

"LOGISTICS AND REAL ESTATE 2016" STUDY

STRONG DEMAND, HIGH EXPECTATIONS AND NEW TYPES OF LOGISTICS PROPERTIES

Logistics properties are already booming in Germany today. Growing cities, greater consumption over the internet and digitisation of industry will challenge the logistics sector further in the future. The way we buy everyday goods will give rise to new types of logistics properties. bulwiengesa has investigated what these changes will be.

www.logistics-and-real-estate.com

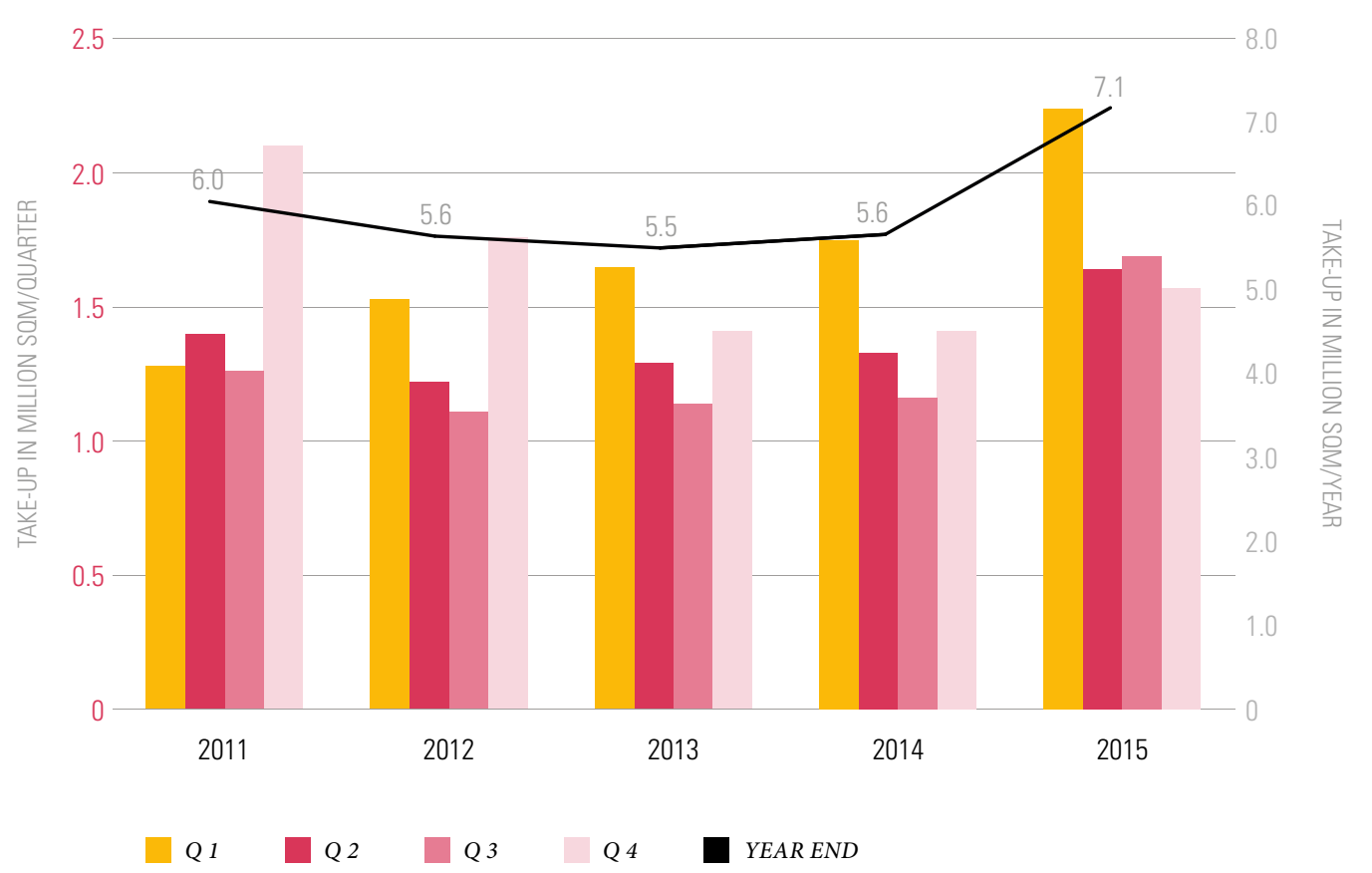
GREATER TRANSPORT VOLUME EQUALS GREATER DEMAND FOR LOGISTICS PROPERTIES

In the last five years, around 30 million sqm of logistics space has been realised. With take-up of 7.1 million sqm, 2015 was particularly dynamic. The demand will continue to develop at a high level in the future.

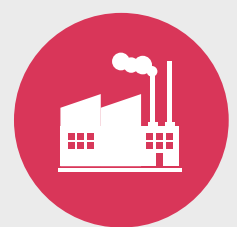
OUTLOOK FOR 2016:

6.3 MILL. SQM
LOGISTICS SPACE REALISED

TAKE-UP BY QUARTER AND YEAR, 2011-2015



IN WHICH INDUSTRY HAS THE DEMAND FOR LOGISTICS PROPERTIES BEEN GREATEST IN THE LAST FIVE YEARS?



TOP REGIONS REMAIN TOP REGIONS

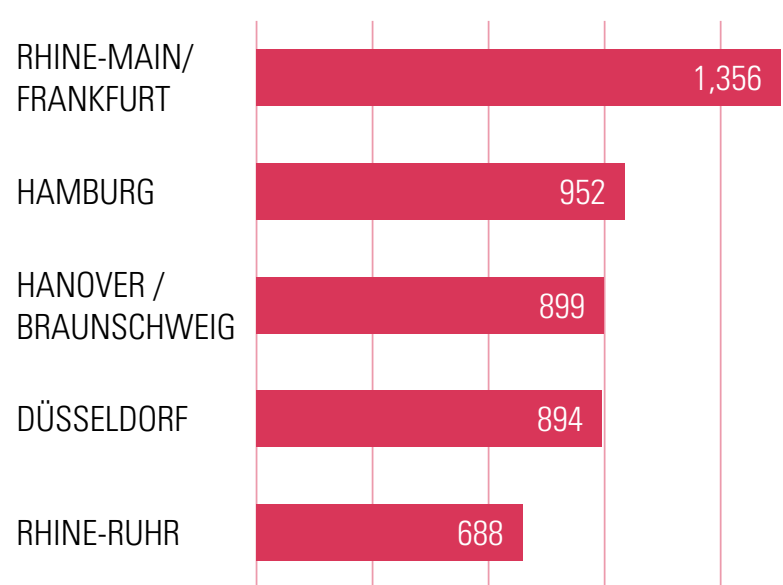
The scoring of location attractiveness to the property economy provides a forecast of future hotspots. Lack of space in the established logistics regions is an opportunity for "hidden champions" to emerge.

- RANK 1: **HAMBURG** 0 ↗
 - RANK 2: **MUNICH** 4 ↗
 - RANK 3: **BERLIN** 1 ↘
 - RANK 4: **DÜSSELDORF** 1 ↗
 - RANK 5: **RHINE-MAIN/FRANKFURT** 1 ↘
- HIDDEN CHAMPIONS: **AUGSBURG** 9 ↗
NUREMBERG 4 ↗
A4 MOTORWAY THURINGIA 6 ↗

81%

OF THE COMPLETED FLOOR SPACE IS LOCATED IN ESTABLISHED LOGISTICS REGIONS

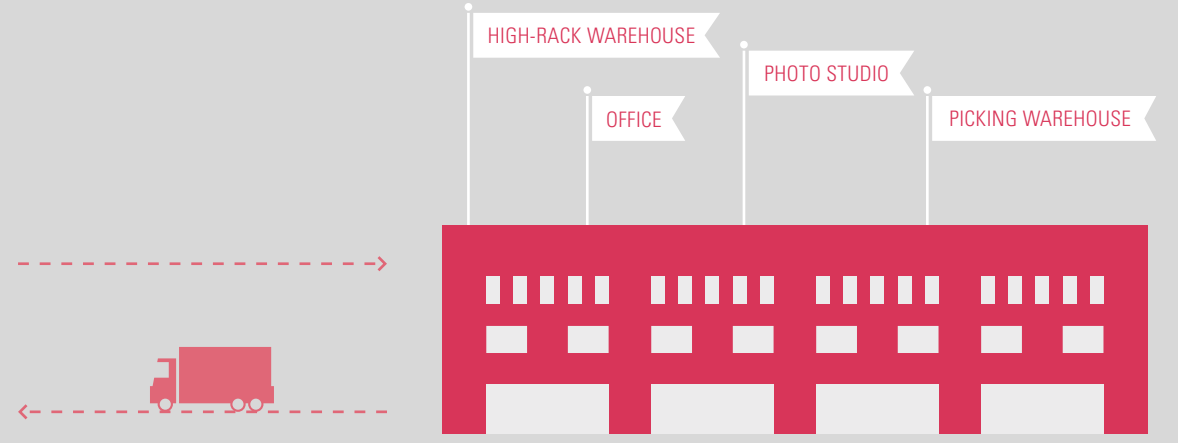
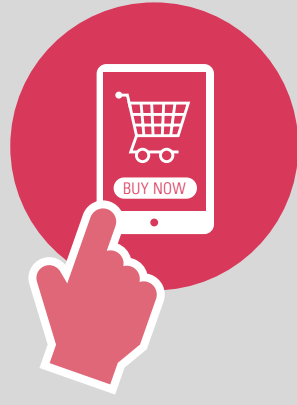
NEW-BUILD COMPLETIONS, 2011-2015, IN '000 SQM



TRENDS AND THEIR EFFECTS

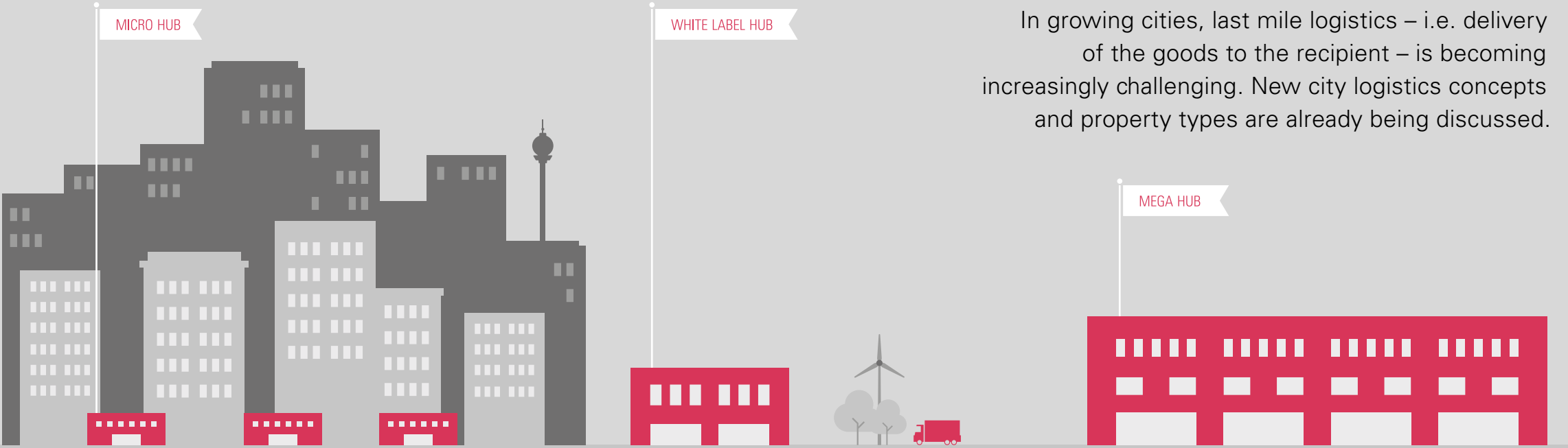
"E-COMMERCE"

E-commerce providers desire specialist e-fulfilment centres, which have a large proportion of office space in addition to high-rack and picking warehousing space and additional space for computer centres or photo studios.



"CITY LOGISTICS"

In growing cities, last mile logistics – i.e. delivery of the goods to the recipient – is becoming increasingly challenging. New city logistics concepts and property types are already being discussed.



"INDUSTRY 4.0"

To become more efficient, logistics and production are merging into one property.

