

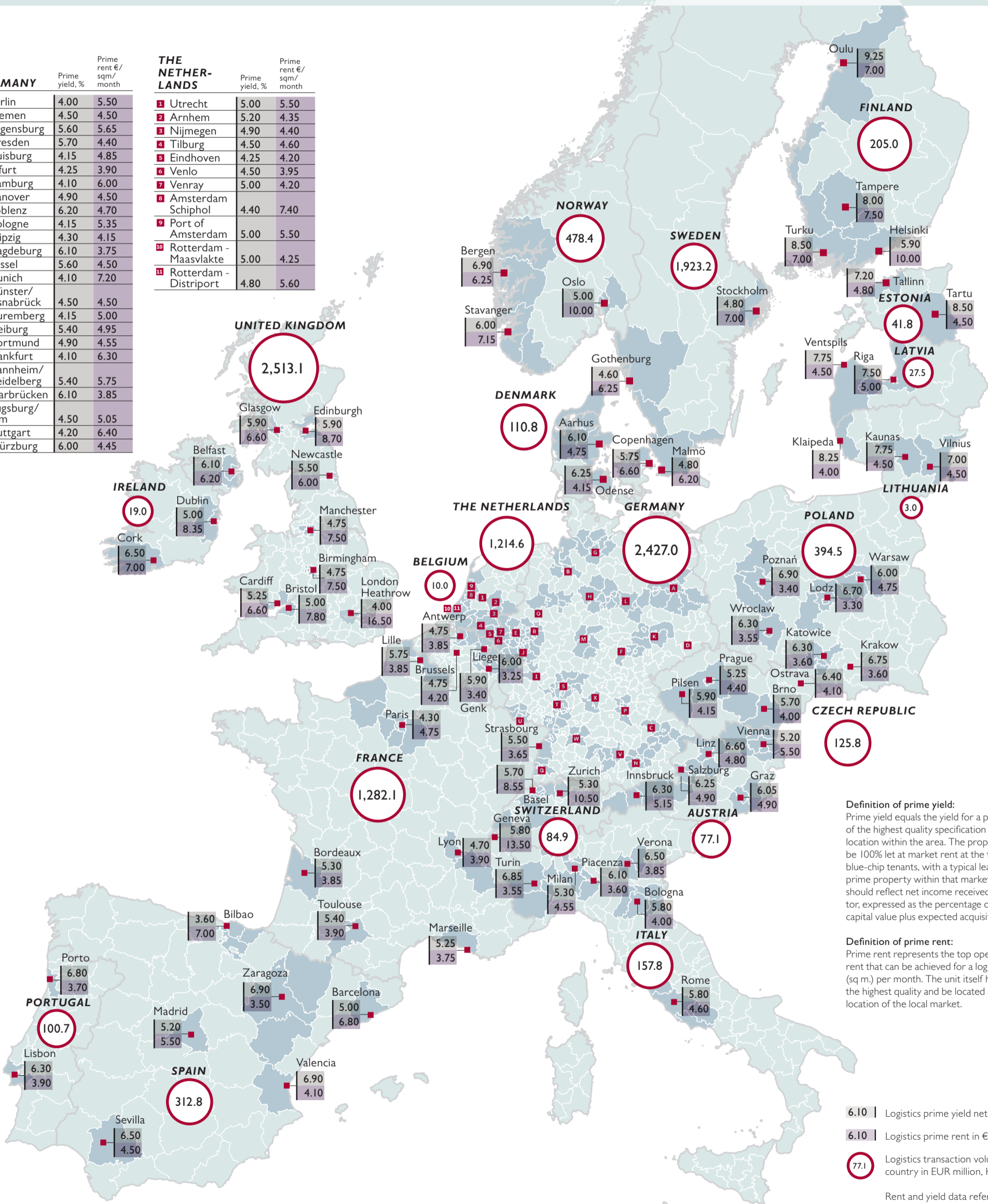
# Dynamic Logistics Market in Europe 2019



For years now, the logistics sector has been recording an almost exponential growth rate, regardless of the sub-segment such as procurement, production or sales logistics. The dynamic demand side, whether in the BtB or BtC business, is strengthening the European logistics market. Investors show a very high level of interest. We expect the high international demand of recent years to continue and (due to limited supply) further yield declines for logistics properties and retail parks. Especially in the City Logistics sector we see a growing demand for the next few years, supporting industrial light and urban warehousing.

GERMANY	Prime yield, %	Prime rent €/sqm/month
A Berlin	4.00	5.50
B Bremen	4.50	4.50
C Regensburg	5.60	5.65
D Dresden	5.70	4.40
E Duisburg	4.15	4.85
F Erfurt	4.25	3.90
G Hamburg	4.10	6.00
H Hanover	4.90	4.50
I Koblenz	6.20	4.70
J Cologne	4.15	5.35
K Leipzig	4.30	4.15
L Magdeburg	6.10	3.75
M Kassel	5.60	4.50
N Munich	4.10	7.20
O Münster/Osnabrück	4.50	4.50
P Nuremberg	4.15	5.00
Q Freiburg	5.40	4.95
R Dortmund	4.90	4.55
S Frankfurt	4.10	6.30
T Mannheim/Heidelberg	5.40	5.75
U Saarbrücken	6.10	3.85
V Augsburg/Ulm	4.50	5.05
W Stuttgart	4.20	6.40
X Würzburg	6.00	4.45

THE NETHERLANDS	Prime yield, %	Prime rent €/sqm/month
1 Utrecht	5.00	5.50
2 Arnhem	5.20	4.35
3 Nijmegen	4.90	4.40
4 Tilburg	4.50	4.60
5 Eindhoven	4.25	4.20
6 Venlo	4.50	3.95
7 Venray	5.00	4.20
8 Amsterdam Schiphol	4.40	7.40
9 Port of Amsterdam	5.00	5.50
10 Rotterdam - Maasvlakte	5.00	4.25
11 Rotterdam - Distripot	4.80	5.60



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Description of 104 logistics regions in Europe, based on NUTS3 geographical units for the purpose of creating regions that were as compact as possible.