



NSW
INDUSTRIAL &
LOGISTICS
MARKET
PRESENTATION

PRESENTED BY MICHAEL O'NEILL, SENIOR DIRECTOR,

CBRE

CBRE

NSW INDUSTRIAL MARKET



RENTAL
GROWTH
OF 7.5% IN THE
PAST 2 YEARS

CAPITAL
GROWTH OF 30%
AND EXAMPLES
OF 100%

SYDNEY'S POPULATION GROWTH / RESIDENTIAL
ENCROACHMENT

INFRASTRUCTURE BOOM / PRIVATE SPENDING

INDUSTRIAL STOCK WITHDRAWN FROM MARKET

GROWTH INDUSTRIES

LOWER INTEREST RATES

CBRE

SOUTH SYDNEY MARKET



LESS THAN
2% A-GRADE
VACANCY



STRATA PRICES
\$2,700 IN 2014
\$5,750 IN 2017



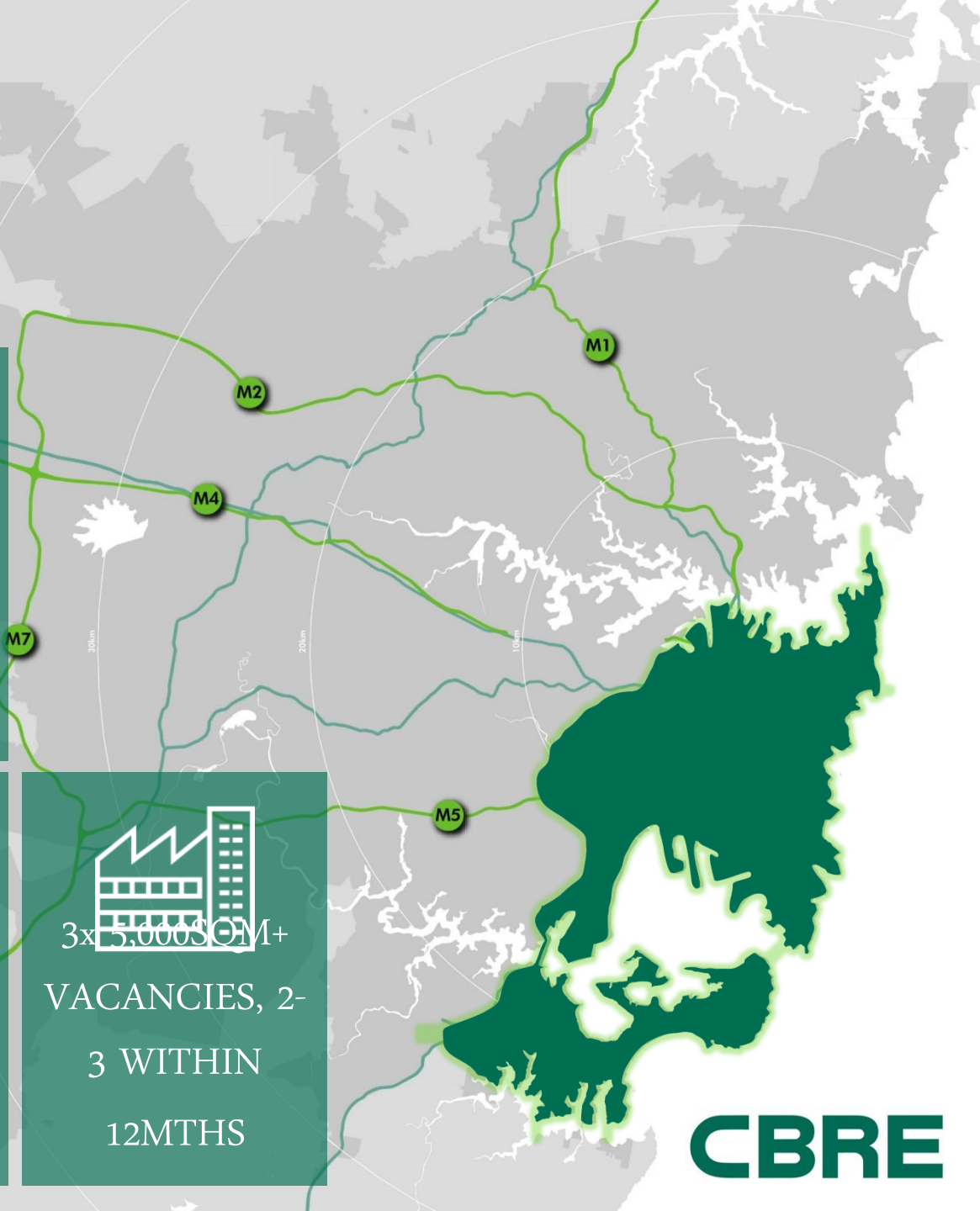
100,000SQM+
REZONED IND
TO RESI



NO PRELEASE
OR
SPECULATIVE
ACTIVITY



3x 5,000SQM+
VACANCIES, 2-
3 WITHIN
12MTHS



CENTRAL WEST MARKET



LESS THAN
2% A-GRADE
VACANCY



7x 5,000SQM+
VACANCIES
COMING
ONLINE



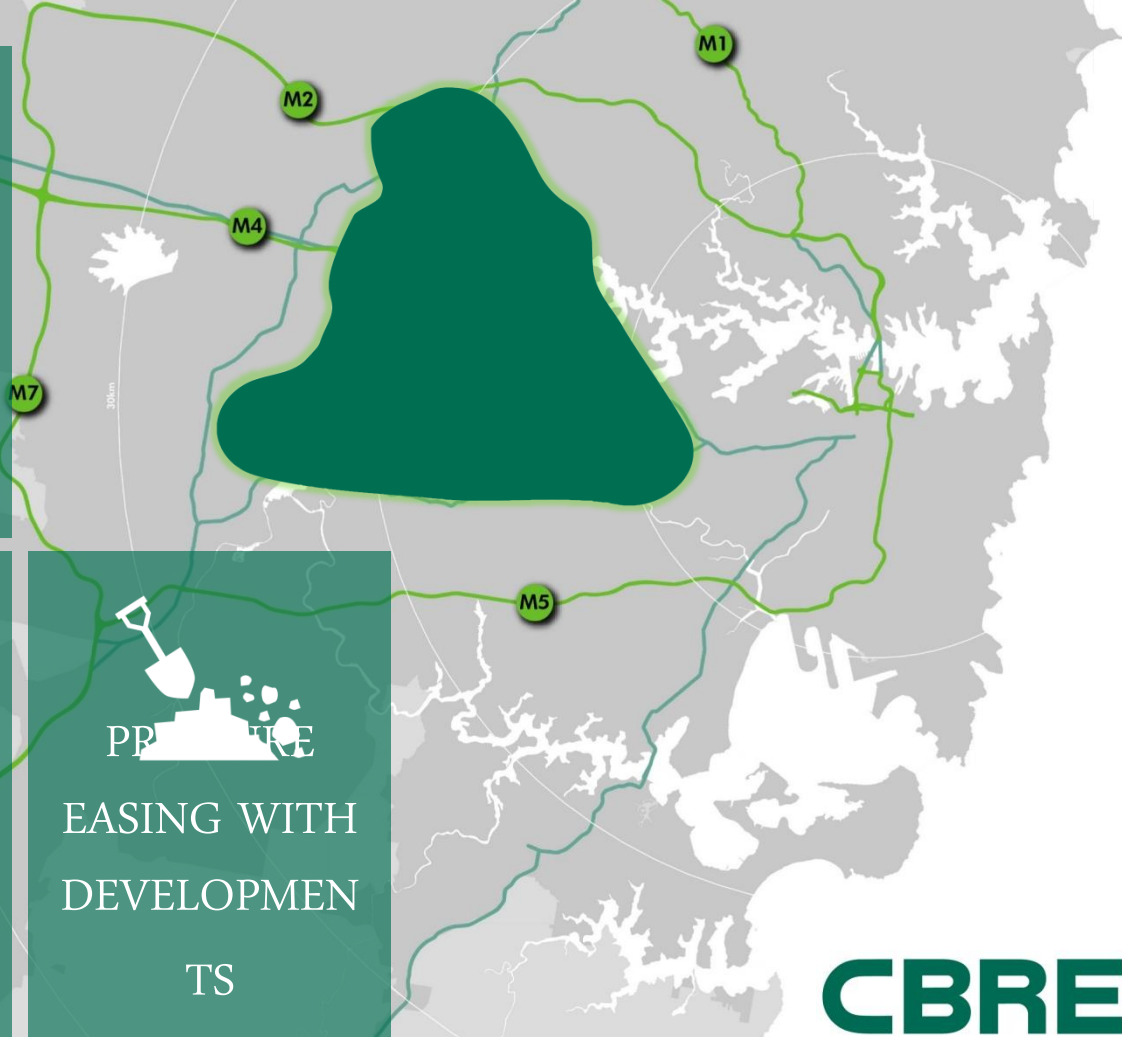
NORTHSHORE
& SOUTH
SYDNEY
TENANTS



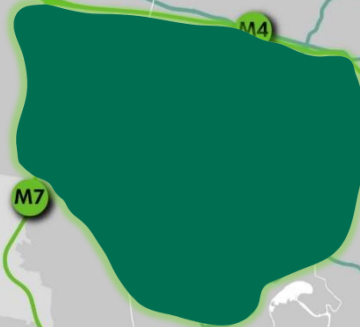
DEMAND
FROM FOOD
USERS &
ONLINE USERS



PRESSURE
EASING WITH
DEVELOPMENTS



METRO WEST MARKET



RATES

ACHIEVED
\$1,000-\$2,000
PER SQM



RECORD
YIELD

ACHIEVED
FOR THE
SYDNEY SIX



7 DEALS OF
98,700SQM IN
16 MONTHS



3 OF THE 7
DEALS WERE
SPECULATIVE

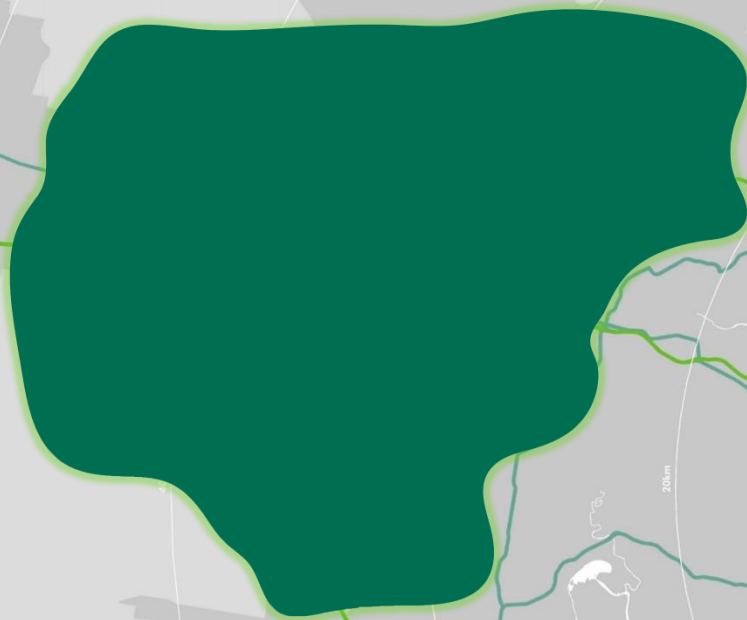


ACCESS

GREYSTANES &
HORSLEY

CBRE
PARK

NORTH & OUTER WEST MARKET



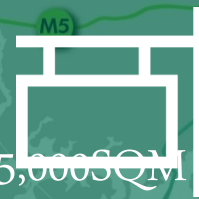
LESS THAN
1% A-GRADE
VACANCY



RENTAL
GROWTH OF
4%



45,000SQM
CURRENTLY
VACANT



125,000SQM TO
COME ONLINE
IN NEXT 12
MTHS



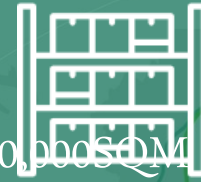
STRONG TAKE
UP OF SPEC
STOCK

CBRE

SOUTH WEST MARKET



35,000SQM+
A-GRADE
VACANCY



140,000SQM TO
COME ONLINE
IN NEXT
12MTHS



STRUCK TAKE
UP OF STOCK
BY 3PL
PROVIDERS



1,000,000SQM
AT
MOOREBANK
INTERMODAL



NEW M12
MOTORWAY
ANNOUNCED

M12 MOTORWAY PREFERRED CORRIDOR

Scoping and investigation

Announce preferred corridor

Display environmental assessment

Project approval

Detailed design

Award contract

Start of construction

Open to traffic

Modified orange option



Preferred corridor route

PROJECT COST: \$1.25 BILLION

CONSTRUCTION START: 2020
COMPLETION BEFORE

OPENING OF WESTERN
SYDNEY AIRPORT

INDUSTRIAL MARKET

TRENDS



OCCUPIERS ARE NEEDING
TO CONSIDER ALTERNATE
AREAS



RENTS INCREASED BUT
STILL COMPETITIVE ON
SPEC STOCK



ABILITY FOR TENANTS TO
MOVE DURING LEASE
TERM



INCREASED INTEREST IN
SUPPLY CHAIN ADVICE



INCREASED INTEREST IN
INTERMODAL LOCATIONS