



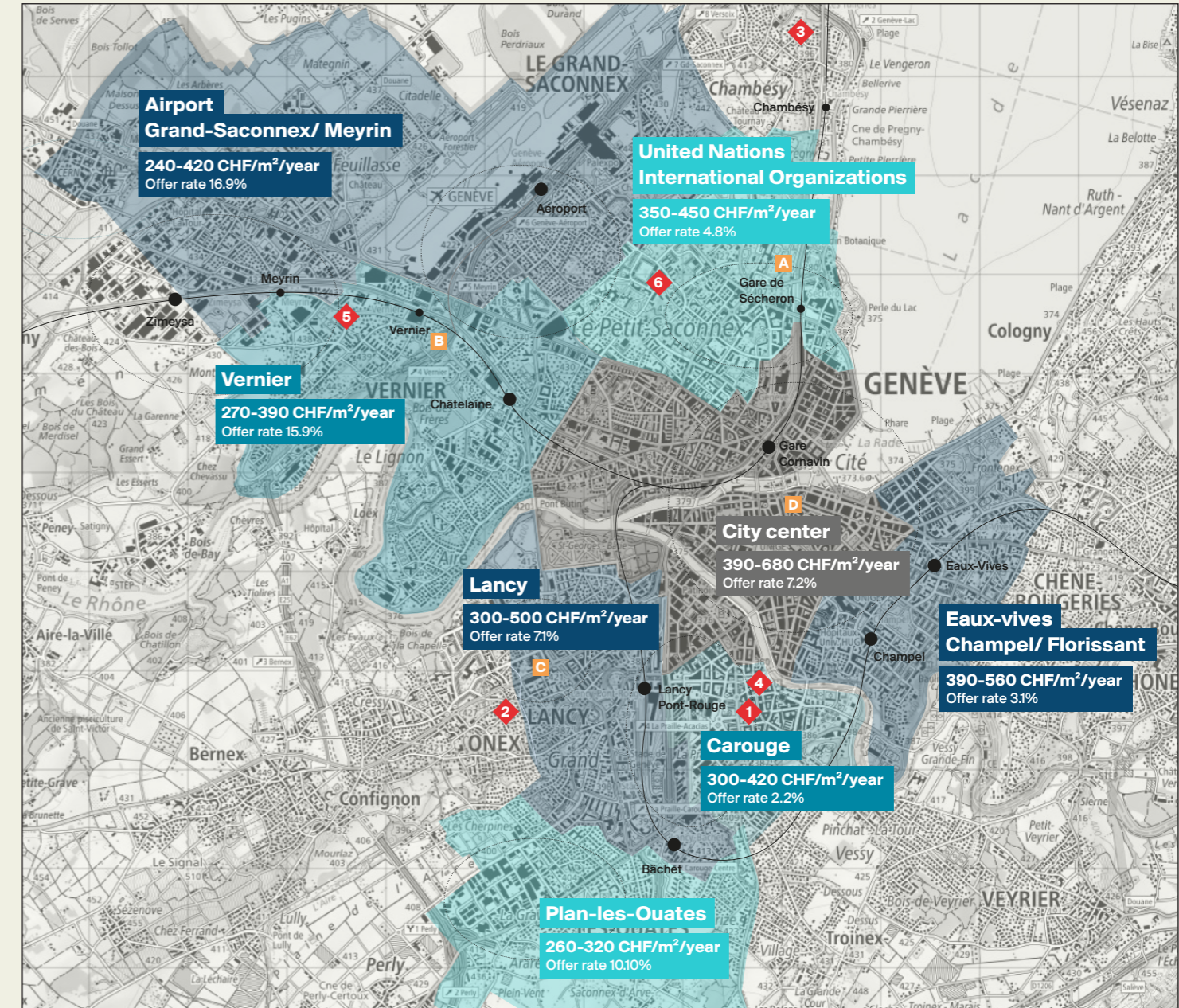
# The Essentials of the Market 2024

**naef** |  **Knight  
Frank**  
Commercial

# Geneva / Centre 2024



# Geneva / Canton 2024



## Typical lease terms in current market

Term	5 to 10 years
Rent reviews	annually, linked to the Consumer Price Index
Rent deposit	6 months
Renewal	either 5 years or 10 years
VAT on rent	if applicable, 8.1%
Assignment & subletting	possible with the owner's agreement
Service charges	between CHF 30.- to 50.- /m <sup>2</sup> / per year
Parking	CBD CHF 350.- to 450.- /space / per month outside CBD between CHF 200.- to 400.- /space / per month

## Geneva in statistics

Population canton Geneva	<b>524'379</b>
Unemployment rate	<b>4.2%</b> (CH 2.3%)
Vacant office space	<b>276'802 m<sup>2</sup></b>
Vacant retail space	<b>36'960 m<sup>2</sup></b>

## New commercial surfaces

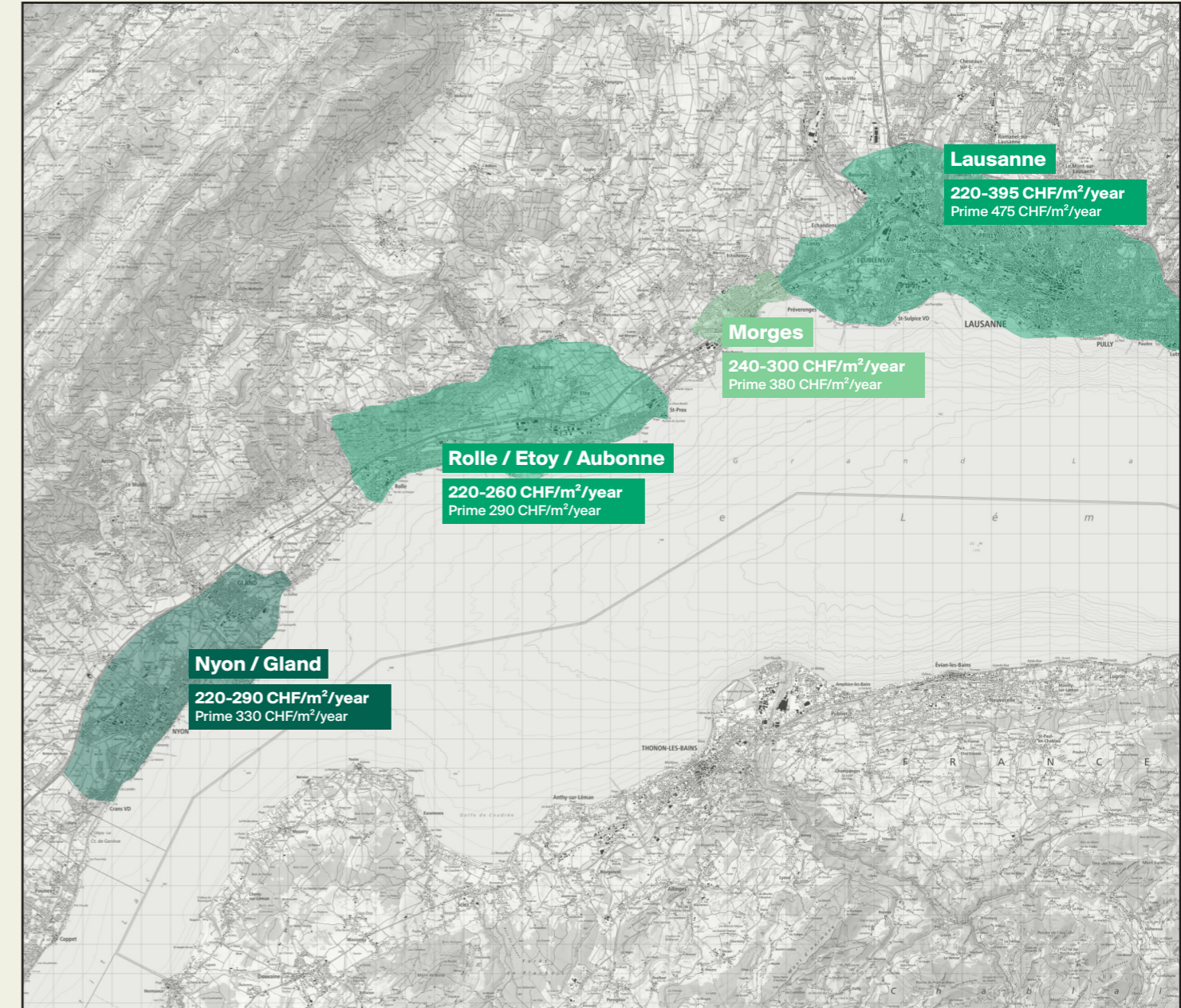
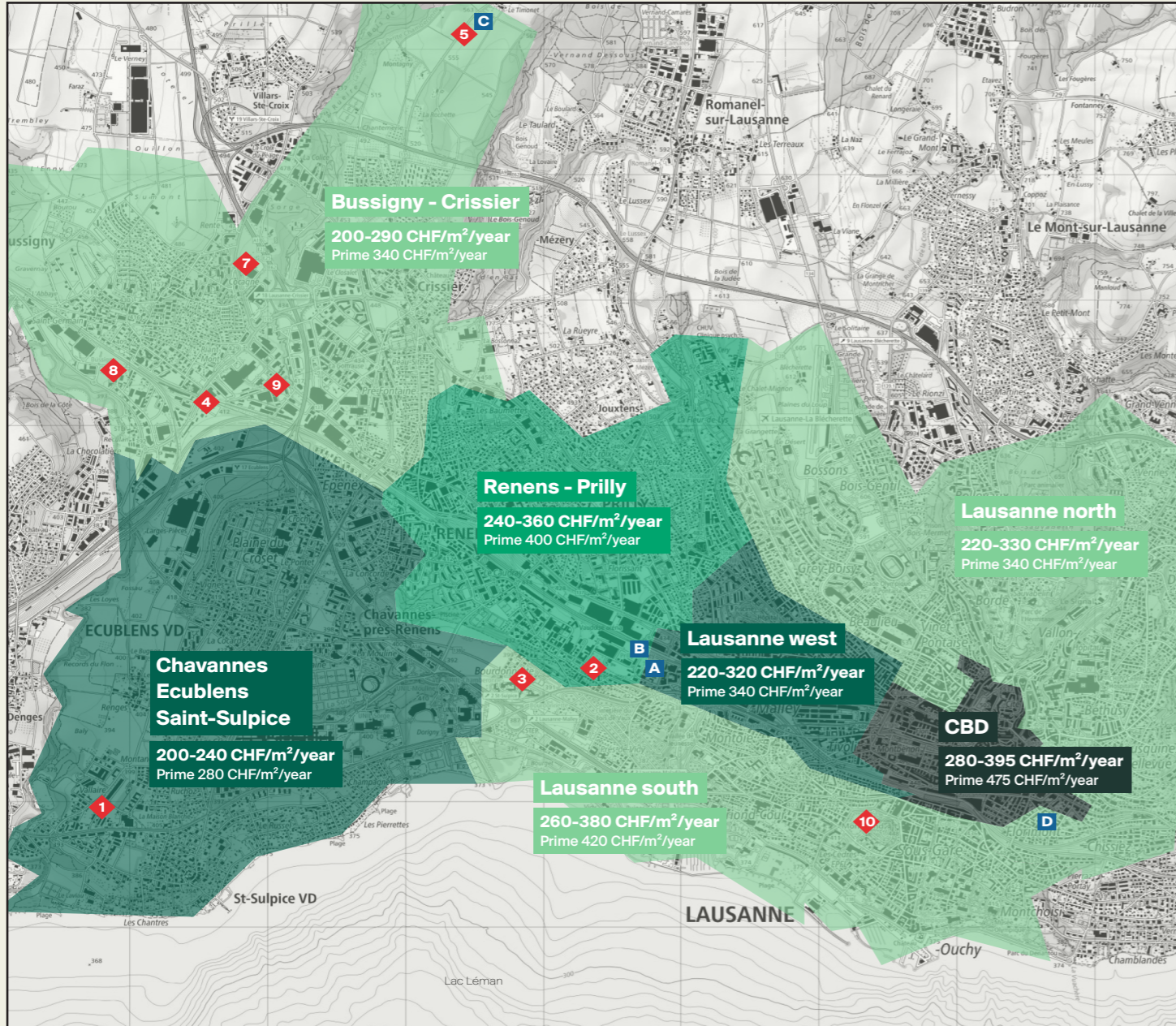
4 years > to 10'000 m<sup>2</sup>

	Surface	Delivery year
1 Campus Pictet, Acacias	55'000 m <sup>2</sup>	2025
2 Small City (étape 2), Lancy	50'000 m <sup>2</sup>	2024
3 Lombard Odier, Bellevue	37'000 m <sup>2</sup>	2024
4 Quai des Vernets, PAV	30'000 m <sup>2</sup>	2027
5 Quarz'up, Vernier	21'000 m <sup>2</sup>	2025
6 Green Village (Kyoto), Grand-Saconnex	12'000 m <sup>2</sup>	2024

## Recent lettings

> to 1'000 m<sup>2</sup>

Sector	Surface	Segment
A United Nations International Organizations	1'250 m <sup>2</sup>	Diplomatic mission
B Airport	5'400 m <sup>2</sup>	IT
C Lancy	2'800 m <sup>2</sup>	Medical
D City centre / Left Bank	700 m <sup>2</sup>	Lawyer



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Service charges	between CHF 30.- to 50.- /m <sup>2</sup> / per year
Parking	CBD CHF 200.- to 300.- /space / per month outside CBD between CHF 150.- to 200.- /space / per month

### Lausanne in statistics

Population canton Lausanne	846'300
Unemployment rate	3.6% (CH 2.3%)
Vacant office space	77'749 m <sup>2</sup>
Vacant retail space	25'283 m <sup>2</sup>

### New commercial surfaces

within 4 years > to 10'000 m<sup>2</sup>

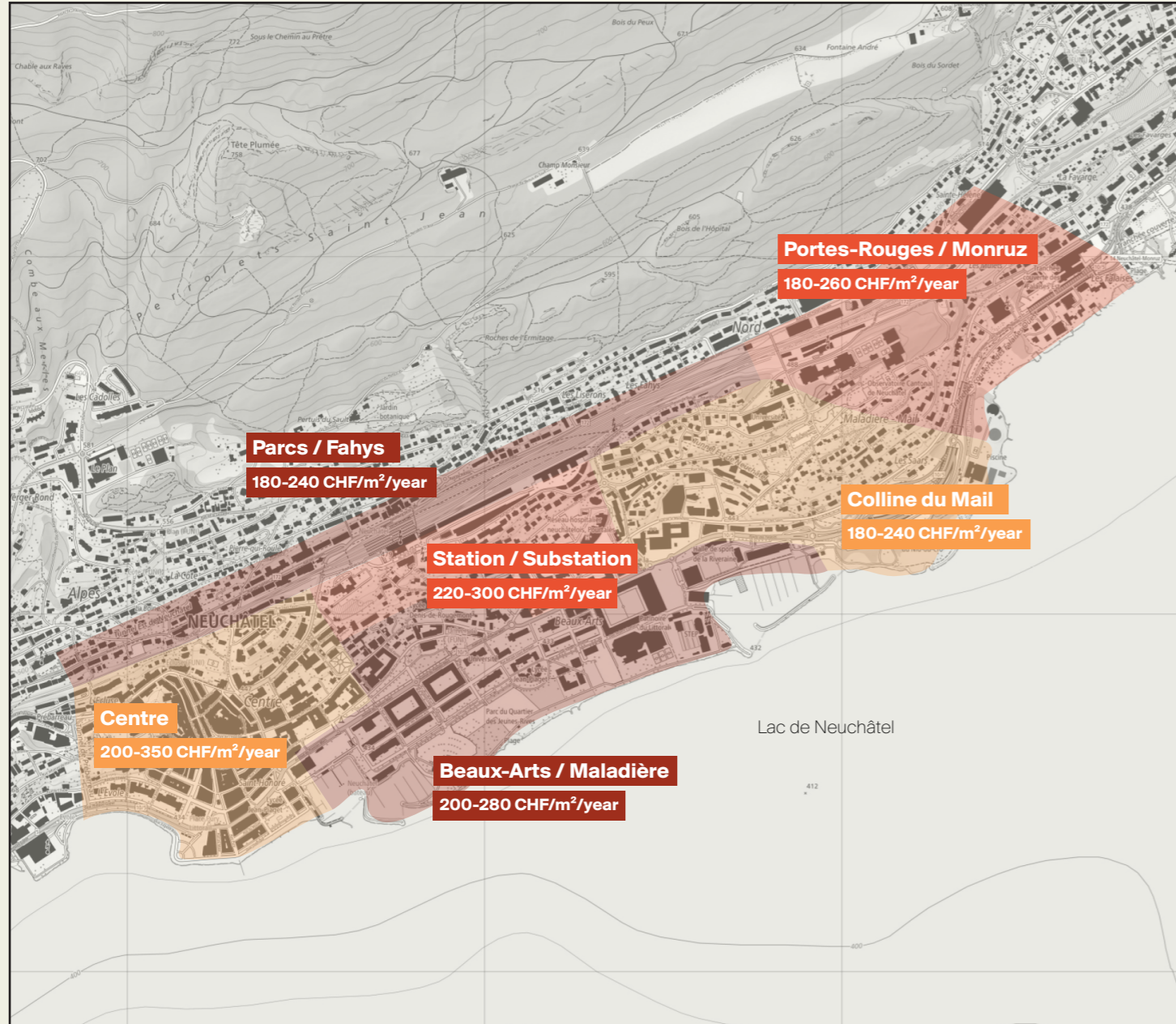
	Surface	Delivery year
1 Ecotop, Ecublens	30'000 m <sup>2</sup>	2026
2 Malley central, Prilly-Malley	23'000 m <sup>2</sup>	2025
3 Cocagne-Buyère, Bussigny	18'000 m <sup>2</sup>	2027
4 Arc-en-ciel, Bussigny	17'000 m <sup>2</sup>	2027
5 Pulse, Cheseaux	40'000 m <sup>2</sup>	2025
6 Biopôle, Epalinges	23'000 m <sup>2</sup>	2025
7 Cocoon, Bussigny	38'000 m <sup>2</sup>	2024
8 Hiag, Bussigny	17'000 m <sup>2</sup>	2027-2028
9 Quartier Horizons, Chavannes-près-Renens	16'000 m <sup>2</sup>	2025
10 Rasude, Lausanne train station	30'000 m <sup>2</sup>	2030-2032

### Recent lettings

> to 1'000 m<sup>2</sup>

	Sector	Surface	Segment
A	Central Malley	2'500 m <sup>2</sup>	Service
B	Malley - Prilly	1'800 m <sup>2</sup>	Real estate
C	Cheseaux-sur-Lausanne	3'000 m <sup>2</sup>	Biotechnology
D	City centre (CBD)	1'000 m <sup>2</sup>	Media

# Neuchâtel / Centre 2024



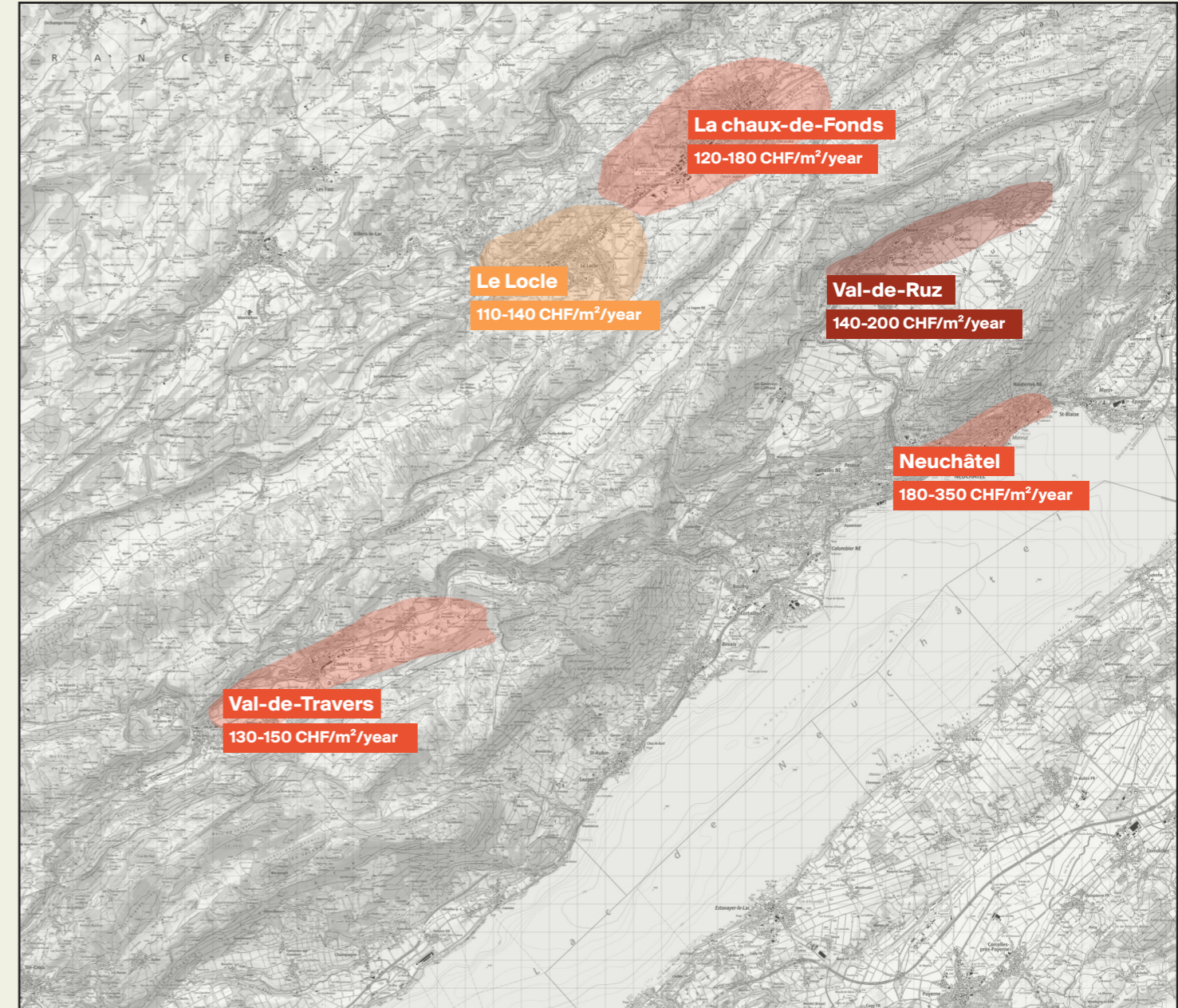
## Typical lease terms in current market

Term	5 to 10 years
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Service charges	between CHF 30.- to 65.- /m <sup>2</sup> / per year
Parking	CBD CHF 150.- à 220.- /space / per month outside CBD between CHF 70.- à 140.-/space / per month

## Neuchâtel in statistics

Population canton Neuchâtel	Unemployment rate
<b>178'173</b>	<b>3.6%</b> (CH 2.3%)
Vacant office space	
<b>36'445 m<sup>2</sup></b>	
Vacant retail space	
<b>9'840 m<sup>2</sup></b>	

# Neuchâtel / Canton 2024

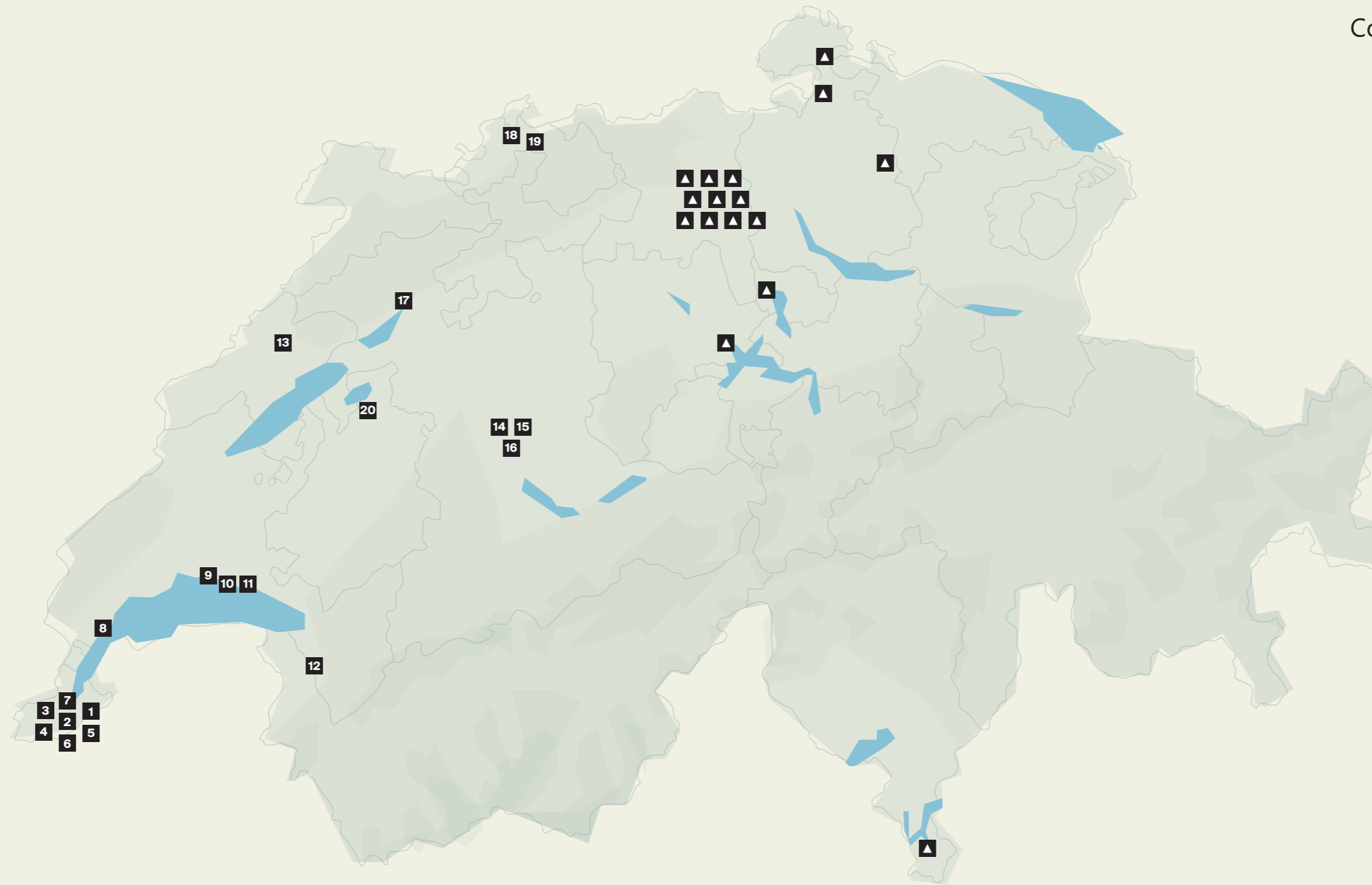


## Attractiveness of the Canton of Neuchâtel

Establishment of	including
<b>19</b> companies	<b>13</b> from abroad
Office space availability rate	Industrial space availability rate
<b>3.0%</b> (CH 6.3%)	<b>0.2%</b> (CH 0.9%)
Retail space availability rate	
<b>1.6%</b> (CH 1.6%)	

## Economic Report

Positive economic growth marked by a remarkable growth in business establishments. The strong demand for available land highlights the urgent need for relevant solutions.

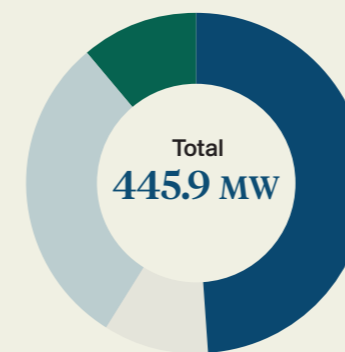


## Examples of Data Centers in Western Switzerland

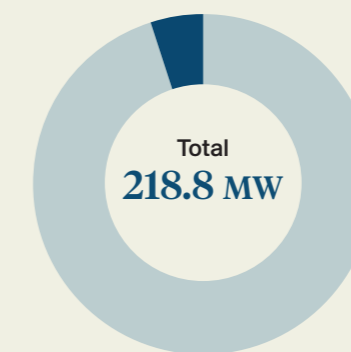
	Address	Operator
1	Data centre, Geneva	Infomaniak
2	GV1, Geneva	Equinix
3	Lumen Technologie, Vernier	Lumen Technologies
4	GEN01, Plan-les-Ouates	STACK Infrastructure
5	Geneva-Montbrillant, City Center	Swisscom
6	Infomaniak, Satigny	Infomaniak
7	GTT, Meyrin	GTT
8	GEN02, Gland	STACK Infrastructure
9	Crissier	BrainServe
10	Lausanne-Savoie, Lausanne	Swisscom

	Address	Operator
11	Lausanne	Alpine DC
12	Saint Triphon Data Centre Ollon	Arcos'arre Architecture
13	Data center, La Chaux-de-Fonds	High DC
14	Colobern South, Bern	NTS
15	Bern-Wankdorf, Bern	Swisscom
16	Colobern North 2, Bern	NTS
17	Datacube Biel, Bienne	NorthC
18	Datacube Muenchenstein, Münchenstein	NorthC
19	Data Center Pratteln, Pratteln	ColoBale
20	SH3 Avenches, Avenches	Safe Host

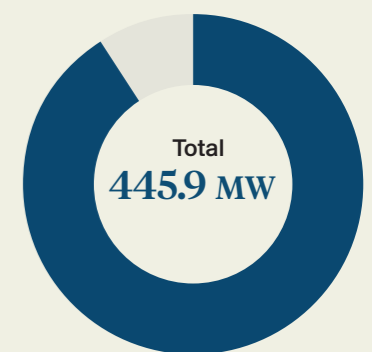
▲ Data centers in German-speaking Switzerland



Category	Percentage	Capacity (MW)
Live	49%	218.8
Under Construction	10%	44
Committed	30%	133.1
Early Stage	11%	50



Category	Percentage	Capacity (MW)
Live sold	95%	208.1
Live availability	5%	10.7



Category	Percentage	Capacity (MW)
Colocation	91%	405.9
Self-build	9%	40

## Your real estate specialist

Investment / Commercial / Tenant Representation



**Jacques Emery**  
Sale Director  
Naef Group



**Neil Hadi**  
Managing Director Naef  
commercial Knight Frank



**Sophie Ipekdjian**  
Commercial Analyst



**Erika Bibollet**  
Commercial Broker



**Rafael Garcia**  
Investment and commercial  
Manager Vaud



**Marie-Claude Müller**  
Investment and commercial  
Manager Neuchâtel



**Cyril Peyrot**  
Investment and commercial  
Manager Geneva



**Maxime Giry**  
Investment analyst Geneva



**Samy El Gana**  
Investment analyst Vaud



**Lee Elliot**  
Partner, Global Head of Occupier  
Research, Commercial Research  
Knight Frank



**Mike Bowden**  
Partner at Knight Frank - Managing  
Director of Europe & Co-Head  
European Capital Markets



**Alex Burgoyne**  
Head of Data Centre

## Naef Commercial / Knight Frank

in numbers

**3** areas  
of expertise  
in Switzerland

**9** employees  
in Switzerland

**1**

commercial lease  
signed per week

**1**

building sold  
per month

**1,2**

million visitors  
to our websites

**50**

countries  
where we are  
represented

**750** Knight Frank  
offices  
worldwide

**27'000**

people working  
for Knight Frank

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## News

Naef Commercial Knight Frank is the result of a partnership between the Naef Real estate group, founded in 1881 in Geneva, with nine agencies in French-speaking Switzerland and Knight Frank, a real estate company, created in 1896 in the United Kingdom, with 750 offices and over 27'000 collaborators worldwide.

Naef Commercial Knight Frank possesses three competence centers in the cantons of Geneva, Vaud, and Neuchâtel, covering the whole of French-speaking Switzerland. Naef Commercial Knight Frank extends its network through Knight Frank's partners in German-speaking Switzerland and thus becomes a key player in the Swiss commercial and investment real estate market.



Our specialists provide our client with support and expertise in commercial and investment real estate.

More information on our website [naef-commercial.ch](http://naef-commercial.ch)

uspr<sup>+</sup> genève  
vaud  
neuchâtel-jura

cer<sup>+</sup>

SVIT  
ROMANDIE

Entreprise



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