



Factsheet

Dutch Market for Industrial and Logistics real estate 2012

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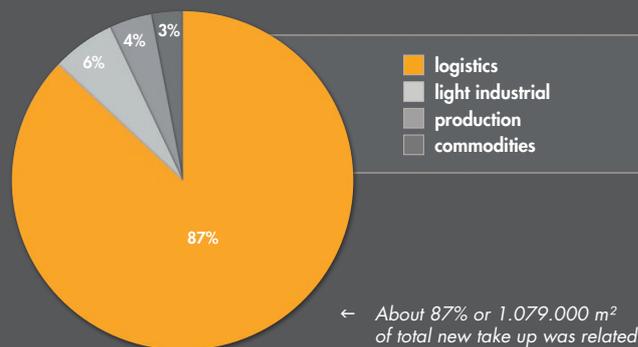
OVERVIEW

All figures mentioned in this factsheet are based on a database of registered industrial and logistics transactions of 5.000 m² and more. In total 105 transactions are registered with an average size of approximately 15.000 m².

In 2012 there has been a total take up of 1.545.000 m² including approximately 305.000 m² of lease renewals. This means that 1.240.000 m² was related to new lease agreements.

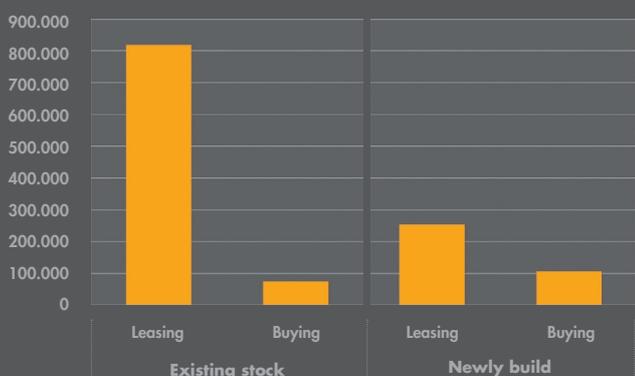
The diagram shows the differentiation in new take up per type of facility.

new take up 2012 per type facility



← About 87% or 1.079.000 m² of total new take up was related to logistics real estate.

new take up 2012 new, existing, leasing, buying



NEW VS. EXISTING STOCK

Approximately 70% of the new take up was related to existing stock whereas 30% was build to suit. Furthermore almost 85% was related to a lease agreement whereas 15% was related to a sales transaction. Those different perspectives combined result in the following diagram.

← Highest take up, approx. 65% or 820.000 m² was related to a lease in existing stock.

TOP 10 TRANSACTIONS LOGISTICS REAL ESTATE

1.	55.000 m ²	Son en Breugel, Rhenus	build to suit	lease with Doc Vast
2.	50.000 m ²	Heerenveen, Lidl	build to suit	owner-occupier
3.	45.000 m ²	Eindhoven, Van Rooijen Logistiek	-	owner-occupier
4.	42.130 m ²	Venlo, Brand Loyalty	build to suit	lease with Built to Build
5.	41.140 m ²	Waddinxveen, Univeg	-	lease renewal with Point Park Properties
6.	40.000 m ²	Venray, Philips	build to suit	lease with Harry Maessen
7.	40.000 m ²	Venray, Ceva/Microsoft	-	lease with Harry Maessen
8.	32.600 m ²	Roosendaal, Broekman Logistics	-	lease with Bakker van Vorst BV
9.	30.000 m ²	Amsterdam, Post NL	-	lease with COD
10.	28.800 m ²	Wijchen, Nabuurs	-	lease with Syntrus Achmea



↑ Son en Breugel, Rhenus



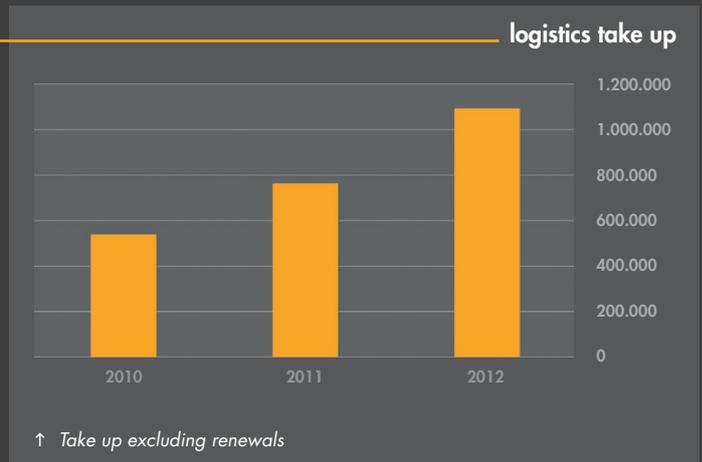
↑ Wijchen, Nabuurs



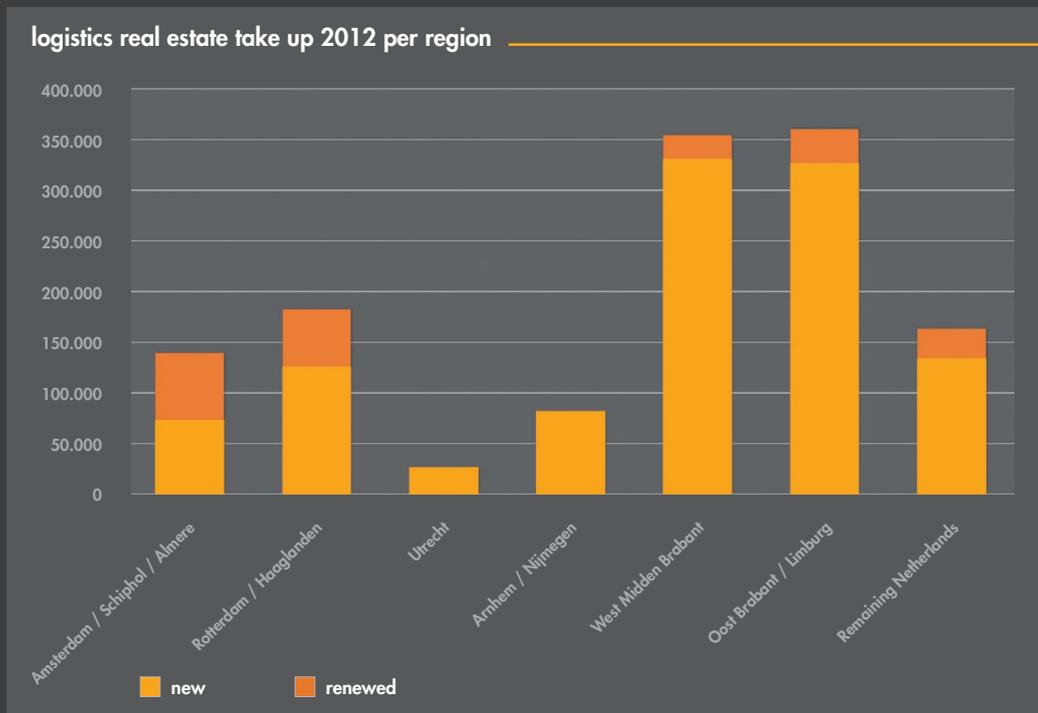
↑ Heerenveen, Lidl

LOGISTICS TAKE UP

Despite the economic crisis in the Euro Zone, take up in logistics real estate showed strong numbers. In 2012 approximately 1.080.000 m² has been taken up by logistics related companies, which is an increase of 17% in comparison to 2011. The top 10 logistics transactions in size are equal to 40% of the total new take up in 2012. More demand in logistics real estate is to be expected by E-Commerce related parties.



logistics real estate take up 2012 per region

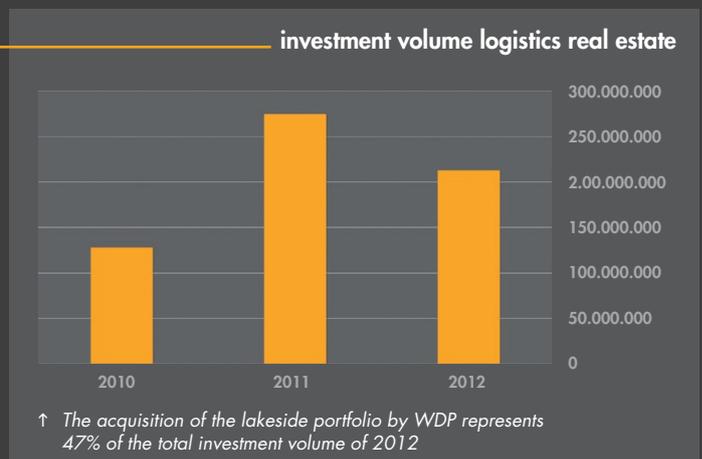


GEOGRAPHICAL SPREAD

The Brabant en Limburg region showed the strongest performance. Large scale transactions were closed by Ceva for Microsoft, Philips, Rhenus, Brand Loyalty, ABG, Arrow Electronics, Hilfiger and Helly Hansen.

INVESTMENTS LOGISTICS REAL ESTATE

Investments reached a total volume of approx. € 222 million in 2012. The Lakeside deal, where WDP acquired several properties for approx. € 105 million, took almost half of it. In total WDP was responsible for almost 70% of the total volume. Newcomer DCAM (Delin Capital) closed her first deal at Flight Forum in Eindhoven. Also Prologis and Aspen RE acquired logistics properties in 2012. The diagram shows the logistics real estate investment volume over the years 2010-2012.





About INDUSTRIAL real estate partners

INDUSTRIAL real estate partners is an independent real estate consultancy company with a strong focus on logistics and distribution facilities throughout the Netherlands.

They particularly focus on agency, investments, strategic real estate advice and developments.

From our offices in Amsterdam Airport, Rotterdam Airport and Tilburg we cover the important logistics regions.

By combining our national scope, our expertise and skills, we are committed to provide the best possible services to owners, users, (re)developers and authorities.

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DUTCH LAND PRICES & RENT LEVELS 2012/2013

		land prices in € per m ²		rent levels warehouse space in € per m ² per year	
1	Schiphol Airport	250	- 325	75	- 90
2	Amsterdam Port	215*	- 250*	40	- 65
3	Almere	110	- 165	35	- 60
4	Utrecht	230	- 300	30	- 65
5	Arnhem/Nijmegen	150	- 170	25	- 60
6	Bleiswijk/Waddinxveen	150	- 265	40	- 75
7	Rotterdam Port	215*	- 275*	40	- 65
8	Moerdijk	160	- 190	30	- 55
9	Breda/Bergen op Zoom/Rosendaal	100	- 150	35	- 50
10	Tilburg/Waalwijk	110	- 150	45	- 55
11	Eindhoven	130	- 170	40	- 50
12	Venlo/Venray	70	- 110	30	- 50
13	Maastricht/Heerlen	75	- 100	30	- 50

* = for 50 year leasehold