REPORT Q2 2016 INDUSTRIAL MARKET

108 REAL ESTATE AGENCY

„A“ CLASS STOCK

new supply

	Q4	Q1	Q2
new supply	153.000	84.000	140.000
stock	5.69 mil. sq m	5.78 mil. sq m	5.92 mil. sq m

AVERAGE RENTS

„A“ class /sq m /month
3.70 - 4.10€

„B“ class /sq m /month
2.90 - 3.50€

VACANCY RATE

Q4	Q1	Q2
5,1	4,8	4,4%

Q2: 261.700 sq m

YEAR TO YEAR TRENDS

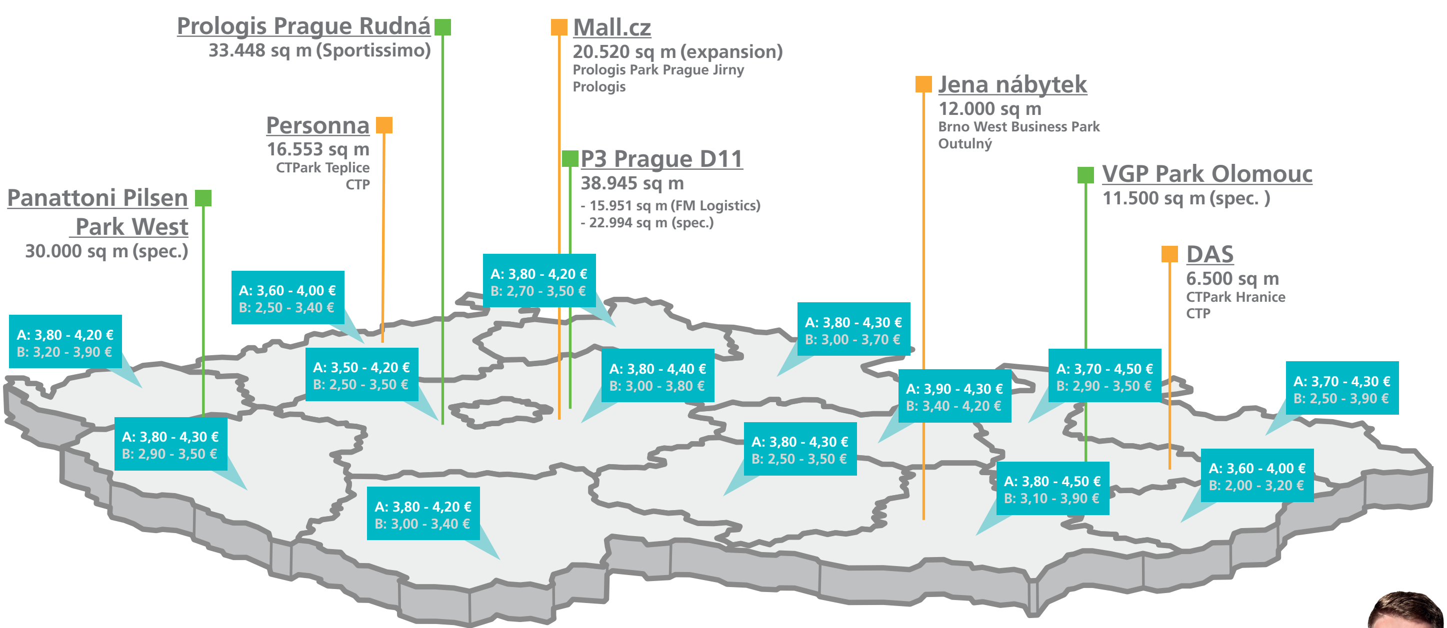
new supply +40%

average rent +5%

vacancy -38%

ACTIVITY HIGHLIGHTS

major transactions new development



INDUSTRIAL MARKET OVERVIEW

Number of finished construction in Q2 moves the Czech industrial market towards the milestone of 6 million sqm of total industrial space. Almost 140 000 sqm hit the market to satisfy the growing market demand.

The Greater Prague area remains the most attractive region with 59% share, followed by Pilsen area. Increased market activity is also reflected in declining vacancy rate, currently at 4,4%. As a result of this trend there is a strong increase in volume of speculative development with 44% share in total Q2 construction.

„With the decreasing amount of immediately vacant storage spaces our recommendation to the clients is to start preparing for relocation or expansion at least 12 months in advance. That way possible options can also include new Bulid-To- Suit project."

MICHAL BARTHELL
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