



At a Glance **Q2 2019**

FOOTFALL REPORT TRIER

Current Key facts



110,013 Inhabitants



55,736 Employees



5.1% Unemployment rate



88.4 Purchasing power index



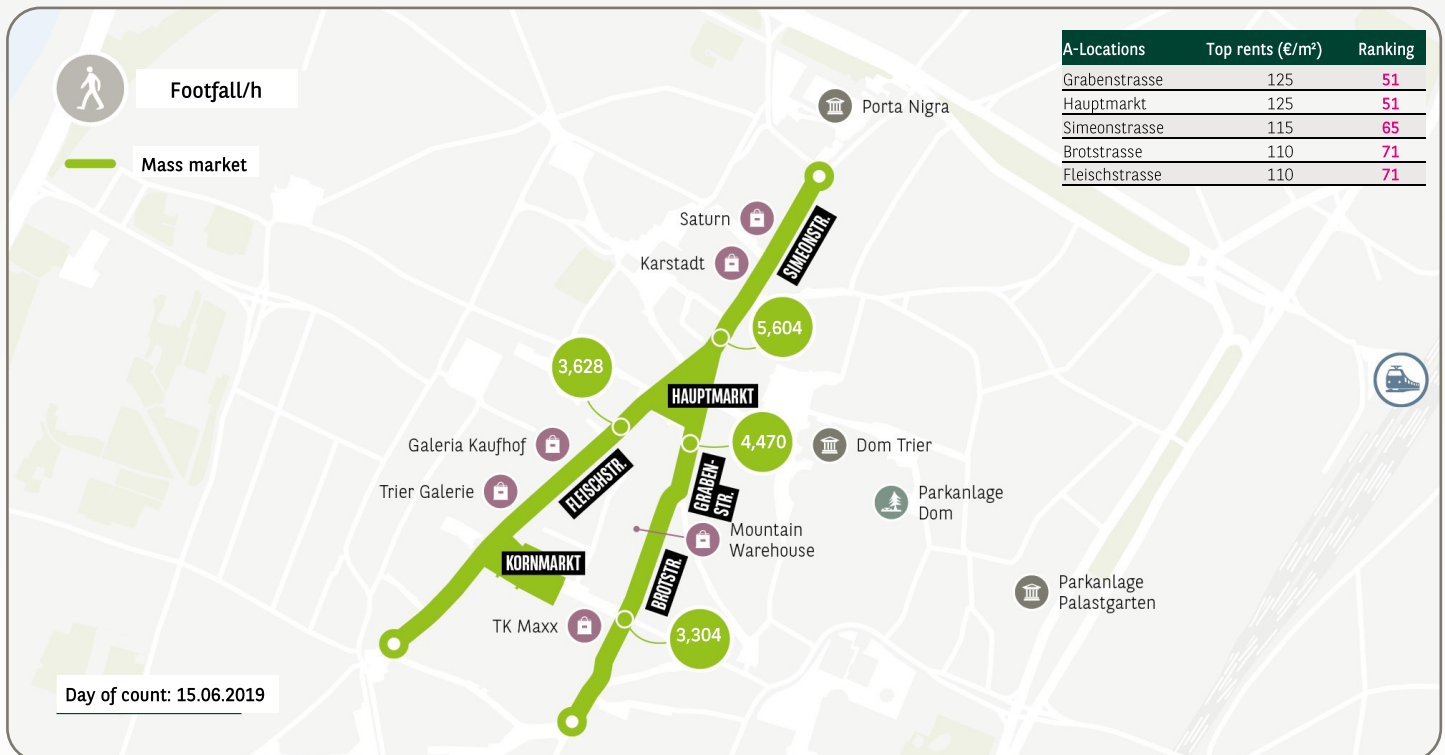
185.5 Turnover index



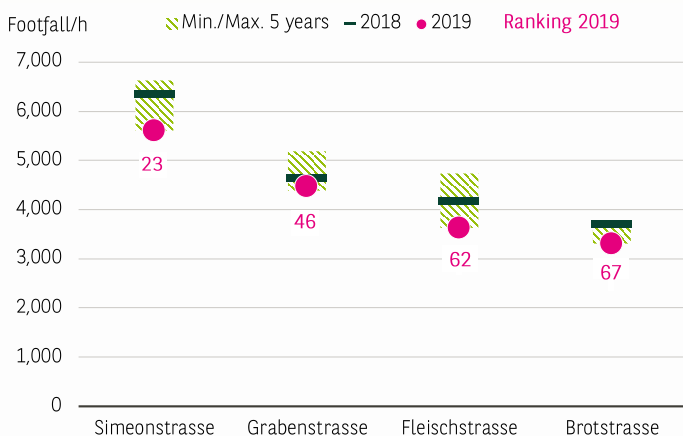
2.10 Centrality

Although Trier with around 110,000 inhabitants is the smallest city in those ranked by the BNP Paribas Real Estate retail market survey, in terms of its regional importance, it is one of the most attractive retail locations in Germany. With a centrality index of 2.10, Trier ranks first in a nationwide comparison of major cities

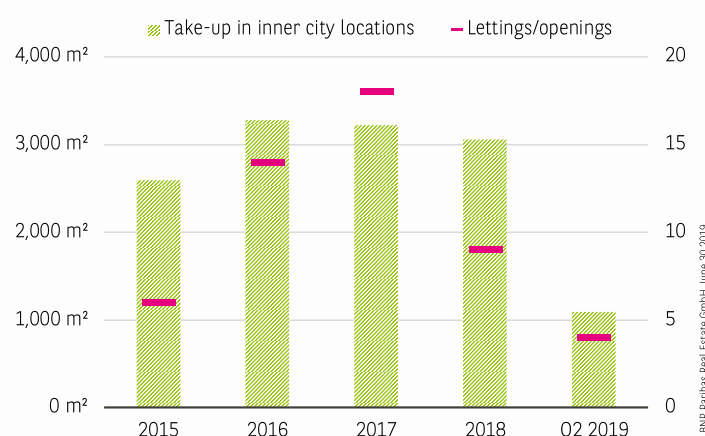
and accordingly occupies a top position in the index ranking. A large part of this exceptional position is partly due to its rural surroundings, for which perhaps Germany's oldest city fulfils a pivotal function. Alternatively, its location within the Saar-Lor-Lux region ensures cross-border purchasing power flows.



Footfall per hour in selected A-locations



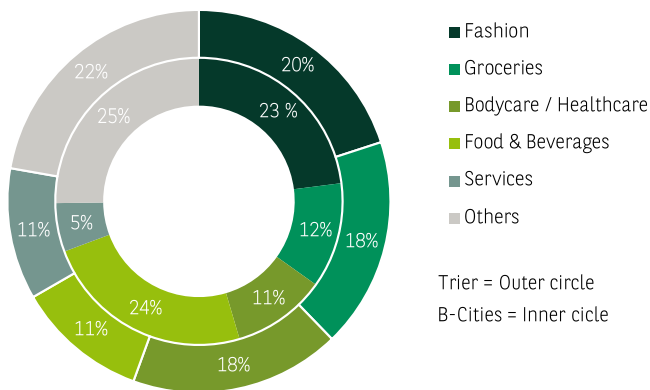
Inner city locations: take-up and lettings/openings



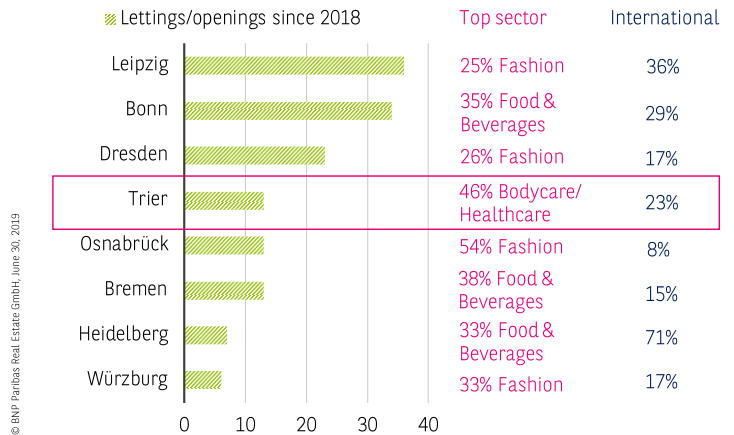
Day of count: 15.06.2019 | Positioning within the nationwide ranking - 95 counting locations respectively 118 top rents in 27 cities

Source: BBE Handelsberatung GmbH | Key facts: Residents and community register, Federal Employment Agency, GfK Geomarketing GmbH

Lettings/openings by sector since 2016



City ranking of lettings/openings since 2018

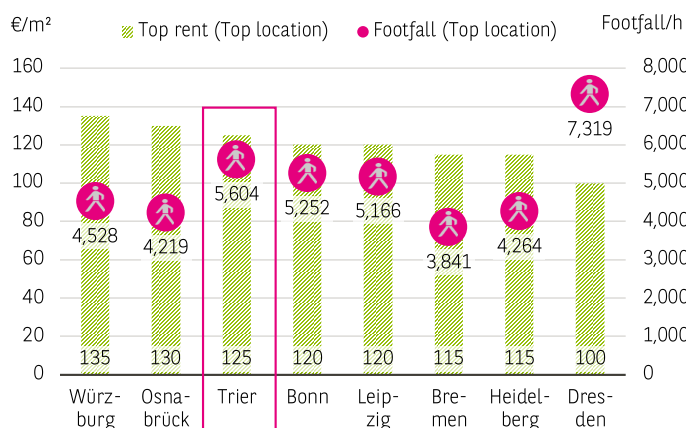


SIMEONSTRASSE AMONG GERMANY'S TOP 25

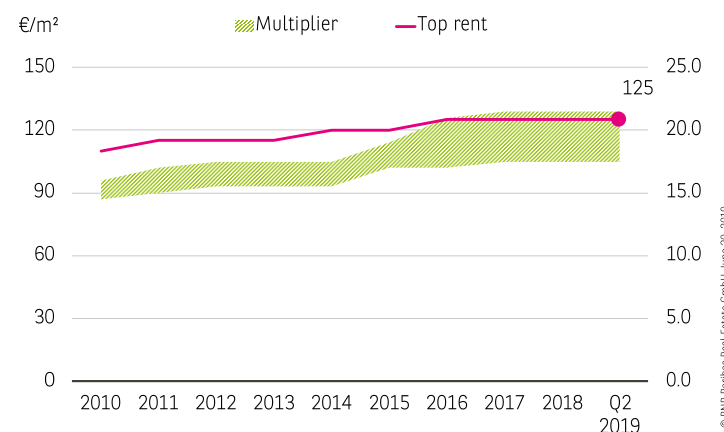
Due to the healthy balance between supply and demand, top rents for a typical 100 m² shop in Trier's city centre are consistently level compared to the previous year. Only in BrotstraÙe is there a slight dip of 5€ to 110 €/m². The most expensive city locations with 125 €/m² can still be found in Grabenstrasse as well as at Hauptmarkt. The highest footfall was again measured at the junction between the latter and Simeonstrasse, with a good 5,600 pedestrians per hour. This puts this location within the top 25 German shopping streets - a more than remarkable result against the background of Trier's low population. The Posthof, located opposite the Kornmarkt, is the main source of market momentum in the first half of the year. After the Italian restaurant Treza opened 300 m², two further retailers secured space in the property: confectioner Cupcake Kitchen (145 m²) and the wine shop Winebank (500 m²), the leasing of which is the biggest deal of the year to date. Another opening took place in ViehmarktstraÙe, with the launch of WonderWaffel which is pursuing its nationwide expansion

strategy. Letting activity in the first half of 2019 is clearly dominated by the food and drink industry and the grocery business. This trend is observable in many cities, as more and more concepts from both sectors are identifying prime sites as suitable locations for themselves. The Porta Nigra district has not yet closed any deals so far this year. Nevertheless, it is noticeable that a growing number of food and drink outlets are drawn to the tourist pulling power of the emblematic landmark. Clothing business had already played a rather subordinate role on the rental market in 2018, for the first time in many years not a single transaction from the industry was recorded up to the middle of the year. However, since demand at Hauptmarkt remains high, this is likely to change in the further course of the year. Project development could provide new impetus to the city centre in the future. According to current plans, a building in BrotstraÙe is to be demolished and a new building with around 2,800 m² of retail space spread over two floors is to be constructed.

Top rent and footfall in selected B-cities



Development of top rent and purchase price multiplier



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