


CMD 24

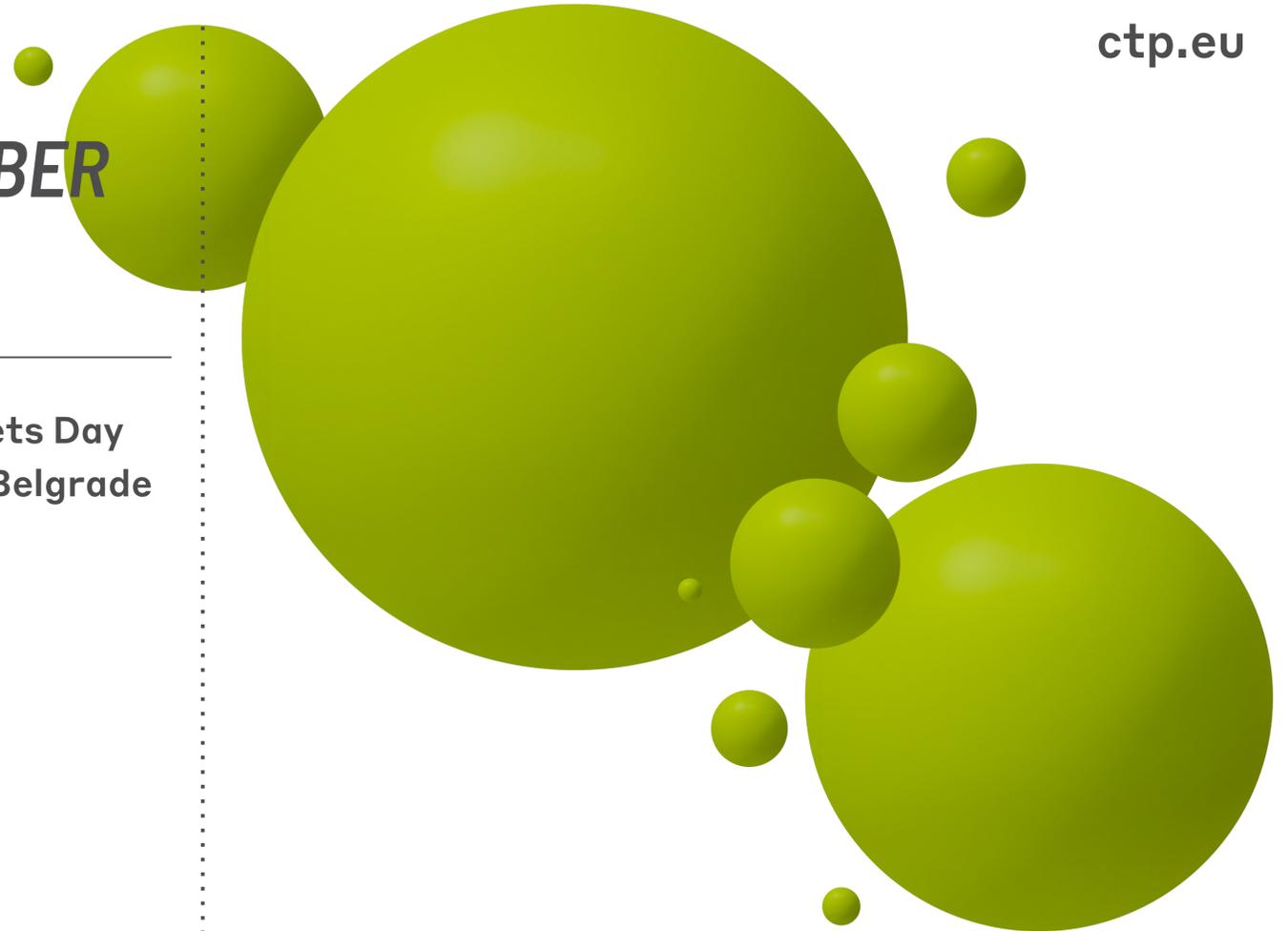
25-26
SEPTEMBER
2024

ctp.eu

Capital Markets Day
Bucharest & Belgrade

Bert Hesselink, Moderator
Group Client Relationship Director

Tenant Insights and CEE Growth Drivers



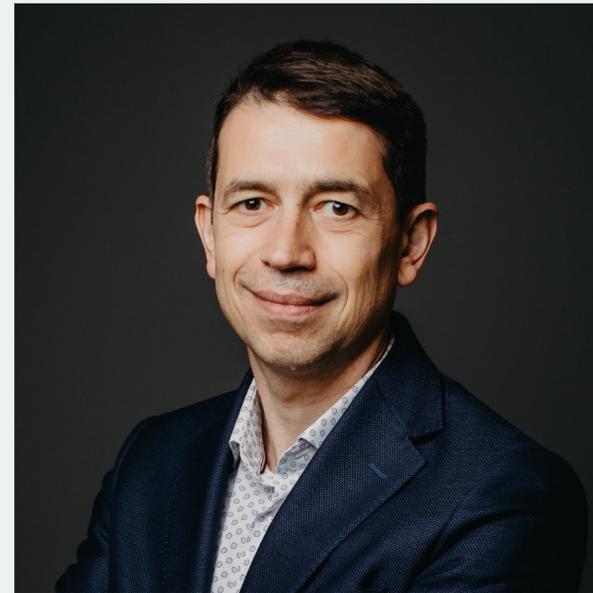
Industry Guests



Alexandru Catana

REGIONAL MANAGING DIRECTOR,
QUEHENBERGER

Alexandru has worked his entire life in logistics. He likes working with people, playing football, reading, travelling, and skiing. He also enjoys good food, nice wine, and going to the theatre.



Andrei Bica

CFO, PROFİ

Andrei is an experienced CFO, having 25 years of relevant experience, and in the last years he has enlarged his area of responsibility towards DigiTech areas. Andrei was one of the main anchors at Profi, helping Mid Europa private equity to manage the successful exit of a very promising asset to one of the largest retail groups in the world.

Moderator



Bert Hesselink

GROUP CLIENT RELATIONSHIP
DIRECTOR

Bert is speaking to occupier clients daily to understand their evolving real estate needs. Also, he is constantly aligning with colleagues in local business development teams and with third-party business partners to affirm they fully understand and embrace CTP's unique value proposition to ensure they will deliver exceptional value that justifies CTP's premium pricing to clients.

CEE: Europe's best cost region for nearshoring

- Core Markets
- Growth Markets
- W. European Markets

#1

CEE

10

COUNTRIES

12.4

MIL SQM GLA

825

EMPLOYEES

200+

LOCATIONS

25.5

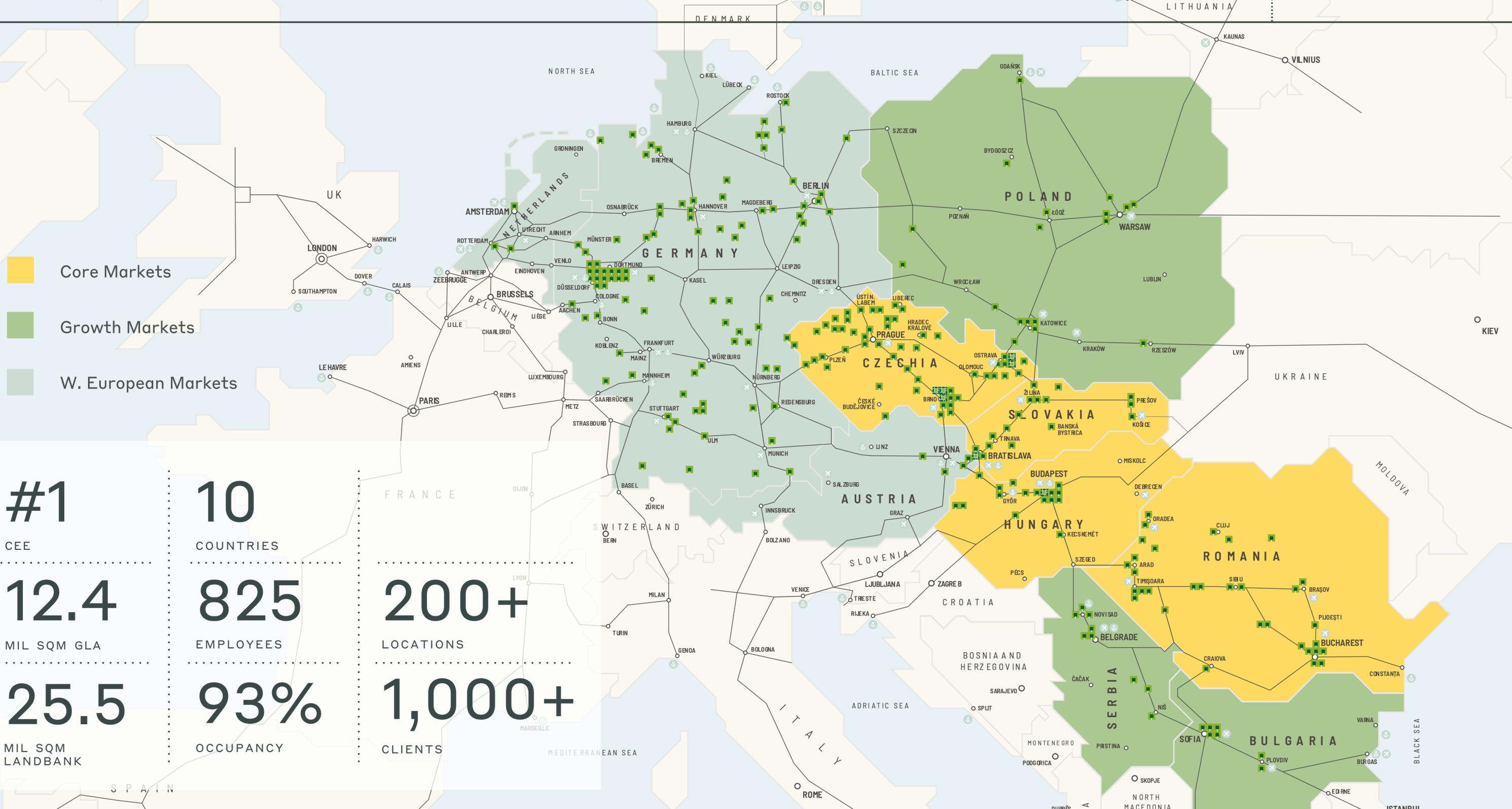
MIL SQM
LANDBANK

93%

OCCUPANCY

1,000+

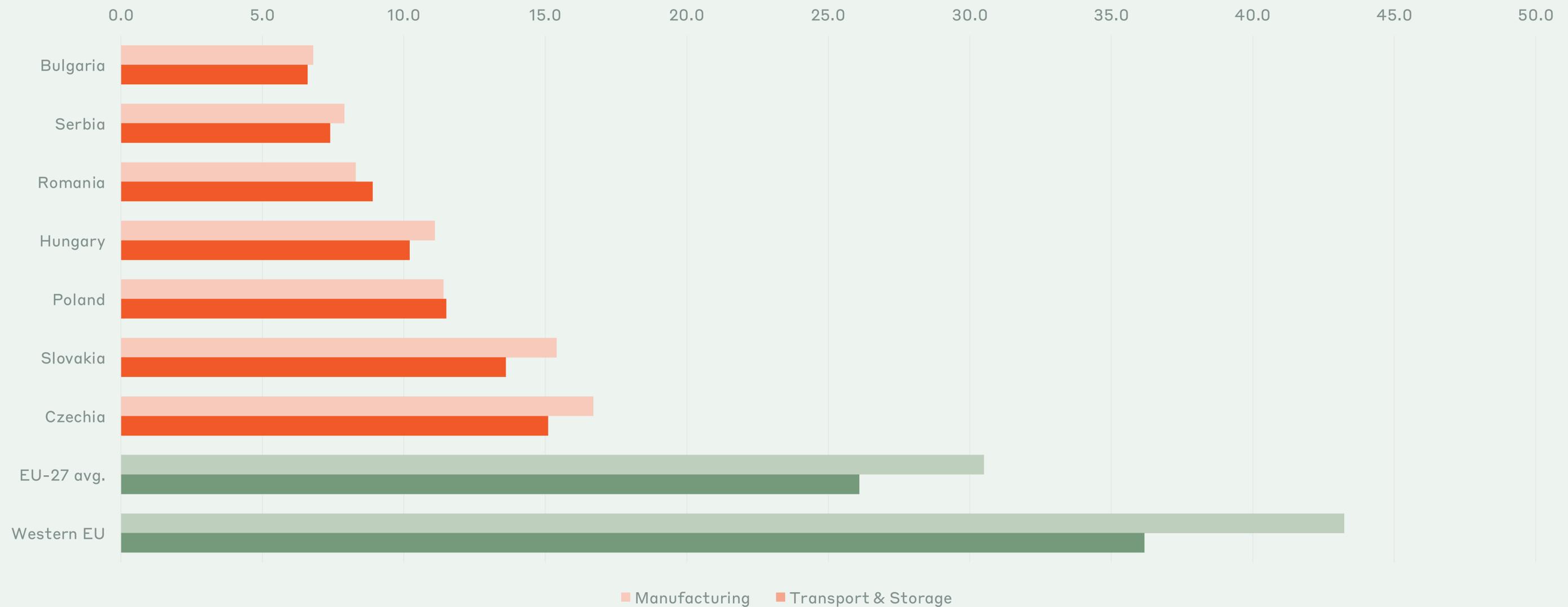
CLIENTS



Labour Cost in CEE around 1/4 of what they are in Western European markets, ensuring the competitive position of CEE

Competitive net labour costs

Labour costs, Industrial & Logistics, €/hr, 2022



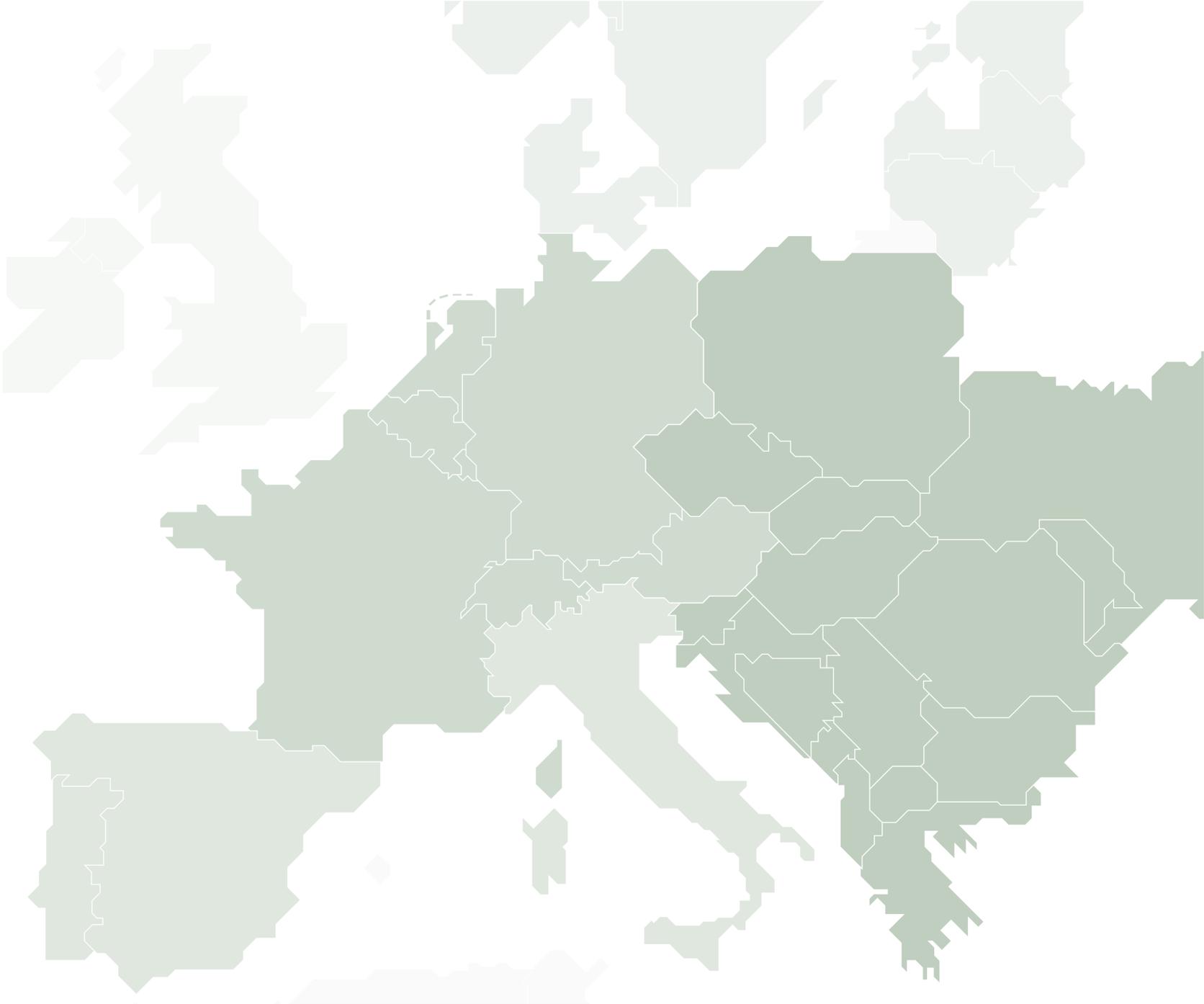
Which regions do occupiers expect to benefit most from nearshoring?

Nearshoring expectations



Lower

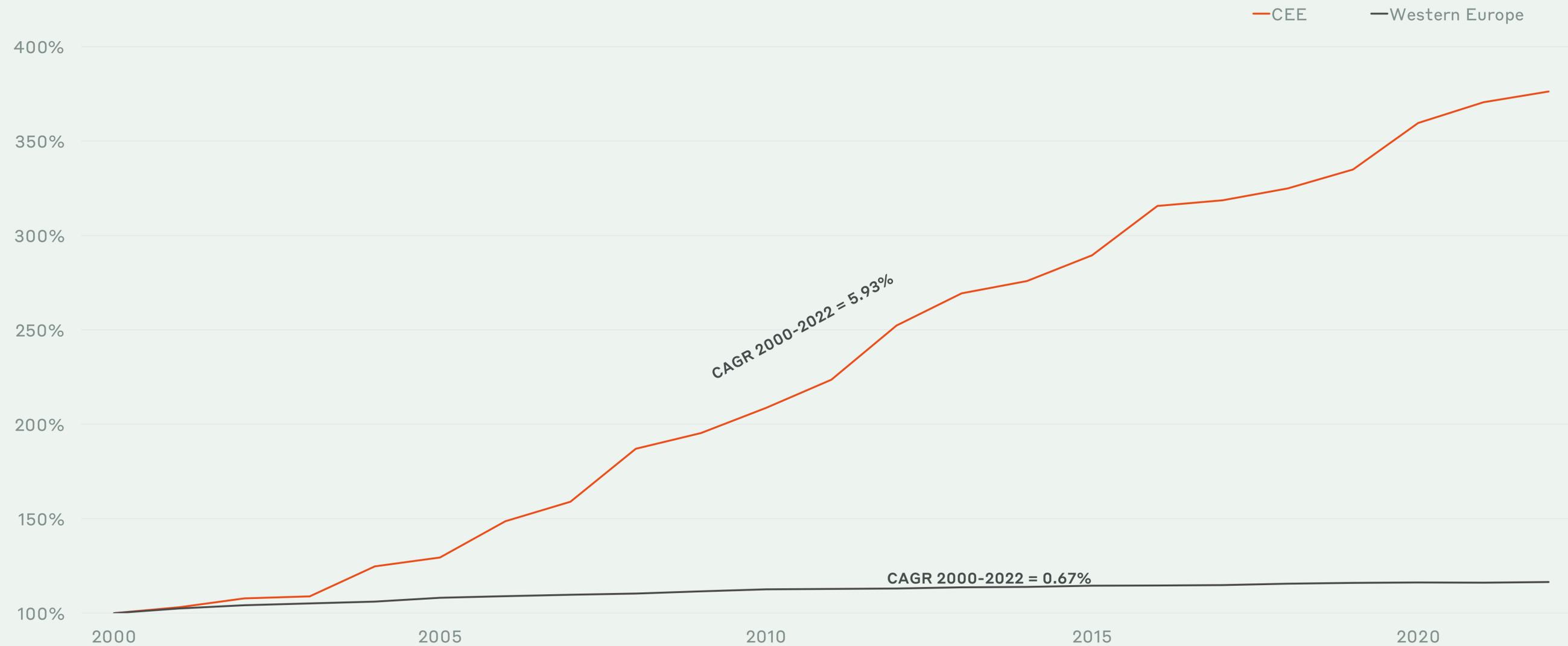
Higher



Source: CBRE and Analytiqa (European Logistics Occupier Survey 2024).

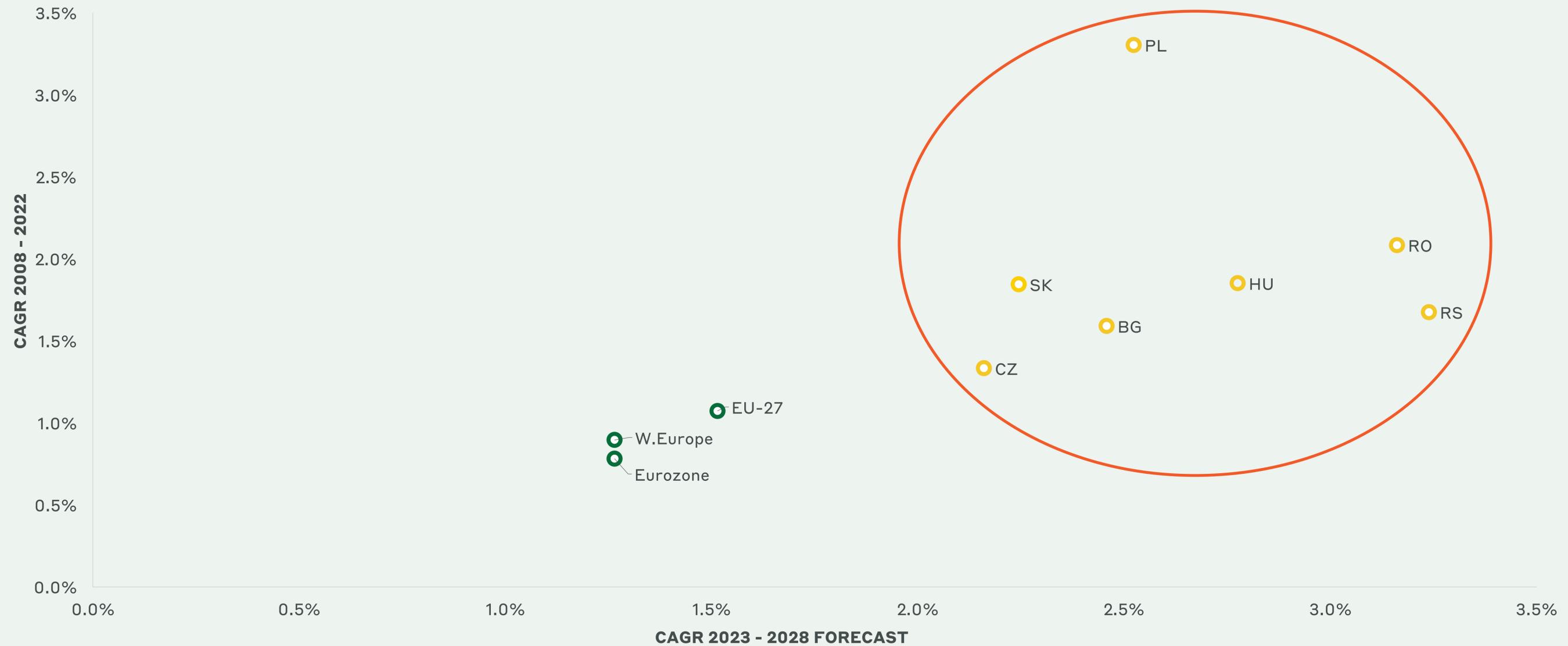
Expansion of motorway network

Cumulative growth in motorway length, index 2000=100



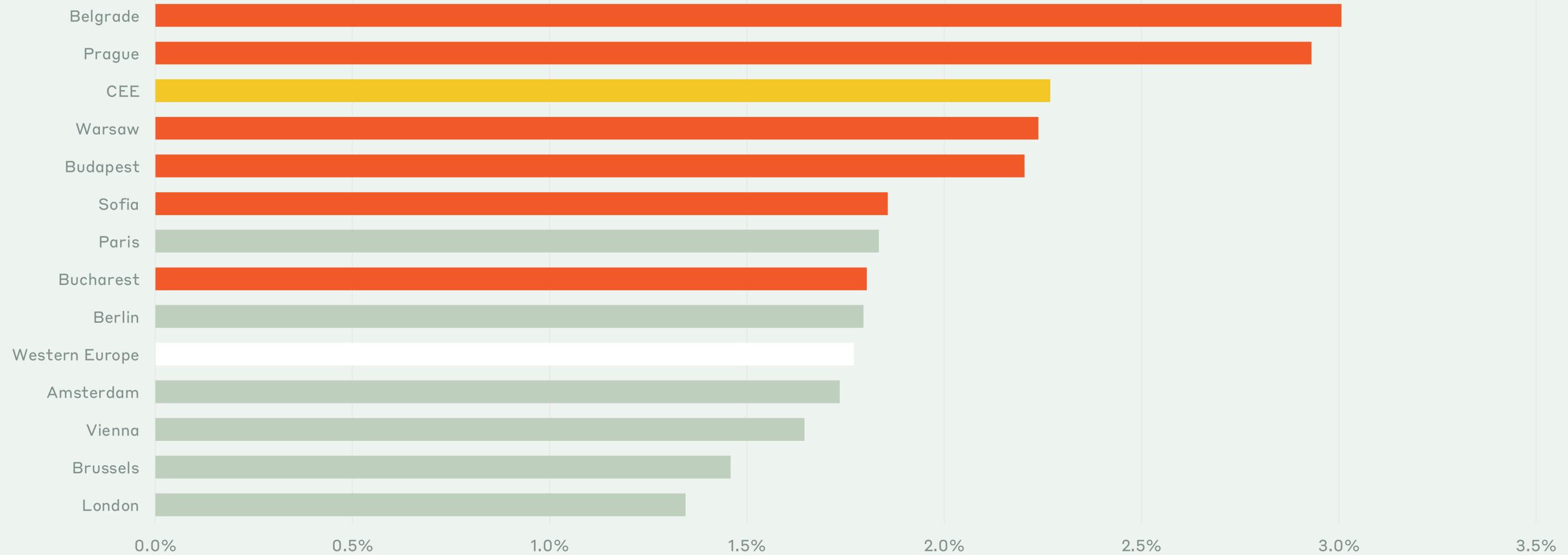
Economic outperformance

Real GDP growth comparison, historic and outlook, CAGR%



CEE capital cities leading Europe

GDP growth in 2024–2028 in Western European vs. CEE capital cities with a population >1 million, CAGR%



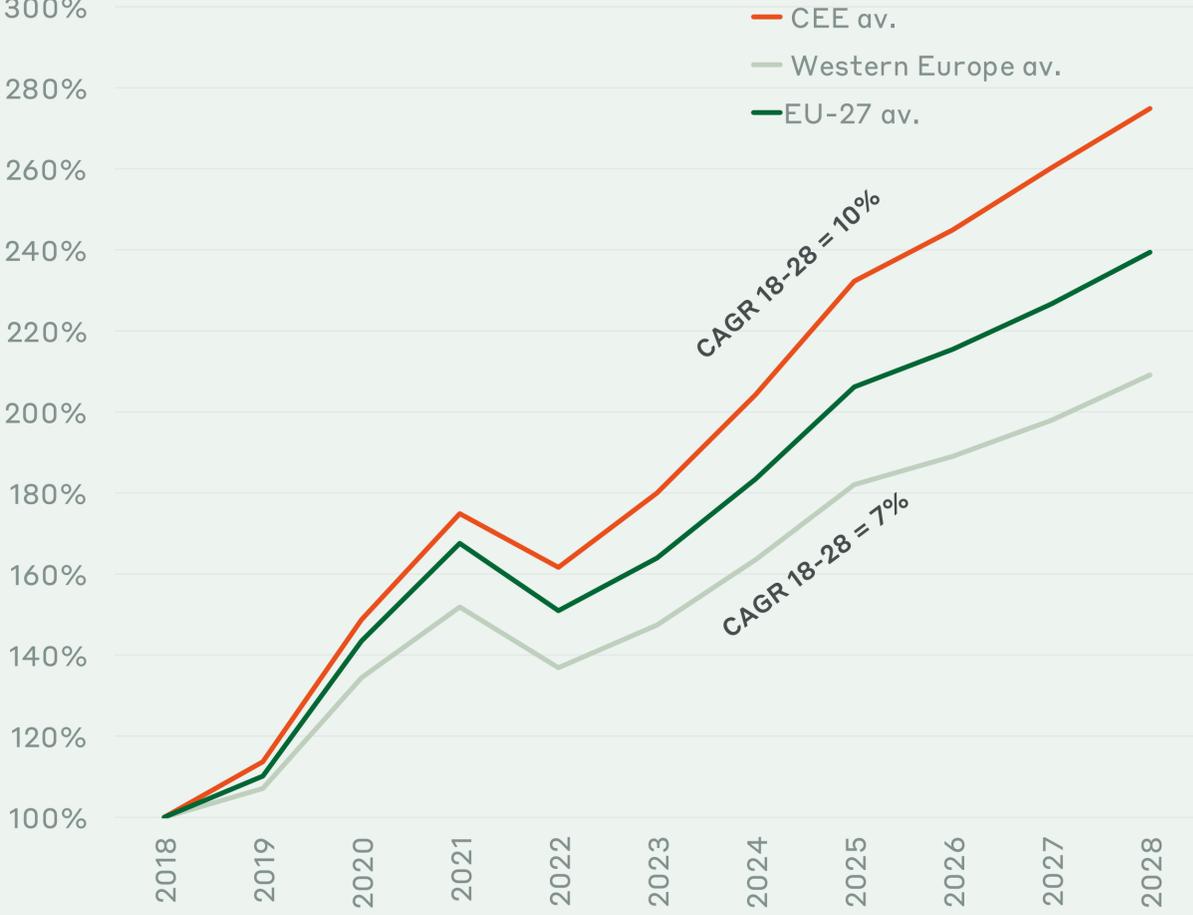
Rising domestic consumption levels

Real expenditure per capita, cumulative growth, index 2010=100



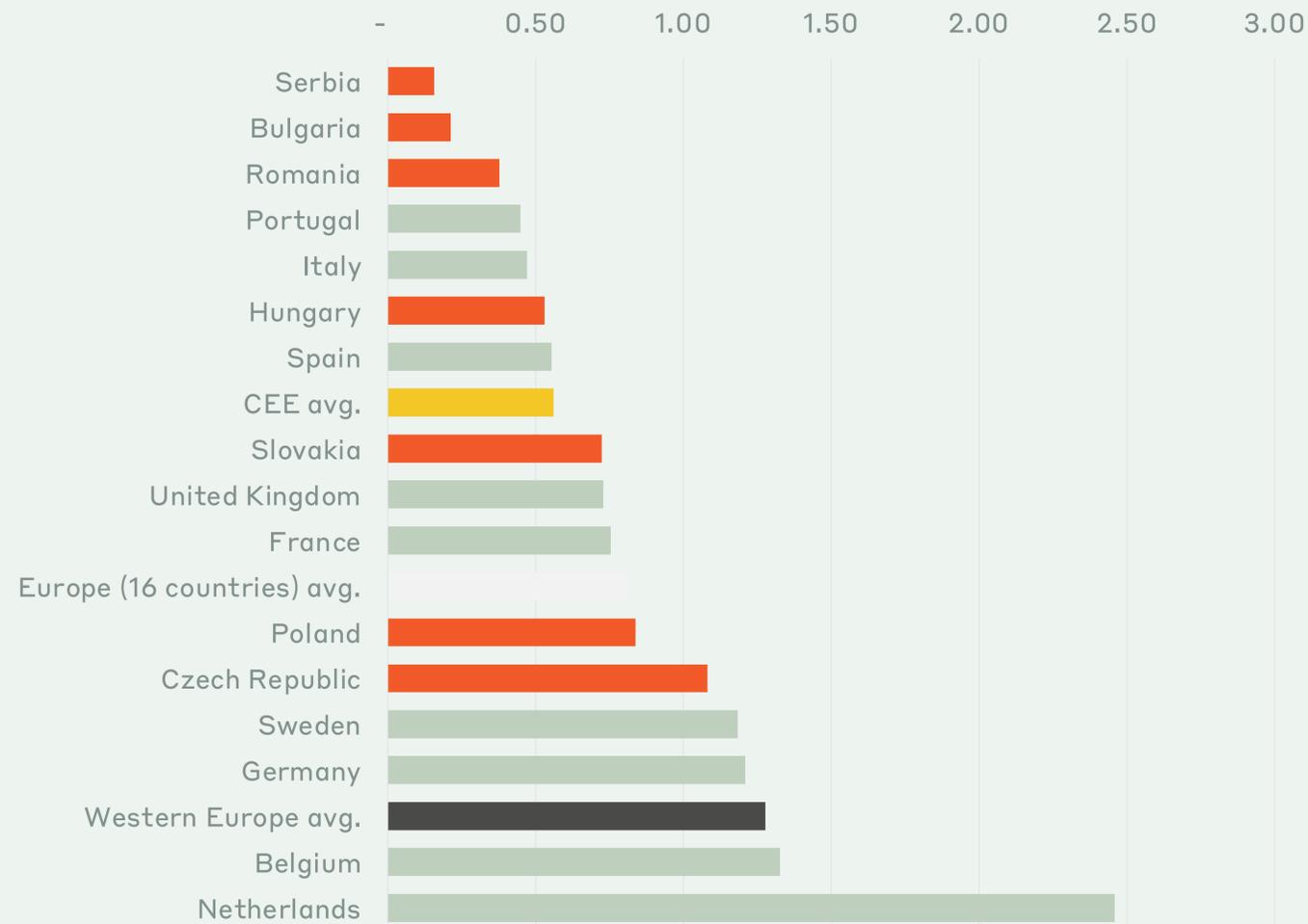
Rising e-commerce revenues

Cumulative growth in revenues, index 2018=100



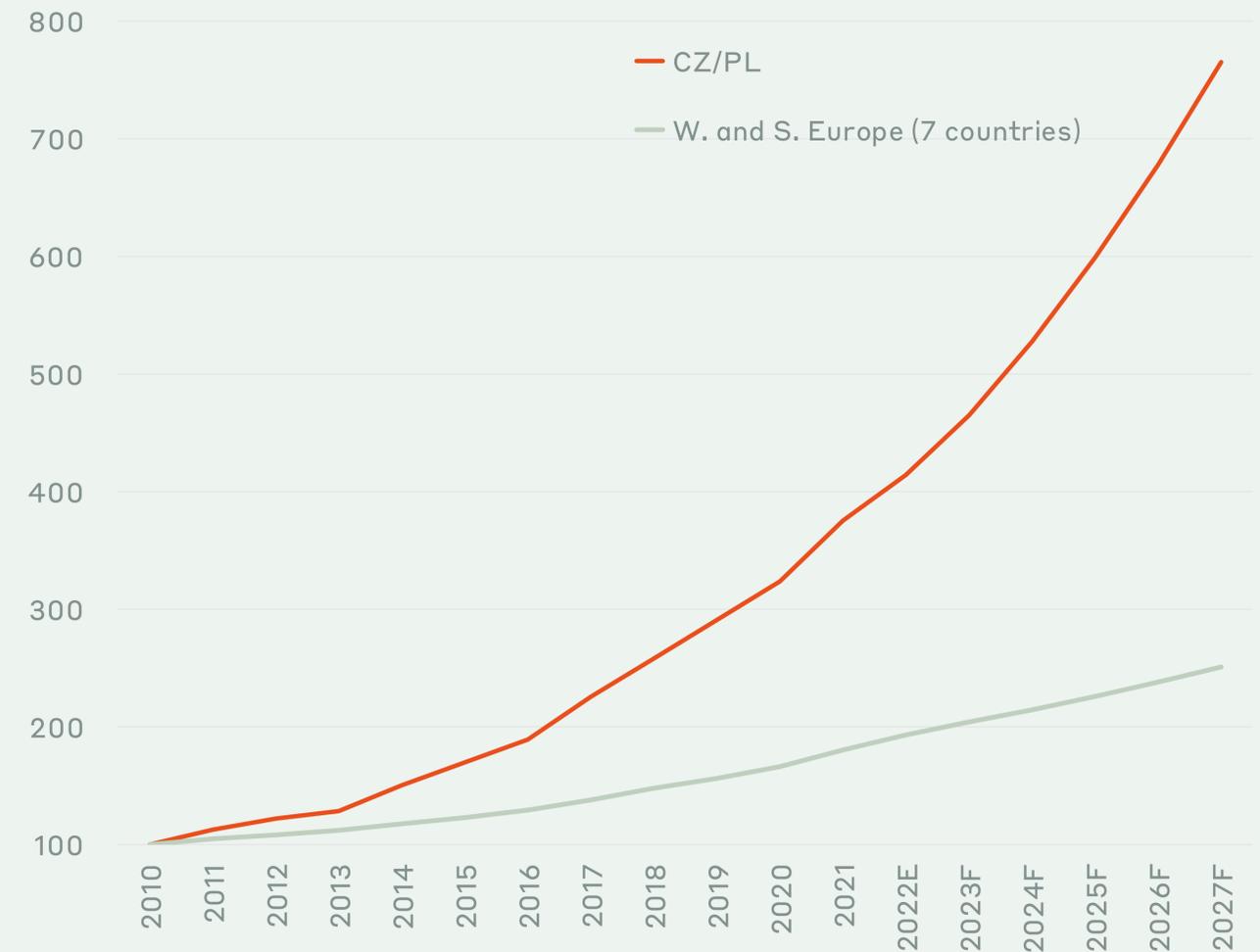
Less mature markets

Stock per capita, sqm, Q4 2023



Continued demand outperformance

Occupied stock growth, index 2010=100





PARKMAKERS

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