



SWEDEN
LOGISTICS MARKET
Q1 2021

CBRE RESEARCH
NORDICS REAL ESTATE
MARKET SNAPSHOT

CBRE

LOGISTICS INVESTMENT MARKET OVERVIEW

CONTINUED FOREIGN INVESTOR INTEREST

Roughly half of the purchaser investment volumes in Q1 stemmed from foreign investors.

NRP has acquired a logistics property in Helsingborg from Skanska for an estimated SEK 200 mn. The property is fully let to Bring Frigo and is a modern refrigeration and freezing terminal of 10,800 sqm.

Genesta has sold a logistics property in Malmö to Bentall Greenoak. The property's size is 19,600 sqm and it's located in Malmö Industrial Park.

The second part of the deal between Blackstone and Castellum was finalized, where Castellum sold 53 properties to Blackstone for an estimated SEK 5 bn.

LOGISTICS TRANSACTION VOLUME

Last 4 quarters

SEK 40.3bn (last 4 quarters)

▲ 36% (last 4 quarters y-o-y)

SEK 6.2bn Q1 2021

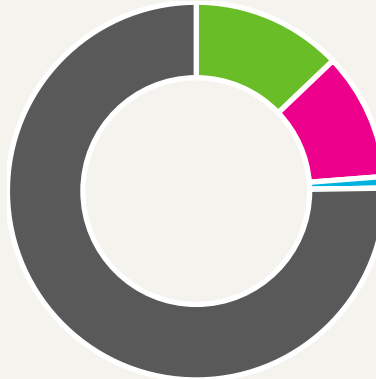
▲ 325% (quarter volumes y-o-y)

STOCKHOLM
SEK 4.7bn

GOTHENBURG
SEK 4.4bn

MALMÖ
SEK 0.2bn

REGIONAL
SEK 31bn



KEY FIGURES LAST 4 QUARTERS

LOGISTICS INVESTMENT MARKET

5 YR SWAP RATE¹⁾

0.29

CROSS BORDER INVESTMENTS

SEK 19.8 bn

SHARE OF TOTAL ALL-SECTOR VOLUME

27%

NUMBER OF TRANSACTIONS

121

LARGEST SINGLE TRANSACTION

SEK 5 bn

INVESTMENT VOLUME IN 2020

SEK 34 bn

LOGISTICS OCCUPIER MARKET OVERVIEW

THE LEASING MARKET

DFDS is constructing 35,000 sqm in Viared, due to be finished at the end of 2021. The new property will be focused on clients active in the automotive industry.

Castellum is starting a new property in Brunna of 17,000 sqm on speculation. The property is estimated to be finished in Q2 2022.

PostNord has signed a 10-year long lease with Peab. The lease is 2,150 sqm logistics property with additional land adjacent to the property. The hub is called Stockholm Syd in Södertälje and the property will be finished in Q2 2022.

Volvo Cars lease 8,000 sqm in Bockasjö's property on Hisingen and becomes neighbor with Samsund STS.

KEY FIGURES Q1 2021

LOGISTICS OCCUPIER MARKET

PRIME RENT PER M² PA
975

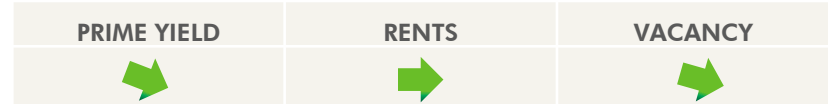
AVERAGE RENT PER M² PA
750

VACANCY RATE
3.8%

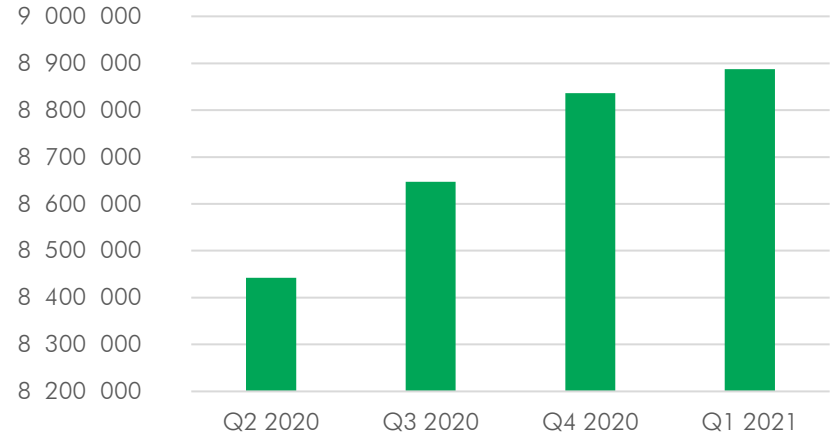
NUMBER OF COMPLETIONS
1

PRIME YIELD
4.00%

OVERALL TREND



LOGISTICS STOCK DEVELOPMENT (M²)



THANK YOU!

PLEASE DON'T HESITATE TO CONTACT US



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