

MARBELLA- COSTA DEL SOL



MARKET OVERVIEW Q1 & Q2 2017

"After the shock impact that Brexit had on the Marbella Market last year, surprisingly sales have been strong during the first half of 2017. Whilst it is true that there are fewer UK buyers, the market seems to have been more than made up for by continued demand from other nationalities such as Scandinavians, Belgians, Dutch, Middle Eastern and increasingly Spanish buyers. There has also been a big increase in the number of New Development projects on the market and these continue to be the most popular choice for buyers who are increasingly focused on quality, design and Energy efficiency."



STEPHEN LAHIRI
Partner
Lucas Fox Marbella



LUCAS FOX MARBELLA - COSTA DEL SOL VOLUME OF SALES TRANSACTIONS

Source: Lucas Fox sales data



Q1 & Q2 2016



↑ 150.00%



Q1 & Q2 2017



LUCAS FOX MARBELLA - COSTA DEL SOL VALUE OF SALES TRANSACTIONS

Source: Lucas Fox sales data



Q1 & Q2 2016



↑ 248.39%

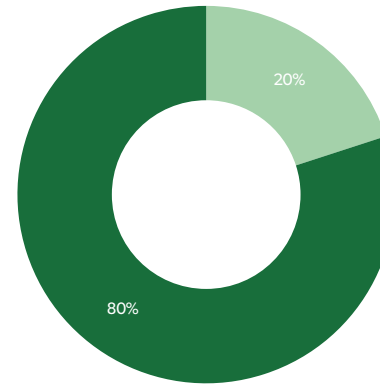


Q1 & Q2 2017

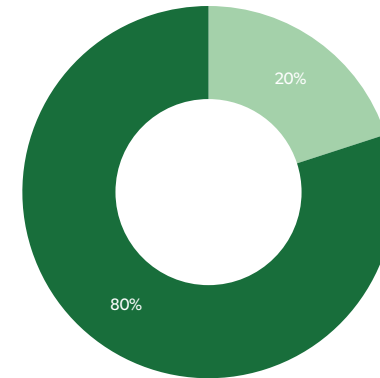


LUCAS FOX MARBELLA - COSTA DEL SOL BUYER COUNTRY OF ORIGIN & MOTIVATION FOR PURCHASE

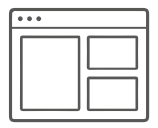
Source: Lucas Fox sales data



- Canada / USA
- Scandinavia

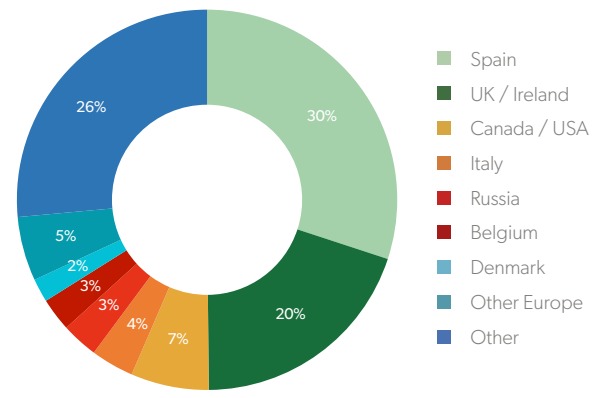


- Primary Residence
- Secondary Residence



LUCASFOX.COM
MARBELLA - COSTA DEL SOL
WEBSITE INTEREST

Source: Lucas Fox website data





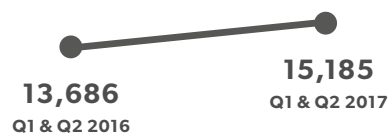
VOLUME OF SALES TRANSACTIONS MÁLAGA PROVINCE AND SPAIN

Source: National Institute of Statistics

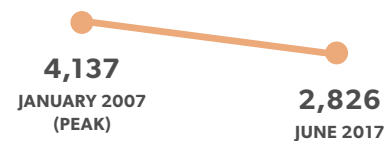


MÁLAGA PROVINCE

↑ **10.95%**



↓ **-31.69%**



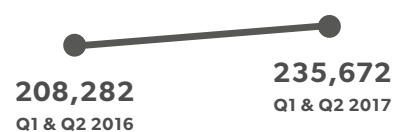
2,531

AVERAGE NUMBER OF
TRANSACTIONS PER MONTH
Q1 & Q2 2017

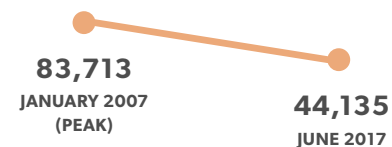


SPAIN

↑ **13.15%**



↓ **-47.28%**



39,279

AVERAGE NUMBER OF
TRANSACTIONS PER MONTH
Q1 & Q2 2017

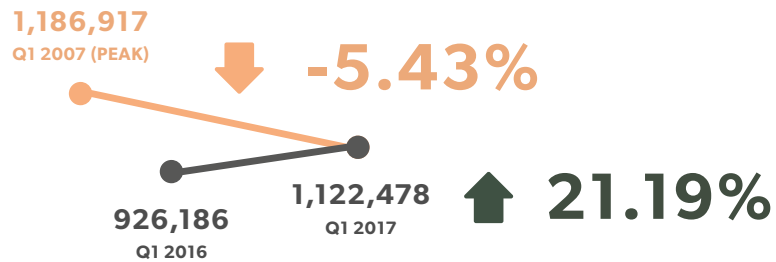
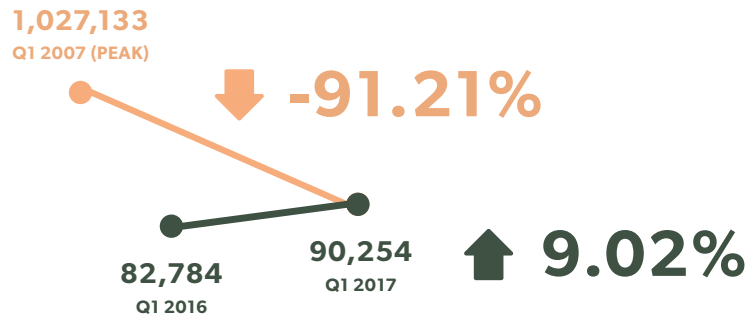


The figures for 2017 are provisional and may be subject to change.



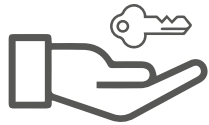
TOTAL VALUE OF SALES TRANSACTIONS MÁLAGA PROVINCE ('000 €)

Source: Spanish Department of Development



The figures for 2017 are provisional and may be subject to change.

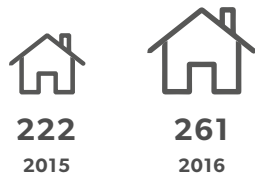




PRIME MARKET VOLUME OF SALES TRANSACTIONS (OVER €900,000) MÁLAGA PROVINCE AND SPAIN

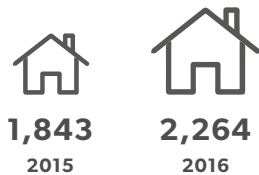
Source: Spanish Department of Development

MÁLAGA PROVINCE



↑ **17.57%**

SPAIN



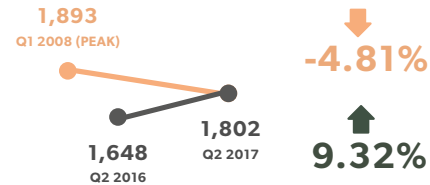
↑ **22.84%**



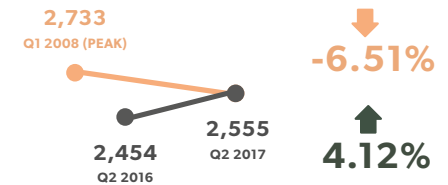
AVERAGE PROPERTY SALES PRICES (€/m²)

Source: Idealista

ESTEPONA



MARBELLA



AVERAGE RENTAL PRICES (€/m²)

Source: Fotocasa

ESTEPONA



MARBELLA





PASSENGER ARRIVALS AT MÁLAGA - COSTA DEL SOL AIRPORT

Source: Aena

