

Pavel Sovička

Marbella

Rethinking

ESG



PANATTONI

70 offices in USA, UK, Europe,
Saudi Arabia and India

60 mil sqm
developed globally

40 years
of experience

25.6 mil sqm

developed
in Europe

1.9 mil sqm

under construction
in Europe

13.9 mil sqm

under asset
management in Europe

AHA! KVÍZOVÁ OTÁZKA





Energy

Timber Construction

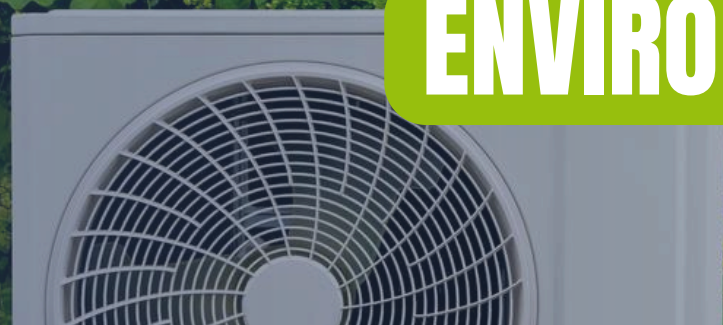
Net Zero

SUSTAINABLE

EFFICIENT | ENERGY

RESILIENT | FUTURE PROOF

ENVIRO FRIENDLY | NATURE & EMPLOYEES

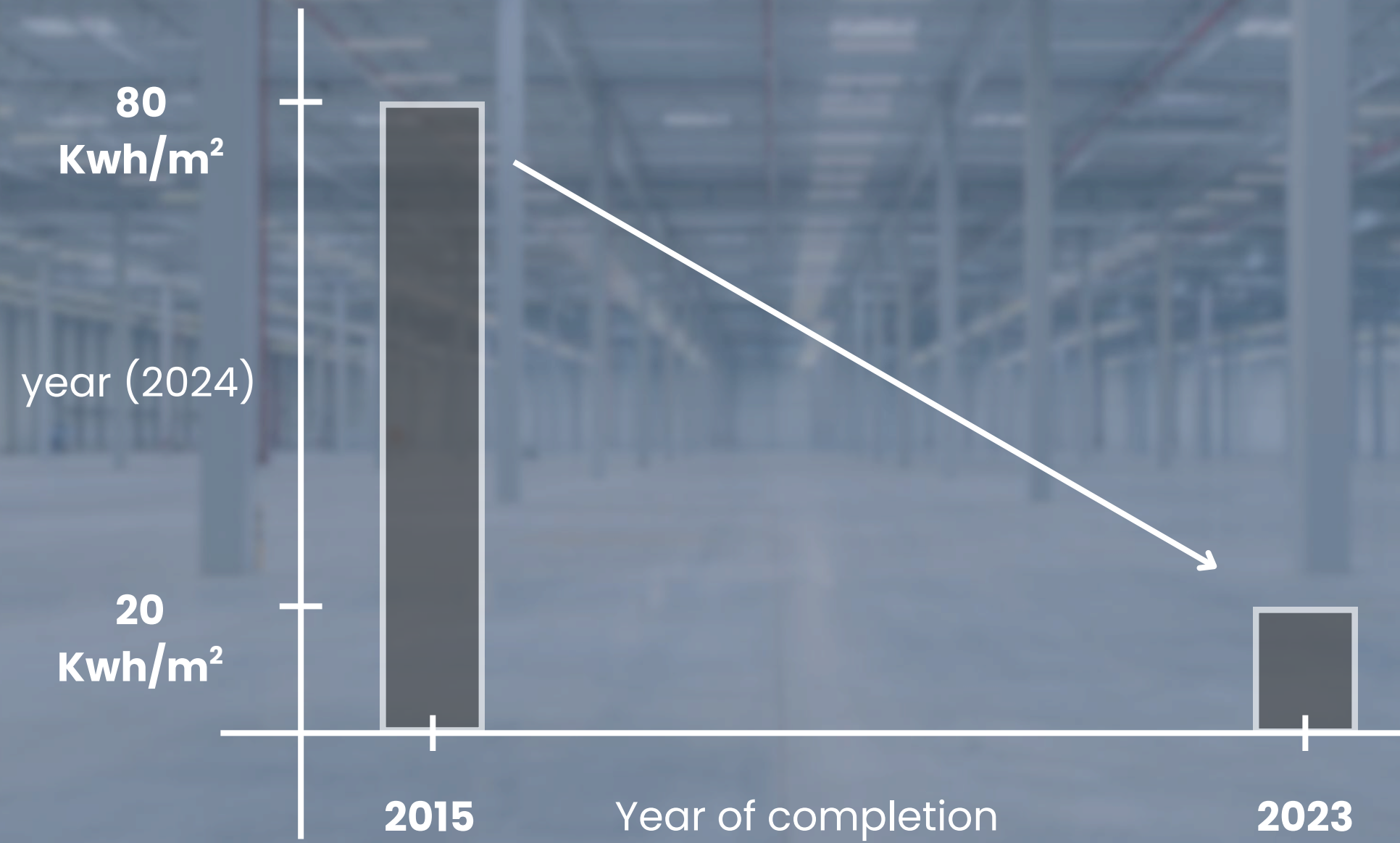




ENERGY

- kWh/m² per year as a new key metric to be monitored
- Significant improvement in building efficiency driven by **construction quality and materials**
- Further progress enabled by **PV systems and heat pumps**



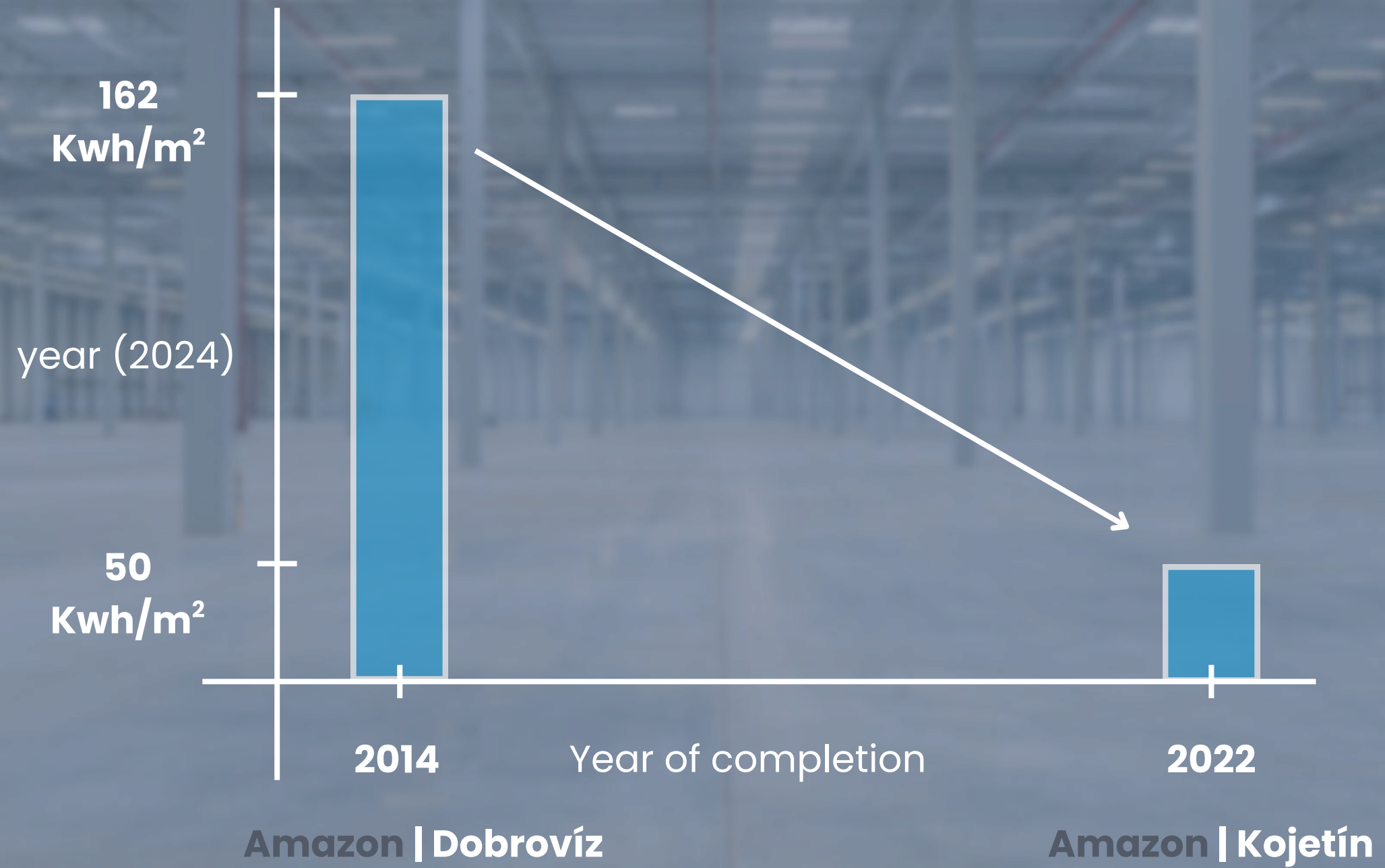




amazon

- Building form – compact
- Optimised building envelope
- Photovoltaics and heat pumps

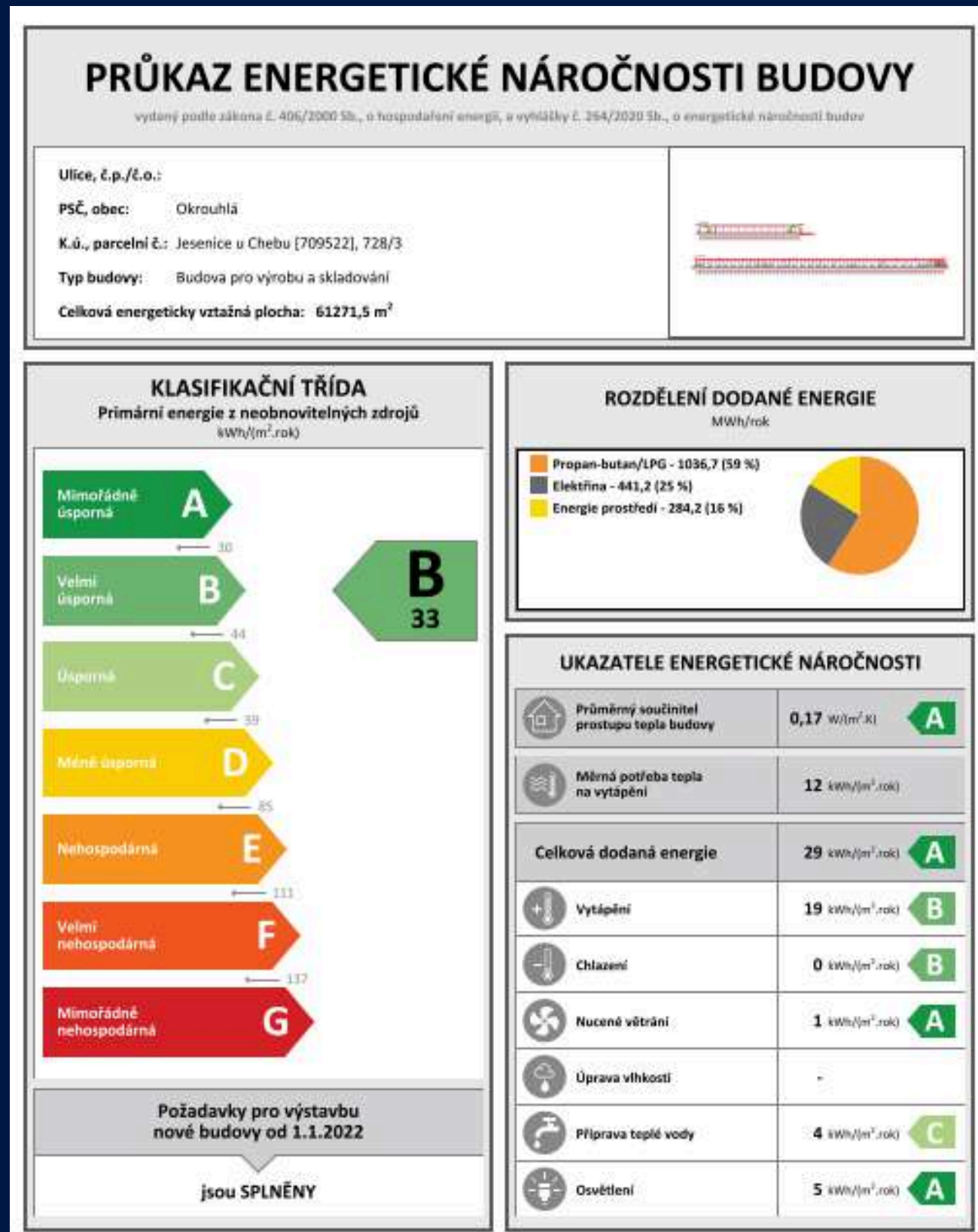






COST COMPARISON

Building	Year of completion	Energy (kWh/m ² year)	Electricity	Gas	Costs €/m ² month
Dobrovíz, 133 000 m ² fulfillment single-storey	2014	162,22	✓	✓	2,44
Cheb, 102 000 m ² storage/logistics	2016	89,32	✓	✓	1,24
Kojetín, 187 000 m ² fulfillment multi-storey	2022	50,08	✓	X	0,93
Cheb, 61 000 m ² storage/tires	2024	24,06	✓	X	0,38



PENB | EPC

The 2028 GWP will be included in the EPC.

- One of the financing requirements | **EU Taxonomy**
- kWh/m² per year < 20
= premium asset from a banking perspective
- kWh/m² per year as a **new key metric to be monitored**

AHA! KVÍZOVÁ OTÁZKA

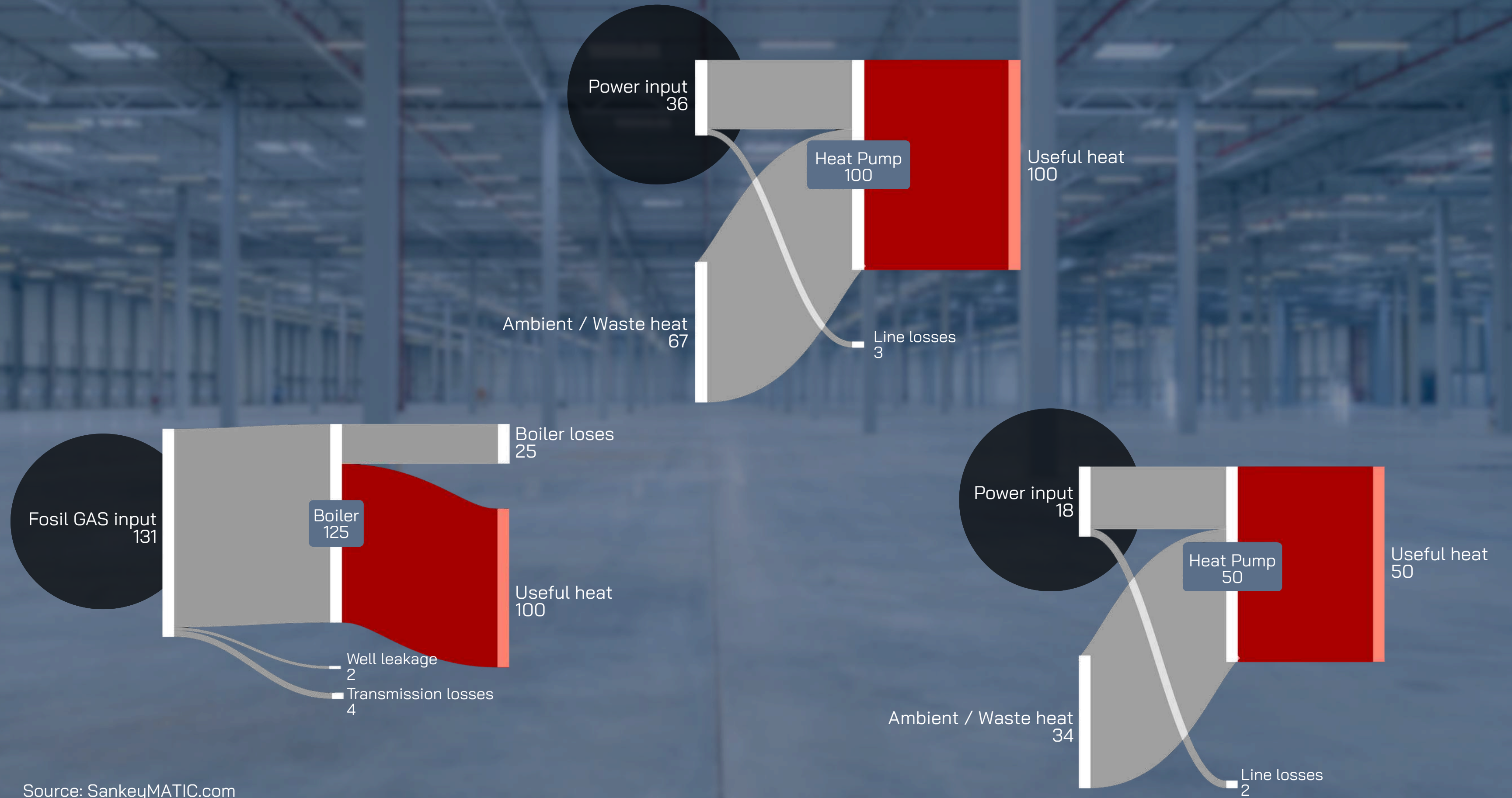




HEAT PUMPS

**SUSTAINABILITY
= EFFICIENCY
and ELECTRIFICATION**





Source: SankeyMATIC.com



MODELS & SIMULATIONS

BUILDING	Electricity consumption (kWh)	Heat consumption (kWh)	10-year costs (18,000 m ²)	10-year savings
Existing condition	1 788 351	1 055 556	327 765 827 CZK	–
Panattoni Model A	1 425 380	–	195 063 733 CZK	132 702 094 CZK
Panattoni Model B	1 416 700	236 250	212 458 820 CZK	115 307 007 CZK
Panattoni Model C	1 754 414	–	240 091 512 CZK	87 674 315 CZK

rent + 0.35 EUR /
sqm month

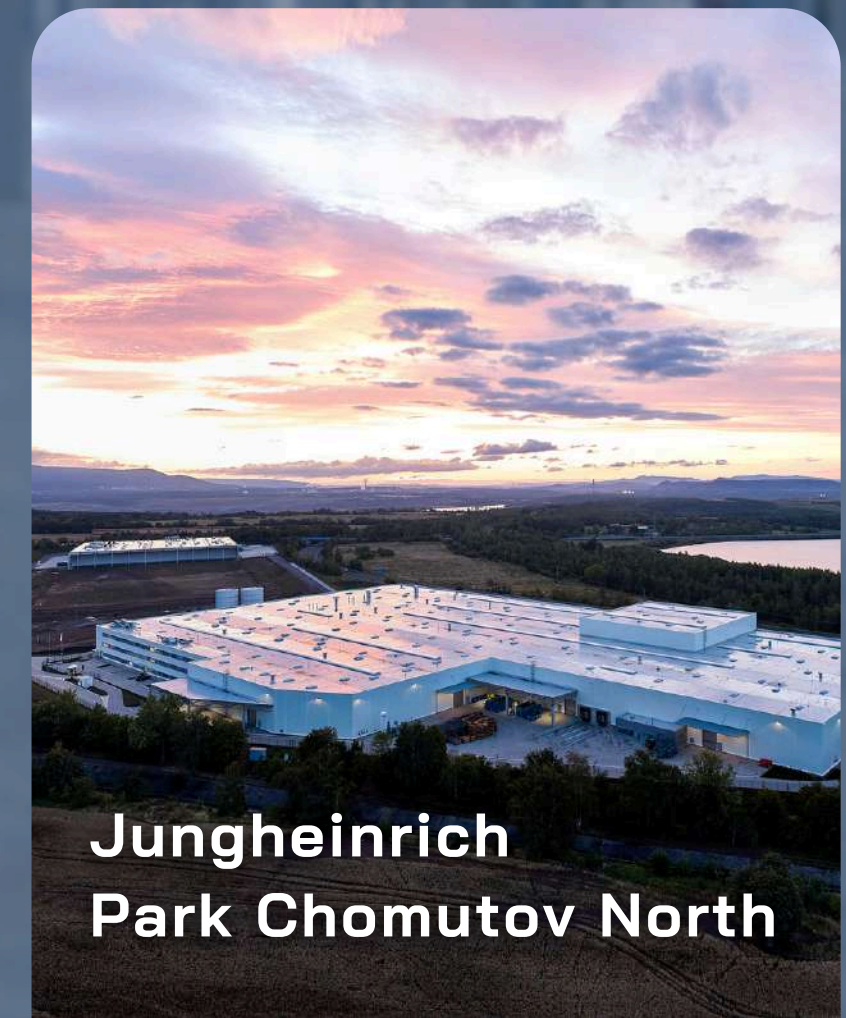


MANUFACTURING PROCESSES



**Hanon Systems
Park Kladno South**

- Design complexity is key to customer satisfaction
- HVAC, BMS & lighting
- Industrial electrification
- Flexible design supporting future growth and changing customer needs



**Jungheinrich
Park Chomutov North**



PHOTOVOLTAICS UNLOCKED

- PV legislation unlocked
- 3+ years of advocacy
- Legal certainty achieved
- Ground-mounted PV allowed
- Future-ready energy



TIMBER TRUSSES

First approval in the Czech Republic for large-scale industrial properties – November 2024, Pilsen Region

FIRE SAFETY APPROVED

LOWER CARBON FOOTPRINT

LIGHTWEIGHT STRUCTURE

Example of a sprinkler-free structure, Germany 2025, Prix



NEXT STEPS

WE ARE LEADING THE CHANGE OF THE FIRE SAFETY STANDARD
CSN 73 0802 FOR LOGISTICS AND INDUSTRIAL HALLS.



UNIVERZITNÍ
CENTRUM
ENERGETICKY
EFEKTIVNÍCH BUDOV
ČVUT V PRAZE



ČESKÁ
AGENTURA PRO
STANDARDIZACI

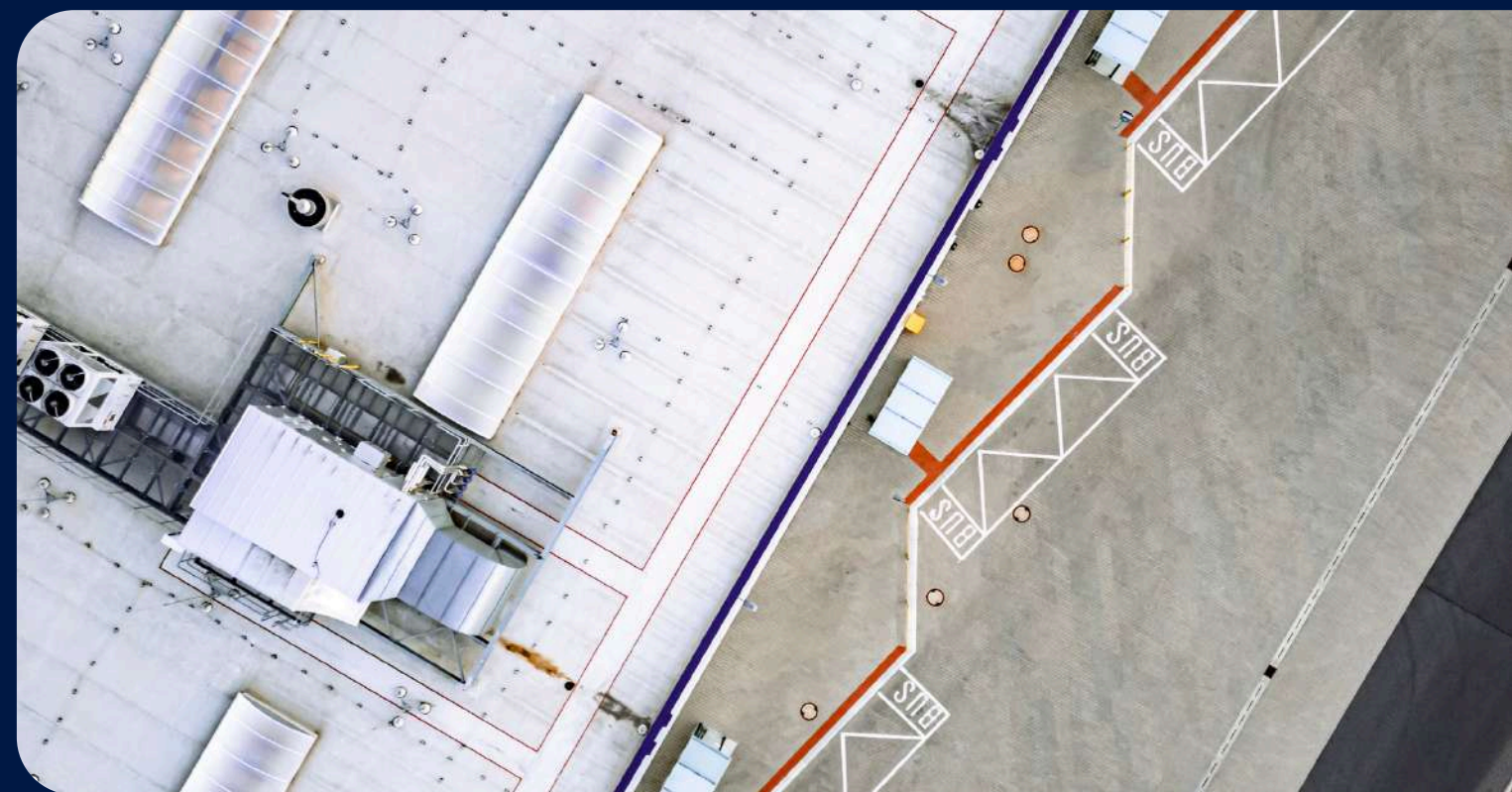


PANATTONI





EMBODIED CARBON



UNIVERZITNÍ
CENTRUM
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ČVUT V PRAZE



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PANATTONI



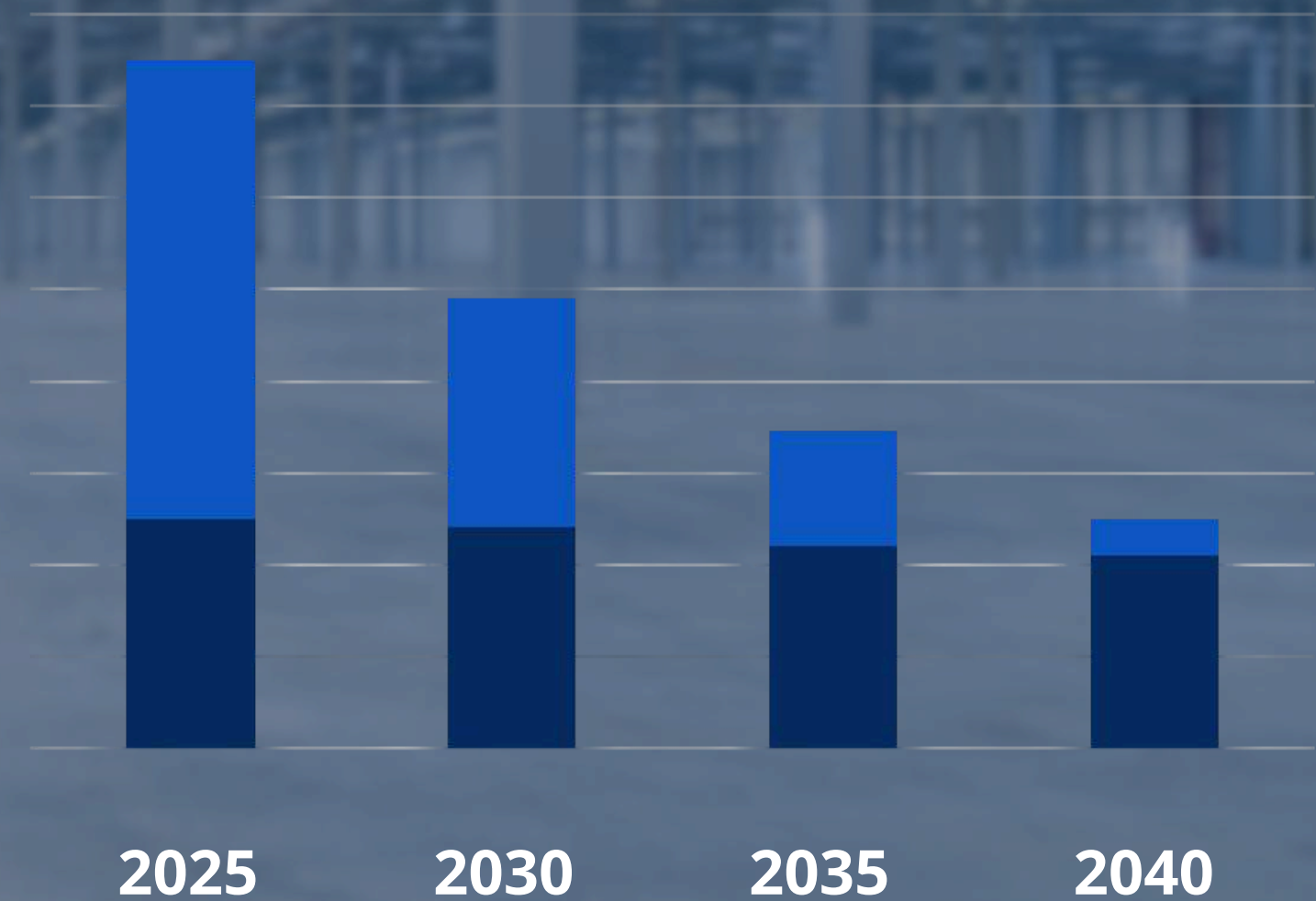


The relationship between reducing operational and embodied carbon

In 2020, building life-cycle emissions in the EU accounted for **over 40% of total greenhouse gas emissions.**

Embedded carbon represented more than 20% of building life-cycle emissions.

■ Embodied carbon ■ Operational carbon





EMBODIED CARBON

Cross-country comparison and Panattoni data analysis

CZE	SWE	UK	FRA
Average in Category A1-A5 kg CO2e/m ²			
390	212	335	341

Panattoni Nordic Strategy

SWE	Base Year 2023	Target 2025	Target 2035
A1-A5 kg CO2e/m ²	305	168	31



EMBODIED CARBON

Projekt Mölnlycke SWE 2025.

SWE	Tender	Final result	Price
A1-A5 kg CO2e/m ²	247	159	< 1 %

Projekt Panattoni Buisness Park Ostrov North ZF

SWE	Tender	Final result	Price
A1-A5 kg CO2e/m ²	non-specification	293	without improvement



NEW STANDARD BREEAM[®] v6 vs v7

- A downward shift of the certification level by 1 grade (e.g. Excellent v6 ≈ Good–Very Good v7)
- Stronger alignment with the EU Taxonomy
- Mandatory studies – e.g. Zero Carbon Plan
- Detailed energy management
- Ban on the use of fossil fuels in building operation (Outstanding level)
- Increase in requirements for electric vehicle charging infrastructure



REDEFINING INDUSTRIAL NET ZERO

PANATTONI BUSINESS PARK
OSTROV NORTH | ZF





NOT YOUR ORDINARY GREEN PROJECT

- First industrial building in the Czech Republic aligned with UK Net Zero principles
- 100% compensation of embodied carbon directly in Czech forests through a certified program
- Zero operational emissions, no fossil fuels

PANATTONI



21



RECOGNISED BY AUTHORITIES

- **Circular construction on brownfield land**
- **98% construction waste recycled on-site**
- **BREEAM Outstanding**
- **Recognised by the Czech Ministry of Environment**



- Forest area: **16,556 ha** (60 km from Prague)
- **29,765 t CO₂** additionally sequestered per year
- **ISO 14064-2** certified & TÜV Austria

PINA EARTH

**leading developer for
European climate projects**





- Strengthening forest resilience and **species diversity**
- Nearly **900,000 trees** planted using climate-resilient species
- Active forest management across **450+ ha**
- **Biodiversity support:** habitat trees, wetlands, bird nesting
- **Education** and long-term stewardship of forest ecosystems

COLLOREDO -MANNSFELD

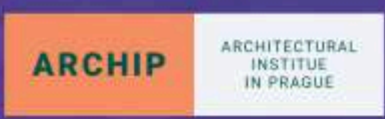
local partner



Colloredo - Mannsfeld

RETHINKING LOGISTICS

STRATEGIES FOR REGENERATIVE
ARCHITECTURE AND URBAN
COMMUNITIES



AHA! KVÍZOVÁ OTÁZKA





PANATTONI SPACES

REFERENCE PROJECTS

JIŘÍ ZITA

Commercial Director

jzita@panattoni.com



BOMBARDIER

Bombardier

BTO

- Construction management of 2 building within existing site of the client
- full ownership of the client
- welding of train bodies
- paintshop





DSV

Prague Airport II

BTS

- Relocation of DSV Czech HQ
- standard warehouse + crossdock
+ large offices
- long term lease
- open book structure with profit sharing





BALL

Pilsen Digital

BTO

- land with permits, prepared by Panattoni
- construction into the ownership of the client
- land for expansion





AMAZON

Kojetín

BTS

- Full implementation of Amazon blueprints
- full open book (incl. GC/subcontractors)
- long term lease





HANON

Ostrov South

BTS

sale-lease back

- Sale and lease back with expansion
- BREEAM certification on new and old part



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MAERSK

Teplice South

BTL

- Leasehold
- multitenant building
- storage of Lilon batteirs
- unique fire safety solution





SHAPE CORP.

Pilsen West II

BTS

- Relocation of existing production facility
- long rent free on part of the premisses
- Shape delivered part of ASTI themselves but we financed it
- rentalization





WACKER

Karlovy Vary

BTS

- Production of silicone
- 3 level 22,5m high tower for Wackers's technology





HAVI

Kladno I

BTS

- brownfield site - former Poldi Kladno
- cooled and frozen warehouse
- tender of cooling equipment done by client





ZF

Ostrov North

BTS

- First net-zero industrial building in the Czech Republic
- BREAM Outstanding
- Heat pumps
- Expansion
- Technology financing

 PANATTONI



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References

BTS by Panattoni

Pre-permitted offer

 PANATTONI 
CZECHIA & SLOVAKIA

BTS BY PANATTONI

BEYOND THE STANDARD



PANATTONI BTS

Dedicated division within Panattoni's structure

We are formally introducing the specialised BTS division to the Czech market.

What BTS means:

DEDICATED ENGINEERING TEAMS

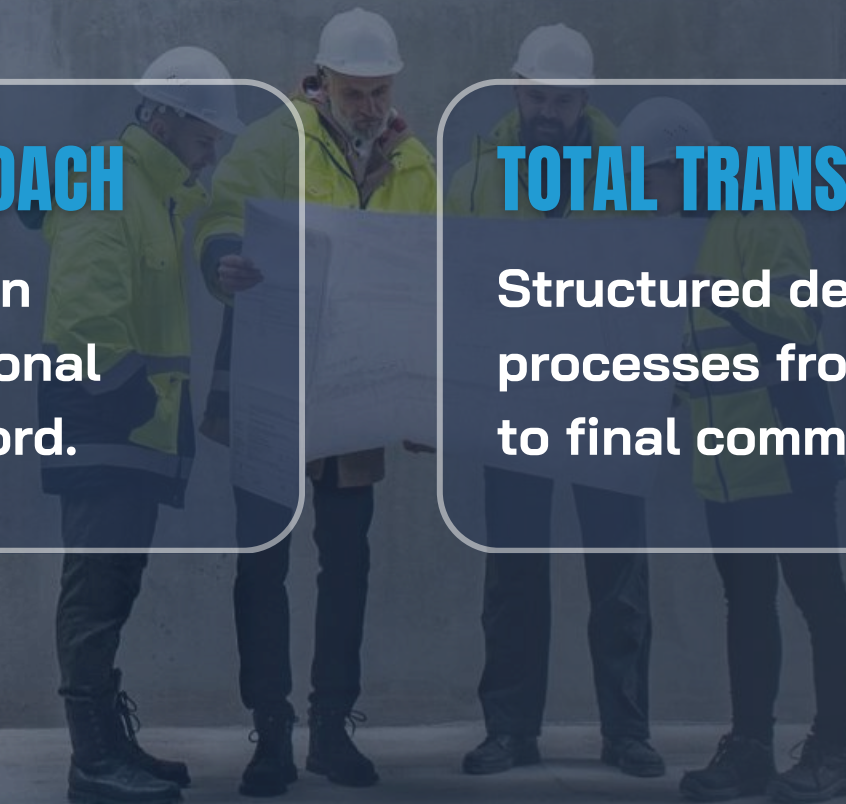
Specialists focused purely on technical specifications and production requirements.

CONSULTATIVE APPROACH

We act as an extension of the client's operational team, not just a landlord.

TOTAL TRANSPARENCY

Structured development processes from land acquisition to final commissioning.





NOT AN ORDINARY LANDLORD

19 years

of experience
in the Czech Republic

83%

BTS projects
in the Czech Republic

+2.3 mil

sqm developed
in the Czech Republic

43%

production projects
in the Czech Republic





COOPERATION

01

LONG-TERM LEASE

- Standard institutional triple net Lease Agreement (10-20 years)
- Investment site owned or acquired by the Landlord
- Development funded by the Landlord
- Additional opportunities: rent free period, cash incentives

02

BUILD-TO-OWN

- Investment site owned or acquired by Client
- Comprehensive customer service in terms of design and construction
- Overall Project Management
- Development funded by the Client
- Optimization of the Client's technical specification, Value Engineering of design

03

PROJECT MANAGEMENT

- Due Diligence
- Project planning
- Conceptual pre-design
- Permitting: complex Building Permit design process
- Author's supervision
- Tender Management
- Project and Cost Management
- Technical Site supervision

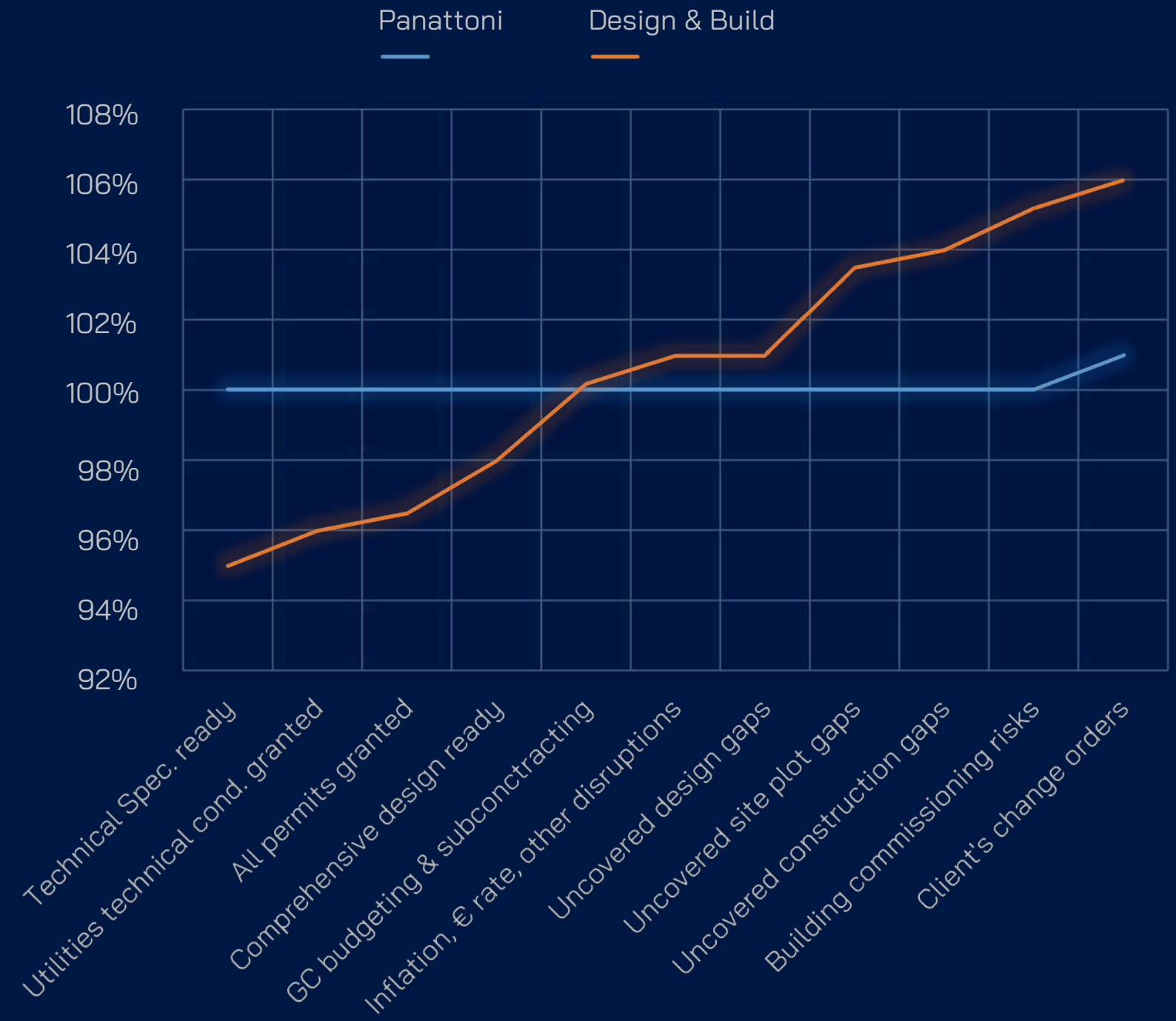




PROJECT VALUE GUARANTEE

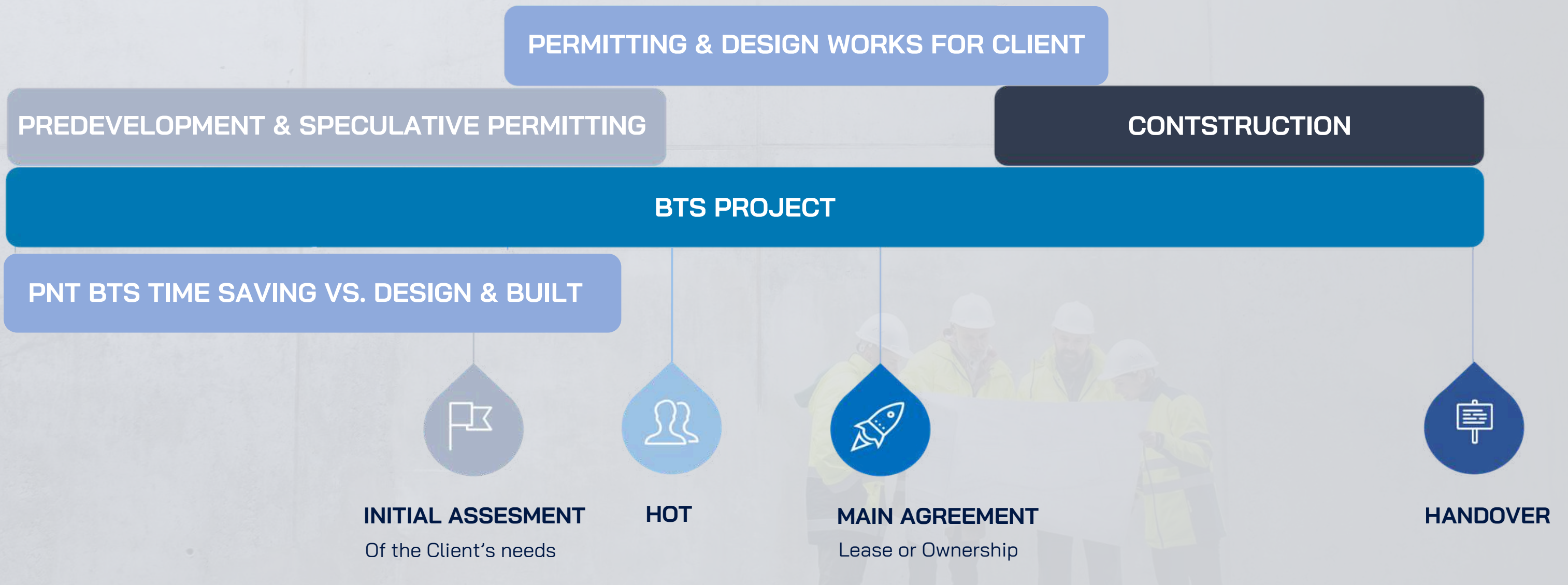
Design & Build
VS
Panattoni BTS

PROJECT VALUE





TIME EFFICIENCY | BTS





TECHNICAL SOLUTION



AHA! KVÍZOVÁ OTÁZKA





BTS TEAM

19 years



Pavel Sovička
Managing Director Panattoni CZ&SK

19 years



Jan Andrejco
Regional Development Director

10 years



Matěj Hejma
Regional Development Director

12 years



Jiří Zita
Commercial Director

7 years



Vladimír Kosek
Acquisition Director

12 years



Vladimír Toman
Project Director

11 years



Jan Zíka
Project Director

4 years



Pavel Fojtík
Regional Sustainability Manager

6 years




Vladimír Müller
Business Development Manager

4 years




Lukáš Svobodník
Business Development Manager

11 years



Petra Fránková
Business Development Manager

1 year



Patrik Gamper
Commercial Manager



OUR PARTNERS

HARDEN

BLUE ASSETS

NEWPORT

Designers

Engineers

Fire Design Specialists

General Contractors

Individual Suppliers

Capital Partners

Banks

Financial Leasing





WHY PANATTONI BTS



01

EXPERIENCE

We have already built the most complex projects in the region.

02

SPEED

Our permitted land bank solves the "timing" hurdle.

03

ESG LEADERSHIP

We deliver the highest certifications (BREEAM Outstanding) as standard.

04

STRATEGIC PARTNERSHIP

We engineer for your bottom line, focusing on long-term OPEX and operational uptime.



BTS FLEXIBLE

**67 000 sqm
available**

D4 Příbram

BTL, BTS, BTO

**79 000 sqm
available**

Business Park Kladno

BTL, BTS, BTO

**40 000 sqm
available**

Pilsen West III

BTL, BTS, BTO



BTS FLEXIBLE

**142 800 sqm
available**

Most Joseph

BTL, BTS, BTO

**132 000 sqm
available**

Ostrava Airport

BTL, BTS, BTO

**320 200 sqm
available**

Smart Park Karviná

BTL, BTS, BTO



MARGARÉTA PETRIKOVIČOVÁ

Business Development Director Parks & SBU

mapetrikovicova@panattoni.com



WHO DO WE COOPERATE WITH?

only and exclusively with

 **Accolade**





WHO DO WE COOPERATE WITH?

~~only and exclusively with~~



Accolade



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RSJ

Chomutov North

available now

Last unit | 4 360 sqm

Business Park Kladno

BTL, BTS, BTO

BTL: 10–12 months
from signing FLA

Business Park Kladno II

BTL, BTS, BTO

BTL: Q1/2028

Most Joseph

BTL, BTS, BTO

up to 15,5 m

46 080 sqm
with BP in place

Q4 2026 | 107 000 sqm
with BP + 46 000 sqm
potential expansion

AHA! KVÍZOVÁ OTÁZKA





WOOD & CO.

up to
39 500 sqm

Cheb South

BTL, BTS, BTO

**BTL: 10–12 months from
signing FLA**



J&T

**from 4 000 sqm
up to 29 000 sqm**

D4 Příbram

BTL, BTS, BTO

**BTL: Q3/2027
4 buildings**



AEW

**6 000 sqm
available now**

Prague Airport II | Hall Q3

EXISTING

**1 600 sqm available
from Q1/2027**



LET'S MAKE SOME DEALS TOGETHER

LEASING FEE

Find a new tenant!

21.1 mil €

Thank you
for your attention