

# REPORT Q3 2019

## INDUSTRIAL PROPERTY MARKET

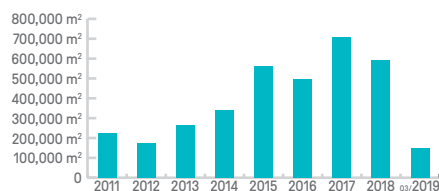
In the third quarter of 2019, a total of 515,000 sq m of modern industrial space was under construction, it is a slight increase over the previous quarter. On the other hand, the vacancy rate of premium industrial premises fell slightly to 4.3 %. In Prague and its surroundings, we can see the occupation of the last vacant premises. At the same time, we can observe new construction and preparation of projects whose construction could be started next year. A slight reduction of demand in the automotive segment is evident and suppliers are more cautious when starting new projects. This will probably affect other segments as well.

"There is a gradual displacement of storage and production activities outside big cities these days. These areas are attractive for a new office and residential projects. However, we should realize that logistics is a part of our lives and that we need to define areas for its further development within the city and its master plan."

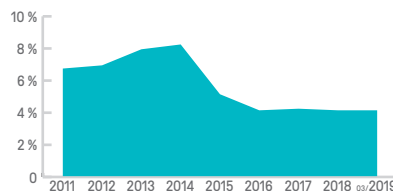
MARTIN ŠUMERA  
Head of Industrial Agency



### COMPLETED CONSTRUCTION

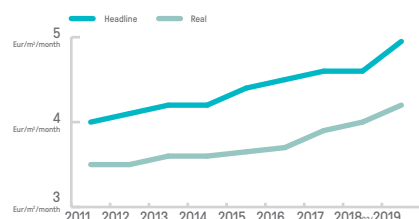


### VACANCY RATE



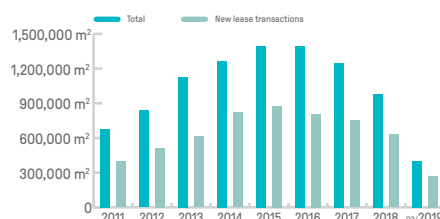
### AVERAGE RENTS

(the average rent in the "A" segment is calculated)



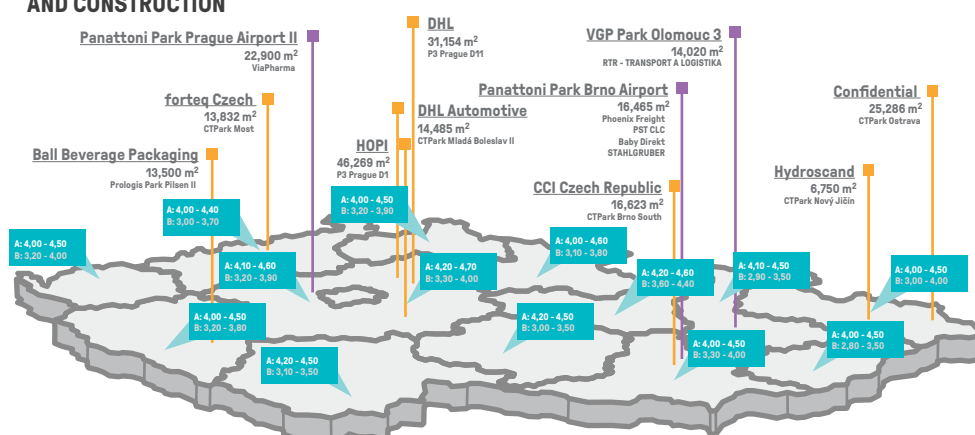
### TAKE UP

("Total" includes all closed transactions in the "A" class segment)



### SELECTION OF TRANSACTIONS AND CONSTRUCTION

significant transactions completed construction



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**"A" CLASS PROPERTIES**  
**8,329,000 m²**

**CONSTRUCTION COMPLETED**  
**149,000 m²**

**UNDER CONSTRUCTION**  
**546,000 m²**

**VACANCY**  
**4.1 % [341,000 m²]**

**AVERAGE RENT**  
**"A" CLASS**  
**4.20 - 4.95 EUR /M²/MONTH**

**"B" CLASS**  
**3.50 - 3.90 EUR /M²/MONTH**

**YIELD**  
**"A" CLASS**  
**5.75 %**

**"B" CLASS**  
**6.5 %**

**UNEMPLOYMENT RATE**  
**2.1 % [204,000 prs.]**