

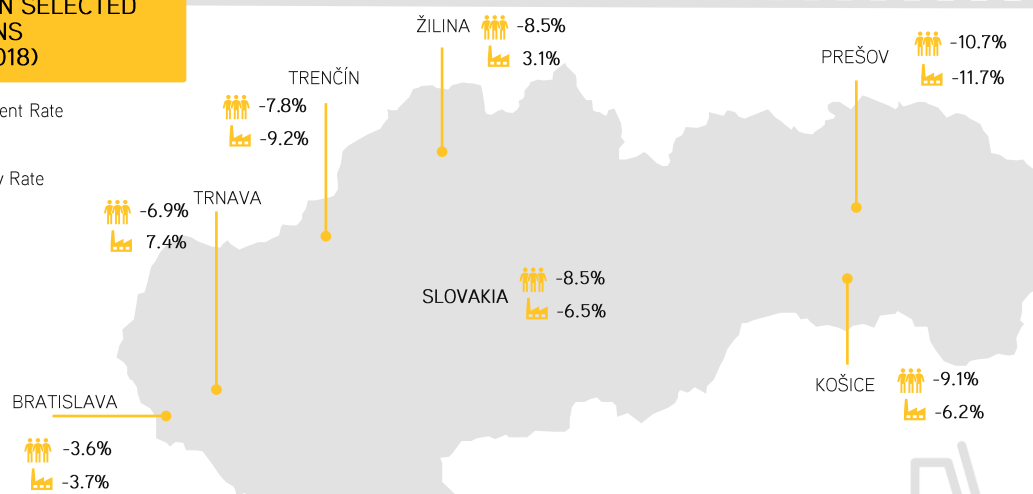
SK INDUSTRIAL & LOGISTICS MARKET BAROMETER

SPRING 2019

- INCREASE IN VACANCY RATES DUE TO SLOWDOWN IN TAKE UP AND STRONG DELIVERY OF SPECULATIVE PROJECTS IN SENEČ, SERED AND TRNAVA;
- STRONG PIPELINE OF PROJECTS UNDER ACTIVE CONSTRUCTION, ESPECIALLY IN BRATISLAVA, KOSICE AND TRENČÍN REGIONS;
- HIGH MARKET CONCENTRATION WITH TOP FIVE DEVELOPERS OWNING AROUND 60% OF THE TOTAL STOCK;
- HIGH INVESTOR APPETITE FOR INDUSTRIAL PREMISES, ESPECIALLY IN THE WESTERN PART OF THE COUNTRY AROUND BRATISLAVA REGION.

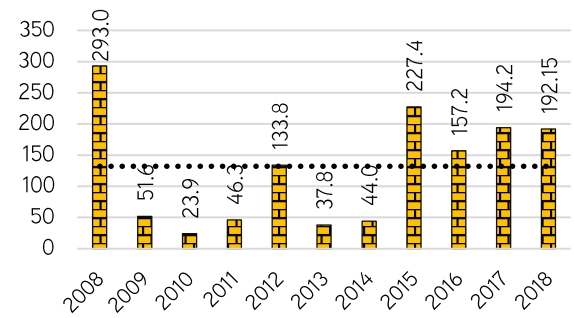
CHANGE IN UNEMPLOYMENT & VACANCY RATE IN SELECTED REGIONS (2013-2018)

Change in Unemployment Rate (2013 vs. 2018)
 Change in I&L Vacancy Rate (2013 vs. 2018)

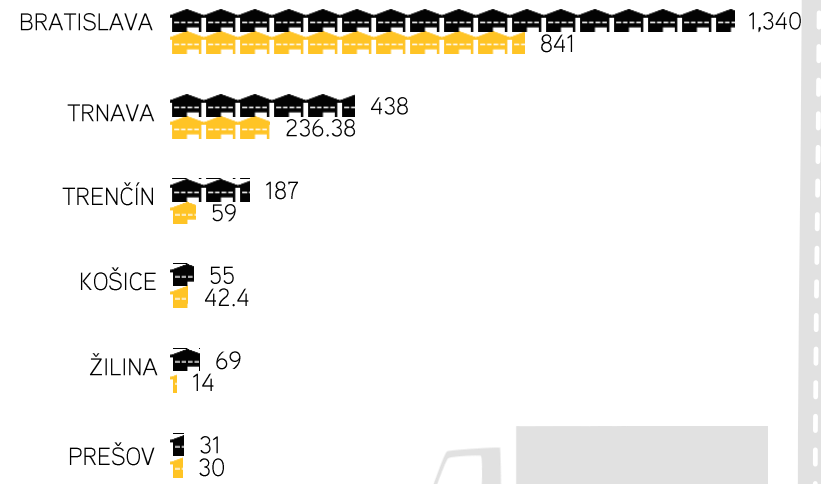


DEVELOPMENT COMPLETIONS (thousand sqm) (2008 – 2018)

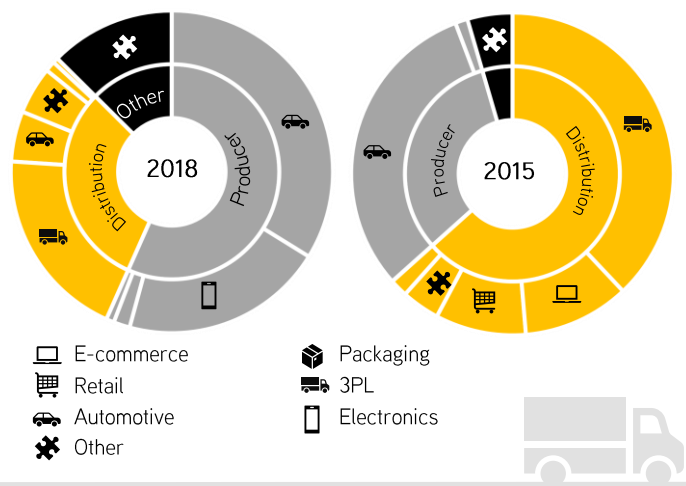
..... 10-Year Average



REGIONAL STOCK GROWTH (thousand sqm) 2013 vs 2018

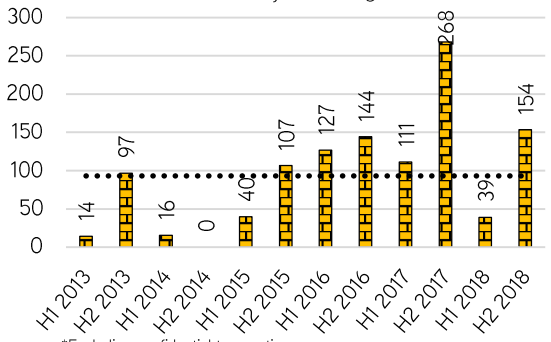


CHANGE IN NET DEMAND 2015 vs 2018



INDUSTRIAL INVESTMENT VOLUMES (€ million)*

..... Half-year average 2013 - 2018



*Excluding confidential transactions

FOR MORE INFORMATION

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