Marché des bureaux : bilan et perspectives

Octobre 2009

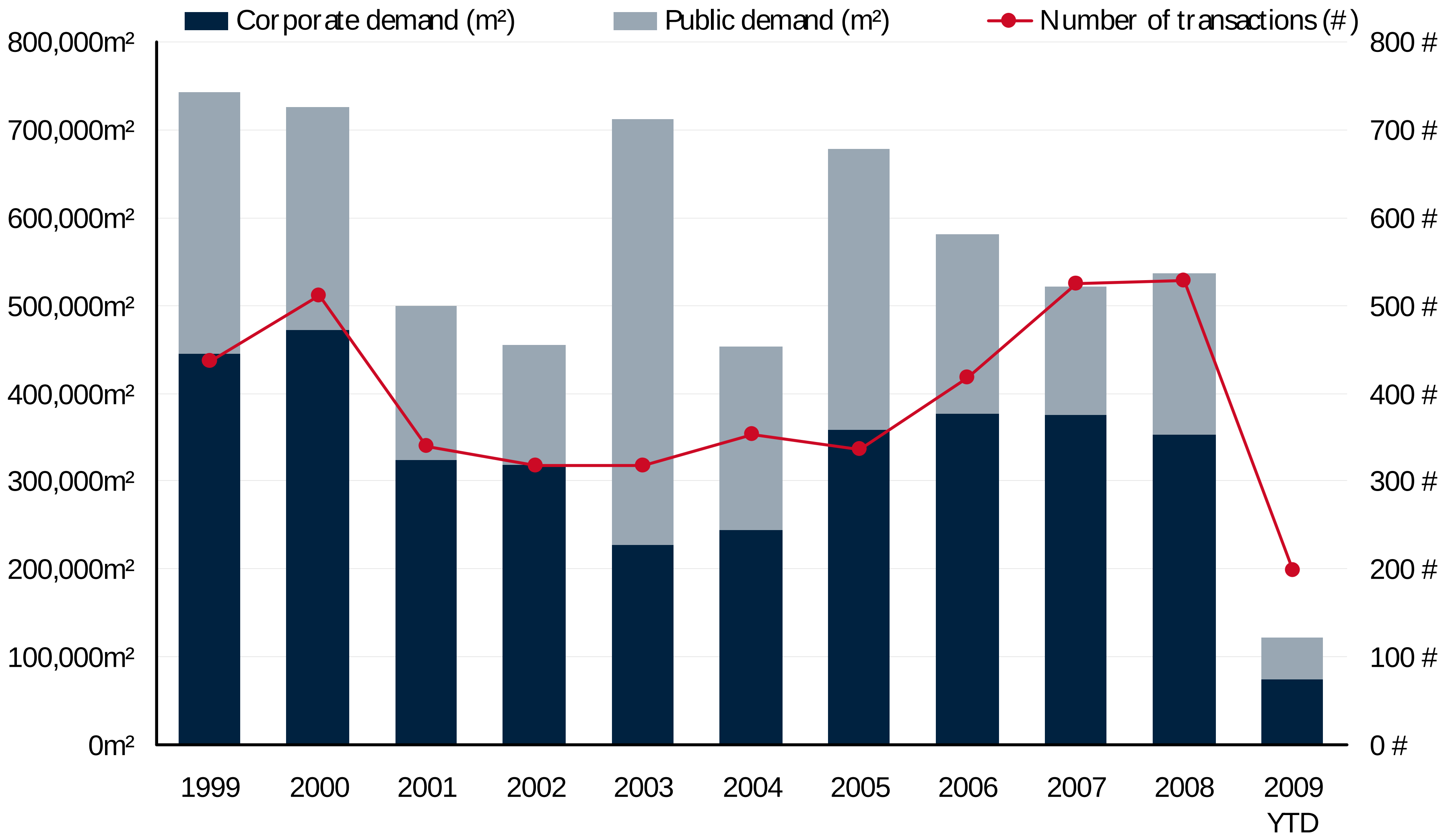
Présentation : Pierre Collette

Séminaire du mercredi 7 octobre 2009

CUSHMAN & WAKEFIELD®

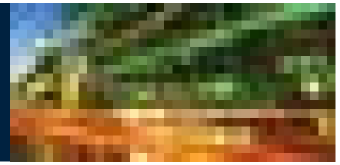
Question 1 : Demande faiblit ou reprend ?

OFFICE TAKE-UP



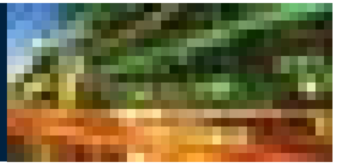
source: Cushman & Wakefield, Expertise Immo Media. 2009

Parfum dôoptimisme de Cushman & Wakefield



629.000 m² *

* Somme des demandes au 30/09/2009 entre 1.000 m² et 50.000 m² que nous traitons actuellement



Take up depuis 1er janvier 2009

Q 1: 31.217 m²

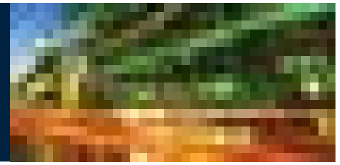
Q2 : 75.061 m²

Q3 : 71.366 m²

Total : 177.644 m²

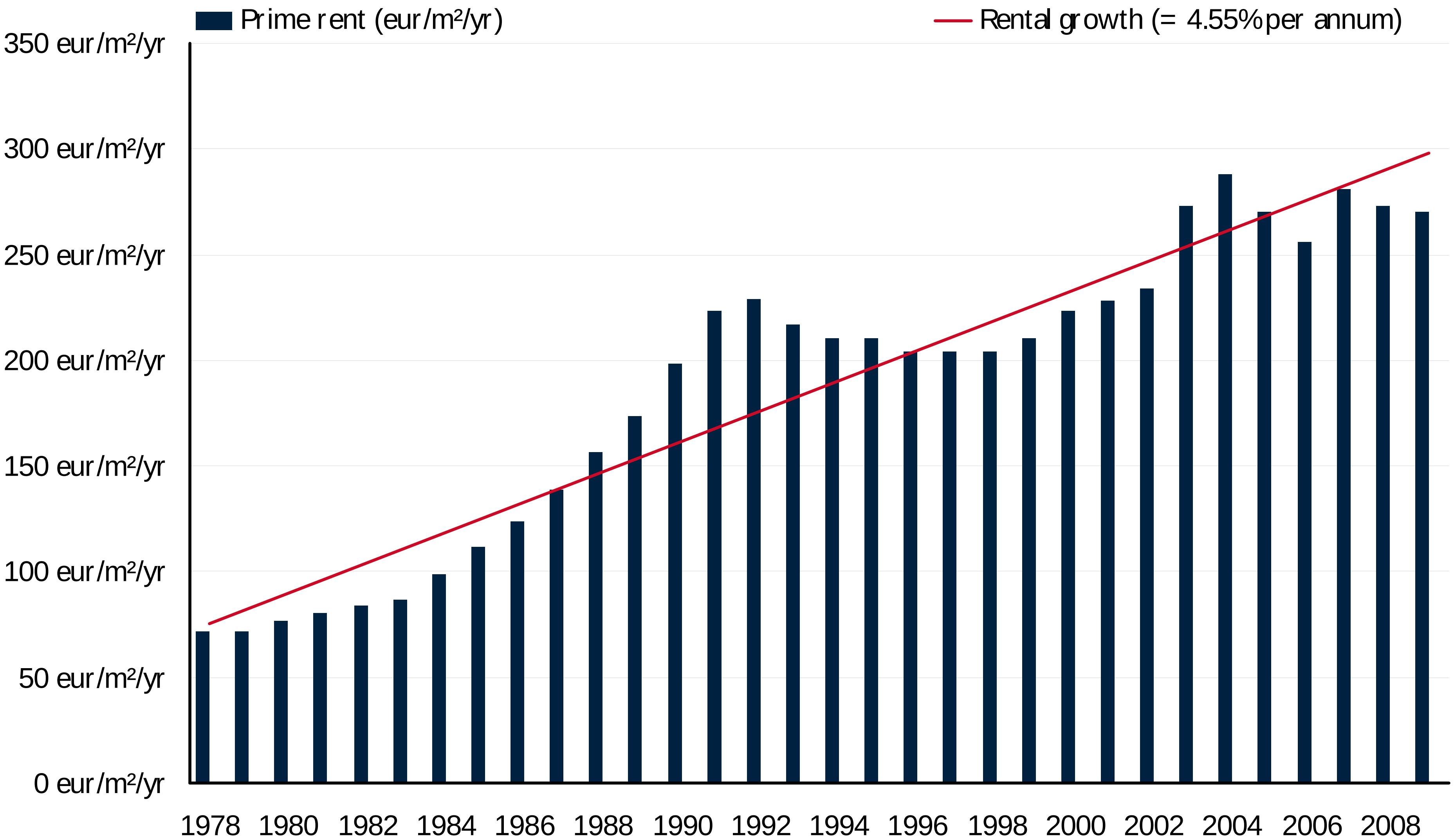
Total « m² » baux connus renégociés :
56.000 m²

Key Figures



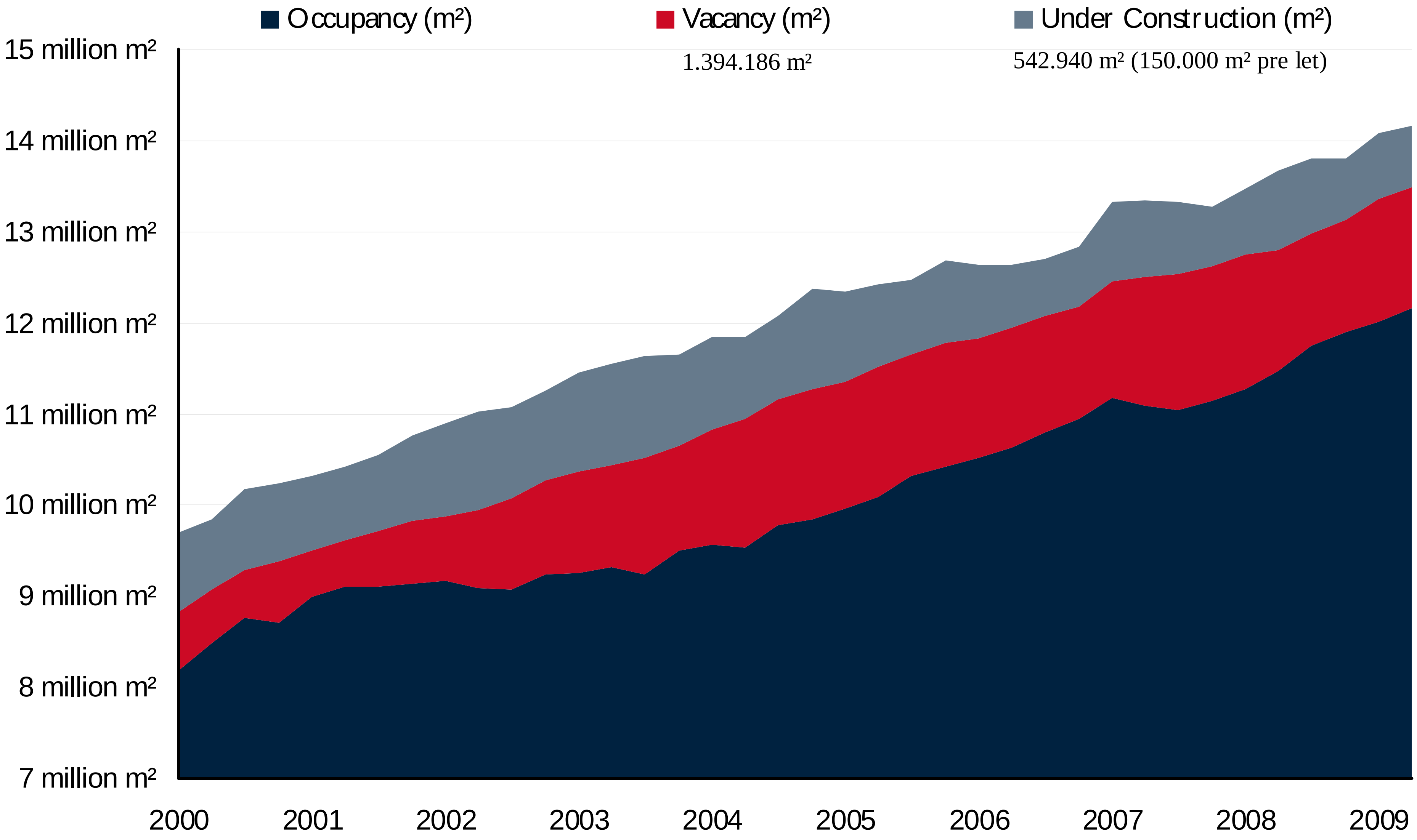
DISTRICT	OFFICE STOCK	VACANCY		TAKE-UP 2009YTD	PRIME RENT	TREND	AVERAGE RENT
Total BRUSSELS	**13 604 448 m^2**	**10.3%**	↗	**177 644 m^2**	**270 ú/m^2**	→	
Leopold	3 341 139 m^2	8.9%	→	36 012 m^2	270 ú/m^2	→	203 ú/m^2
Pentagon	2 278 149 m^2	6.4%	↗	22 781 m^2	195 ú/m^2	↘	156 ú/m^2
North Station	1 587 768 m^2	7.2%	↗	11 674 m^2	190 ú/m^2	↘	174 ú/m^2
Louise	773 993 m^2	10.7%	→	16773 m^2	195 ú/m^2	→	154 ú/m^2
South Station	451 962 m^2	4.6%	→	0 m^2	190 ú/m^2	↘	139 ú/m^2
Decentralised	3 006 346 m^2	12.0%	→	50994 m^2	175 ú/m^2	→	135 ú/m^2
Periphery	2 165 091 m^2	17.2%	→	39 410 m^2	155 ú/m^2	↘	127 ú/m^2

PRIME RENT EVOLUTION



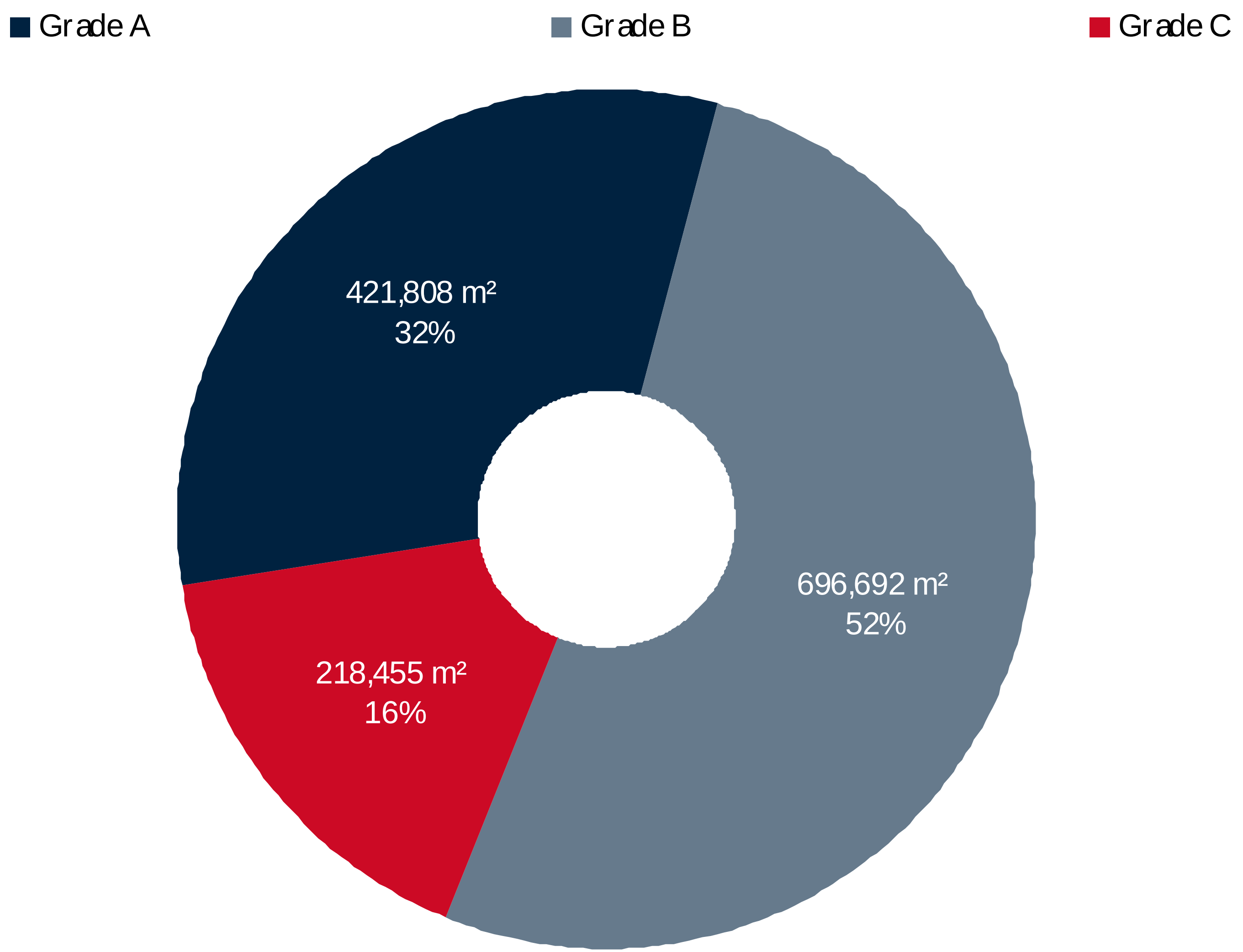
source: Cushman & Wakefield. 2009

STOCK, VACANCY & PIPELINE



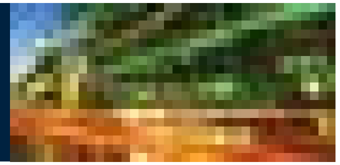
source: Cushman & Wakefield.

VACANCY BY GRADE



source: Cushman & Wakefield. 31/07/2009

Liste des «+» grosses transactions



Phoenix Building

Extension Gouvernement flamand - 5 924 m²

Airway Park

Ericsson - 4 109 m²

Solaris

Nauta Dautilh - 4 480 m²

Palais 100

CPAS de Schaerbeek ï 3 900 m²

The Platinum

Bird & Bird ï 3 000 m²

ADA

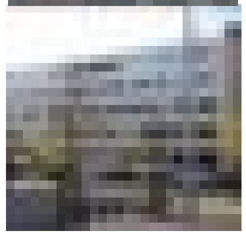
Rep. de la Turquie à l'E.U. - 3 830 m²

Place Rouppe 16

St.-Goedele Brussel ï 2 975 m²

Meiboom 16

Communauté française ï 3 384 m²



The Corporate Village

Astra Zeneca ï 2 767 m²

Question 1I : Performance énergétique !
Critère prépondérant pour les occupants ?

Atlantis

Van Volxem

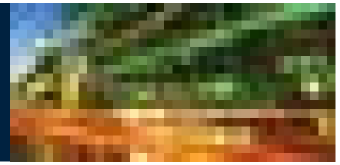
Sainctelette

Airport Plaza

Platinum

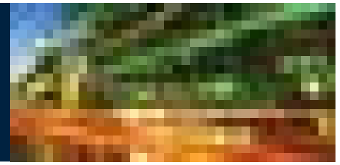
Solaris

OCCUPIERS MARKET



- Occupier sentiment is one of increased caution
  - Cost-cutting measures are likely to be a primary driver of the market
  - Declining employment implies a decrease of occupational demand
- High occupier needs (➔ Built-to-suit)
  - High quality
  - High parking ratio
  - Public transport
  - Rent >< Total Occupancy cost
- Green buildings and energy performance

SUSTAINABILITY

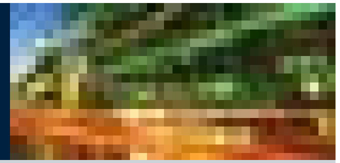


- Lot of discussion going on about óGreen Certificatesô

- Lot of confusion in the different types of Certificates

  - Valideo (B)
  - Bream (UK): Bre Environmental Assesment Method
  - Leed (US): Leadership in Energy and Environmental Design
  - HQE (F): Haute Qualité Environmental

C&W WEôRE THERE!



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