

21
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INVESTOR
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PANEL DISCUSSION

Exploring Real Estate Market Trends in the CEE

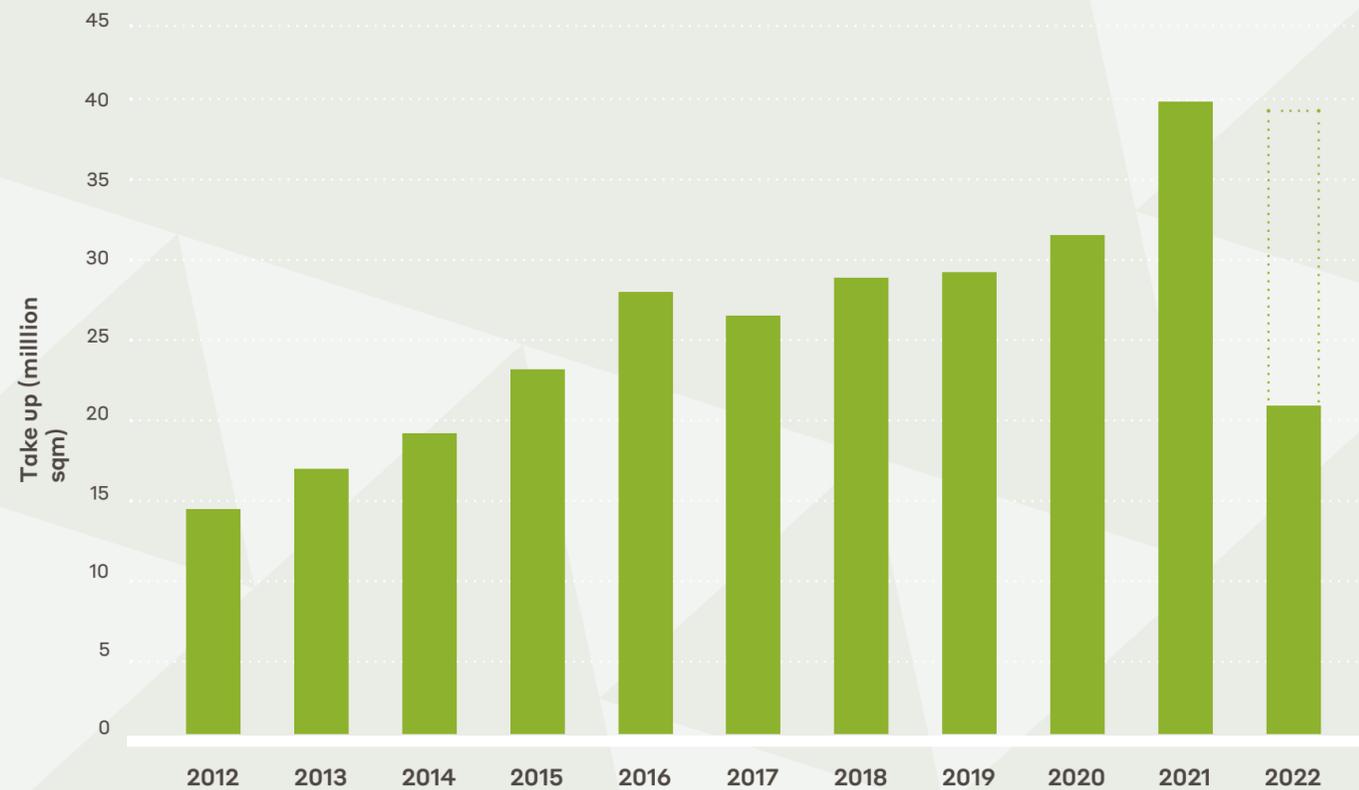
Bert Hessellink

CTP Group Client Relationship Director
(Moderator)

Market fundamentals remain attractive with strong market demand

Strong Demand

European Logistics take-up reached circa 20m sqm in H1 2022

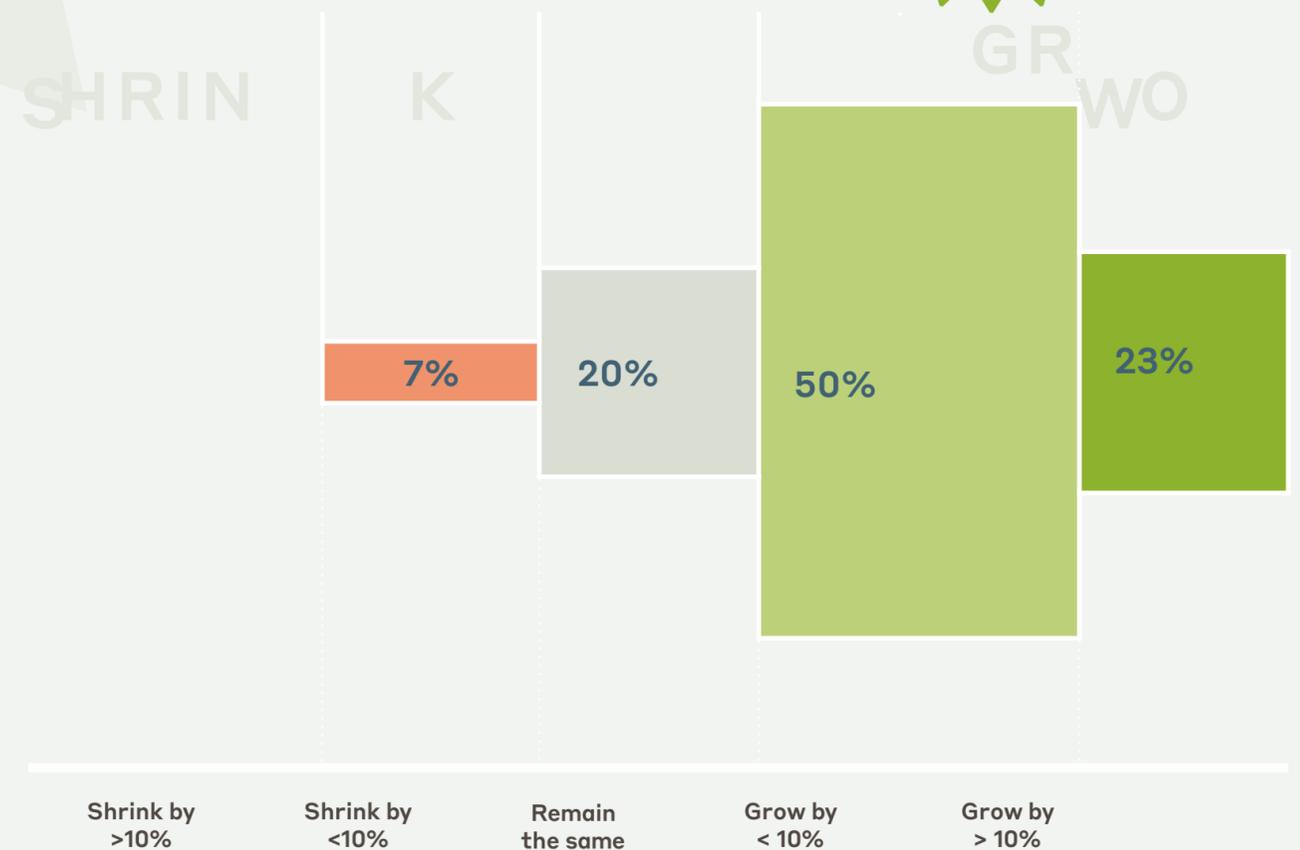


The chart shows data for the following countries
UK, Spain, Romania, Portugal, Poland, the Netherlands, Ireland, Hungary, Germany, France, Czech Republic, Belgium

Expansion Plans

How occupiers are planning to expand their logistics footprint in the next three years

73%
looking to expand

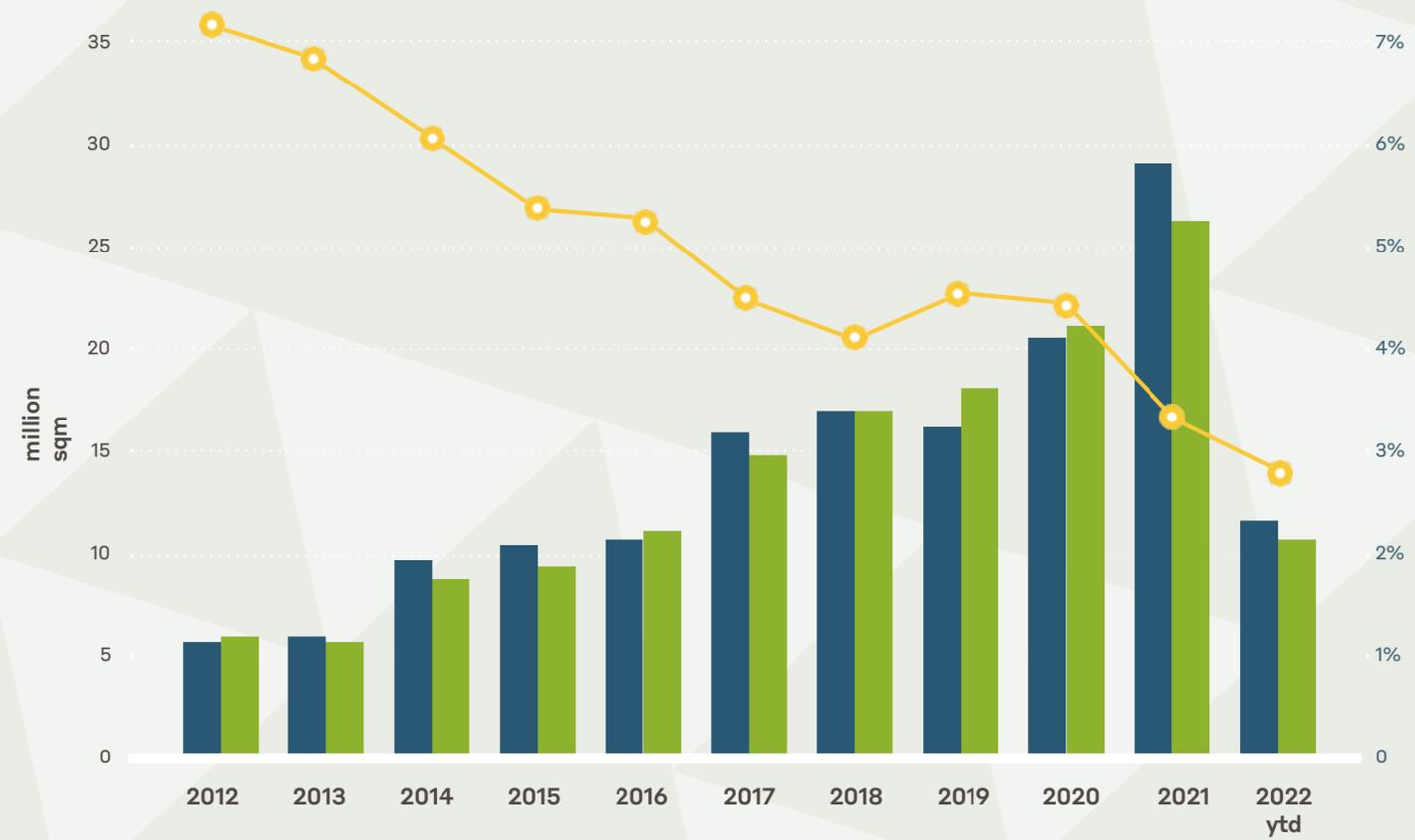


Source: CBRE, Analytiqa (European Logistics Occupier Survey 2022)

Market fundamentals remain attractive with strong market demand

Vacancy & Supply

Average vacancy rate is currently at its lowest point ever.



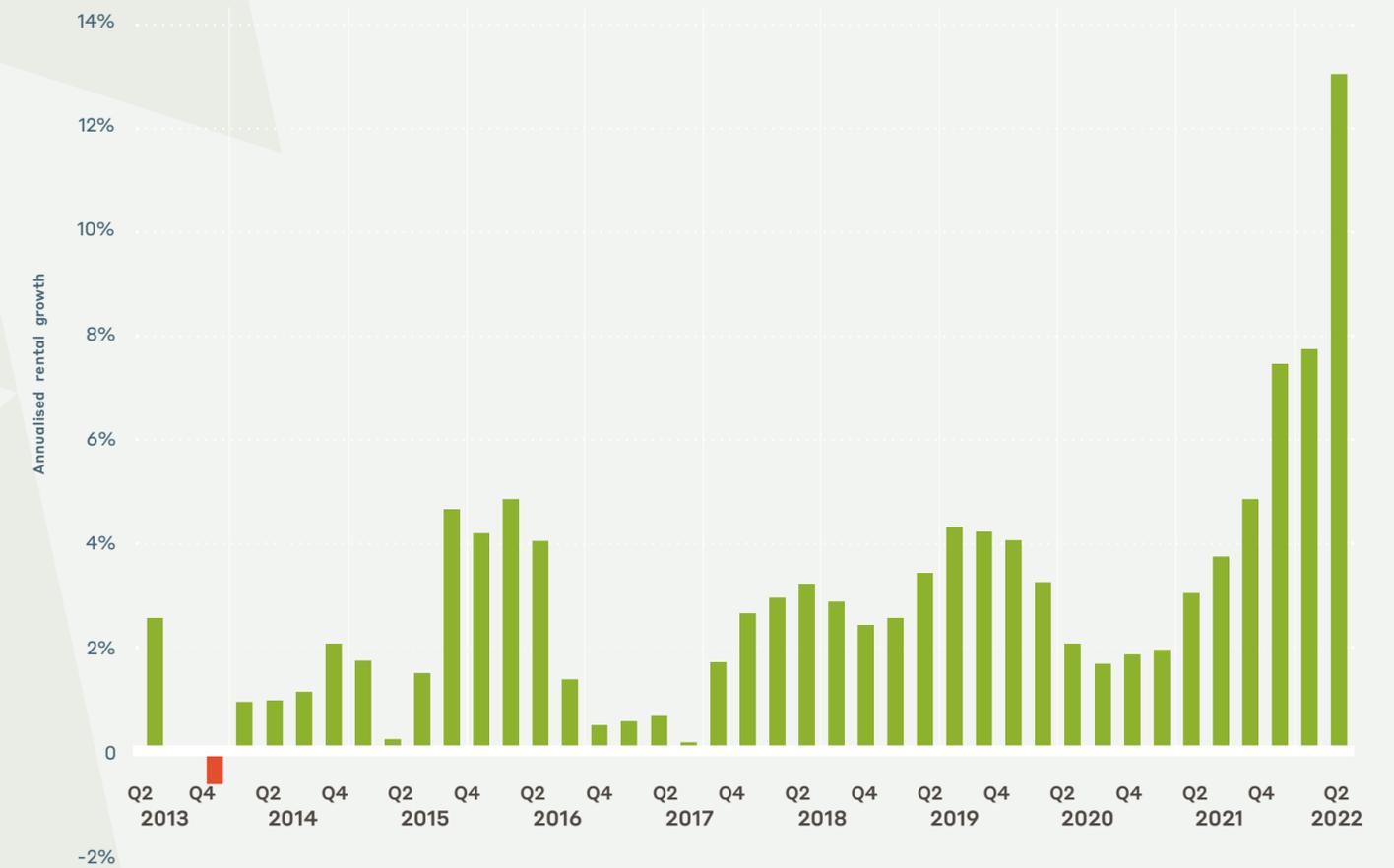
■ Net absorption ■ Net completions —○— Vacancy rate (RHS)

The chart shows data for the following countries
UK, Spain, Poland, the Netherlands, Germany, Italy, France, Czech Republic, Belgium

Source: CBRE, Analytiqa (European Logistics Occupier Survey 2022)

Rental Growth

The imbalance creates pressure on rents, with record growth in 2021.



■ % rental growth per annum

Source: CBRE ERIX (All European markets, weighted average rental growth)

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