

# FRESH DATA

## HUNGARIAN INDUSTRIAL MARKET

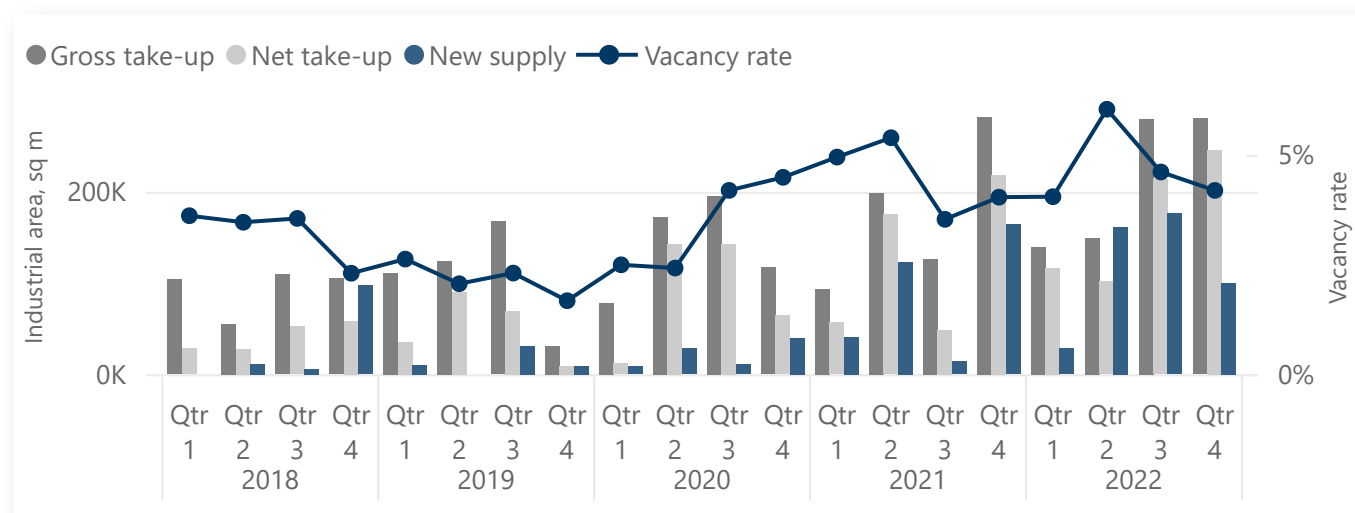
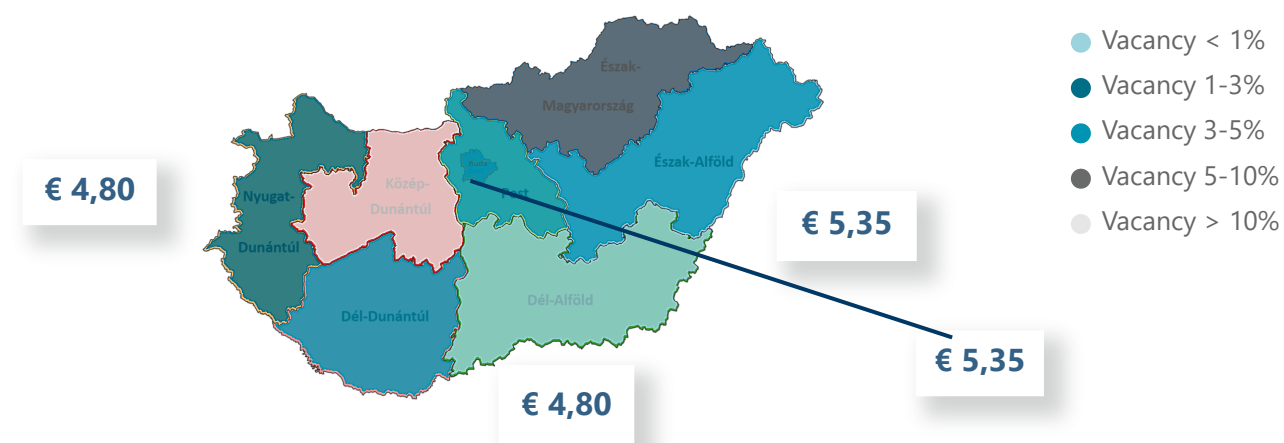
Q4 2022



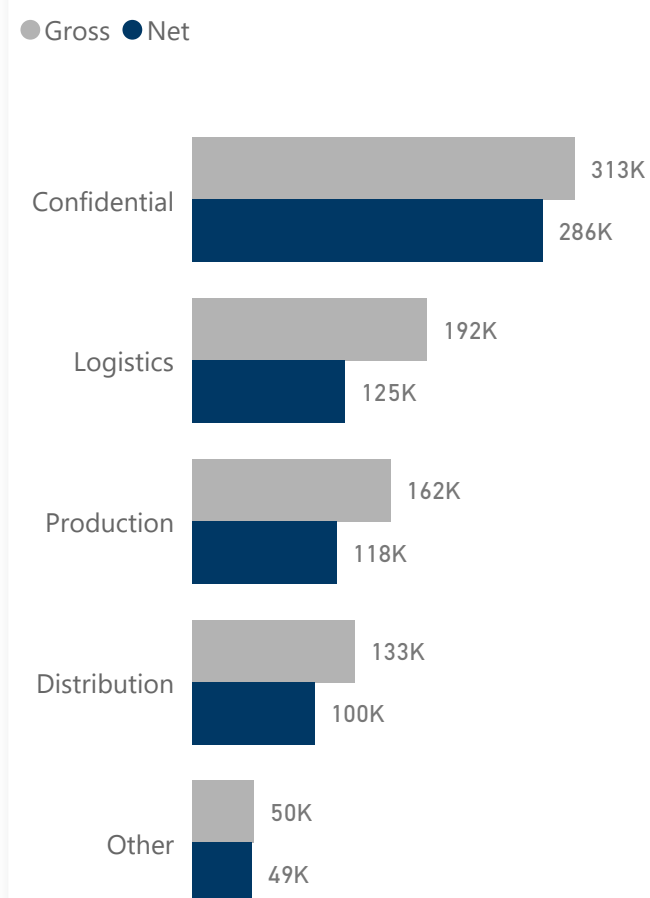
### QUARTERLY INDICATORS

<b>4 582 700</b> Total stock	<b>4,19%</b> Vacancy rate	<b>100 300</b> New supply	<b>280 400</b> Gross take-up	<b>612 400</b> Under construction	<b>€ 5,35</b> Prime rent	<b>5,75%</b> Prime yield
<b>2%</b> QoQ change	<b>-0,42</b> QoQ change	<b>89%</b> vs. 5y average	<b>92%</b> vs. 5y average	<b>8%</b> vs. 5y average	<b>13%</b> Prime rent YoY%	<b>0 bps</b> YoY change

### PRIME RENTS & VACANCY



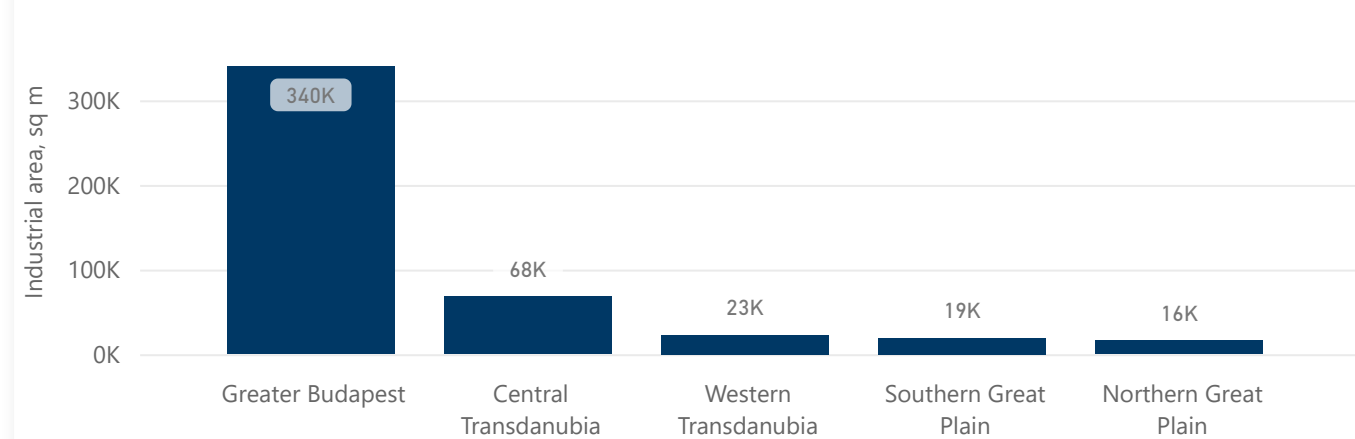
### YTD TAKE-UP (SQ M)



### TOP COMPLETIONS IN THE QUARTER

Property name	Region	Total size	Vacancy	Developer
Inpark Páty (NIPÜF)	Greater Budapest	32 100	0	NIPÜF
CTP Komárom KMR5	Central Transdanubia	18 300	0	CTP
CTPark Budapest West	Greater Budapest	18 100	18 100	CTP
Inpark Veszprém (NIPÜF) II	Central Transdanubia	10 400	4 900	NIPÜF
Alba Ipari Zóna	Central Transdanubia	7 200	7 200	M59 Üzleti Park
LogStar Budapest M0-M3	Greater Budapest	4 700	0	Biggeorge's
Inpark Gyula (NIPÜF) III.	Southern Great Plain	3 400	0	NIPÜF
Logicube I ütem	Greater Budapest	3 200	0	Defactoring

### YTD NEW SUPPLY (SQ M)



### PLANNED COMPLETIONS IN THE NEXT 12 MONTHS

Property name	Region	Total size	Delivery	Developer
CTP Sziget	Greater Budapest	118 400	2024 Q2	CTP
HelloParks Páty - PT1	Greater Budapest	58 400	2023 Q2	HelloParks
HelloParks Fót - FT2	Greater Budapest	45 300	2023 Q2	HelloParks
HelloParks Maglód -MG3	Greater Budapest	45 200	2023 Q1	HelloParks
CTPark Ecsér (ECS1)	Greater Budapest	42 500	2023 Q1	CTP
CTPark Tatabánya - TBN5	Central Transdanubia	33 600	2023 Q1	CTP
VGP Park Aerozone -A1	Greater Budapest	28 500	2023 Q4	VGP

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## HUNGARIAN INDUSTRIAL MARKET

Q4 2022

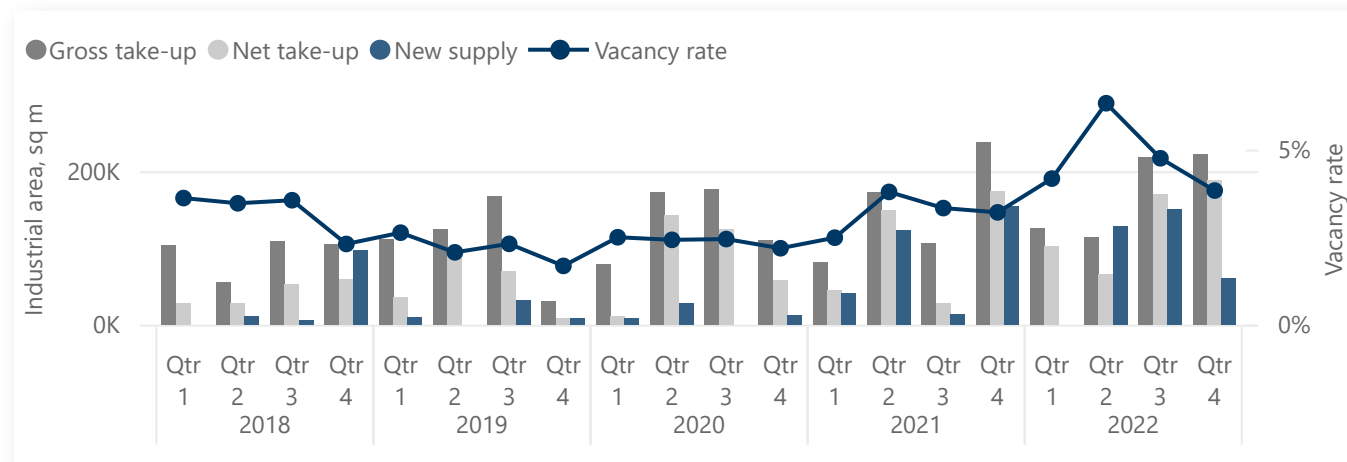
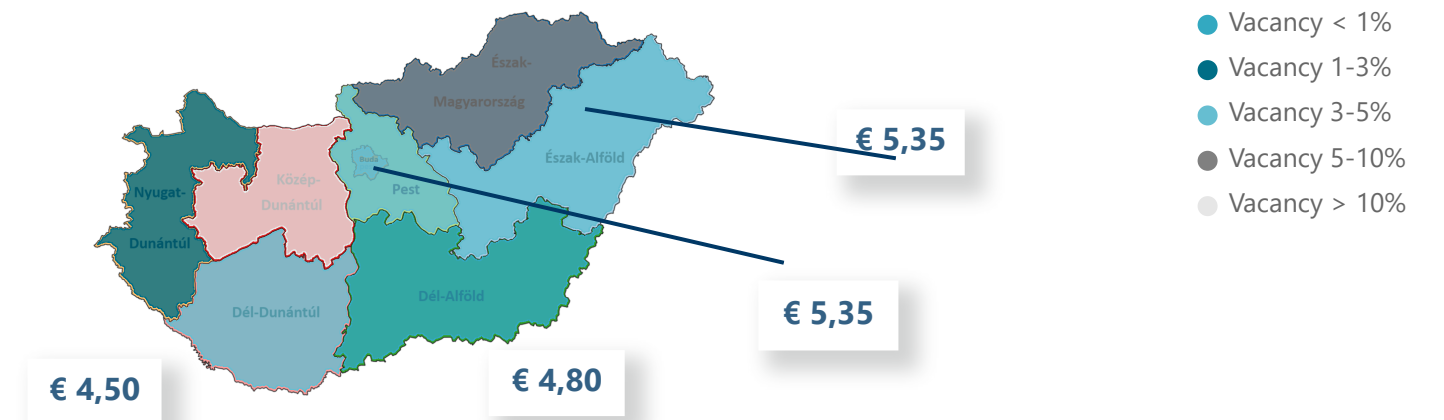
Greater Budapest



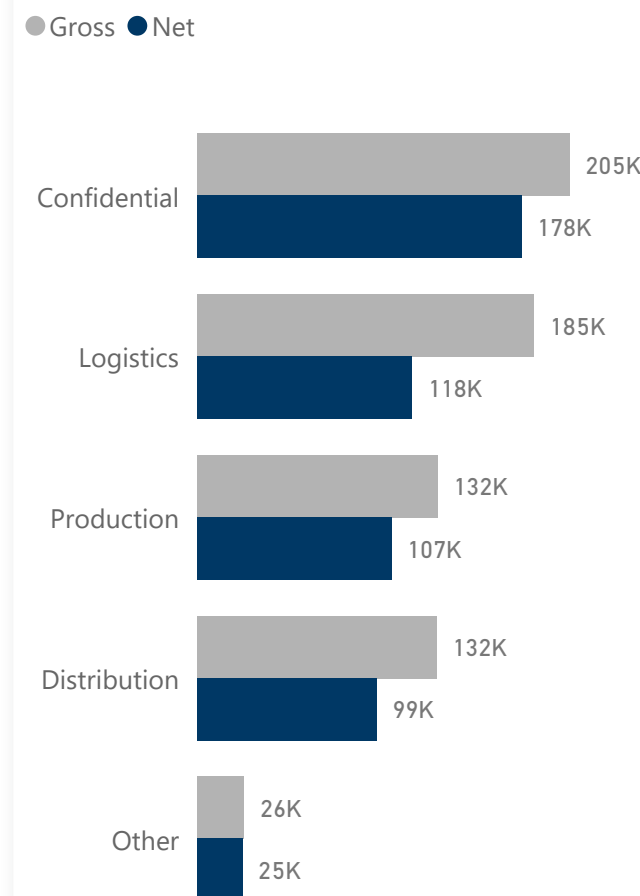
### CURRENT QUARTER:

<b>3 137 700</b> Total stock	<b>3,83%</b> Vacancy rate	<b>61 000</b> New supply	<b>222 700</b> Gross take-up	<b>476 400</b> Under construction	<b>335 100</b> Speculative UC	<b>€ 5,35</b> Prime rent
<b>2%</b> QoQ change	<b>-0,92</b> QoQ change	<b>37%</b> vs. 5y average	<b>70%</b> vs. 5y average	<b>10%</b> vs. 5y average	<b>3%</b> vs. 5y average	<b>€ 0,10</b> Prime rent QoQ%

### VACANCY RATE & PRIME RENTS BY REGIONS



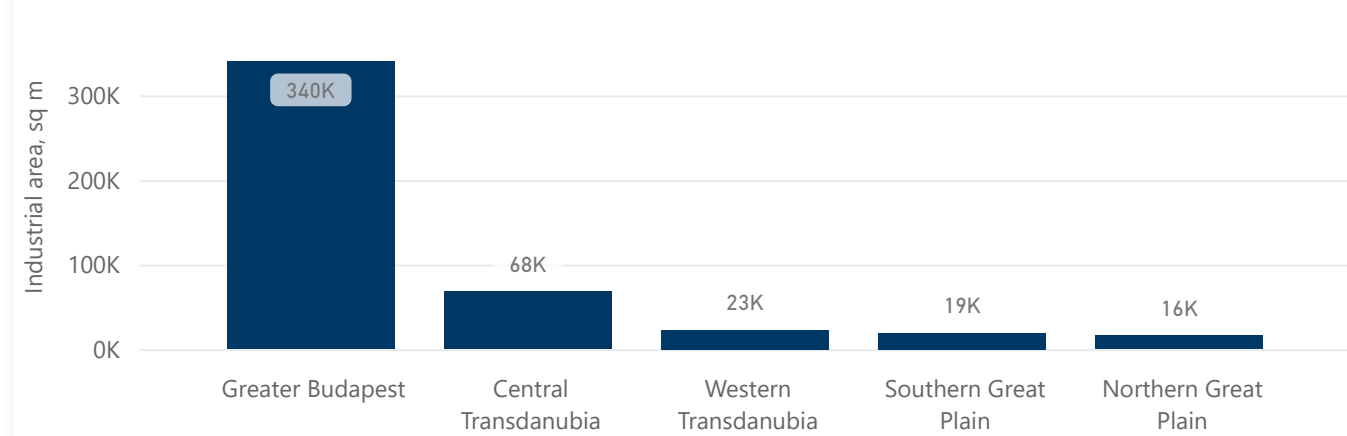
### YTD TAKE-UP (SQ M)



### TOP COMPLETIONS CURRENT QUARTER

Logistics Park	Region	Total size	Vacancy	Developer
Inpark Páty (NIPÜF)	Greater Budapest	32 100	0	NIPÜF
CTPark Budapest West	Greater Budapest	18 100	18 100	CTP
LogStar Budapest M0-M3	Greater Budapest	4 700	0	Biggeorge's
Logicube I ütem	Greater Budapest	3 200	0	Defaktoring
CTPark Ecsér (ECS4)	Greater Budapest	2 800	2 800	CTP

### YTD NEW SUPPLY (SQ M)



### PLANNED COMPLETIONS IN THE NEXT 12 MONTHS

Property name	Region	Total size	Delivery	Developer
CTPark Ecsér (ECS1)	Greater Budapest	42 500	2023 Q1	CTP
HelloParks Fót - FT2	Greater Budapest	45 300	2023 Q2	HelloParks
HelloParks Fót - FT6	Greater Budapest	28 000	2023 Q1	HelloParks
HelloParks Maglód -MG3	Greater Budapest	45 200	2023 Q1	HelloParks
HelloParks Páty - PT1	Greater Budapest	58 400	2023 Q2	HelloParks
Panattoni Park Budapest	Greater Budapest	17 300	2023 Q2	Panattoni
Prologis Park Sziget II -	Greater Budapest	18 000	2023 Q1	Prologis