

# MARKET BAROMETER

SPRING 2020

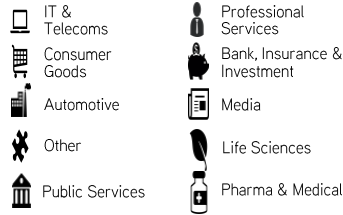
STRONG EXPANSION OF STOCK WITH SUBSTANTIAL PIPELINE OF NEW PROJECTS UNDER ACTIVE CONSTRUCTION

STRONG DEMAND FROM IT SECTOR FOLLOWED BY PROFESSIONAL SERVICES AND PHARMA/MEDICAL WITH DOMINATION OF RENEWALS AND NEW OCCUPATIONS,

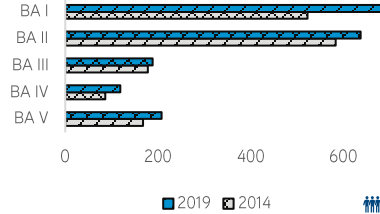
DEVELOPMENT OF THE NEW CDB AREA AROUND THE NIVY DISTRICT;

TIGHTENING LABOUR MARKET WITH RECORD LOW LEVEL OF UNEMPLOYMENT LIMITING GROWTH OPPORTUNITIES FOR TENANTS.

## CHANGE IN NET DEMAND 2015 vs 2020



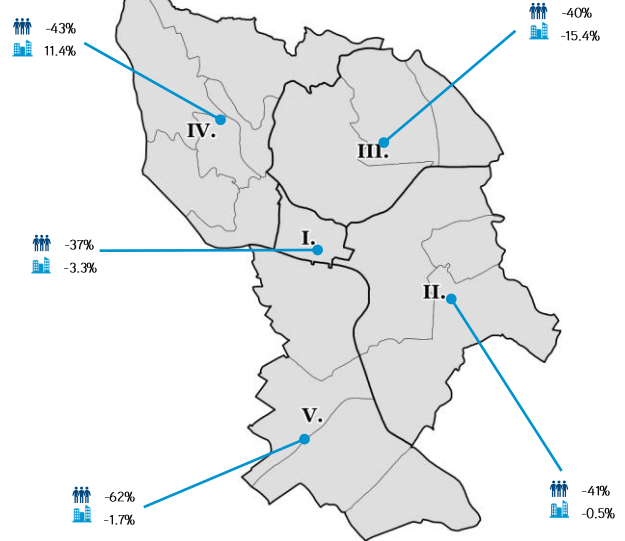
## STOCK GROWTH, BY DISTRICT (thousand sqm) 2013 vs 2019



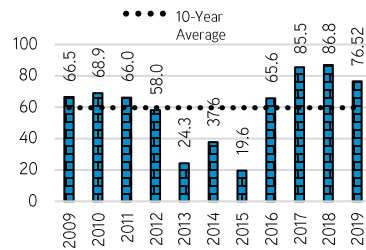
## CHANGE IN THE NUMBER OF REGISTERED JOB APPLICANTS & VACANCY RATE IN BRATISLAVA (2014-2019)

Change in the Number of Registered Job Applicants (2014 vs. 2019)  
 Change in Office Vacancy Rate (2014 vs. 2019)

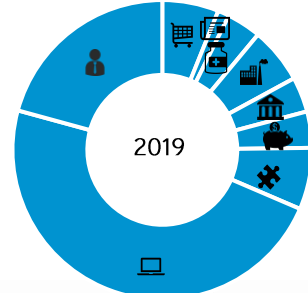
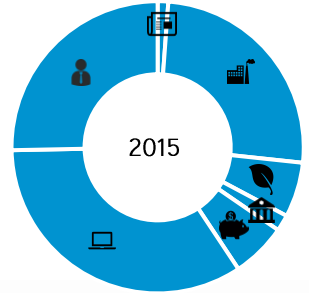
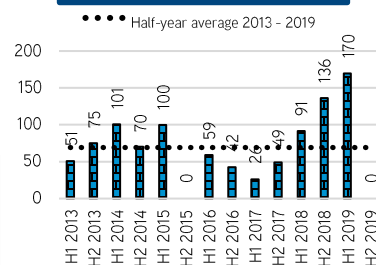
## BRATISLAVA



## DEVELOPMENT COMPLETIONS (thousand sqm) (2009 - 2019)



## OFFICE INVESTMENT VOLUMES (€ million)\*



FOR MORE INFORMATION

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