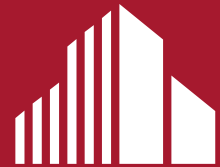




CUSHMAN &
WAKEFIELD

Industrial Space Options

Industrial Department



Possibilities for development



- Industrial Department
- Market Overview
- Incentivization by Region
- Investment Opportunities
- Industrial Space
 - Built to Suite
 - Built to Lease
 - Built to Own
 - Logistics Parks Overview
- Land Acquisition
- Our Partners
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Industrial Department



The **industrial team** consisting of **market leaders** is posing an active presence in the Slovak industrial market since 2008. The main focus of the department is to provide the client with **exceptional in-market expertise** and a service worthy of the Cushman & Wakefield global brand.

The **unrivalled market position** of Cushman & Wakefield is communicated via the **uncommon track record** in the Czech and Slovak industrial real-estate market with over **1,000,000 m²** of leased industrial space and over **4,500,000 m²** of industrial land acquisitions and property sales.

Occupier Services

- Strategic real estate advice.
- Organization and management of developer tenders.
- Advice on target location.
- Extensive search for warehouse/production/office space in target location.
- Acquisition of land/existing facilities.
- International tenant representation.
- Lease re-negotiations.
- Sale of existing facilities.
- Sale and leaseback of existing facilities.
- Providing temporary solutions

Landlord Services

- Letting
- Re-Letting
- Real Estate Risk Management

Developer Services

- International Investor Representation
- Development Consultancy
- Land Acquisitions

Market Research Services

- Research and Marketing Surveys
- High Quality Quarterly Market Reports



Market Overview



Occupier Focus

The wider Bratislava area continues to attract most occupier demand; indeed, in Q4 2015, over 90% of all take-up was registered here. Across Slovakia, 52,700 sq.m was leased in Q4, a figure matching the 5-year average. Similarly to previous quarters, the automotive industry was the primary sector bolstering interest for new space. This trend is not expected to change and should continue to shape the industrial market going forward as well as boost demand for new space.

Investment Focus

Healthy investor appetite for prime investments in the Slovak investment market translated into the conclusion of a mixed use – albeit mostly logistics – portfolio deal in Nitra and Trnava. Furthermore, the increasingly active development sector is expected to fuel the supply of available investmentgrade assets, and this may see further deals conclude in the year ahead. Prime yields have sharpened by 25 bps in Q4 in both the logistics and manufacturing market segments.

Market insight

Take up	246,031 sq m
Supply	80,344 sq m
Stock	1,342,244 sq m
Vacancy	3,30%
Prime Logistics Rent	3,60 EUR/sq m/month
Prime Yields	7,75%

For additional market insight visit

www.cushmanwakefield.sk

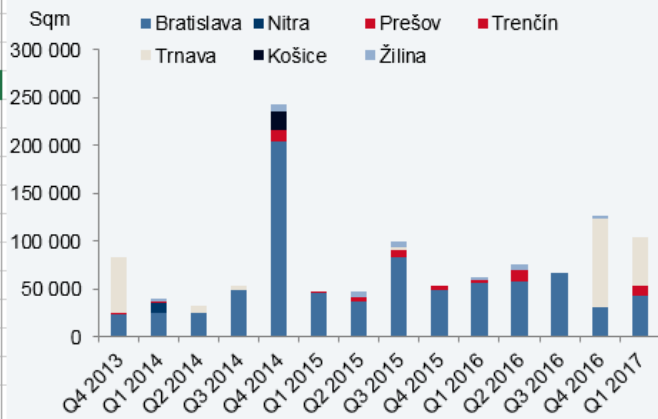


Market overview Q1 2017



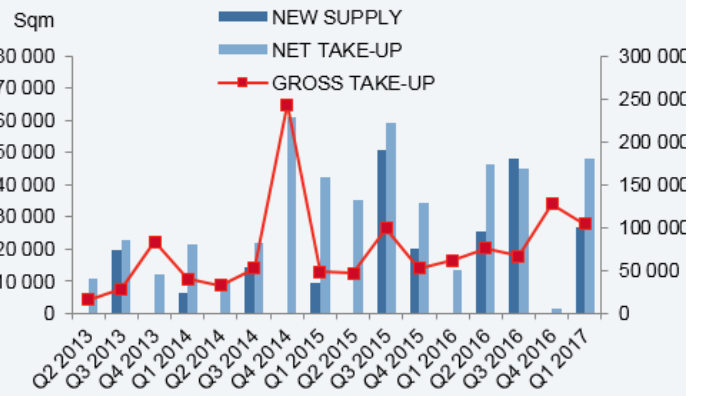
TOTAL STOCK IN SR: 1 442 523 sq m

TOTAL GROSS TAKE UP BY REGION: 103 997 sq m

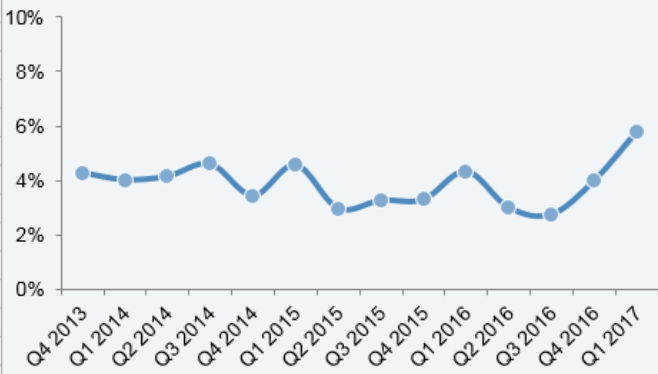


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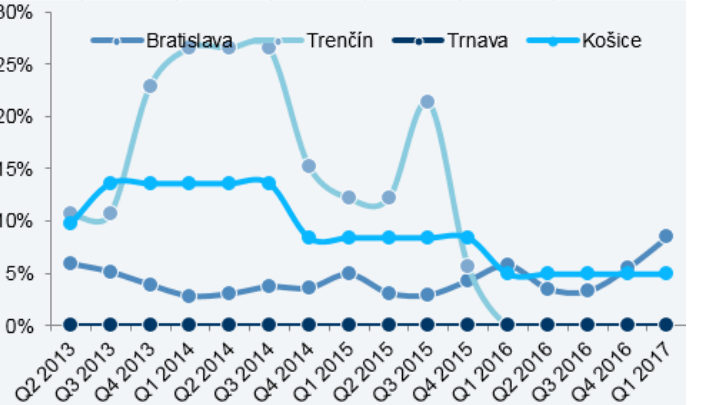
NEW SUPPLY AND TAKE UP IN SLOVAKIA



VACANCY RATE IN SLOVAKIA 5,8%



VACANCY RATE IN REGIONS %



Industrial Space



Due to the **close cooperation** with industrial developers Cushman & Wakefield offers its clients the **opportunity to rent or purchase** a property **taylorred** specifically to their needs, wheter the requirement is towards existing building or for construction of a new space according to the clients needs.

Existing Industrial Space

- Review of client specifications
- Cooperation with developers
- Offer – layout, location, pricing, processes
- Tendering processes
- Review by client
- Signing of LOI/HOT
- Preparation of conceptual documents
- Handover

Built to Suite Process

- Review of client specifications
- Cooperation with developers
- Offer – layout, location, pricing
- Tendering processes
- Review by client
- Signing of LOI/HOT
- Preparation of conceptual documents
- Building permit application process
- Construction
- Handover

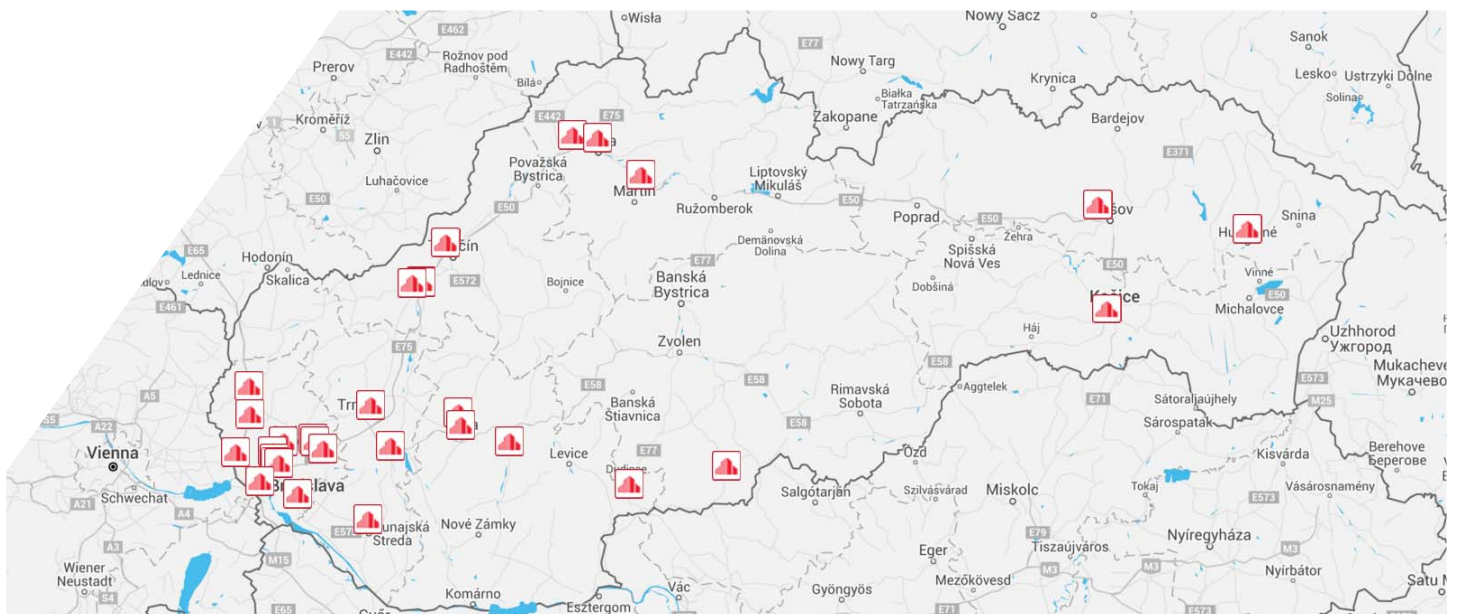
The entire process can be estimated to have a duration of 6-8 months depending on building permit complexity.

Built to Lease

In the case of a Built to Lease project the client is to lease the newly build warehousing premises. The industry minimal leasing period is on average 10 years.

Built to Own

The Build to Own scenario consists of a complete warehouse development to the client's ownership.



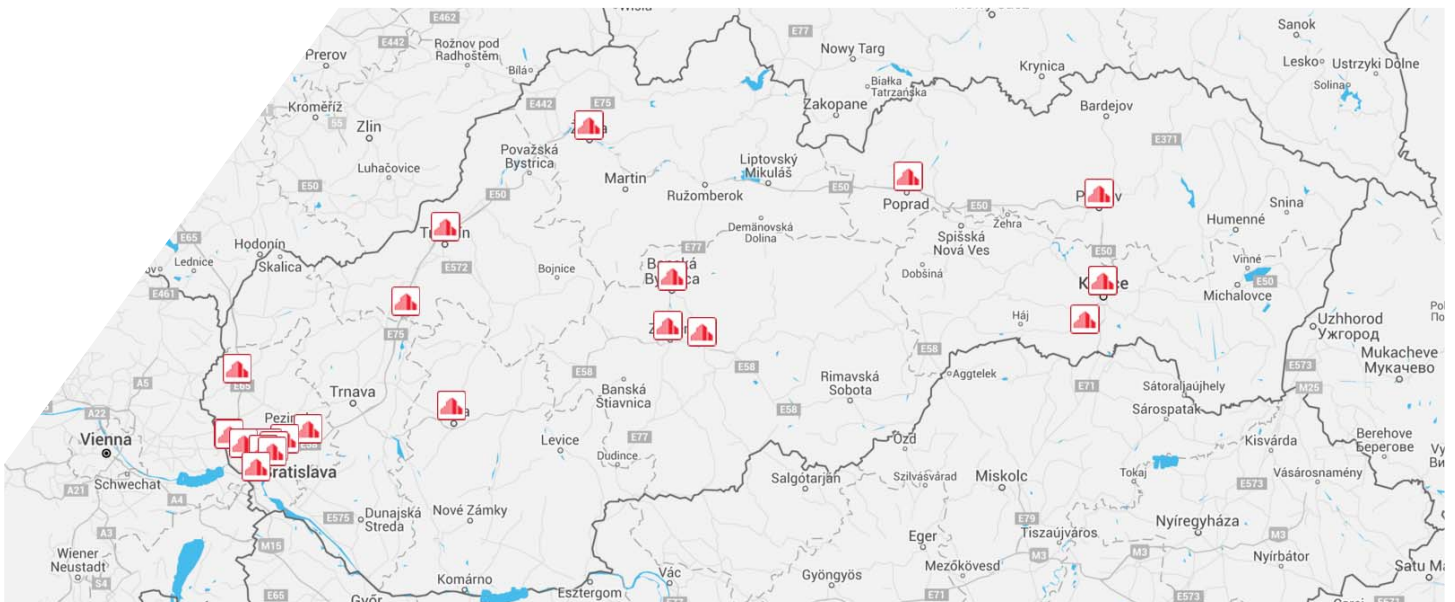
Land Acquisition

With excellent relationships with international and local **land owners** Cushman & Wakefield specializes in **negotiation and delegation** of the property acquisition processes.

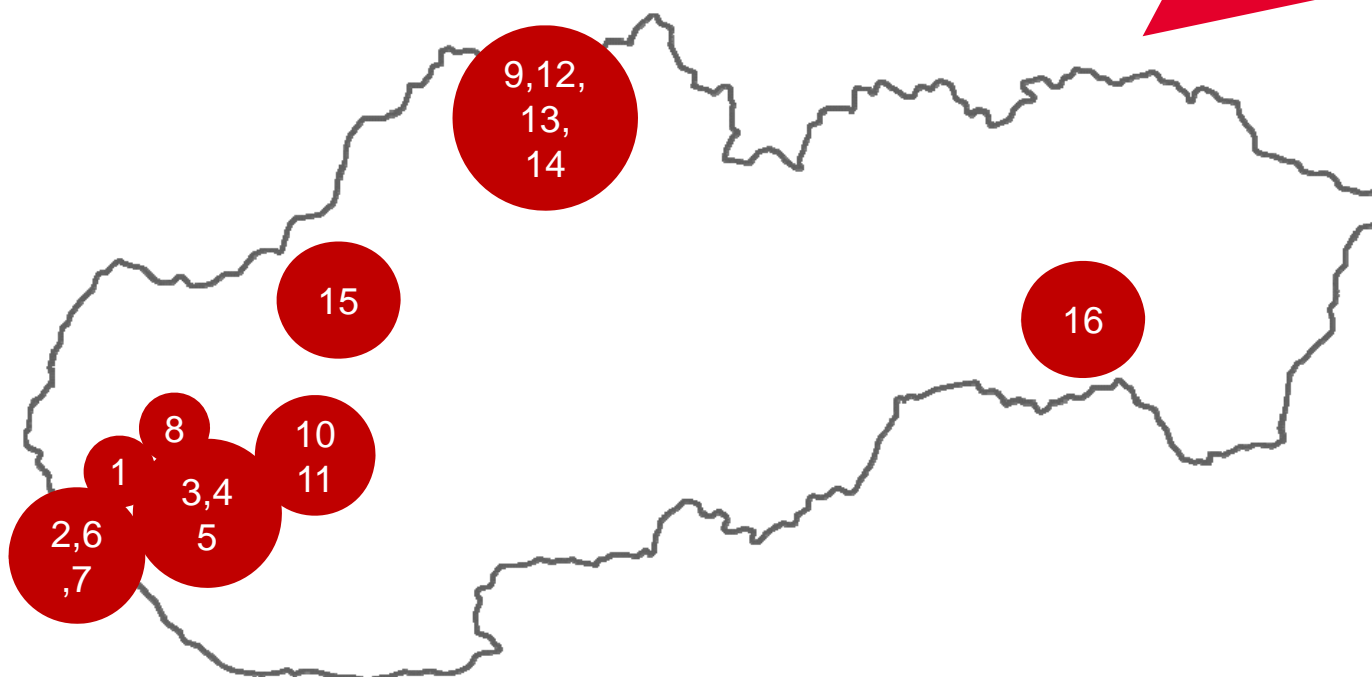
Land Acquisition Process

- Establishing a property acquisition strategy
- Advisory on acquisition structure
- Site research / Identification of sites
- Definition of temporary solutions if applicable
- Preparation, negotiation and execution of Head of Terms
- Collection and verification of purchase business terms
- Coordination of the legal and technical negotiations between contractual parties

Cushman & Wakefield keeps database of land plots in the prime locations, but has experience to perform in-depth land research focusing on client's needs, accompanying the client every step of the way.



Overview of Logistics Parks

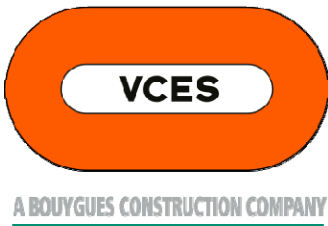


No.	Park	Location	For Lease	Planned and BTS
1	HB Reavis Park Raca	Bratislava – Rača	1,500 - 3,380 sqm	0
2	HB Reavis Park Svaty Jur	Bratislava - Svätý Jur	0	0
3	Goodman Senec Logistics Centre	Bratislava – Senec	6,500 sqm	17,500 sqm
4	Prologis Logistics Park	Bratislava – Senec	13 800 sqm	od 3,500 sqm
5	Bratislava Logistics Park	Bratislava – Senec	12,000 sqm	36,000 sqm
6	P3 Logistics Park Lozorno	Lozorno	0	10,000 sqm
7	VGP Park Malacky	Malacky	0	9,000 sqm
8	CTPark Voderady	Voderady	0	91,512 sqm
9	CTPark Zilina	Žilina	7,028 sqm	44,564 sqm
10	CTPark Nitra	Nitra	0	14,800 sqm
11	Prologis Logistics Park Nitra	Nitra	0	95,000 sqm
12	Immopark Zilina	Žilina	0	Do 30,000 sqm
13	CTPark Zilina	Žilina	7,028 sqm	44,564 sqm
14	P3 Logistics Park Zilina	Žilina	8,400 sqm	0
15	Logicore Park Nove Mesto nad Vahom	Nové Mesto nad Váhom	5,000 sqm	5,000 sqm
16	Immopark Kosice	Kosice	9,000 sqm	0



CUSHMAN & WAKEFIELD

Our Partners



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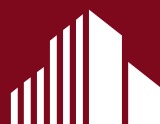
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CUSHMAN &
WAKEFIELD



We are helping our clients to make
an informed real estate decision.