

The  
Advisors



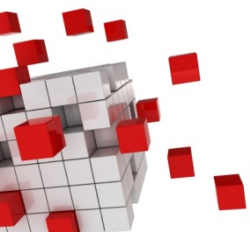
## Kancelárske priestory

14/04/2016

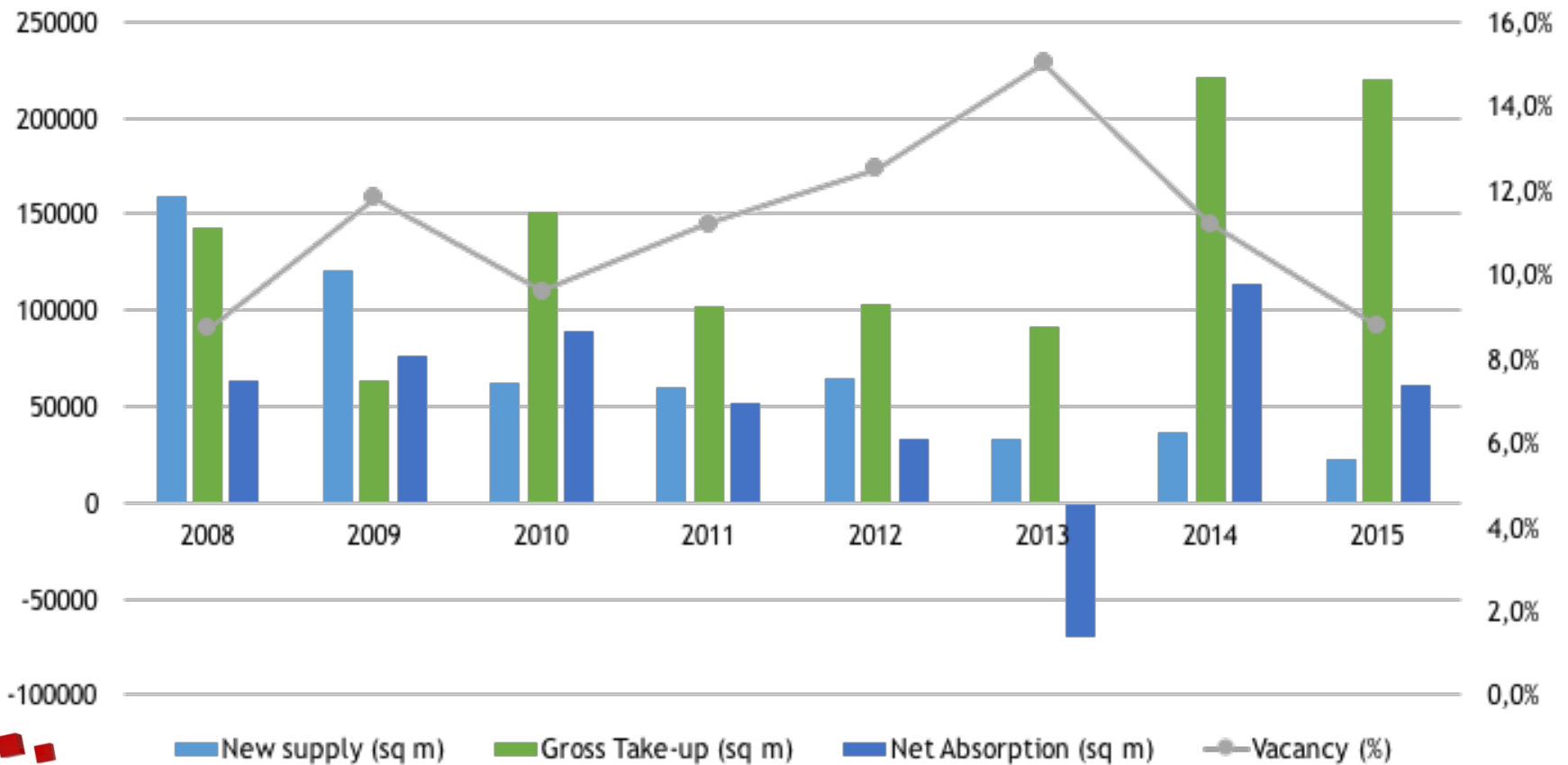


## KANCELÁRSKE PRIESTORY: 4.panel

- Rekordný rok 2015
- Vývoj počas H1/2016
- Zásoba na roky 2016 - 2018
- Región CEE

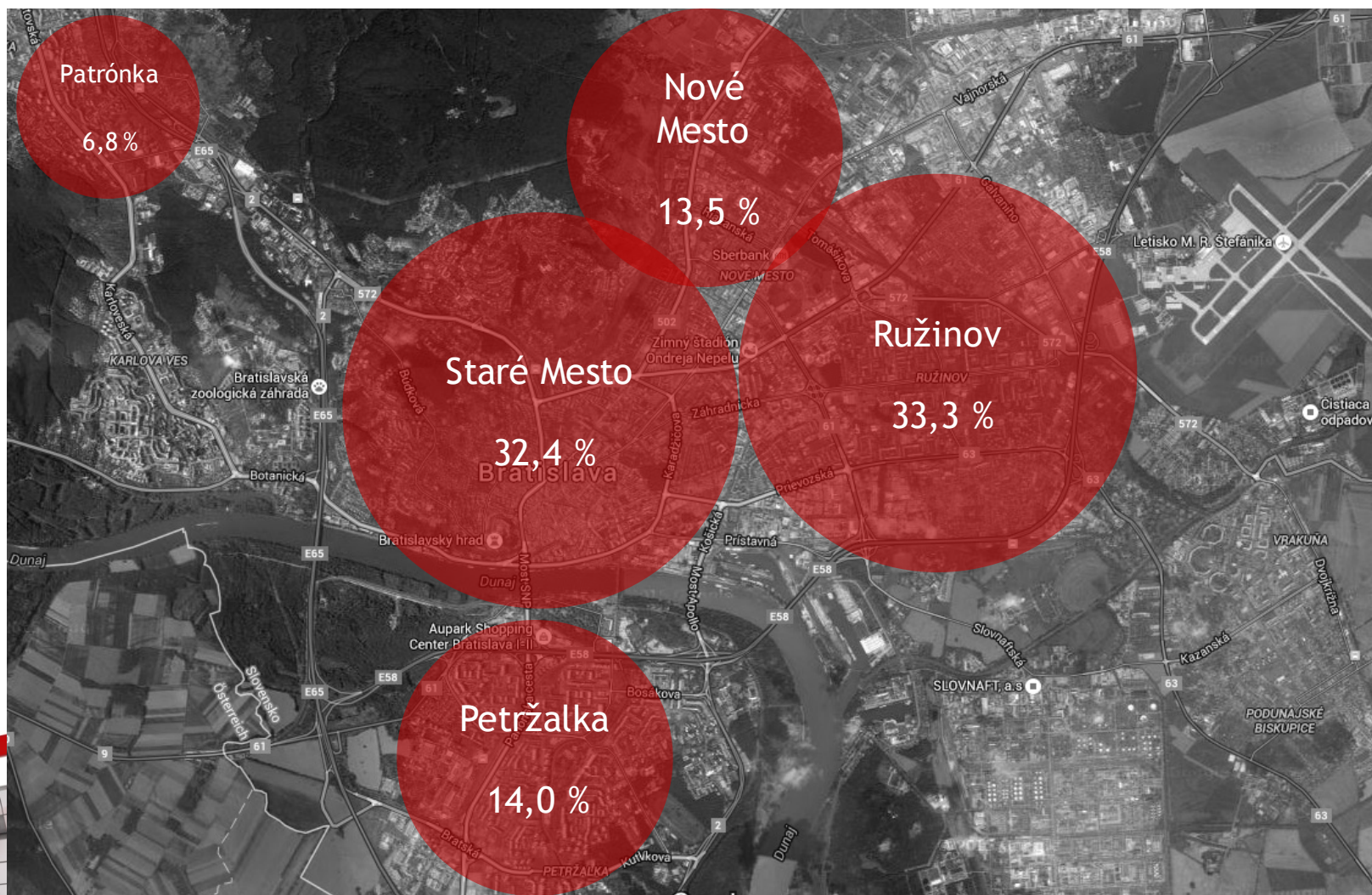


## BRATISLAVA: Dopyt 2008 - 2015

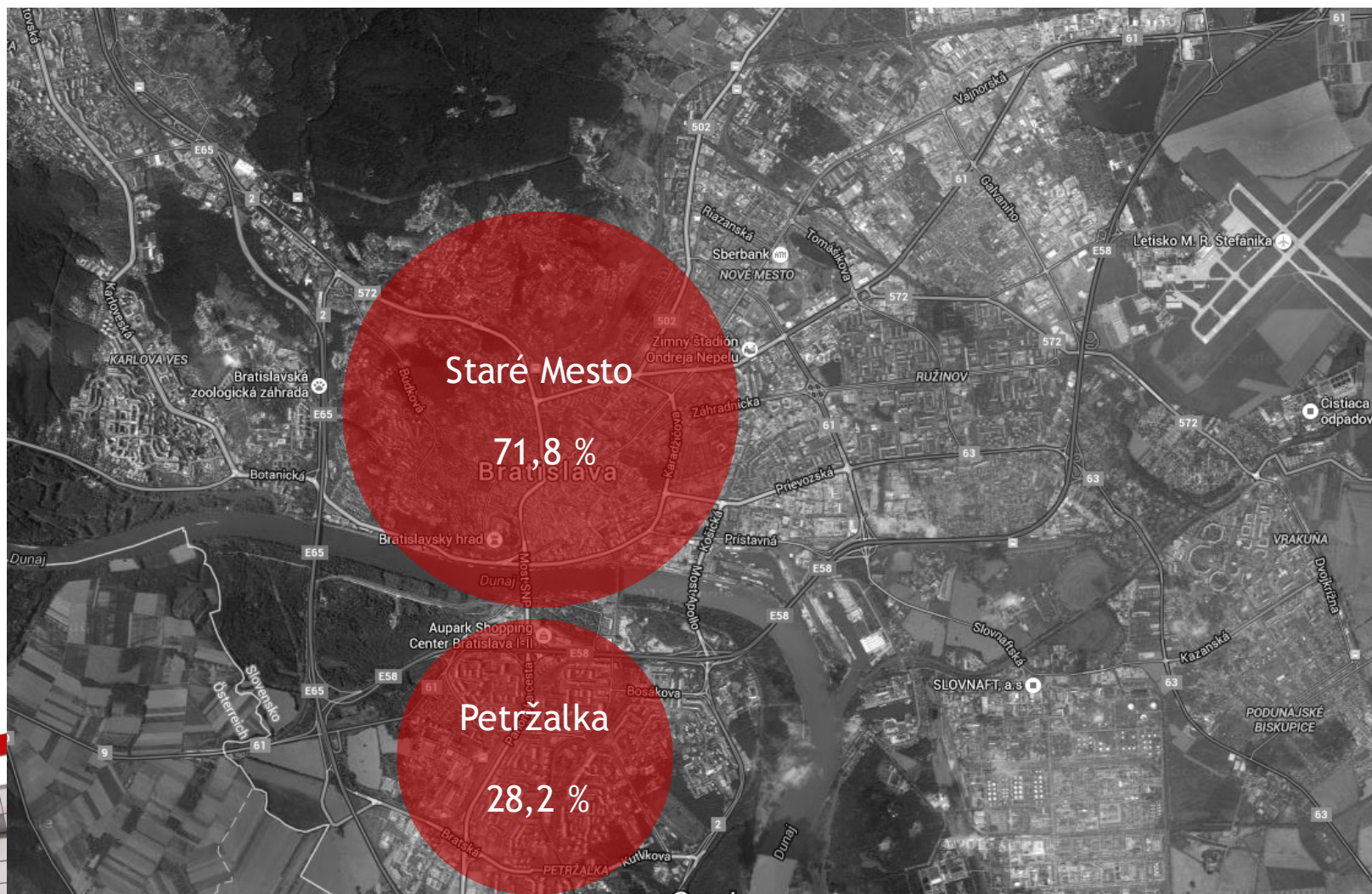


Zdroj: Cushman & Wakefield



## BRATISLAVA: Dopyt 2015

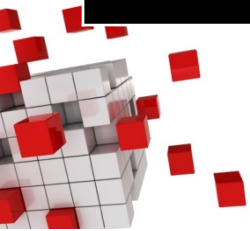


## BRATISLAVA: Nová ponuka 2015

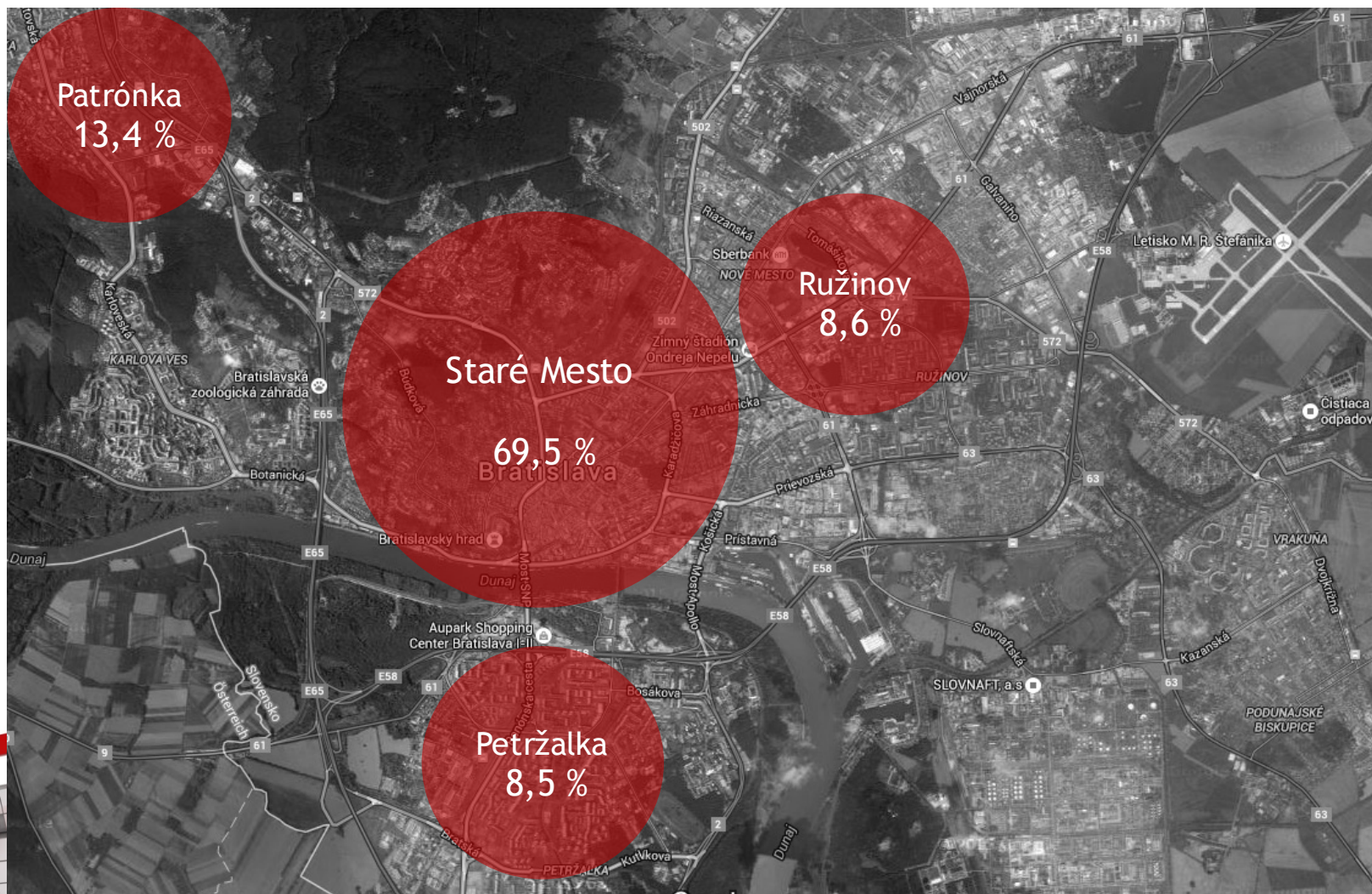


## BRATISLAVA: Nová ponuka 2015: 23 100 m<sup>2</sup>

PROJEKT:	Twin City - Fáza I.	Panon Office
		
Kolaudácia:	Q4/2015	Q4/2015
Výmera:	16 600 m <sup>2</sup>	6 500 m <sup>2</sup>
Obsadenosť:	97%	100%
Developer:	HB Reavis	Capital Park
Nájomcovia:	Sféra, SBA, PWC...	VŠZP

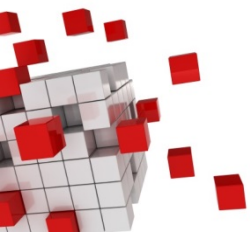


## BRATISLAVA: 2016 - 2018: cca. 250 000m<sup>2</sup> v 10 projektoch



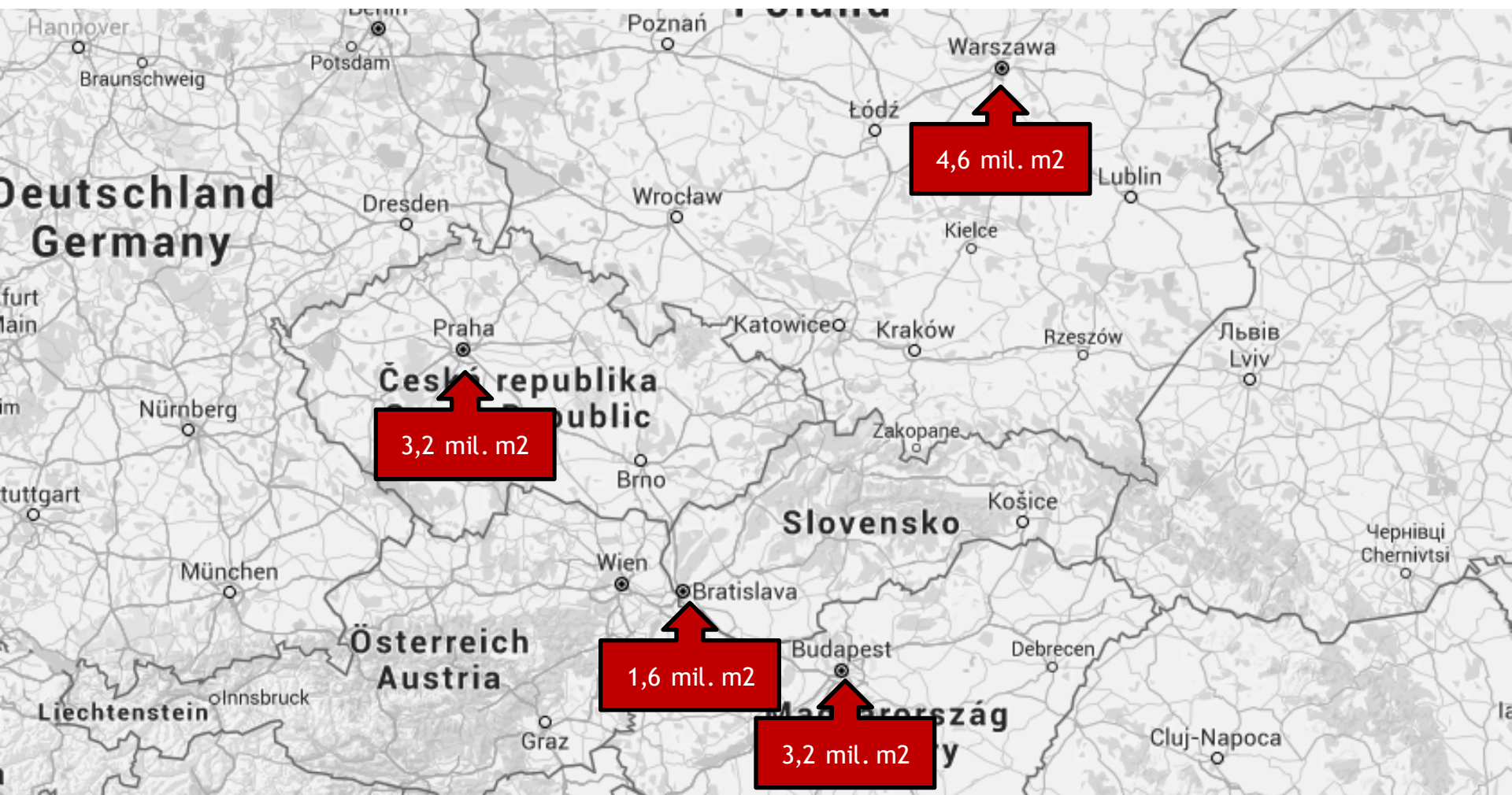
**BRATISLAVA: 2016 - 2018: cca. 250 000m<sup>2</sup> v 10 projektoch**

	Staré mesto	Ružinov	Patrónka	Petržalka
				
Investor:	J&T Real Estate, Corwin Capital, Cresco, HB Reavis, MiddleCap	Rosum / Penta Investments	Westend Piazza / J&T Real Estate	Einsteinova Offices / S Immo
Výmera:	171 230 m <sup>2</sup>	21 228 m <sup>2</sup>	33 000 m <sup>2</sup>	21 000 m <sup>2</sup>



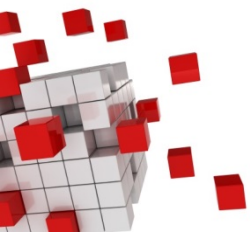
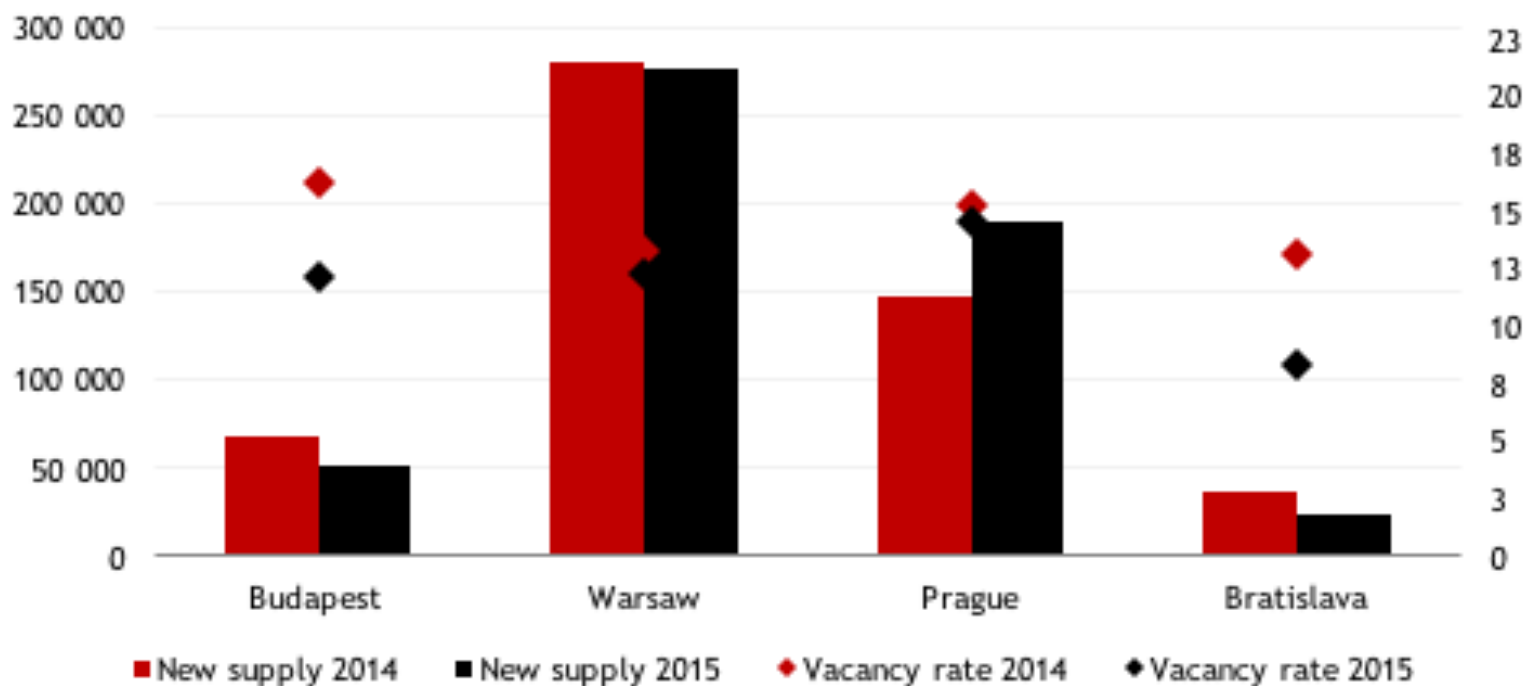


## Región CEE: Hlavné mestá V4



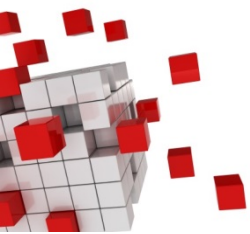
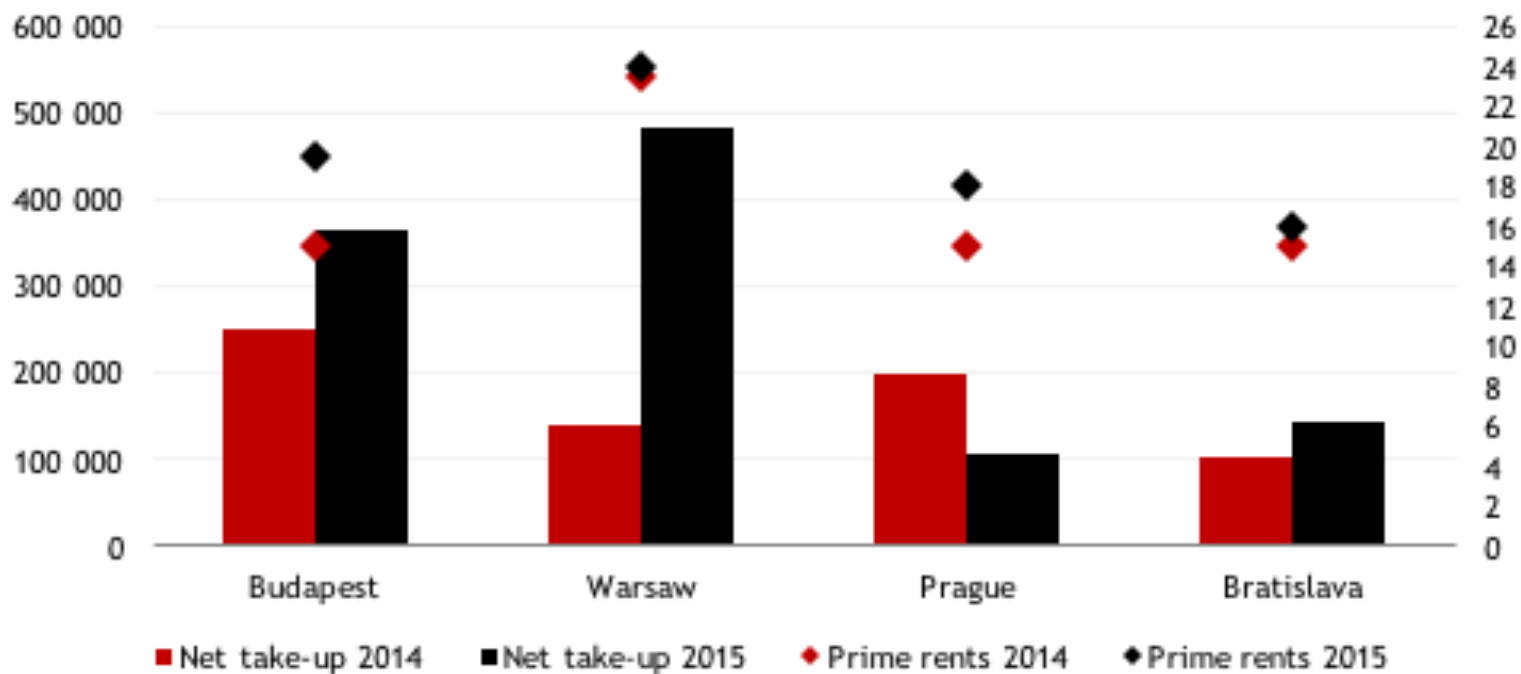
## Región CEE: Hlavné mestá V4

New supply vs. Vacancy rate



## Región CEE: Hlavné mestá V4

Net-take up vs. Prime rents



**ĎAKUJEME ZA POZORNOSŤ**

