REPORT Q3 2016 INDUSTRIAL PROPERTY MARKET

108 REAL ESTATE AGENCY

INDUSTRIAL MARKET SUMMARY

In the third quarter of 2016 we have seen relatively low volume in terms of new deals combined with significant amount of prolongations and expansions. Market demand for new industrial premises comes mainly from e-commerce subjects and providers of logistic services.

There is no question that the total industrial market inventory exceeded the milestone of 6 million sq m in Q3. With the ongoing demand for new industrial solutions we predict that the total stock in Czech Republic will continue in its growth. New development will depend mainly on the ability of developers to secure sufficient amount of the land suitable for new construction.

„Close connection to Germany is the key figure for clients seeking new industrial space premises in the Pilsen and Karlovy Vary region. Combination of infrastructure, accessibility and skilled labor make the area perfect target for „big-box" solutions – projects offering about 70 to 200 000 sq m."

PETER KOLENČÍK
Industrial Agency

WAREHOUSE PROPERTIES „A" CATEGORY

	Q1	Q2	Q3
new	84.000	180.000	53.000
stock	5.78 mil. sq m	5.96 mil. sq m	6.01 mil. sq m

AVERAGE RENTS

category „A" /sq m /month
3.70 - 4.10

category „B" /sq m /month
2.90 - 3.50

VACANCY RATE

Q1	Q2	Q3
4,8	4,1	4,6%

Q3: 276.598 sq m

YEAR ON YEAR TREND

newly completed **-80%**

the average rent **+5%**

vacancy **-19%**

SELECTION OF TRANSACTIONS AND CONSTRUCTION

significant transactions · new construction

Segro Logistic Park Prague
3.500 sq m (Lobkowicz)
3.500 sq m (GO! EXpress + spec.)

Prologis Park Prague Airport
11.720 sq m (speculatively)

Megatech Industries
11.346 sq m
CTPark Modřice
CTP

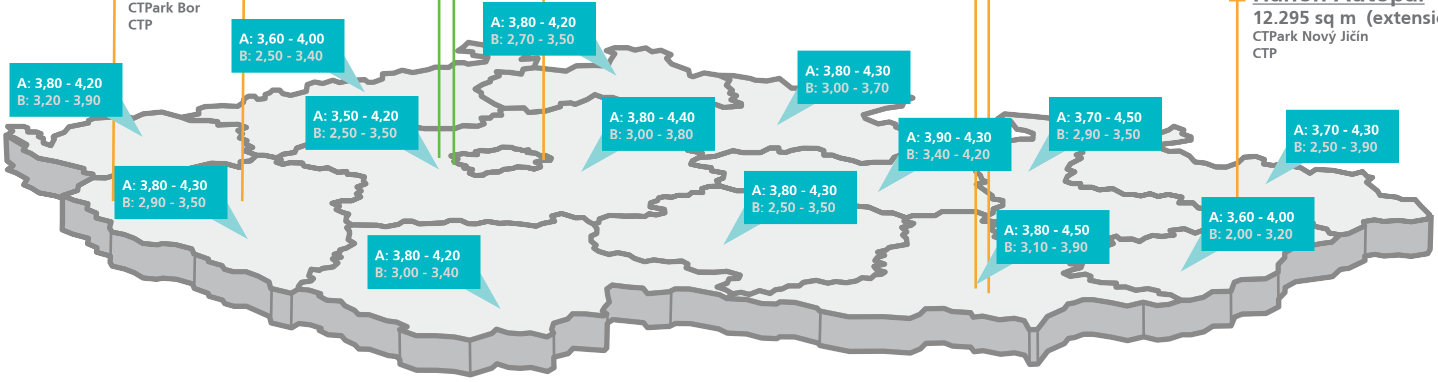
SONY DADC
20.450 sq m (extension)
Prologis Park Plzeň Štěnovice
Prologis

MD Logistika
39.710 sq m (extension)
P3 Horní Počernice
P3 Parks

DB Schenker
9.310 sq m
CTPark Blučina
CTP

LOXXESS
33.858 sq m (extension)
CTPark Bor
CTP

Hanon Autopal
12.295 sq m (extension)
CTPark Nový Jičín
CTP



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