 beds, price start from: £4,500,000
3 beds, price start from: £5,750,000
4 beds, price start from: £17,000,000
Penthouses, Price start from: £38,000,000

Coming Soon



Knightsbridge Gate SW1
Launch: April 2022

Coming Soon

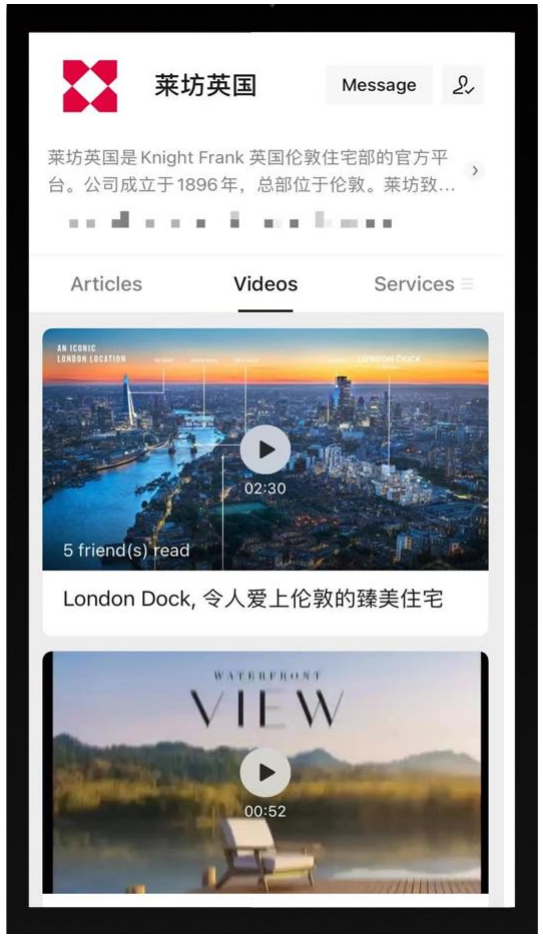


Holland Park Gate, Kensington, W8
Launch: March 2022

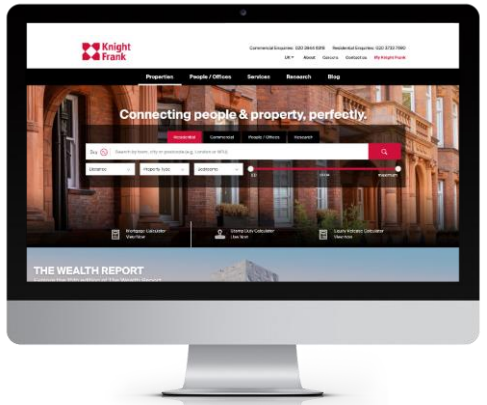
More projects

Your partners
in property
for 125 years

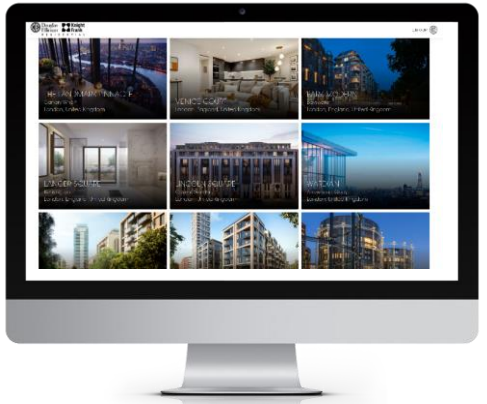
How to get access to more properties?



Knight Frank WeChat Account



Knight Frank Website



Knight Frank Folio

Property Collections



Any questions?

Thank you

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