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Asia Pacific attracts growing share of global capital as investors plan ahead

Colliers releases new Global Capital Flows report

ASIA PACIFIC, March 17, 2026 – Global capital is increasingly reallocating towards Asia Pacific as investors reset portfolios for the next phase of the real estate cycle, according to new research from Colliers.

Colliers' latest [Global Capital Flows \(March 2026\)](#) report has found a sharp rise in capital being raised for deployment across the APAC region, despite a more measured recovery in investment volumes.

According to the report, global real estate fundraising rebounded strongly in 2025, rising 28.9 per cent year-on-year to just over US\$222billion. Within this, capital raised for Asia Pacific-focused strategies surged by 109 per cent, significantly outpacing growth in funds allocated to North America and EMEA and signaling renewed conviction in the region's long-term fundamentals.

This fundraising momentum contrasts with a more uneven recovery in transactional activity. Global real estate investment volumes rose 8.2 per cent year-on-year in 2025, led by North America where volumes increased 15.4 per cent, followed by EMEA at 8.6 per cent. In Asia Pacific, investment volumes grew by 1.7 per cent overall, with activity softening towards the end of the year after a stronger start and mid of 2025. However, transactions involving standing assets in core Asia Pacific markets rose by around 8 per cent, underscoring continued investor confidence in high-quality, well-located assets.

"Asia Pacific is increasingly being re-weighted within global portfolios as a strategic, long-term allocation," Theo Novak, Colliers' Managing Director, Capital Markets & Investment Services, Asia Pacific, said. "While they remain selective, the scale of capital being raised for deployment into the region shows a clear shift in how global portfolios are being constructed for the next cycle."

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The report highlights a growing divergence between where capital is being raised and where it is currently being deployed. EMEA dominated as a destination for cross-border capital for standing assets in 2025, featuring seven of the world's top 10 markets. However, several Asia Pacific destinations are gaining ground. **Japan** and **Australia** both increased their share of global cross-border investment in 2025, moving above their respective five-year averages and reinforcing their status as key global gateways.

On the capital supply side, the United States remained the largest source of global real estate capital in 2025, supported by strong fundraising for data centres and other growth sectors. Within Asia Pacific, **Japan** and **Hong Kong** rank among the leading sources of cross-border capital, reflecting deeper domestic capital pools and rising outbound investment activity.

Sector preferences also continue to evolve. Globally, multifamily remained the largest sector by transaction volume on a two-year rolling basis, although its dominance is increasingly challenged by industrial and office assets. In Asia Pacific, **office** has been the standout sector over the past 24 months, supported by demand for high-quality buildings aligned with evolving occupier requirements, while **retail** investment has strengthened alongside the recovery in tourism and consumer spending.

Colliers expects the surge in capital raised for Asia Pacific to support increased momentum in investment activity through 2026, particularly as economic growth forecasts for the region remain among the most resilient globally.

"As investors look ahead, the focus is firmly on relevance and resilience," Mr Novak said. "Capital is backing assets and markets that can perform through change, not just in the near term, but over the long run."

To download the full report, click [HERE](#).

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