

Warehouse market overview

Russia

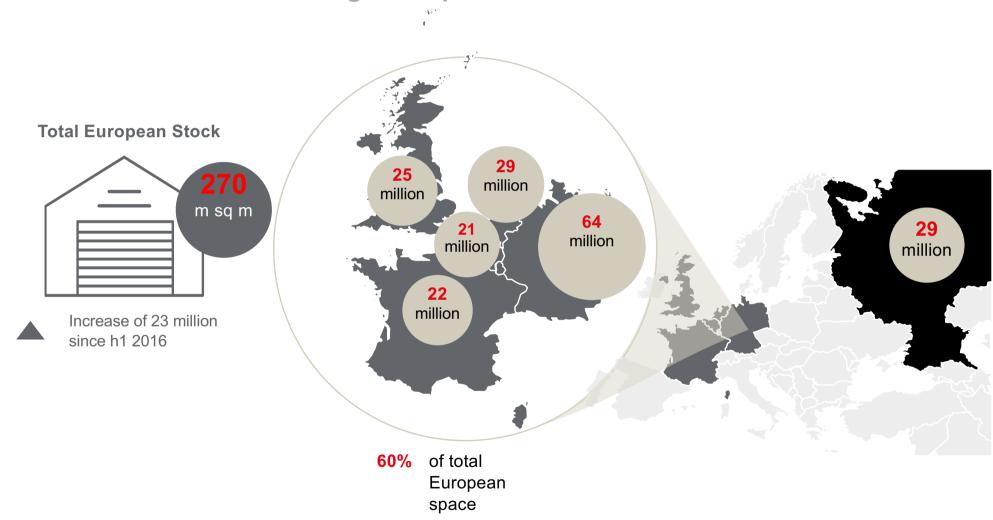
September 2017



European warehouse stock



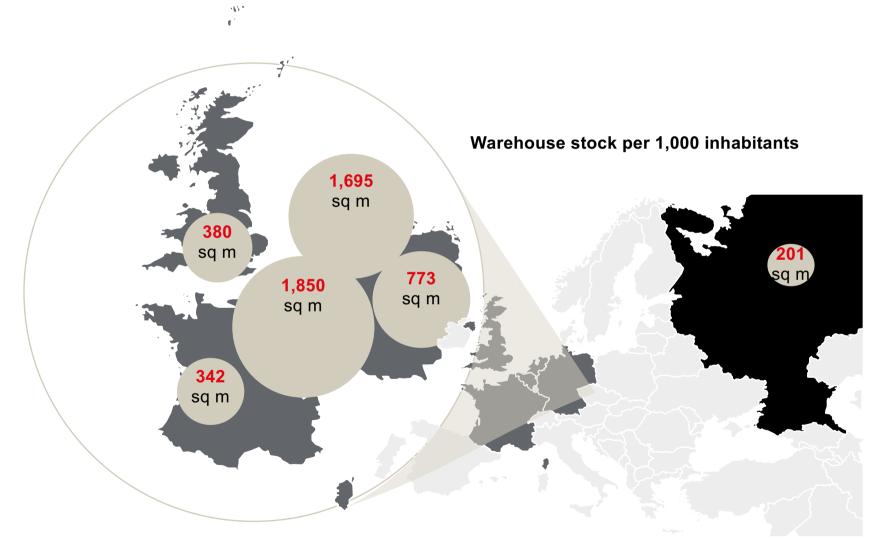
Russia stock is close to average European level



Russian warehouse market is underdeveloped



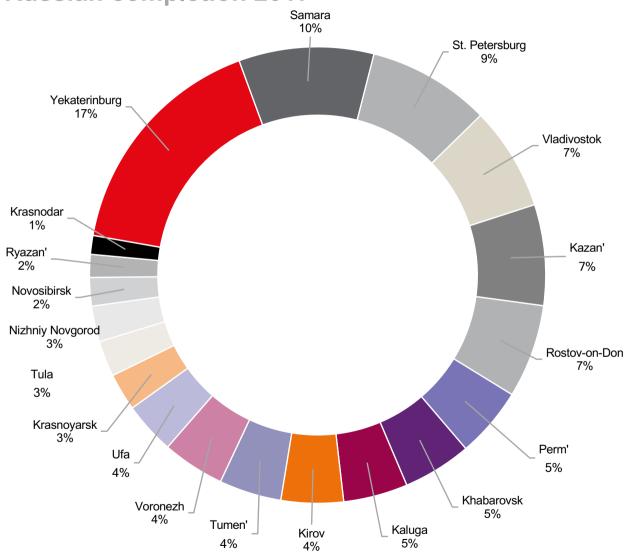
Russia has one of the lowest level 'warehouse stock /1,000 inhabitants'



Moscow: logistics capital of Russia



Russian completion 2017



Total Moscow Stock



Increase of 0,75 million sq m in 2017

Total Regional Stock (without Moscow)





Increase of 0,68 million sq m in 2017

Moscow: logistics capital of Russia



Russian completion 2017



Total Moscow Stock



Increase of 0,75 million sq m in 2017

Total Regional Stock (without Moscow)



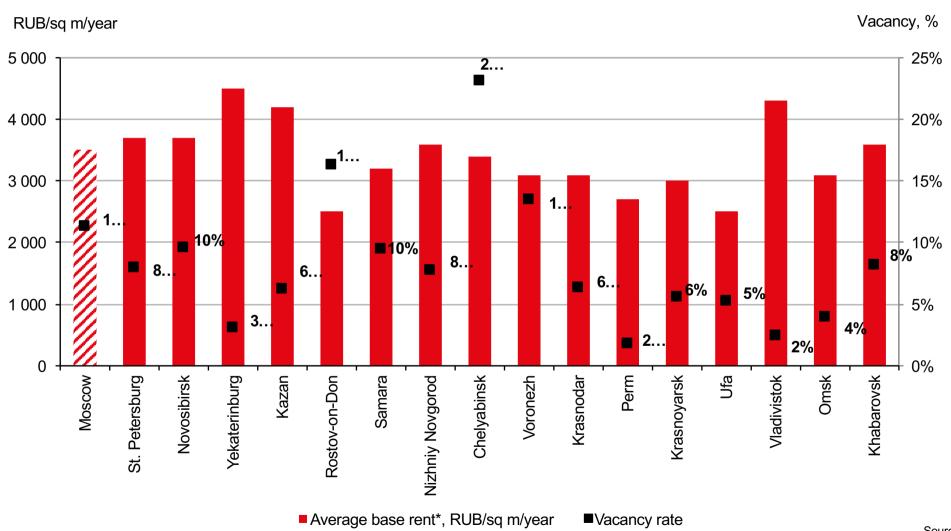


Increase of 0,68 million sq m in 2017

Russia warehouse market balance

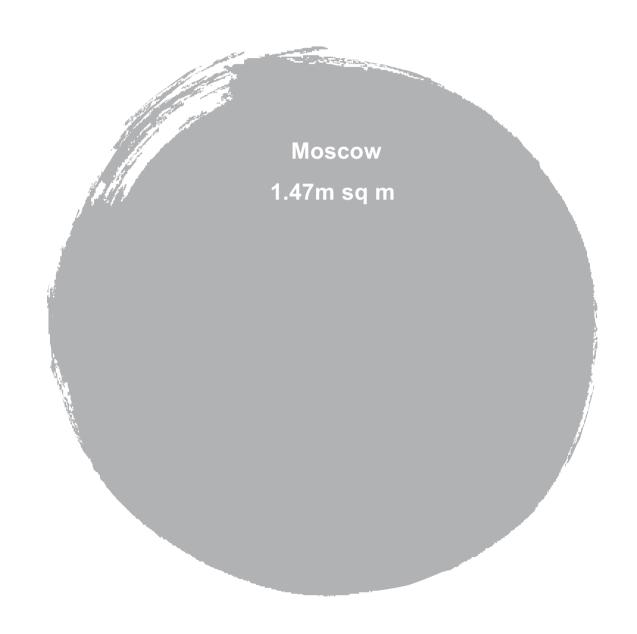


Some regions markets are in more higher demand than Moscow



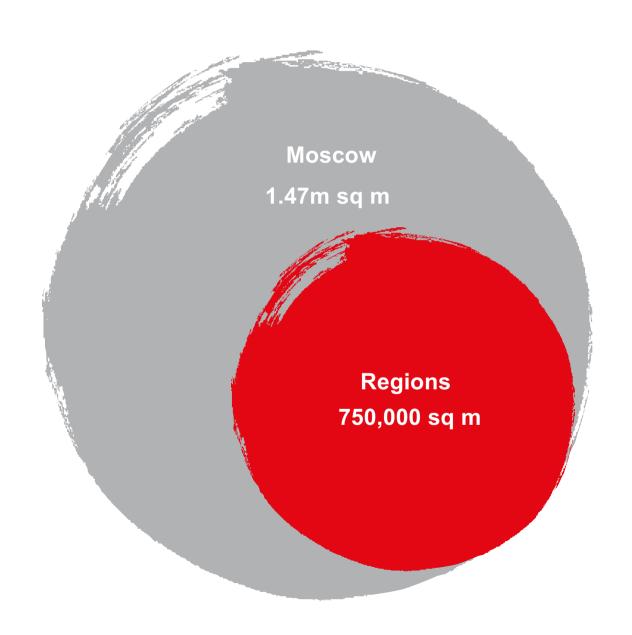
Vacancy: Moscow vs Regions





Vacancy: Moscow vs Regions

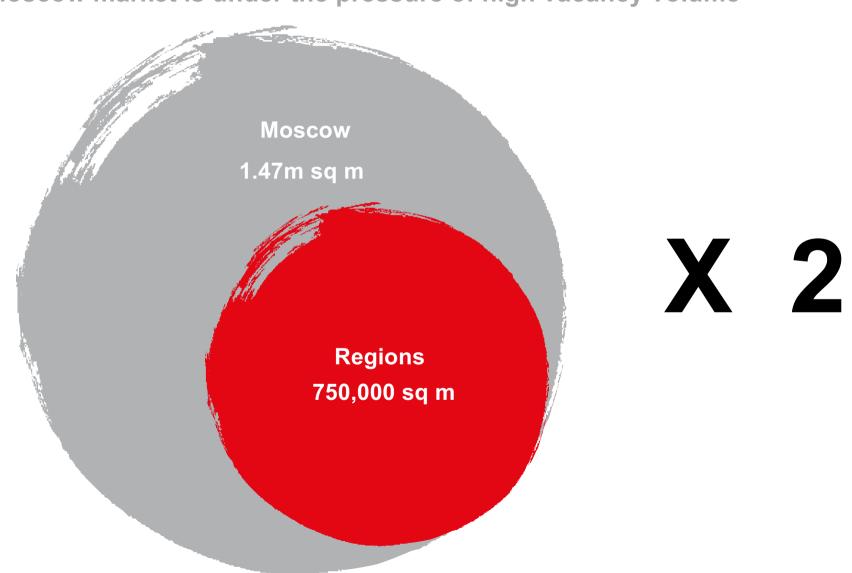




Vacancy: Moscow vs Regions



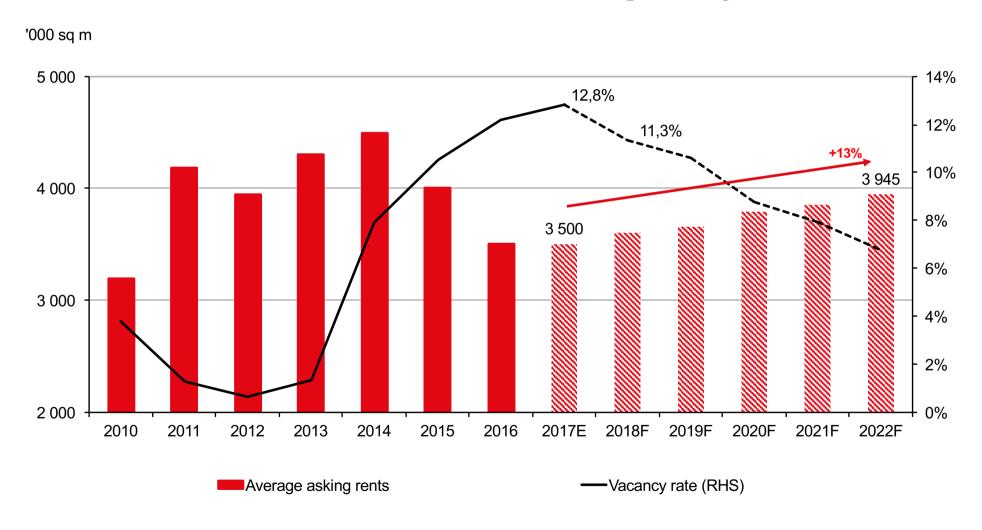
Moscow market is under the pressure of high vacancy volume



Moscow region market forecast



Moscow warehouse market should be remain, but gradually





Thank you

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