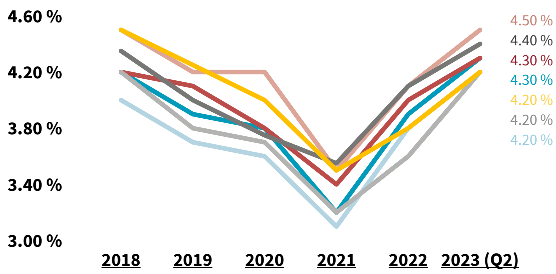
INDUSTRIAL AND LOGISTICS PROPERTIES FACT SHEET

TOP 7 | 2023/Q2

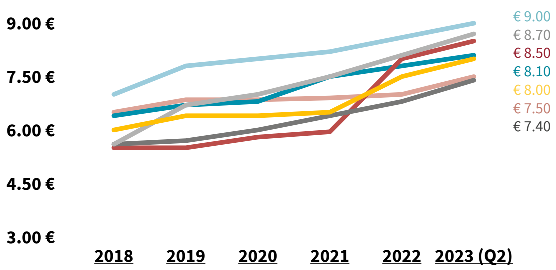
BERLIN DÜSSELDORF FRANKFURT HAMBURG COLOGNE MUNICH STUTTGART

- Investors are still acting with restraint. Prime yields have increased further in the first half of the year, and are meanwhile approaching the levels recorded in 2018 or even 2017.
- Development projects are being pursued more selectively, owing to the difficult general conditions for financing and sale.
- Following a number of years in which land value increased steadily, prices for commercial construction land are now stagnating in many places.
- User demand for space has decreased on the whole, owing to the economic situation. Nevertheless demand continues to outstrip supply.
- Prime rents have increased further in the city areas of the top 7 core cities, as well as in neighbouring communities.

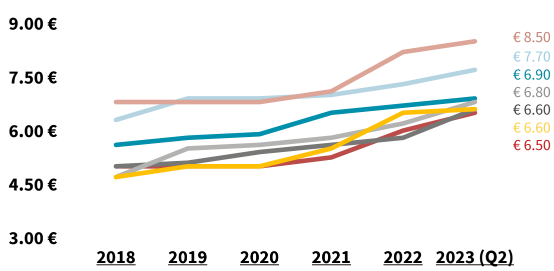
NET PRIME LOGISTICS YIELDS



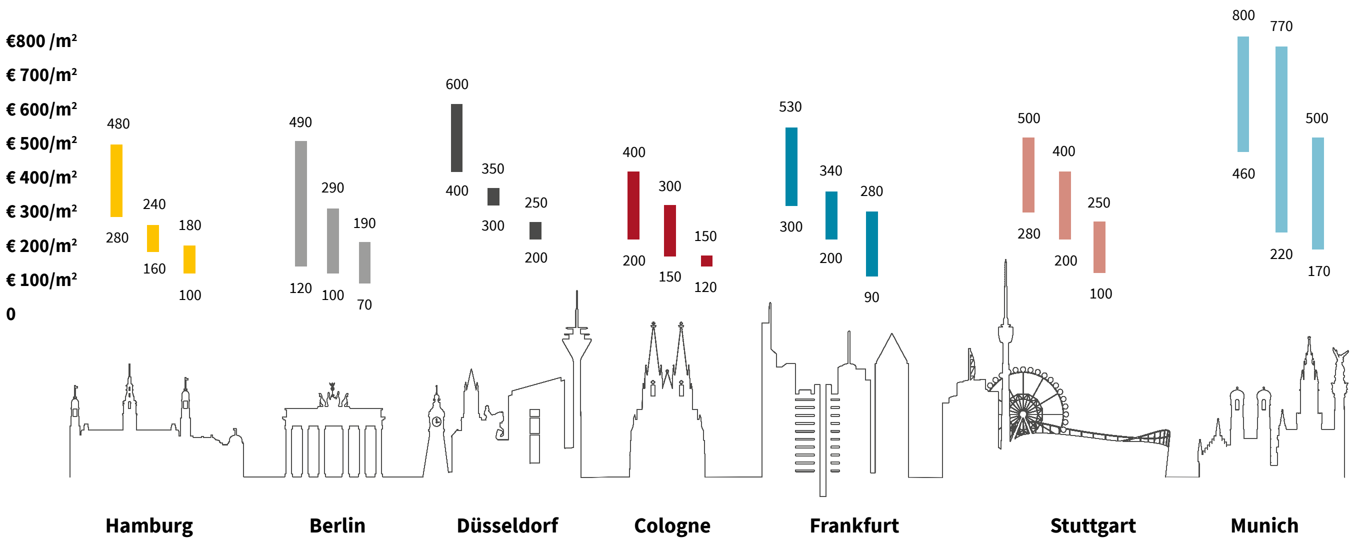
CITY AREA PRIME RENTS €/m²



PRIME RENTS IN SURROUNDING REGIONS €/m²



LAND PRICES (CITY AREA, SURROUNDING REGION, GREATER AREA)



*Please note that all statements included in this report are non-binding. They are based mostly on information provided by third parties. This document is intended for the sole purpose of providing general information to our clients.

** Source (diagrams): German Property Partners (GPP)/bulwiengesa for Berlin, Frankfurt and Munich.

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