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 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.

TOP 10 TRANSACTIONS LOGISTICS REAL ESTATE

1. 55,000 m²  Son en Breugel, Rhenus  build to suit  lease with Doc Vast
2. 50,000 m²  Heerenveen, Lidl  build to suit  owner-occupier
3. 45,000 m²  Eindhoven, Van Rooijen Logistiek  -  owner-occupier
4. 42,130 m²  Venlo, Brand Loyalty  build to suit  lease with Built to Build
5. 41,140 m²  Waddinxveen, Univeg  -  lease renewal with Point Park Properties
6. 40,000 m²  Venray, Philips  build to suit  lease with Harry Maessen
7. 40,000 m²  Venray, Ceva/Microsoft  -  lease with Harry Maessen
8. 32,600 m²  Roosendaal, Broekman Logistics  -  lease with Bakker van Vorst BV
9. 30,000 m²  Amsterdam, Post NL  -  lease with COD
10. 28,800 m²  Wijchen, Nabuurs  -  lease with Syntrus Achmea

- Son en Breugel, Rhenus
- Wijchen, Nabuurs
- Heerenveen, Lidl
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.

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 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.

† Take up excluding renewals

† The acquisition of the lakeside portfolio by WDP represents 47% of the total investment volume of 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

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<th></th>
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<th>Amsterdam Port</th>
<th>Utrecht</th>
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<th>Bleiswijk/Waddinxveen</th>
<th>Rotterdam Port</th>
<th>Moerdijk</th>
<th>Breda/Bergen op Zoom/Roosendaal</th>
<th>Tilburg/Waalwijk</th>
<th>Eindhoven</th>
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* = for 50 year leasehold

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