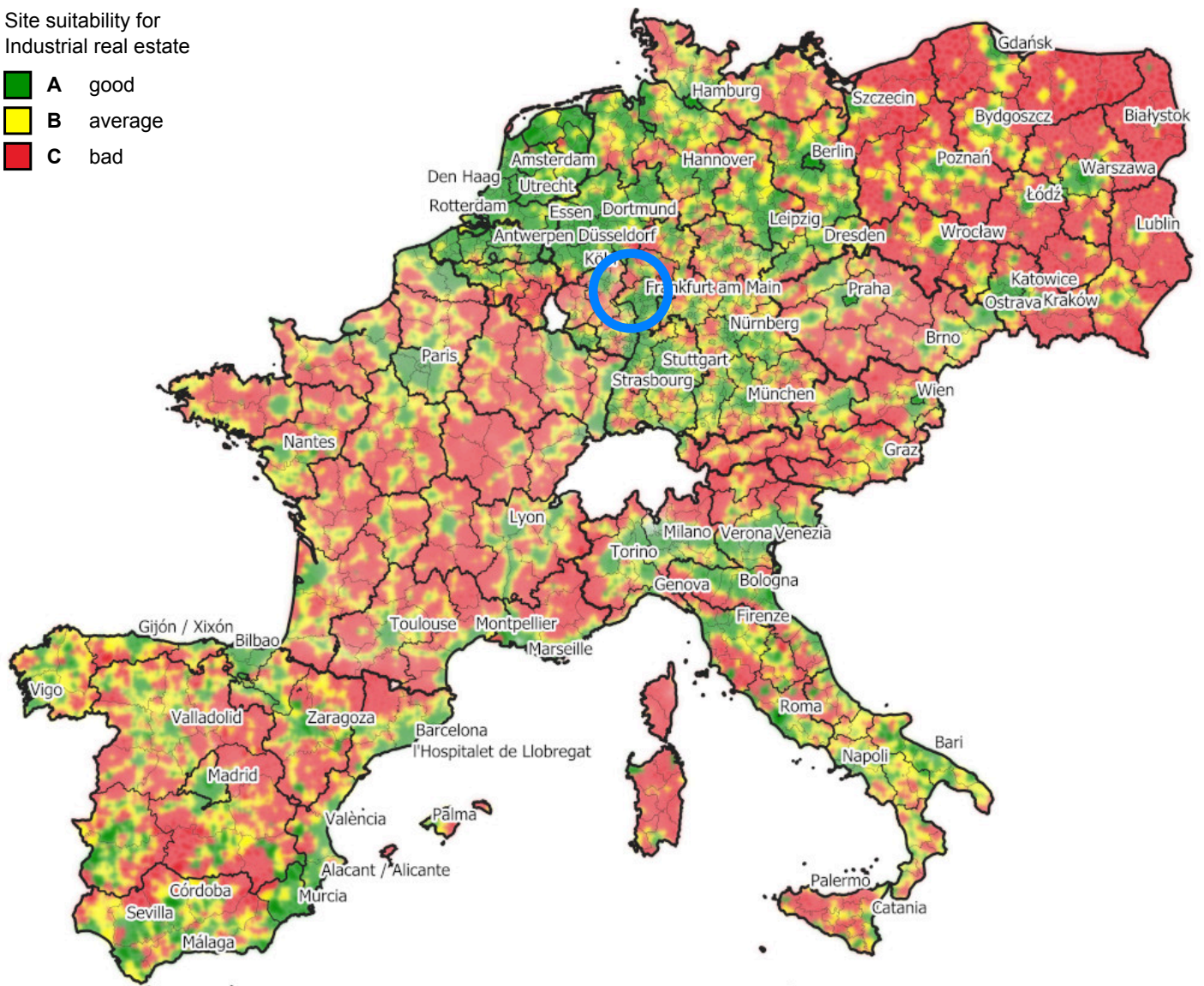


(Date: 31. Dec 2024)

Site suitability for Industrial real estate

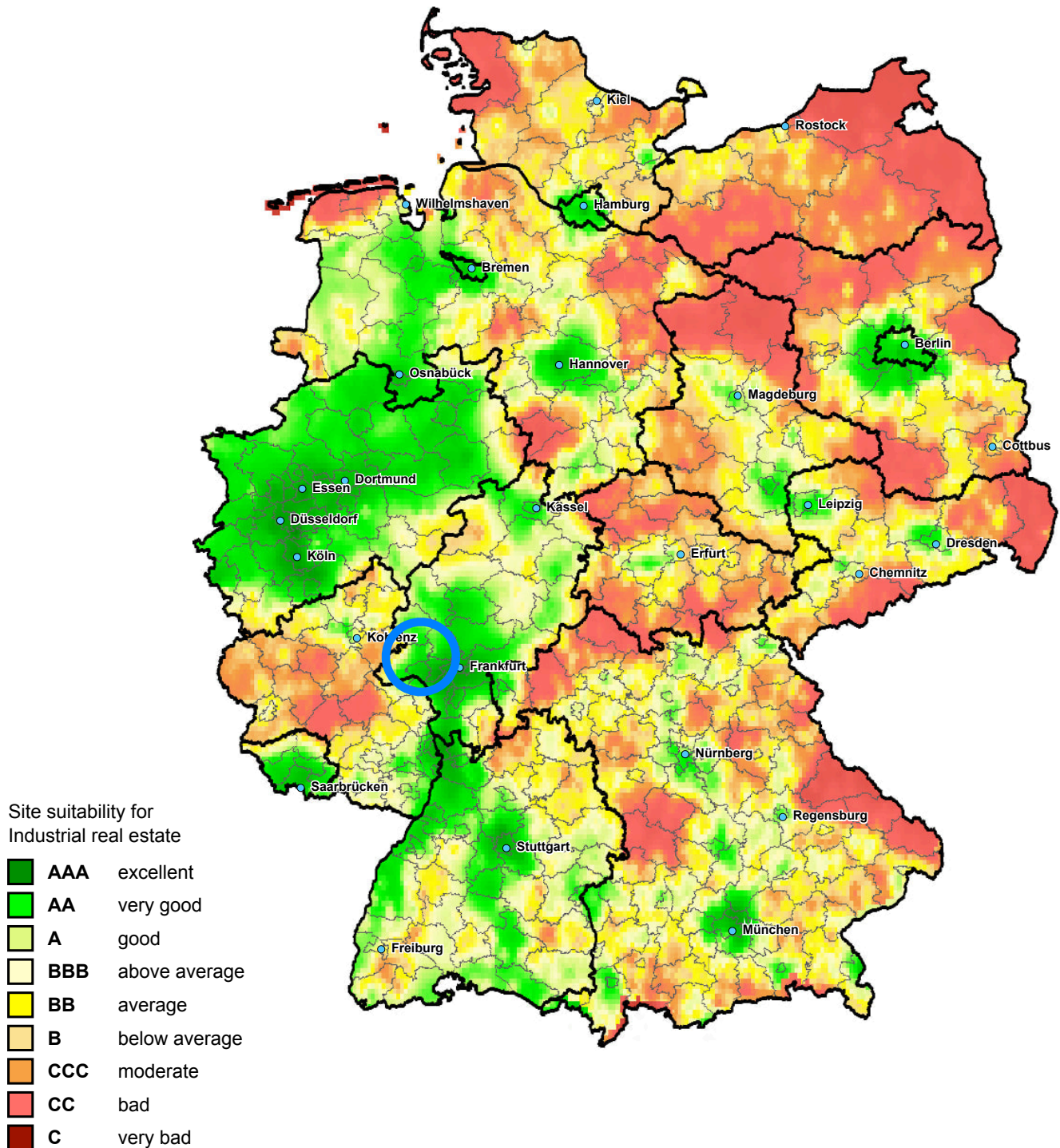
- | | | |
|---|----------|---------|
|  | A | good |
|  | B | average |
|  | C | bad |



IndustrialBundle EU



National Map



Map source: IndustrialPort in cooperation with Hochschule Fresenius
Date: 31. Dec 2024

Site suitability according to IndustrialScore for Idstein: AAA

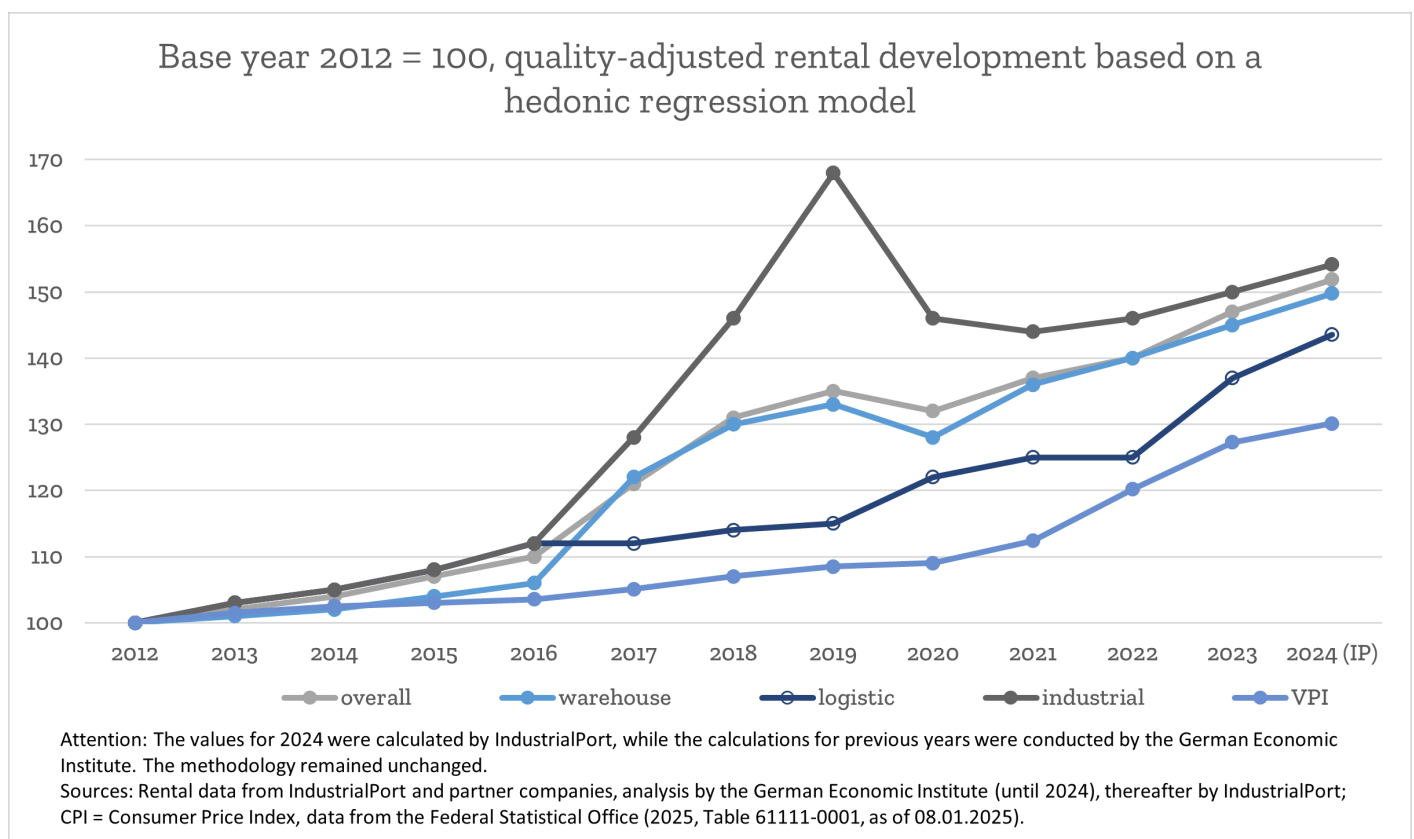
This place is within the first quartile in the national comparison.



1 National industry and logistics real estate market

The IW-IndustrialPort Industrial Real Estate Index (IWIP Index) has been tracking rental trends in the market for production, logistics, and warehouse spaces since 2012. The data analysis is based on a proprietary database that contains over 35,000 observations over the entire period.

The Industrial and Logistics Real Estate Index (IWIP) continues to show a positive development in rental prices for warehouse, logistics, and production properties in Germany in 2024, with an increase of 3.5%.



For more information, visit: <https://www.industrialport.net/industrieimmobilien-index-iwip/>

Notably, the value development of all analyzed real estate categories – albeit in some cases narrowly – exceeds that of the Consumer Price Index (CPI). Warehouse and production properties recorded an increase of 3.1% each, while logistics properties lead with a rise of 4.5%. Overall, the value development of 3.5% is below the previous year's figure of 4.5%, with logistics growth nearly halving at 4.5%. The CPI also lags significantly behind the previous year's increase, rising by only 2.2% compared to 5.9% last year.



2 Regional industry and logistics real estate market

Idstein is a town in the Rheingau-Taunus district in Hesse, distinguished by its historic old town and its attractive location in the Taunus. The town offers good access to the A3 motorway, which is an important traffic axis between Frankfurt am Main and Cologne. This convenient location makes Idstein an interesting site for industrial and logistics companies that wish to benefit from the proximity to the Rhine-Main and Rhine-Ruhr metropolitan areas.

In Idstein, there are several commercial areas that provide space for industrial and logistics properties. These areas are well-developed and offer modern infrastructure that meets the requirements of companies from various industries. The proximity to Frankfurt, one of Europe's most important logistics centers, is another advantage that makes Idstein attractive to companies reliant on efficient transport and supply chains.

The city administration of Idstein supports the establishment of companies through business-friendly conditions and active economic promotion. This includes providing information about available spaces and properties as well as assistance with approval procedures. The combination of a strategically favorable location, solid infrastructure, and a supportive administration makes Idstein a promising location for companies looking to expand or establish themselves in the Rhine-Main-Taunus region.



3 Statistical data

Federal State	Hessen	Metropolitan Area	Reg.-Bez. Darmstadt
County	Rheingau-Taunus-Kreis	Association of local authorities	Idstein, Stadt
Population	25,709	Population density	322 citizens per km²
IndustrialScore	AAA (excellent)		
Reachability	National Average	Idstein	Diff. to national average
Motorways	5 Min.	3 Min.	-40.0 %
Regional metropolities	17 Min.	24 Min.	+41.2 %
District center	4 Min.	0 Min.	-100.0 %
Congested areas	80 Min.	66 Min.	-17.5 %
EU congested areas	222 Min.	194 Min.	-12.6 %
Statistical data	National Average	Rheingau-Taunus-Kreis	Diff. to national average
Unemployment rate	7.5 %	4.8 %	-36.0 %
Employment rate	42.3 %	41.5 %	-1.9 %
Gross domestic product per employed person	89,836.90 €	75,706.00 €	-15.7 %
Assessment rates	National Average	Idstein	Diff. to national average
Business tax	391.4 %	420.0 %	+7.3 %
Tax on land and buildings	457.5 %	450.0 %	-1.6 %
Industry distribution	National Average	Idstein	Diff. to national average
Manufacturing (C)	12.6 %	5.4 %	-57.1 %
Construction (F)	4.5 %	4.2 %	-6.7 %
Trade (G)	13.7 %	20.3 %	+48.2 %
Transportation (H)	13.7 %	20.3 %	+48.2 %
Other (Ot)	55.5 %	49.8 %	-10.3 %
Failures	National Average*	Rheingau-Taunus-Kreis*	Diff. to national average
CFGH failure rate	1.61 %	0.83 %	-48.4 %

* Statistics from 2023, the values for 2024 are currently unavailable.

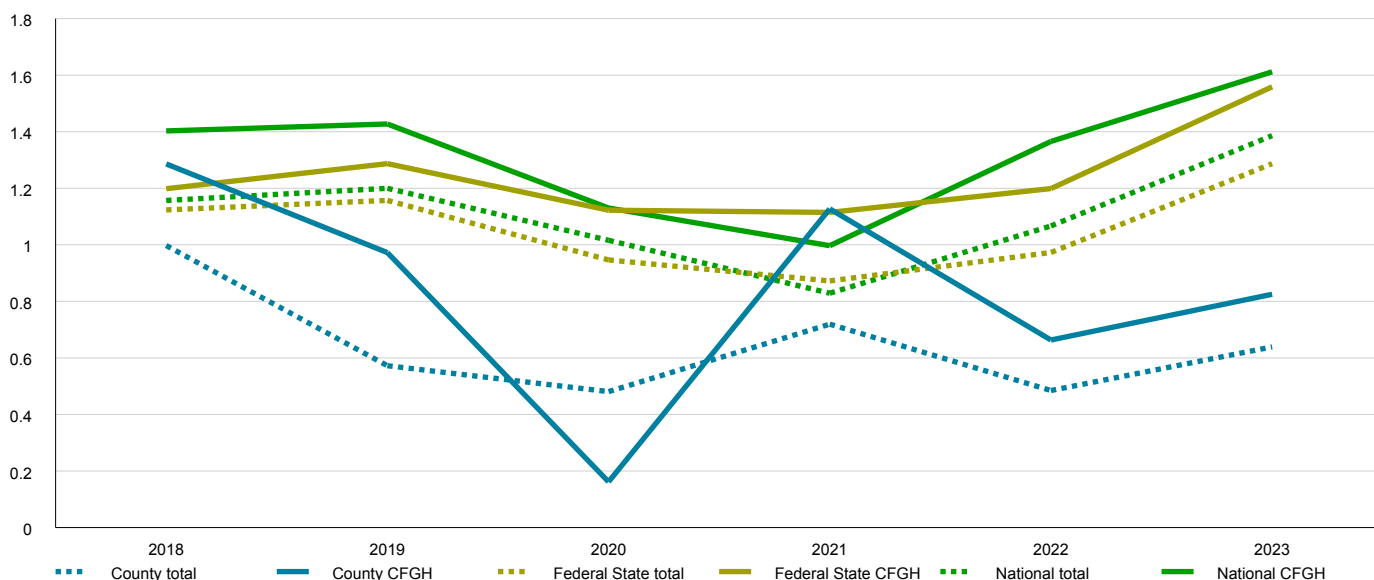
Industry distribution

National Average	C	F	G	H	Ot
Idstein	C	F	G	H	Ot



4 Failure rate

Rheingau-Taunus-Kreis vs. Germany



Absolute failures (county level)

Last 3 years total	Ø 7 failures per year in 1,252 companies
Last 3 years CFGH	Ø 5 failures per year in 606 companies
Last 5 years total	Ø 7 failures per year in 1,252 companies
Last 5 years CFGH	Ø 4 failures per year in 621 companies

Classification of industries (WZ 2008; hallenaffine Branchen lt. IndustrialPort)

SECTION C - Manufacturing

SECTION F - Construction

SECTION G - Trade

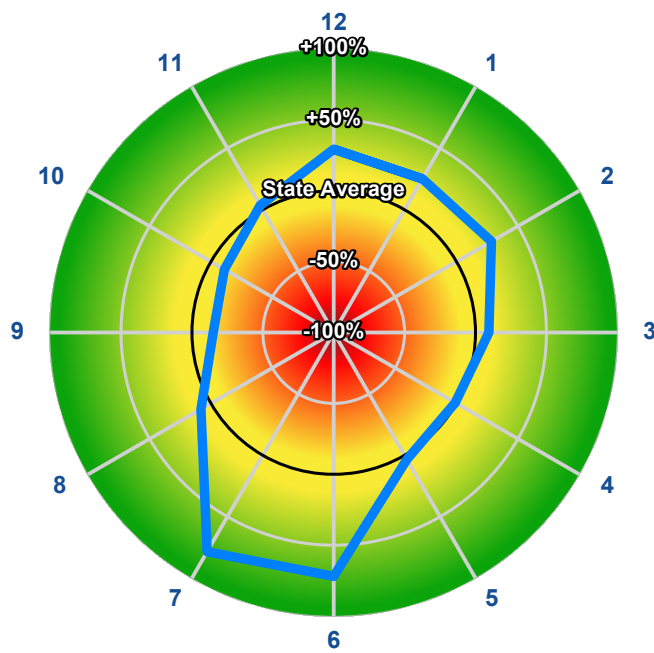
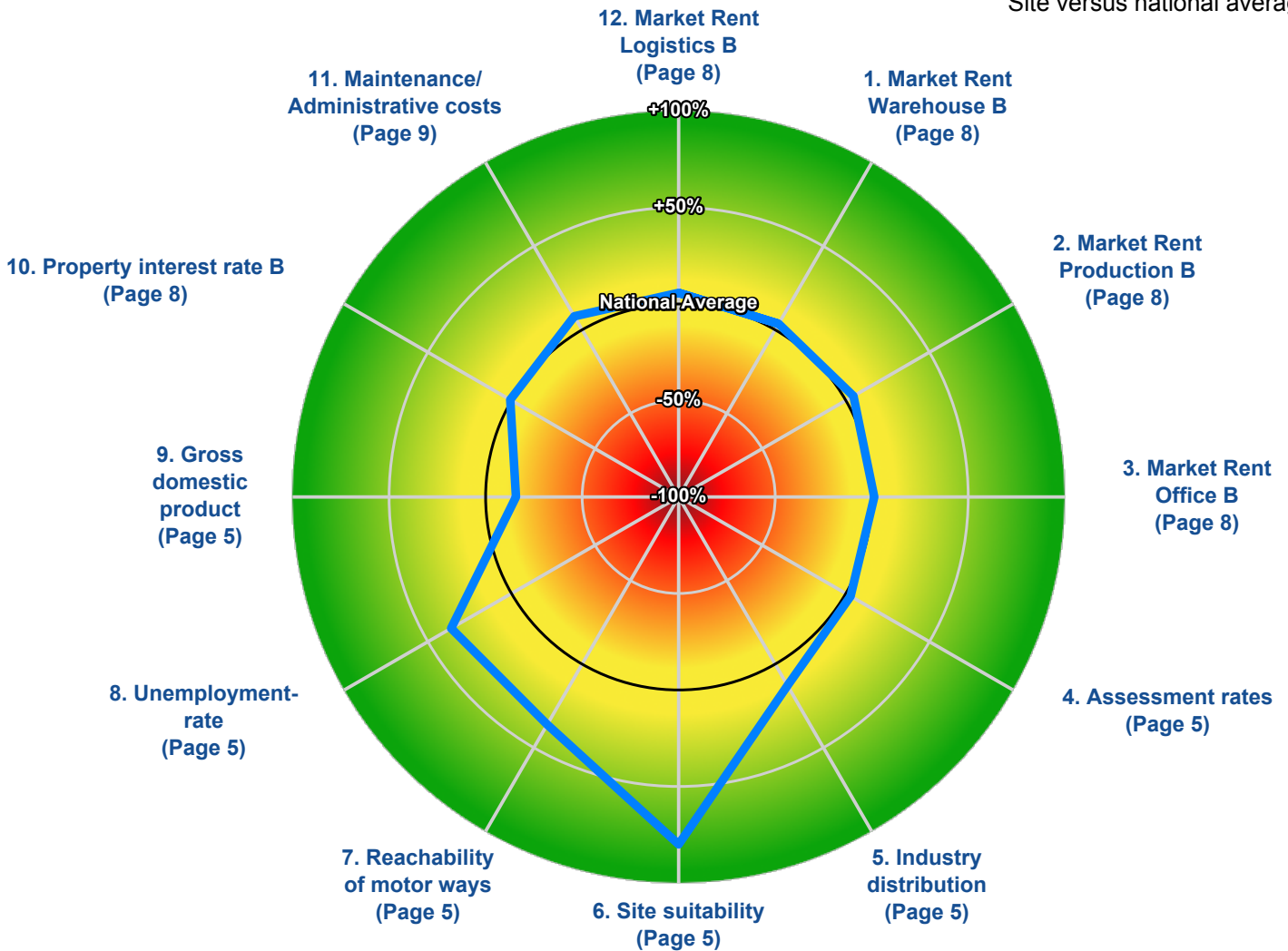
SECTION H - Transport

Values for Germany describe the mean of locations of comparable suitability

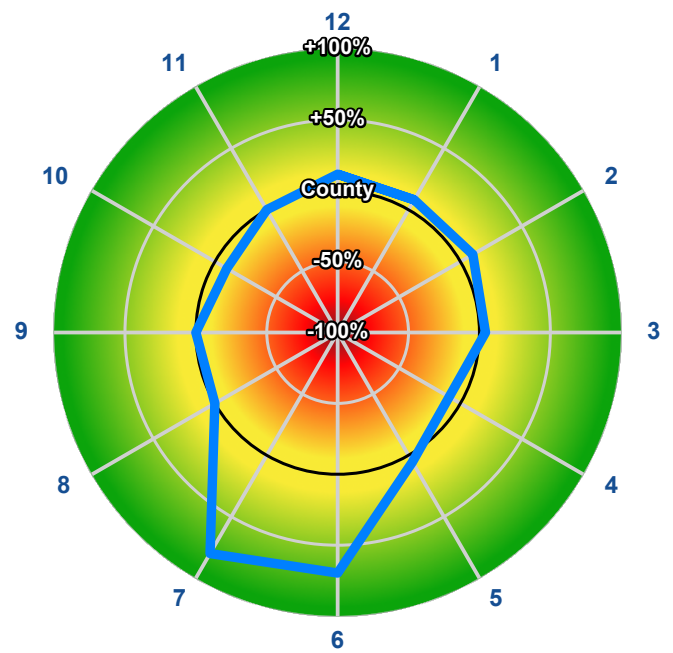


5 Site overview

Site versus national average



Site versus state average



Site versus county average



6 Median market rent (municipality)

Median market rents in Idstein (2024)

Equipment class	Rent ¹	Average ²	Deviation ³	Standard dev.
Storage areas A	5.50 €	5.25 €	+4.8 %	±17.2 %
Storage areas B	4.80 €	4.60 €	+4.3 %	±17.7 %
Storage areas C	3.85 €	3.60 €	+6.9 %	±21.3 %
Logistics space A	6.55 €	6.10 €	+7.4 %	±16.2 %
Logistics space B	5.70 €	5.40 €	+5.6 %	±16.2 %
Logistics space C	4.50 €	4.25 €	+5.9 %	±20.5 %
Production areas A	5.30 €	5.00 €	+6.0 %	±17.3 %
Production areas B	4.60 €	4.40 €	+4.5 %	±19.1 %
Production areas C	3.70 €	3.45 €	+7.2 %	±22.2 %
Office spaces A	8.45 €	8.20 €	+3.0 %	±10.7 %
Office spaces B	7.00 €	6.90 €	+1.4 %	±11.5 %
Office spaces C	5.60 €	5.65 €	-0.9 %	±12.4 %

7 Property interest rate per quality class (municipality)

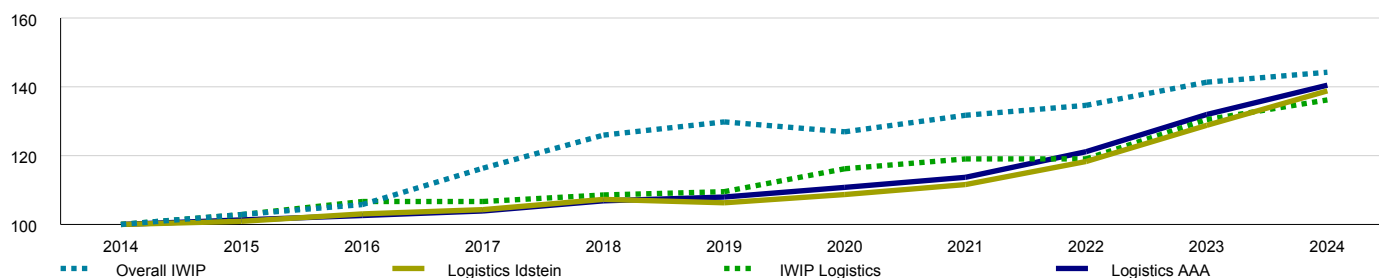
Average property rates in Idstein (2024)

Equipment class	Interest rate
Property interest rate A	5.5 %
Property interest rate B	6.5 %
Property interest rate C	7.7 %



8 Development

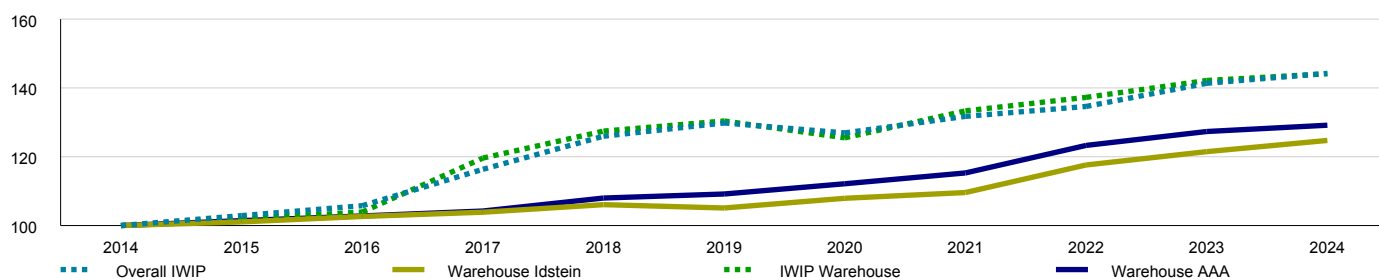
Market development Idstein - Logistics



Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Overall IWIP in %*	100	103	106	116	126	130	127	132	135	141	144
Logistics Idstein in %*	100	101	103	104	107	106	109	112	118	129	139
Logistics Idstein	4.03 €	4.06 €	4.15 €	4.20 €	4.32 €	4.28 €	4.38 €	4.49 €	4.76 €	5.19 €	5.59 €
Logistics IWIP in %*	100	103	107	107	109	110	116	119	119	130	136
Logistics AAA in %*	100	101	103	104	107	108	111	114	121	132	140
Logistics AAA	3.75 €	3.80 €	3.85 €	3.89 €	4.01 €	4.05 €	4.15 €	4.26 €	4.54 €	4.95 €	5.27 €

*base year = 2014

Market development Idstein - Warehouse

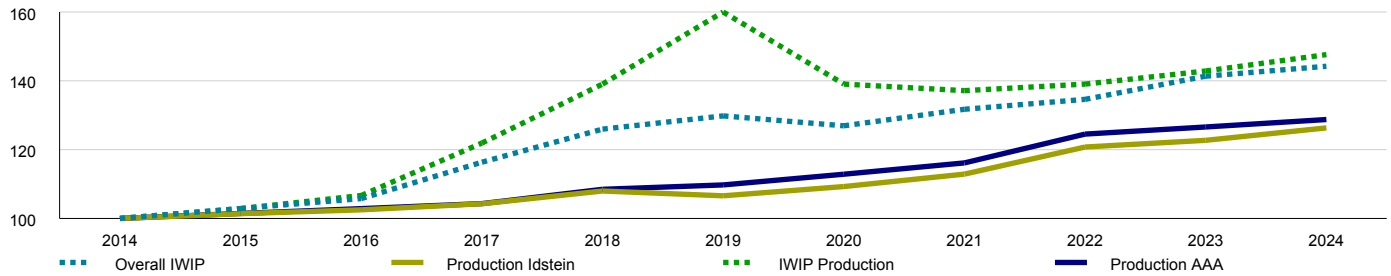


Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Overall IWIP in %*	100	103	106	116	126	130	127	132	135	141	144
Warehouse Idstein in %*	100	101	103	104	106	105	108	110	118	121	125
Warehouse Idstein	3.79 €	3.83 €	3.89 €	3.93 €	4.02 €	3.98 €	4.09 €	4.15 €	4.45 €	4.60 €	4.72 €
Warehouse IWIP in %*	100	102	104	120	127	130	125	133	137	142	144
Warehouse AAA in %*	100	101	103	104	108	109	112	115	123	127	129
Warehouse AAA	3.48 €	3.53 €	3.58 €	3.63 €	3.76 €	3.80 €	3.91 €	4.02 €	4.30 €	4.44 €	4.50 €

*base year = 2014



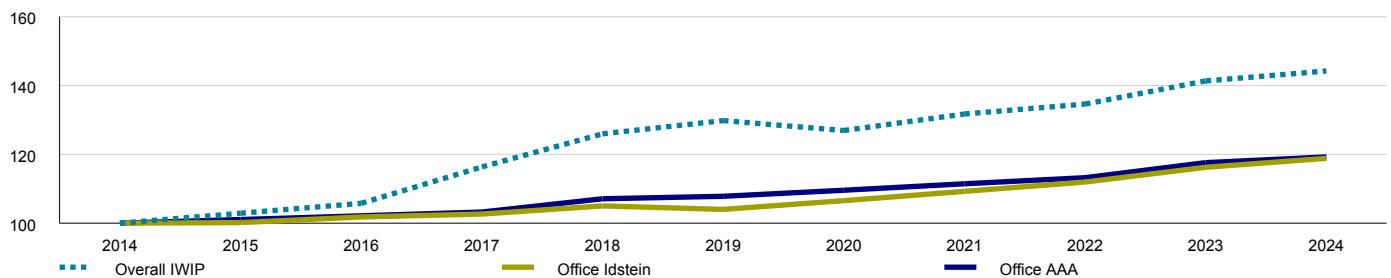
Market development Idstein - Production



Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Overall IWIP in %*	100	103	106	116	126	130	127	132	135	141	144
Production Idstein in %*	100	101	103	104	108	107	109	113	121	123	126
Production Idstein	3.60 €	3.65 €	3.69 €	3.75 €	3.88 €	3.83 €	3.93 €	4.06 €	4.34 €	4.41 €	4.54 €
Production IWIP in %*	100	103	107	122	139	160	139	137	139	143	148
Production AAA in %*	100	101	103	104	108	110	113	116	125	127	129
Production AAA	3.33 €	3.38 €	3.42 €	3.47 €	3.61 €	3.65 €	3.76 €	3.87 €	4.15 €	4.21 €	4.29 €

*base year = 2014

Market development Idstein - Office



Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Overall IWIP in %*	100	103	106	116	126	130	127	132	135	141	144
Office Idstein in %*	100	100	102	103	105	104	107	109	112	116	119
Office Idstein	5.91 €	5.92 €	6.02 €	6.07 €	6.21 €	6.15 €	6.30 €	6.46 €	6.62 €	6.87 €	7.02 €
Office AAA in %*	100	101	102	103	107	108	110	111	113	118	119
Office AAA	5.80 €	5.86 €	5.93 €	5.99 €	6.21 €	6.26 €	6.36 €	6.47 €	6.57 €	6.82 €	6.92 €

*base year = 2014



9 Maintenance costs (district)

Average maintenance costs in the district

Type of use	2024	Average ²	Deviation ³	Standard dev.
Storage areas A	4.64 €	4.29 €	+8.2 %	±8.4 %
Storage areas B	3.70 €	3.42 €	+8.2 %	±8.4 %
Storage areas C	2.65 €	2.45 €	+8.2 %	±8.4 %
Logistics space A	4.64 €	4.29 €	+8.2 %	±8.4 %
Logistics space B	3.70 €	3.42 €	+8.2 %	±8.4 %
Logistics space C	2.66 €	2.46 €	+8.1 %	±8.4 %
Production areas A	6.34 €	5.86 €	+8.2 %	±8.4 %
Production areas B	4.38 €	4.05 €	+8.1 %	±8.4 %
Production areas C	3.59 €	3.32 €	+8.1 %	±8.4 %
Office spaces A	3.97 €	3.67 €	+8.2 %	±8.4 %
Office spaces B	2.41 €	2.23 €	+8.1 %	±8.4 %
Office spaces C	1.91 €	1.76 €	+8.5 %	±8.4 %

10 Administrative costs (district)

Average administrative costs in the district

Type of use	2024	Average ²	Deviation ³	Standard dev.
Storage areas A	1.43 €	1.32 €	+8.3 %	±8.4 %
Storage areas B	1.30 €	1.20 €	+8.3 %	±8.4 %
Storage areas C	0.91 €	0.84 €	+8.3 %	±8.4 %
Logistics space A	1.43 €	1.32 €	+8.3 %	±8.4 %
Logistics space B	1.33 €	1.23 €	+8.1 %	±8.4 %
Logistics space C	0.94 €	0.87 €	+8.0 %	±8.4 %
Production areas A	1.83 €	1.70 €	+7.6 %	±8.4 %
Production areas B	1.78 €	1.64 €	+8.5 %	±8.4 %
Production areas C	1.58 €	1.46 €	+8.2 %	±8.4 %
Office spaces A	1.40 €	1.29 €	+8.5 %	±8.4 %
Office spaces B	0.99 €	0.92 €	+7.6 %	±8.4 %
Office spaces C	0.90 €	0.83 €	+8.4 %	±8.4 %



11 Sources

The Heatmap is developed in cooperation of IndustrialPort and Hochschule Fresenius.

Statistical data: Statistisches Bundesamt, regional statistic authorities, modell of reachability of the BBSR

Failure rates: Creditreform

Market rents: Own Research

Property rates: Own Research

FM-Costs: WISAG Facility Management Holding GmbH & Co. KG, Frankfurt on the Main

Heatmap Europe: IndustrialPort, Date: 31. Dec 2024

Heatmap Germany: IndustrialPort in cooperation with Hochschule Fresenius, Date: 31. Dec 2024

12 Definitions

IndustrialScore (Site suitability analysis)

The ability for a location/Site suitability is a measure of the suitability of the municipality/city as location for the settlement/existence of industrial real estate. The ability for a location/ Site suitability was developed by IndustrialPort in conjunction with Hochschule Fresenius (Fresenius University of applied sciences).

For further information on the ability for a location/site suitability, please see website www.heatmap-magazin.de

Classification of Hall- and office areas

Warehouses are primarily used for the storage of goods. They often have a low ceiling height and have only a limited number of ground level gates or ramps.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Hall height	8.5m or higher	6.0m until 6.8m	below 6.0m
Hall floor bearing capacity	minimum 5t/sqm	4.0t/sqm to 5t/sqm	below 4.0t/sqm
Gates	minimum 1 gate per 1,000sqm hall area	minimum 1 gate per 2,500sqm hall area	less than 1 gate per 2,500sqm hall area
Service area/switching area for trucks	broad	adequate	insufficient
Heating system	efficient	adequate	no heating system
Illumination through daylight	Daylight through light domes and window bands	Daylight through light domes or window bands	insufficient



Logistic halls combine storage and distribution functions. They have a higher hall height and depth and a higher number of ramp gates than conventional warehouses. Logistics halls are usually heated and equipped with a sprinkler system.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Hall height	10.5m or higher	7.0m until 10.5m	below 7.0m
Hall floor bearing capacity	minimum 5t/sqm	4.0t/sqm to 5t/sqm	below 4.0t/sqm
Gates	minimum 1 ramp gate per 1,500sqm hall area plus ground level gates	minimum 1 ramp gate per 2,500sqm hall area	less than 1 ramp gate per 2,500sqm hall area
Service area/switching area for trucks	broad	adequate	insufficient
Heating system	efficient	adequate	no heating system
Illumination through daylight	Daylight through light domes and window bands	Daylight through light domes or window bands	insufficient

Production halls primarily serve the production of goods. They are mostly heated and have walk-in roller doors, daylight and partly crane systems.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Hall height	6.5m or higher	5.5m to 6.5m	below 5.5m
Hall floor bearing capacity	minimum 5.0t/sqm	4.0t/sqm to 5.0t/sqm	below 4.0t/sqm
Gates	minimum 1 ground level gate per 1,500sqm hall area plus ramp gates	minimum 1 ground level gate per 3,000sqm hall area	less than 1 ground level gate per 3,000sqm hall area
Service area/switching area for trucks	broad	adequate	insufficient
Heating system	efficient	adequate	no heating system
Illumination through daylight	Daylight through light domes and window bands	Daylight through light domes or window bands	insufficient



The indicated rental prices of **office spaces** refer exclusively to office space in commercial and / or industrial areas, which are located directly in or on an indoor area.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Ceiling height	3.0m or higher	2.5m to 3.0m	below 2.5m
Sun protection	External blinds, electrically operated	External blinds, manually operated	No sun protection
Cabling	False floor	Raised floor	Window sill duct
Cooling	Air conditioning	Cooling ceiling	No cooling
Security technology	Access control, additional video control	Access control	No security technology

Median

The median is an average for distributions in statistics. The median of a number of values is the number that is in the mid position when sorting the values by size. Generally, a median divides a sample, a number of values, or a split into two halves, such that the values in one half are smaller than the median, and larger in the other.

The median belongs to the group of quantiles and can also be considered as a 0.5-quantile. Compared to the arithmetic mean, often called average, the median is more robust against outliers (extremely differing values).

Market rent

The indicated market rent are the medians of the asking rents on the basis of the focused community. For this purpose, all offers in all major real estate portals were evaluated and then clustered according to main types of use and facility/equipment classes. Besides comparable object types and location, comparable soil values are also used. The median results from at least five comparable buildings.

The rents are shown separately according to the equipment classes modern (A), functional (B) and simple (C) as well as the main utilisation types logistics, warehouse (storage) and production, amounting to Euro per each square meter (€/sqm) for the gross floor area (BGF).

To avoid the problem of "outliers" in the data groups, no median were deliberately chosen.

The indicated rental prices for office spaces refer exclusively to office space in commercial and / or industrial areas, which are located directly in or on an indoor area.

¹Average rents for the chosen equipment class in Idstein (RGS 064390008008) in 2024

²Average rent of chosen equipment class of all cities and municipalities in Germany in 2024 with a comparable site suitability rating as Idstein (see section: IndustrialScore)

³Deviation of rent¹ in 2024 to the national average² of all comparable locations in 2024



Property interest rate

Property rate §21 para. 2 of the ImmoWertV (Ordinance on the Valuation of Property).

"Property interest rates are capitalization interest rates with which the market values of properties are typically interest-bearing on average, depending on the type of property. Property interest rates are determined according to the principles of the income approach as per §§ 27 to 34, based on suitable purchase prices and the corresponding net incomes."

They are to be derived on the basis of suitable purchase prices and their corresponding net income for similarly constructed and used land, taking into account the remaining useful life of the buildings in accordance with the principles of the capitalized earnings method (§§ 17 to 20).

The real estate yield is calculated using a converted earnings formula (income value method) analogous to ImmoWertV. The determination here is carried out iteratively.

The stated real estate yield is at community level. The classification A, B and C refers to an industrial property with:

- A: Building age under 10 years
- B: Building ages between 10 and 25 years
- C: Building age older than 25 years

In case of mature industrial plants, the building age per building part or the fictitious mean building age of the entire plant must be used.

Administrative costs

Administrative costs are, according to §19 ImmoWertV, costs for the manpower and facilities necessary for the administration of the property as well as the legal or voluntary examination of the annual financial statement and supervision.

²Average administrative costs of chosen equipment class of all cities and municipalities in Germany in 2024 with a comparable site suitability rating as Idstein (see section: IndustrialScore)

³Deviation of administrative costs in 2024 to the national average² of all comparable locations in 2024

Maintenance costs

Maintenance costs are costs incurred to keep the building in its intended and contractual condition. In this case, the costs of the commercial tenancy agreement can in principle be assigned to the tenant, the landlord or even partially to both contracting parties.

²Average maintenance costs of chosen equipment class of all cities and municipalities in Germany in 2024 with a comparable site suitability rating as Idstein (see section: IndustrialScore)

³Deviation of maintenance costs in 2024 to the national average² of all comparable locations in 2024

Standard deviation

The standard deviation is defined as the square root of variance. It indicates the range of typical values in a population (ca. 68% for normal distributions) when added to/subtracted from the median. In order to give normalized information, it is expressed as a percentage of the respective average for each indicator. The farther outside the boundaries of one standard deviation a value is, the less common it is within the population.



13 Contact and Imprint

IndustrialPort GmbH & Co. KG
Rodergasse 15
65510 Idstein
Germany

Mail: info@industrialport.net
Phone +49 6126 979 0000

Managing Director: Graduate engineer. Industrial engineer Peter Salostowitz FRICS
Commercial Register: District Court Wiesbaden HRA 9699

Disclaimer

The information contained herein is from sources believed to be reliable and has been prepared with the highest level of care. We do not doubt its correctness, but we have not checked it. We assume no liability for this and neither give a guarantee, nor make any assurances. It is your responsibility to confirm their accuracy and completeness independently. All estimates, statements, assumptions or estimates used are examples only and do not reflect current or future market developments and are not intended to be used for the purposes of selling or recommending the purchase or sale of any particular financial asset.

This information is intended solely for use by the customers of IndustrialPort GmbH & Co. KG and may not be reproduced without the prior written acceptance/agreement of IndustrialPort GmbH & Co. KG.

Copyright 2024 IndustrialPort GmbH & Co. KG

14 More products from IndustrialPort

Webshop: <https://www.industrialport.net/onlineshop-industrialport/>
Market Reports: <https://www.industrialport.net/produkt-kategorie/marktberichte-von-industrialport-auf-gemeindeebene/>
Valuation: <https://www.industrialport.net/wertermittlung-industrieimmobilien/>
Consulting: <https://www.industrialport.net/beratung-fuer-industrieimmobilien/>
Index: <https://www.industrialport.net/industrieimmobilien-index-iwip/>

and many more products. Also tailored for your needs in the logistic business.

All products can be obtained via www.industrialport.net.