



SWEDEN
LOGISTICS MARKET
Q2 2021

CBRE RESEARCH
NORDICS REAL ESTATE
MARKET SNAPSHOT

CBRE

LOGISTICS INVESTMENT MARKET OVERVIEW

NEW ENTRANTS IN THE INVESTMENT MARKET

Oscar properties bought an industrial property portfolio across Sweden from Kvalitena. The estimated price tag is SEK 930 mn.

The property Vindyget 1 located in Borås, Ellos headquarters and main storage, was bought by Vatne from Bosjö Fastigheter. The price is an estimated SEK 908 mn and the property has a total space of 94,000 sqm.

Arendal 1:16 was sold by DWS to British Tritax Eurobox, who thus have made their first acquisition in the Nordics. The purchase price was SEK 474 mn with an estimated net initial yield of 3.60%. The property's tenants include Agility, Nordicon and Vink Essaplast.

LOGISTICS TRANSACTION VOLUME

Last 4 quarters

SEK 49.5bn (last 4 quarters)

▲ 10% (last 4 quarters y-o-y)

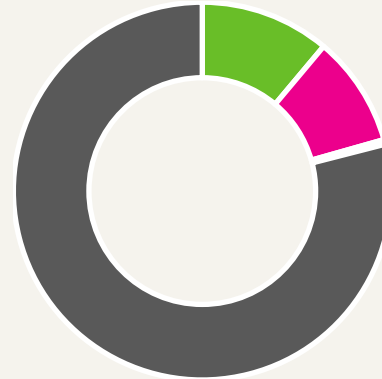
SEK 7.4bn Q1 2021

▲ 143% (quarter volumes y-o-y)

STOCKHOLM
SEK 5.5bn

GOTHENBURG
SEK 4.7bn

MALMÖ
SEK 0.2bn



REGIONAL
SEK 39.1bn

KEY FIGURES LAST 4 QUARTERS

LOGISTICS INVESTMENT MARKET

5 YR SWAP RATE¹⁾

0.38

CROSS BORDER INVESTMENTS

SEK 29.3 bn

SHARE OF TOTAL ALL-SECTOR VOLUME

28%

NUMBER OF TRANSACTIONS

146

LARGEST SINGLE TRANSACTION

SEK 1.3 bn

INVESTMENT VOLUME IN 2020

SEK 34 bn

LOGISTICS OCCUPIER MARKET OVERVIEW

THE LEASING MARKET

Greenfood has signed a leasing agreement with Skanska for a 44,000 sqm large logistics center in Helsingborg. It is the largest logistic property ever constructed by Skanska in the Nordics, and the new property is expected to be up and running in 2023. The lease term is for 20 years and increase their production capacity with 40%. Rooftop sun panels will cover part of the business' energy needs. CBRE was adviser in the deal.

Italian appliance manufacturer Smeg moves their Nordic warehousing from Löddeköpinge and expands it to 6,500 sqm in Malmö's newly constructed property in the northern harbor. The property is owned by MG Real estate. The lease term is for 10 years with move in November.

KEY FIGURES Q2 2021

LOGISTICS OCCUPIER MARKET

PRIME RENT PER M² PA
1,050

AVERAGE RENT PER M² PA
800

VACANCY RATE
2.6%

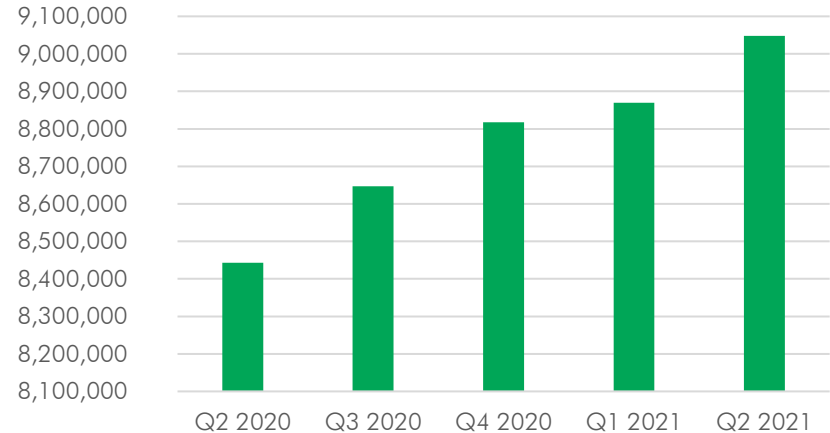
NUMBER OF COMPLETIONS
7

PRIME YIELD
3.75%

OVERALL TREND

PRIME YIELD	RENTS	VACANCY
➔	➔	➔

LOGISTICS STOCK DEVELOPMENT (M²)



THANK YOU!

PLEASE DON'T HESITATE TO CONTACT US



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