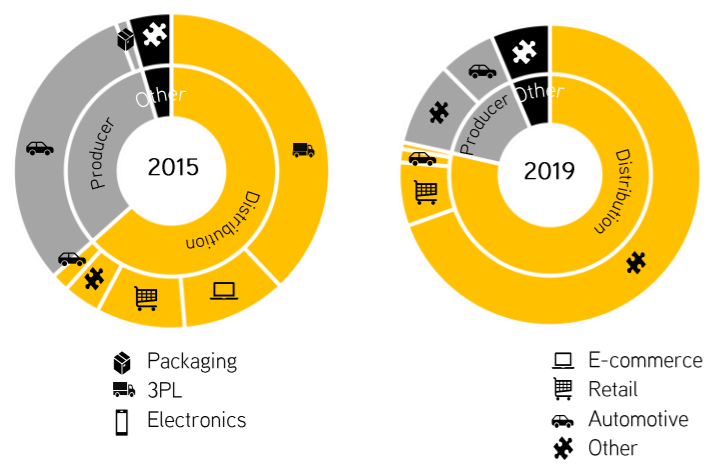


SK INDUSTRIAL & LOGISTICS MARKET BAROMETER

SPRING 2020

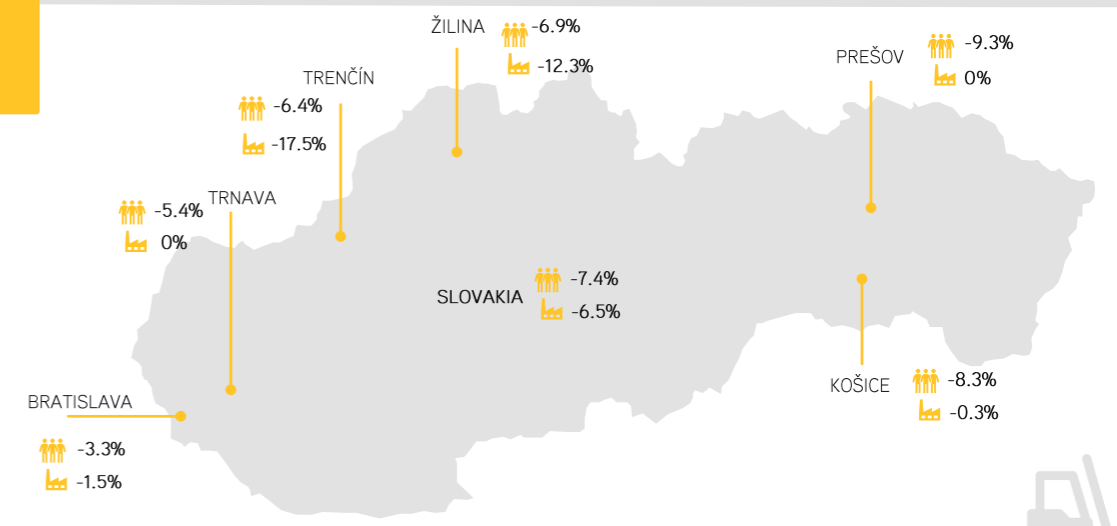
- BRATISLAVA REGION REMAINS THE MAIN HUB OF INDUSTRIAL ACTIVITY IN THE COUNTRY, HOWEVER DUE TO THE LIMITED AVAILABILITY OF LAND WITH NECESSARY PERMITS NEW DEVELOPMENTS ARE MOVING FROM THE CAPITAL TO SECONDARY CITIES IN A CLOSE PROXIMITY;
- INCREASE IN INTEREST FOR THE AREA AROUND THE CITY DUNAJSKA STREDA WITH MORE FAVOURABLE MARKET SITUATION, LOWER LAND PRICES AND UPCOMING INFRASTRUCTURAL ADVANTAGES BROUGHT BY THE CONSTRUCTION OF R7 HIGHWAY;
- ADDITIONAL STIMULUS FOR MARKET ACTIVITY IN NITRA REGION BROUGHT BY THE START OF THE NEW MODEL (DEFENDER) PRODUCTION AT THE JLR PLANT LIKELY TO RESULT IN THE NEED OF CAPACITY EXPANSION FOR THE SUPPLY CHAIN PRODUCERS;
- FAST PACED GROWTH OF THE E-COMMERCE SECTOR WITH NEW INTERNATIONAL PLAYERS ENTERING THE MARKET.

CHANGE IN NET DEMAND 2015 vs 2019

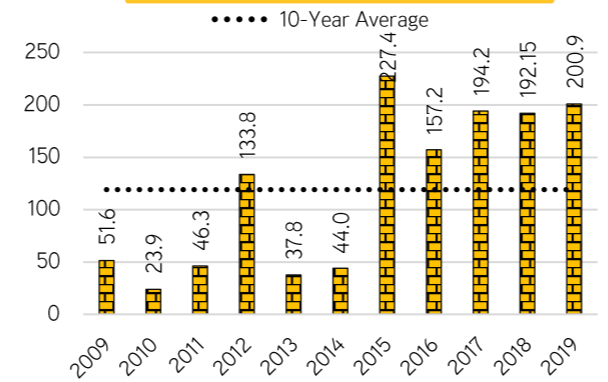


CHANGE IN UNEMPLOYMENT & VACANCY RATE IN SELECTED REGIONS (2014-2019)

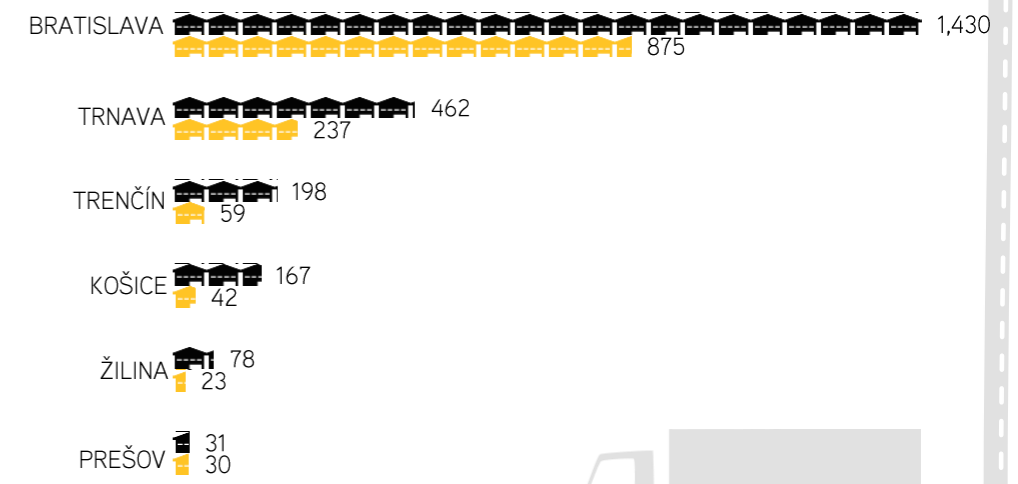
Change in Unemployment Rate (2014 vs. 2019)
 Change in I&L Vacancy Rate (2014 vs. 2019)



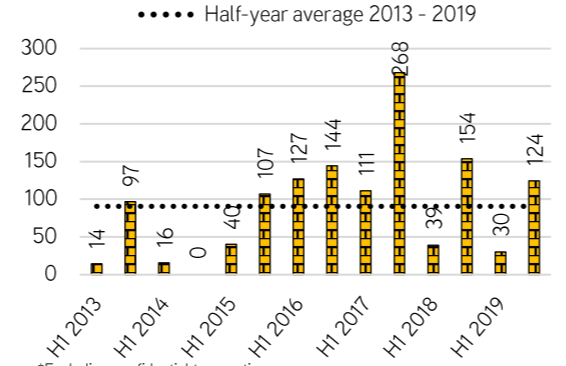
DEVELOPMENT COMPLETIONS (thousand sqm) (2009 - 2019)



REGIONAL STOCK GROWTH (thousand sqm) 2014 vs 2019



INDUSTRIAL INVESTMENT VOLUMES (€ million)*



FOR MORE INFORMATION

Tamila Nussupbekova
 Associate | Slovakia
 Research
 + 421 911 556 899
 tamila.nussupbekova@colliers.com

Source: Colliers International
 Reproduction, use and duplication of the content is permitted only when citing Colliers International as the source



*Excluding confidential transactions