

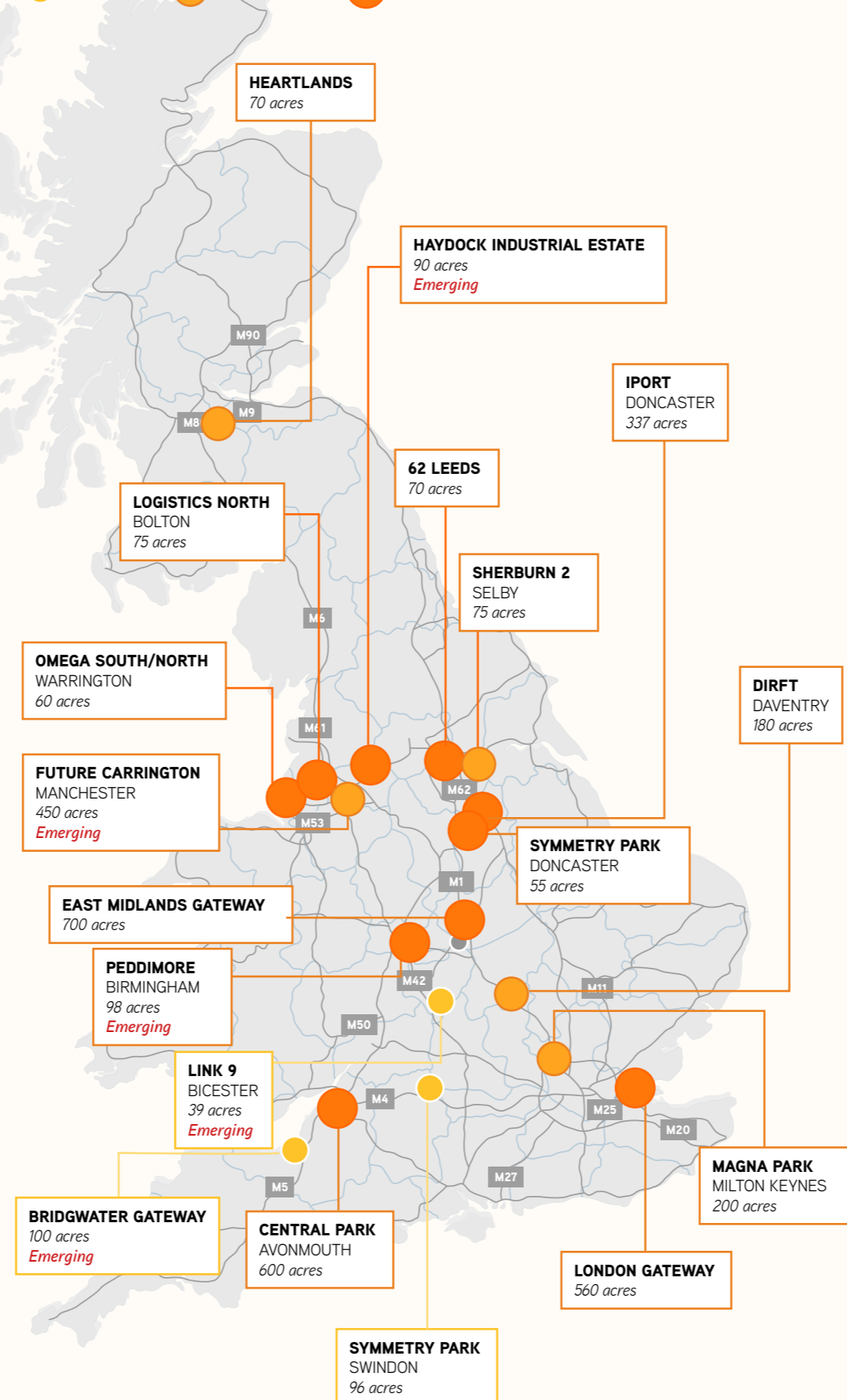
MARKET BAROMETER

AUTUMN 2017

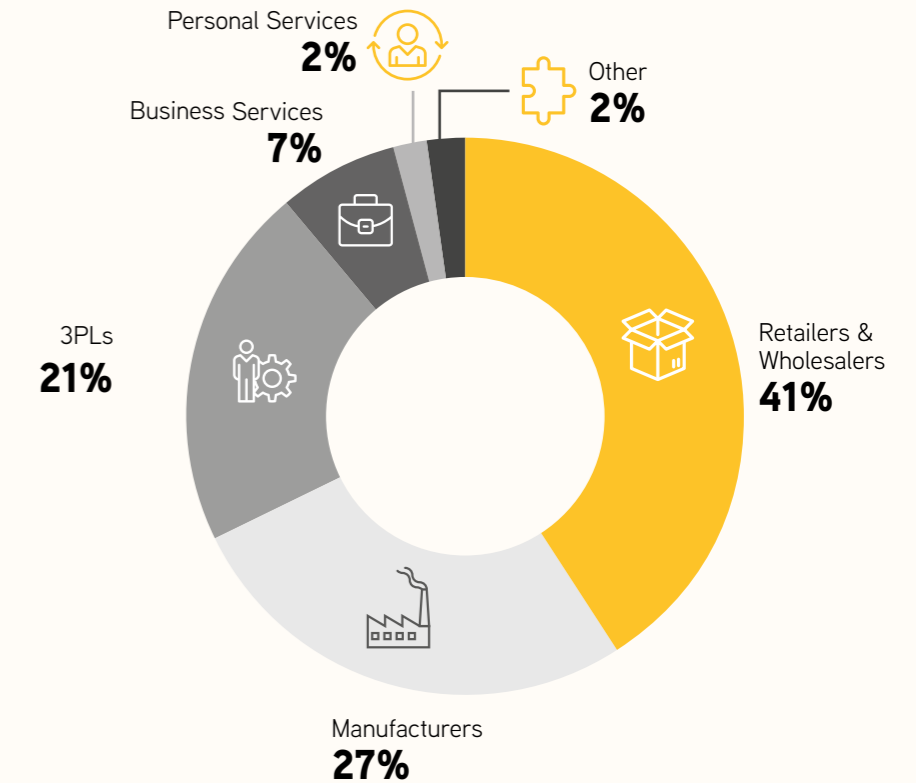
SNAPSHOT OF LARGE UK SITES WITH SPECULATIVE NEW BUILD AVAILABILITY / IMMEDIATELY READY TO BUILD

INDUSTRIAL EMPLOYMENT HOTSPOTS (25 MIN DRIVE TIME)

● <40,000 ● 40-80,000 ● >80,000



Q1-Q3 2017 UK DEMAND BY TYPE >100,000 SQ FT



UK TAKE-UP >100,000 SQ FT (MILLIONS)



Source: Colliers International/Experian/ONS

-15% Q1-Q3 2017 VS 2016 TAKE-UP, ONLY **3%** BELOW 5-YEAR AVERAGE (> 100,000 SQ FT)

ONLY **5,300** ACRES PRIME UK LOGISTICS LAND WITH PLANNING CONSENT (>50 ACRE PLOTS)

EMPLOYMENT HOTSPOTS: BLACK COUNTRY, NORTH WEST, LONDON GATEWAY

MORE DEMAND FROM DISCOUNT GROCERY, COSMETICS, OUTDOOR & DIY RETAILERS & MANUFACTURERS

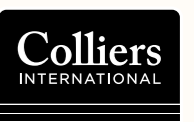
LESS ACTIVITY FROM AMAZON, HIGH-END DEPARTMENT STORES AND RETAILERS

+2.9% Prime rental increase on average in the UK in the last 12 months

+2.5% Annual average rental growth (2017-2021), outperforming other core property sectors

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