



# LOGISTICS LEASING

TOP 8 | Q1 | **Q2** | Q3 | Q4 | 2022

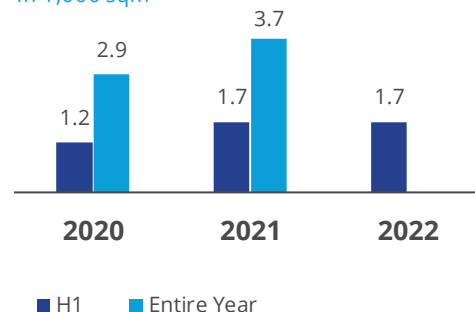
Colliers

## Market at a Glance

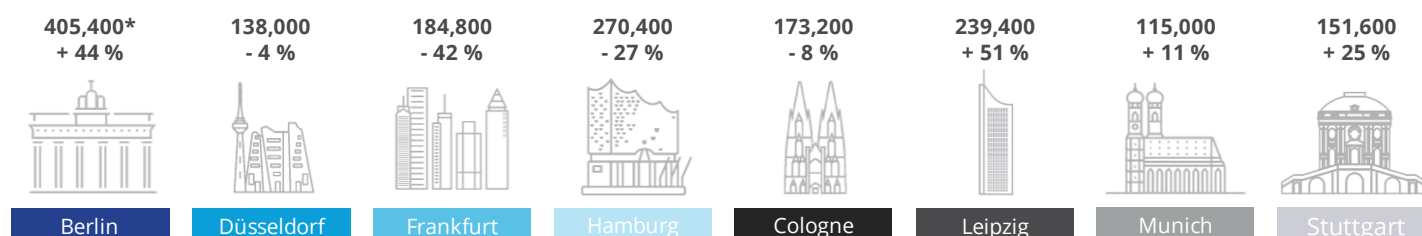
Germany's top 8 industrial and logistics markets finished out the first half of 2022 with record take-up of roughly 2.0 m sqm. This remarkable result was largely thanks to the owner-occupier deal signed by Tesla in the Berlin logistics region, which marked the largest of its kind recorded in the first 6 months of the year at around 327,000 sqm. Excluding this one-off effect, the country's top 8 regions achieved average results, posting roughly 1.7 million sqm in total take-up in H1 2022 and exceeding the 3-year average by around 24%. This shows that the shortage of space continues to vary significantly

from region to region, with 4 out of the 8 markets reporting a drop in take-up. Thanks to some strategic subleases, take-up remained at the previous year's level. Retail companies, especially e-commerce companies, continue to be the most important drivers of take-up and thus exert more pressure on rents. As a result, prime and average rents rose in all top 8 locations. The decline in new construction activity is leading to record growth rates of up to 16 % (Düsseldorf) for prime rents in a 12-month comparison.

## Take-up of Space\* in 1,000 sqm



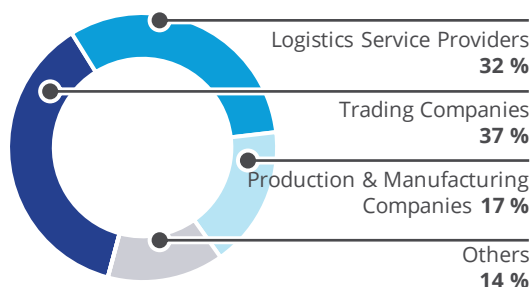
## Take-up in sqm, change year-on-year in %



## Outlook 2022 ↑

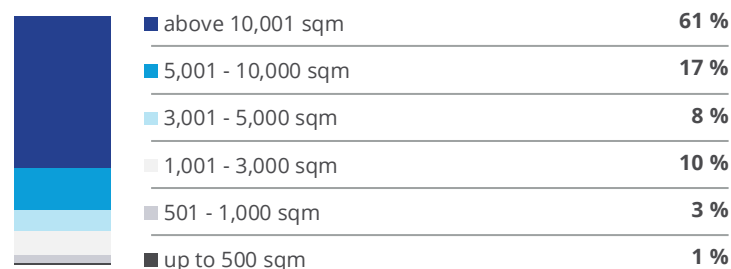
## Take-up\*

by Branche in %



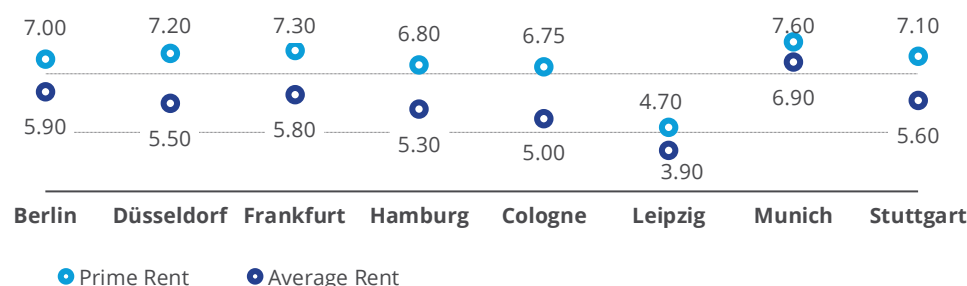
## Take-up\*

by Size Category in %



## Prime and Average Rent

in €/sqm/month



## Outlook ↑

Prime Rent 2022

## Contact



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\* Excluding Tesla closing (327,000 sqm)

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