

Q4:2013

Savills' investment agents must be seriously chuffed with their fourth quarter results. In just three months they have managed to end CBRE's five-quarter winning streak, knocking it off the top of the leader board.

Savills' secured a fifth of the overall market after it acted on three of the largest deals in the fourth quarter, acting for the purchaser on the £1.7bn More London portfolio, SE1; Shell-Mex House, 80 Strand,

WC2; and the St Botolph Building, EC3. The agent was more than £2.2bn behind CBRE's annual running total as quarter three closed but managed to claw its way to the top after securing £4bn worth of sales.

CBRE plunged to fifth place behind Strutt & Parker, Jones Lang LaSalle and Eastdil Secured.

GM Real Estate surprised many by racing up the leader board, grabbing the number seven position and signing a massive 88% of its annual deals in the last quarter of the year. GM Real Estate's total was boosted by disposing of the £170m Centrium at 61 Aldwych, WC2.

This was not the only surprise, with Eastdil Secured making its entry at number four in the league table. The firm is better known as a real estate investment bank but has been growing its advisory business; its position was boosted by the £400m sale of Devonshire House, W1.

In the leasing tables, there was little upset in the top five, as CBRE, JLL and DTZ rounded off strong years with a solid final quarter and secured the top three positions. Between them, they took nearly two-thirds of the total London leasing market.

2013 Q4 INVESTMENT LEAGUE TABLE

Rank	Agent	Value (£m)	Market share
1	Savills	4,021	20%
2	Strutt & Parker	2,356	12%
3	Jones Lang LaSalle	2,276	12%
4	Eastdil Secured	2,100	11%
5	CBRE	2,057	10%
6	Capital Real Estate Partners	1,903	10%
7	Knight Frank	990	5%
8	GM Real Estate	944	5%
9	Tudor Toone	796	4%
10	Michael Elliott	435	2%

TOP AGENTS BY SUBMARKET - Q4 2013

CITY CORE

Rank	Agent	Disposals (sq ft)	No. deals
1	Jones Lang LaSalle	646,241	34
2	DTZ	329,397	18
3	GM Real Estate	317,052	2
4	Knight Frank	229,709	13
5	CBRE	222,547	21

MIDTOWN

Rank	Agent	Disposals (sq ft)	No. deals
1	Knight Frank	201,624	4
2	CBRE	193,310	13
3	DTZ	190,917	9
4	Savills	151,118	12
5	Jones Lang LaSalle	82,325	2

DOCKLANDS

Rank	Agent	Disposals (sq ft)	No. deals
1	CBRE	48,937	4
2	Jones Lang LaSalle	36,681	3
3	GM Real Estate	28,746	2
4	Knight Frank	18,300	3
5	Cherryman	16,923	4

CITY FRINGE

Rank	Agent	Disposals (sq ft)	No. deals
1	Hatton Real Estate	156,731	30
2	CBRE	56,952	6
3	Allsop	56,488	5
4	Jones Lang LaSalle	52,858	5
5	Savills	43,234	2

WEST END

Rank	Agent	Disposals (sq ft)	No. deals
1	CBRE	222,670	23
2	Jones Lang LaSalle	154,756	19
3	Monmouth Dean	102,180	10
4	Montagu Evans	100,741	13
5	Knight Frank	65,555	10

SOUTH BANK

Rank	Agent	Disposals (sq ft)	No. deals
1	CBRE	72,112	9
2	Jones Lang LaSalle	39,409	3
3	HZSO	39,286	3
4	Cushman & Wakefield	34,223	2
5	Farebrother	27,819	2

TOP LONDON ACQUISITION AGENTS 2013

Rank	Agent	Acquisitions (sq ft)	No of deals	Market share
1	CBRE	1,632,748	72	11%
2	Jones Lang LaSalle	1,141,715	61	7%
3	Cushman & Wakefield	767,443	29	5%
4	DTZ	688,364	21	4%
5	BNP Paribas Real Estate	611,411	14	4%
6	James Andrew International	419,824	17	3%
7	Savills	416,523	21	3%
8	DeVono	335,821	58	2%
9	Knight Frank	280,583	20	2%
10	Colliers International	237,535	20	2%
11	Edward Charles & Partners	214,802	13	1%
12	Monmouth Dean	186,342	30	1%
13	Deloitte Real Estate	185,907	15	1%
14	Newton Perkins	158,783	22	1%
15	Capita Symonds	158,651	3	1%
16	Strutt & Parker	153,324	13	1%
17	GVA	111,852	16	1%
18	Mellersh & Harding	92,807	21	1%
19	GI Hearn	92,429	1	1%
20	Farebrother	73,857	11	0%
21	AOS Studley	70,990	9	0%
22	Dron & Wright	68,559	5	0%
23	Crossland Otter Hunt	65,673	9	0%
24	Montagu Evans	64,537	7	0%
25	Gerald Eve	59,403	5	0%

TOP LONDON LEASING AGENTS Q4 2013

Rank	Agent	Disposals (sq ft)	No of deals	Market share
1	Jones Lang LaSalle	1,017,970	67	24%
2	CBRE	845,643	78	19%
3	DTZ	606,244	40	17%
4	Knight Frank	519,688	31	15%
5	Savills	405,082	40	12%
6	Cushman & Wakefield	376,379	22	5%
7	GM Real Estate	351,998	6	4%
8	Hatton Real Estate	234,937	33	4%
9	HZSO	152,900	22	4%
10	Deloitte Real Estate	127,768	15	3%
11	Monmouth Dean	125,164	16	3%
12	Montagu Evans	123,362	15	3%
13	GVA	119,631	10	3%
14	Colliers International	114,275	9	3%
15	Strutt & Parker	113,949	17	3%
16	Ingleby Trice	109,529	11	2%
17	Bluebook	109,457	10	2%
18	Edward Charles & Partners	102,363	12	2%
19	Allsop	101,215	15	2%
20	Kinney Green	100,925	9	2%
21	Hall Kemp	84,768	14	1%
22	BNP Paribas Real Estate	74,904	14	1%
23	Farebrother	65,438	14	1%
24	Tuckerman	61,068	12	1%
25	Newton Perkins	47,365	14	1%

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