

LOGISTICS LEASING TOP 8 H1 | 2021 | GERMANY



Market at a Glace

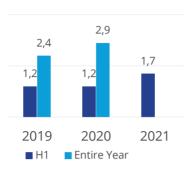
The logistics real estate market achieved a record result in the middle of the year. The TOP 8 regions generated a total takeup of approx. 1.7 million sqm and were thus 39 % above the previous year's result. Six out of eight locations recorded a yearon-year increase. In some cases, the growth rates are above average compared to the previous year, as the first half

of 2020 was largely characterized by a reluctance to take decisions due to the pandemic. The high demand for logistics space is clearly

noticeable at all locations, so that in some cases even structural vacancies are being let. Given the lack of space and the low level of new construction activity at the TOP 8 locations, rents for existing properties rose at seven of eight locations in the last 12 months. Due to the low level of new construction activity, only 12% of all lettings were in the large-volume sector. As a result, brownfield developments are becoming increasingly important in the TOP 8 markets.

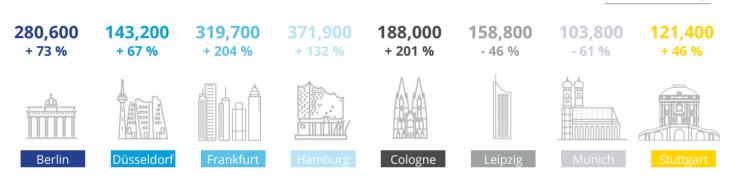
Take-up of Space





Outlook 2021 D

Take-up in sqm, change year-on-year in %



Take-up



Take-up by Size Category in %

above 10.001 sqm	45 %
5 .001 - 10.000 sqm	26 %
a.001 - 5.000 sqm	14 %
<mark>=</mark> 1.001 - 3.000 sqm	12 %
= 501 - 1.000 sqm	3 %
up to 500 sqm	0 %
	 5.001 - 10.000 sqm 3.001 - 5.000 sqm 1.001 - 3.000 sqm 501 - 1.000 sqm

Prime and Average Rents in €/sqm/month

Outlook Prime Rent 2021

7,50 6,80 6,50 6,50 6,20 6,20 5.85 6,75 4,60 5,50 5,30 5.20 5,00 4,95 4,80 3,80 Berlin Düsseldorf Frankfurt Hamburg Cologne Leipzig Munich Stuttgart Average Rent Prime Rent

CONTACT



Anna Owczarek Consultant I Research Germany +49 89 624 294 794 anna.owczarek@colliers.com

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