

**airLED: Local economic
development in airport
catchment areas,** Bologna 13. February 2014



Real estate for people
Andreas Sander, Architect - Munich Airport



Munich Airport today ... [figures 2012]

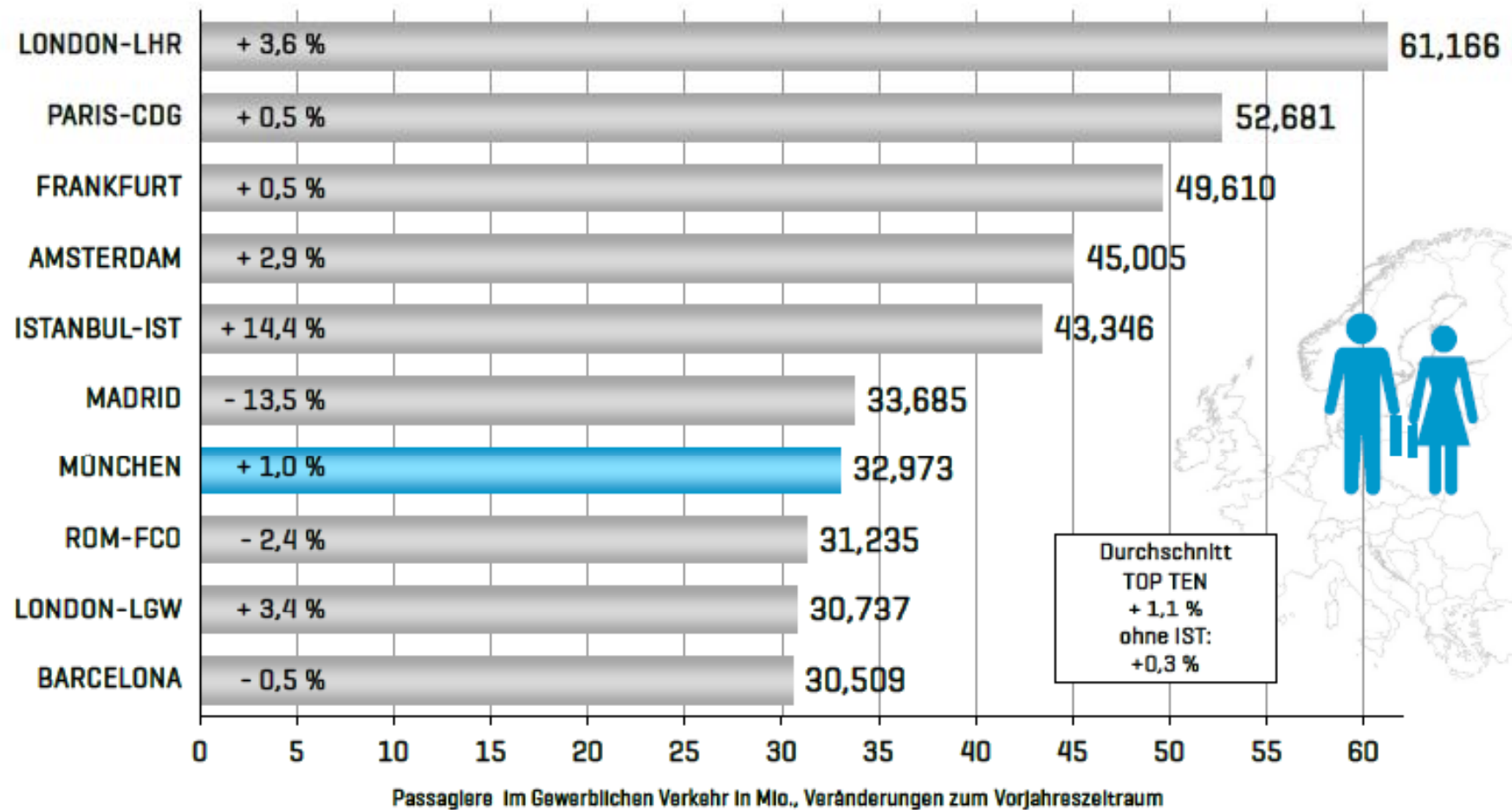


- Opened (at the present location): 1992
- Area: 1.600 ha
- 240 domestic and international destinations, served by 100 airlines
- 38,40 Mio. Passengers (+1,6%)
- 400.000 Aircraft Movements (-2,9%)
- Employees (Munich Airport Company): ca. 7.500
Employees (Airport overall): ca. 30.000
- Turnover: ca. 1.2 Mrd. €, EAT: 95 Mio. €
- Shareholder:
State of Bavaria (51 %)
Federal Republic of Germany (26 %)
City of Munich (23 %)

Top-Ten-Flughäfen Europas im Vergleich Januar – November 2013



- Nummer 7 in Europa im Bezug auf das Passagieraufkommen



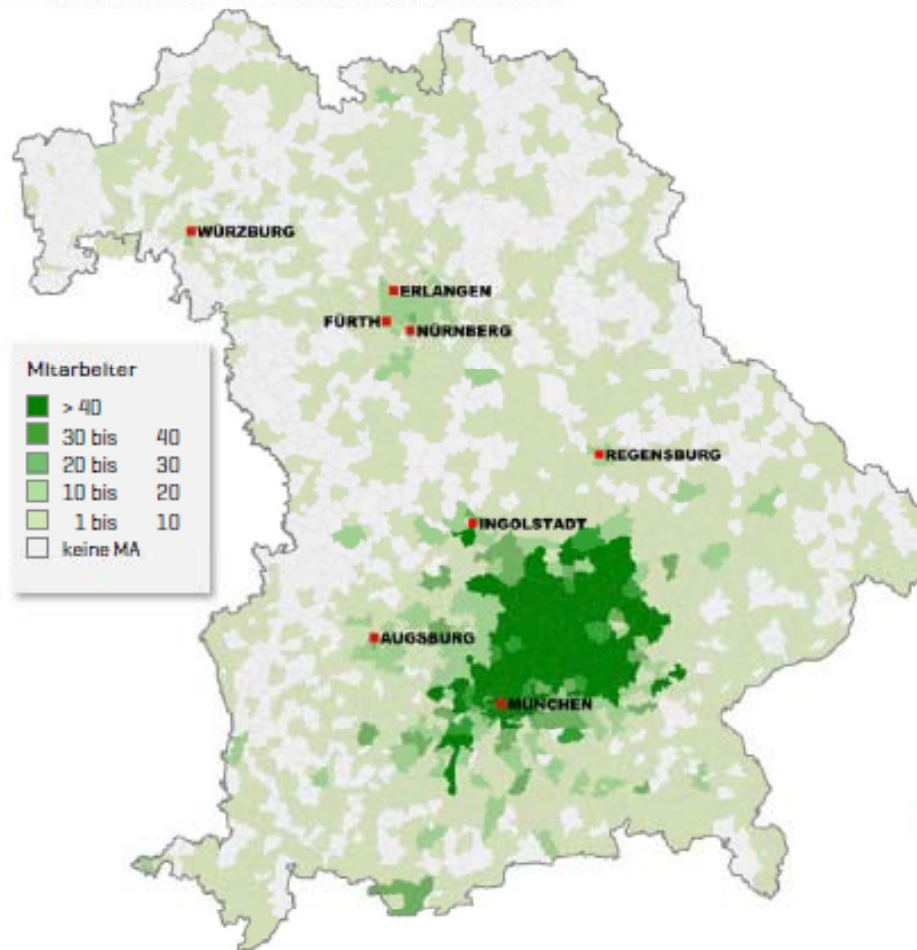
Verkehrsentwicklung Jahr 2013



Flughafen München – Jobmotor für ganz Bayern



• Wohnorte der Mitarbeiter



		Anteil 2012	Veränderung zu 2009
Landkreis Freising	7.050	22%	1,2 PP.
Stadt München	6.800	21%	1,5 PP.
Landkreis Erding	5.160	16%	-0,2 PP.
Stadt u. Landkreis Landshut	3.220	10%	0,0 PP.
Landkreis München	1.810	6%	0,3 PP.
übriges Oberbayern	3.980	12%	0,2 PP.
übriges Niederbayern	780	2%	-0,2 PP.
andere Wohnorte	3.450	11%	-2,8 PP.

Datenbasis Karte: Wohnorte der Mitarbeiter; Postleitzahlgebiete





Characteristics of Munich Airport



One of the key factors of success of Munich Airport is its attractiveness. In 2012, the Skytrax Award for best Central European Airport was presented to Munich Airport.

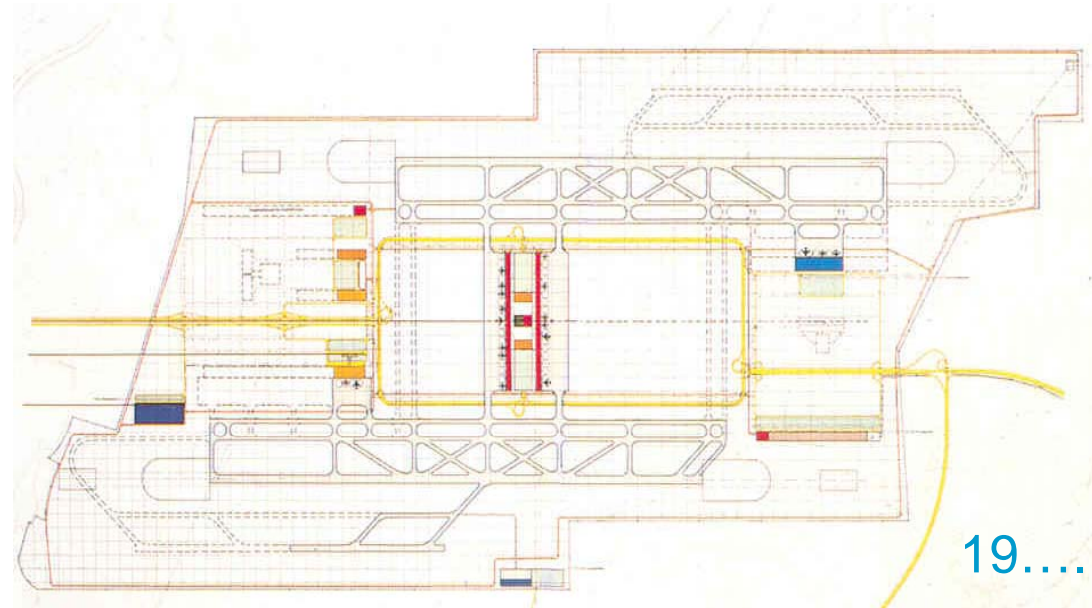
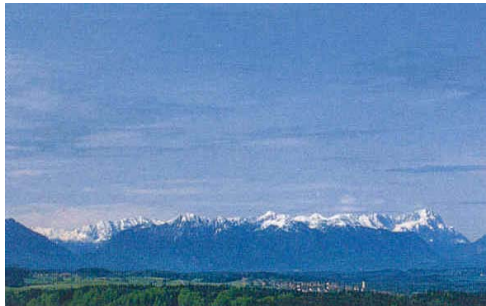
On a global basis, Munich Airport claims the 6th position in the world and is therefore listed among the most attractive hub airports.

In addition, Munich Airport is characterised by clear structures and processes and a “feel-fine factor”.



First concept

A white airport surrounded by green nature



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Addition to capacity – Projected



- New Satellite Terminal 2



- 3rd Runway



- Airport City Development

Running Projects



New Satellite Terminal 2 (construction work started)

- Ready für Operation: 2015
- Capacity: 11 Mio. Passengers (first step)
- 123.000 m²
- Terminal a/c-Positions: 27; Gates 52
- 9.000 m² Retail // Food&Beverage
- Interlinking PTS Terminal 2/Satellite
- Investment 653 Mio. €



New Satellite Terminal 2

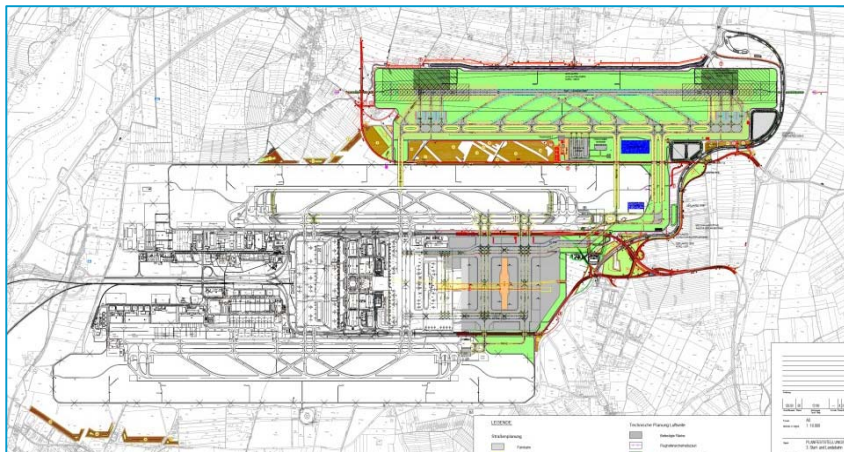


Running Projects



3rd Runway

- Planning work has been finished
- Court procedere will be finished 2013
- Political decision expected in 2014/2015
- Ready für Operation: 2019
- Investment: 1.2 Mrd. €



Running Projects



Airport City Development

- New Airport Kindergarden has been finished 2013
- Hotel Kempinski – An annex with 160 new rooms will be built onto the adjacent Kempinski Hotel
- The airtsite West development started in 2013. The masterplan idea is finished jet. First layout drawings and the business case are in discussion with the board



Airport Kindergarden



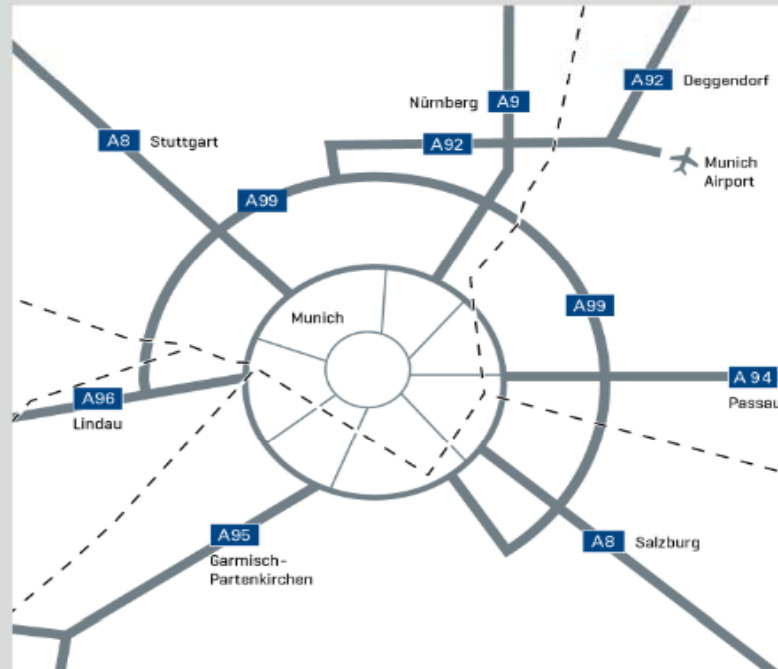
Hotel Kempinski





/ LOCATION AND REACHABILITY

Munich Airport occupies a central position on the European map: Whether Northern, Eastern, Southern or Western Europe – almost all European capitals can be reached directly in a matter of hours from Munich. With a ratio of transit passengers of almost 40 percent, Munich Airport has developed into a major international hub.



- Munich Airport is located some 30 kilometres north-east of Munich in the Erdinger Moos region, in the direct vicinity of Freising. It is about a 30-minute drive from Munich on the A92 motorway in the direction of Munich-Deggendorf.
- The suburban trains S1 and S8 run to Munich Airport every 20 minutes. The airport can be reached in 45 minutes from the central train station and in half an hour from the Ostbahnhof station (with the S8).
- In 2012, 101 airlines regularly flew to 242 destinations in 68 countries: 20 in Germany, 113 in the EU, 41 in Europe (non-EU), 26 in Asia, 25 in North and South America and 17 in Africa.
- London Heathrow and Paris Charles de Gaulle were the most frequented connections from and to Munich in 2012, each with more than a million passengers, followed by Amsterdam, Barcelona, Madrid and Istanbul, each with more than 600,000 passengers.
- In intercontinental traffic, the most frequented connection in 2012 was Dubai with 623,000 passengers, followed by New York/Newark, Chicago/Ohare and Tokyo/Narita, each with over 300,000 passengers.



The European metropolitan region of Munich, which includes not only the vibrant capital of Bavaria, but also the entire district of Upper Bavaria and a number of rural districts in Swabia and Lower Bavaria, numbers around 5.6 million inhabitants. They generate a GDP of €211.8 billion and have an average spending power of €24,161.

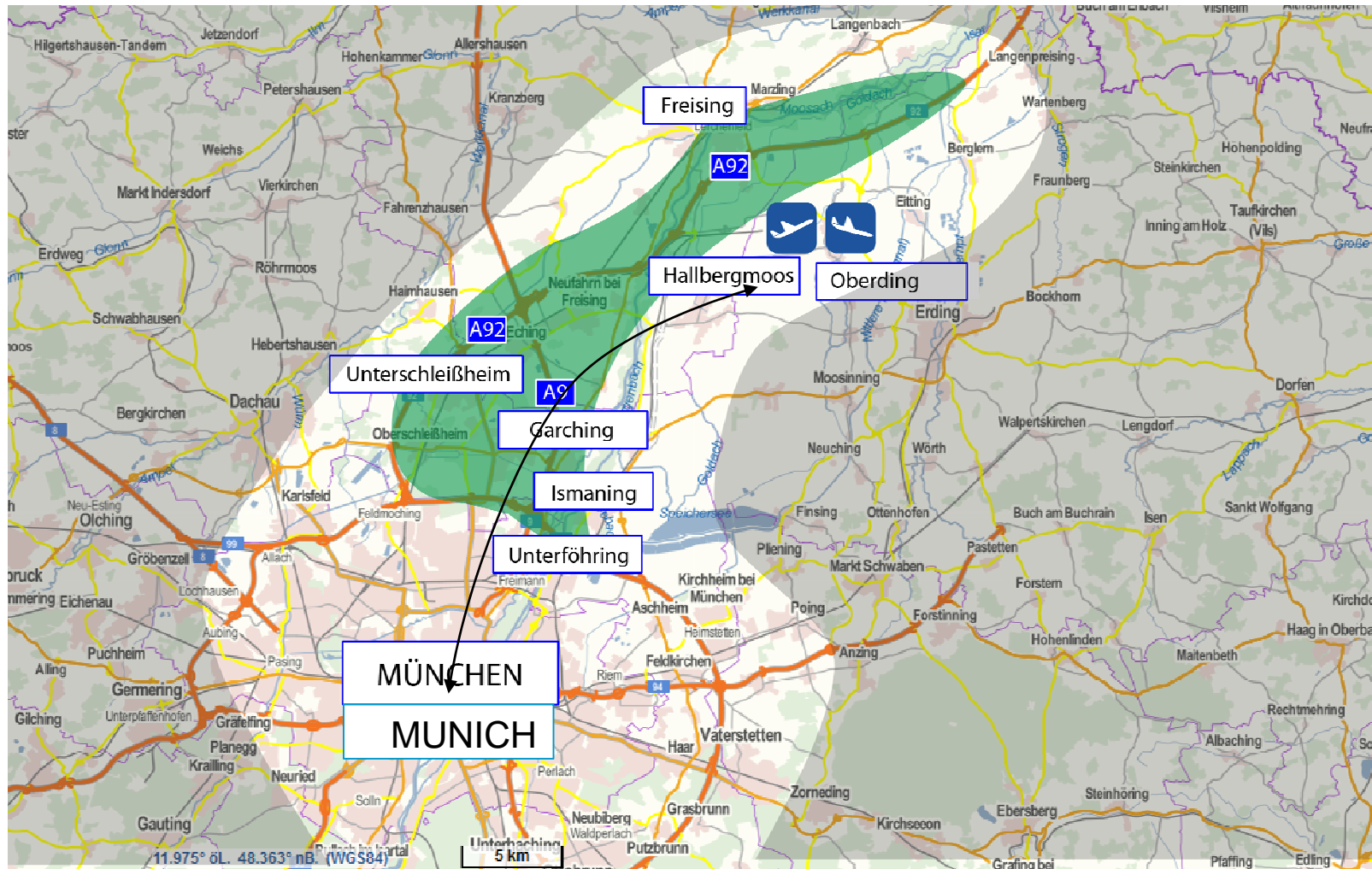
With its exceptional dynamism, the metropolitan region is one of Europe's leading economic areas – and home to six DAX 30 companies. The core competence of this region lies in the concentration of knowledge at a leading European level, a very broad technological base with a diverse range

of future-oriented industries, and the very highest quality of life in a delightful countryside.

The metropolitan region of Munich also offers an excellently developed infrastructure ensuring ideal links to international markets. Apart from a well-developed rail and road network, Munich Airport is a key component of the metropolitan region's suprarregional transport network and of exceptional importance to the Bavarian economy. As a result, a large number of companies have set up at or in the direct vicinity of the airport and enabled clusters to be created in numerous industries.

Munich real estate market

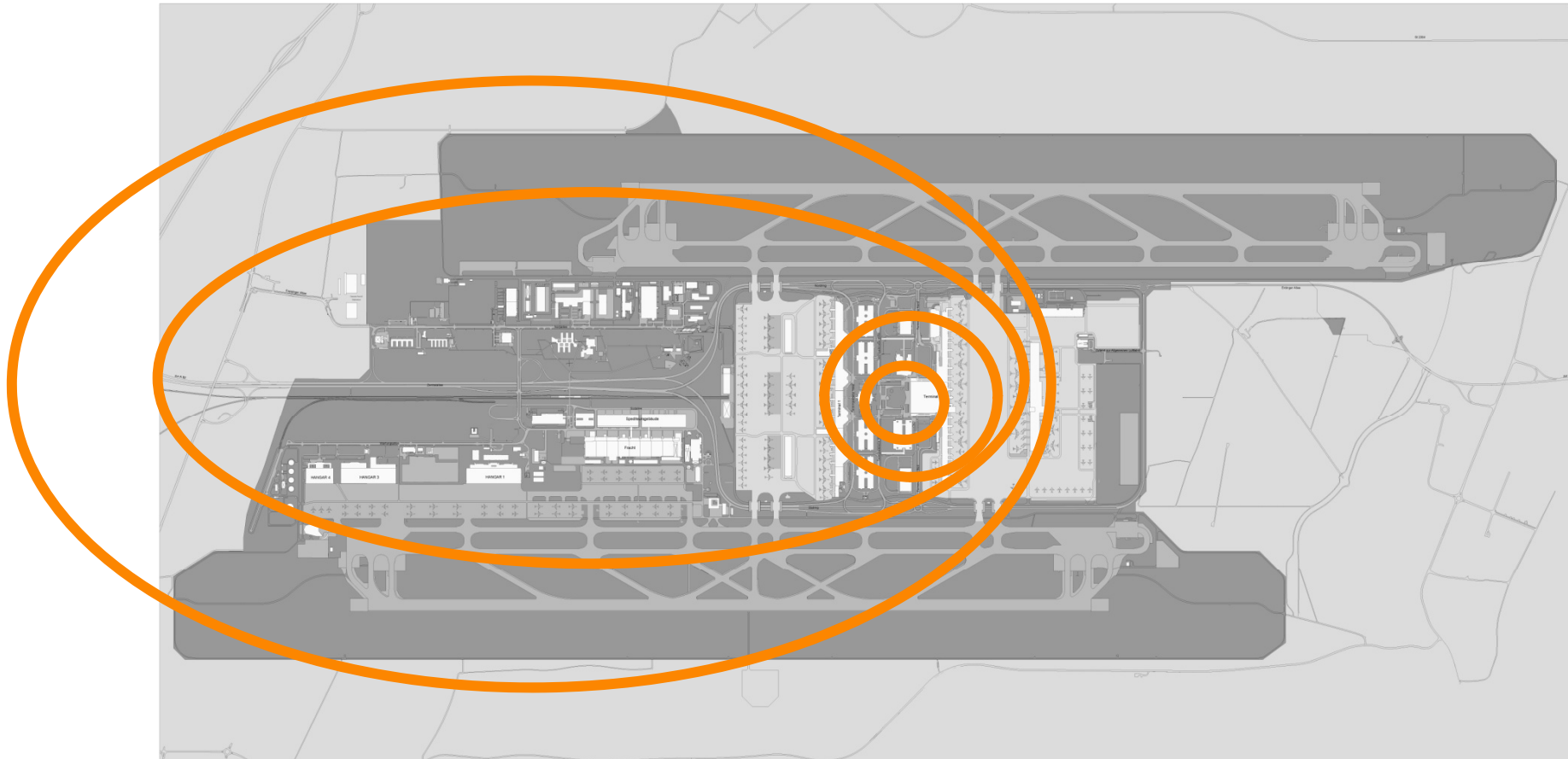
Growth axis of the metropolitan region in the north-east direction



Airport City Development



Airport City development – within phased periods



Development from the inner to the outer area of the Airport City



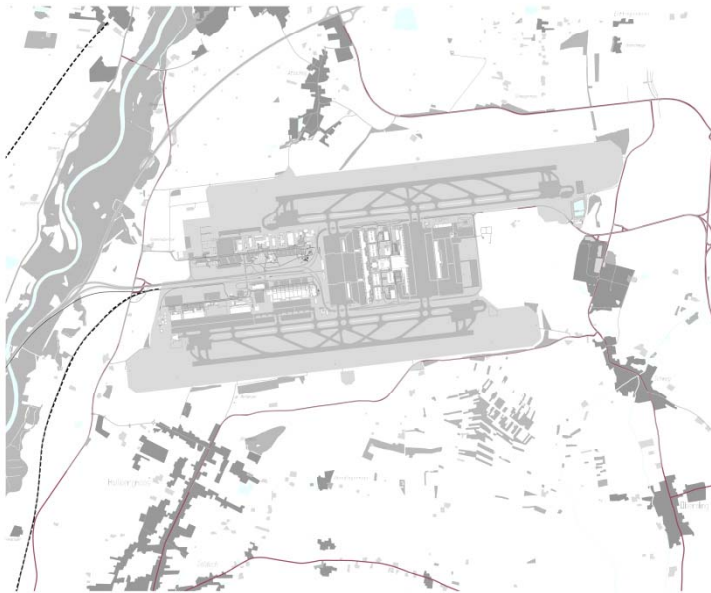
Product categories + development areas

Creation of diverse product categories

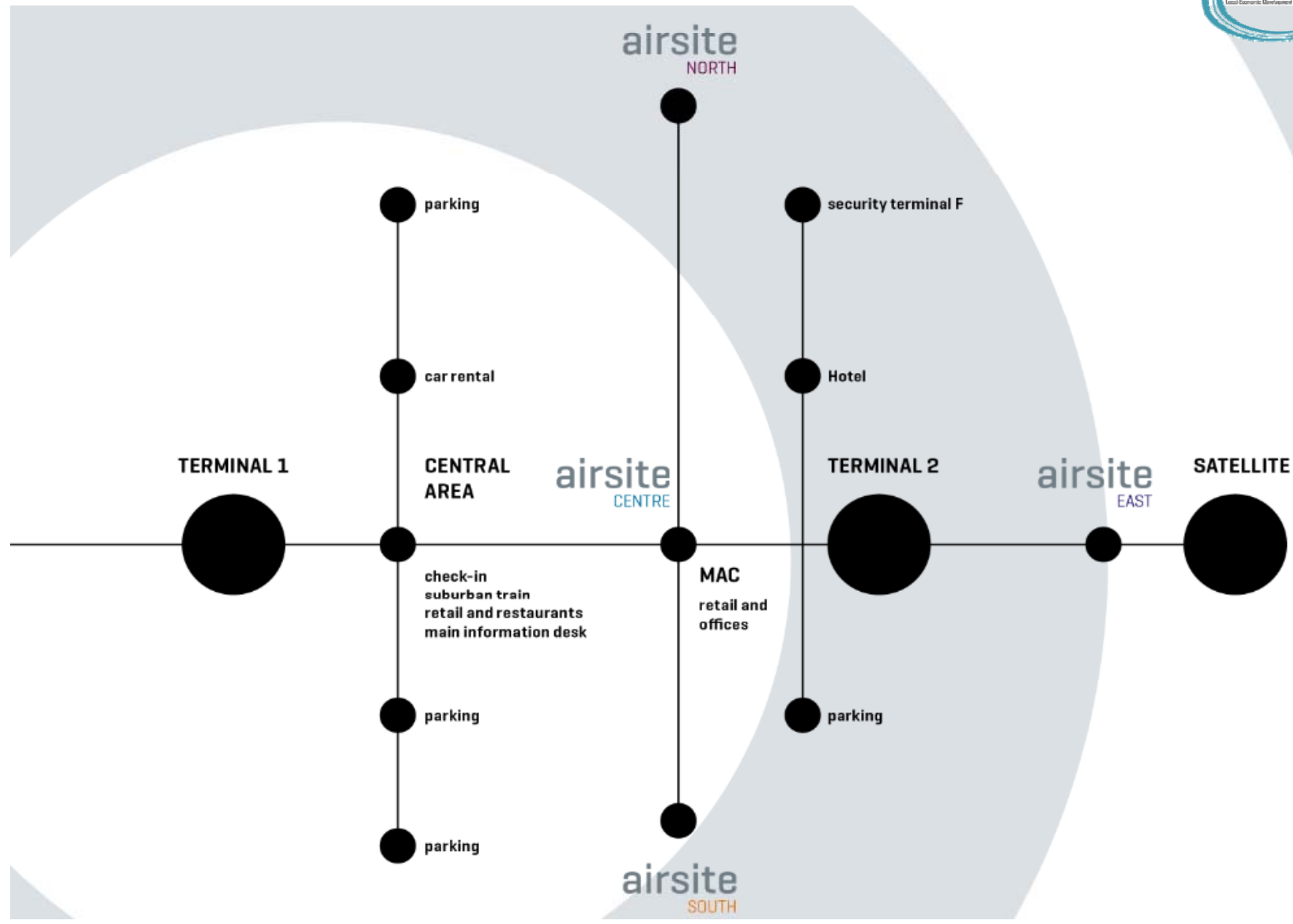


The area of Munich Airport has a size of 15,7 km² with about 6,3 km² (40%) developed. The campus area is subdivided into five product categories and operationally necessary airport areas.

By their specific location the different product categories feature quite distinctive attractiveness for the market and therefore generate adequate rental price levels.



1. Premium Location
2. high strategical importance
3. strategical importance/3+
4. average strategical importance
5. operationally necessary airport areas

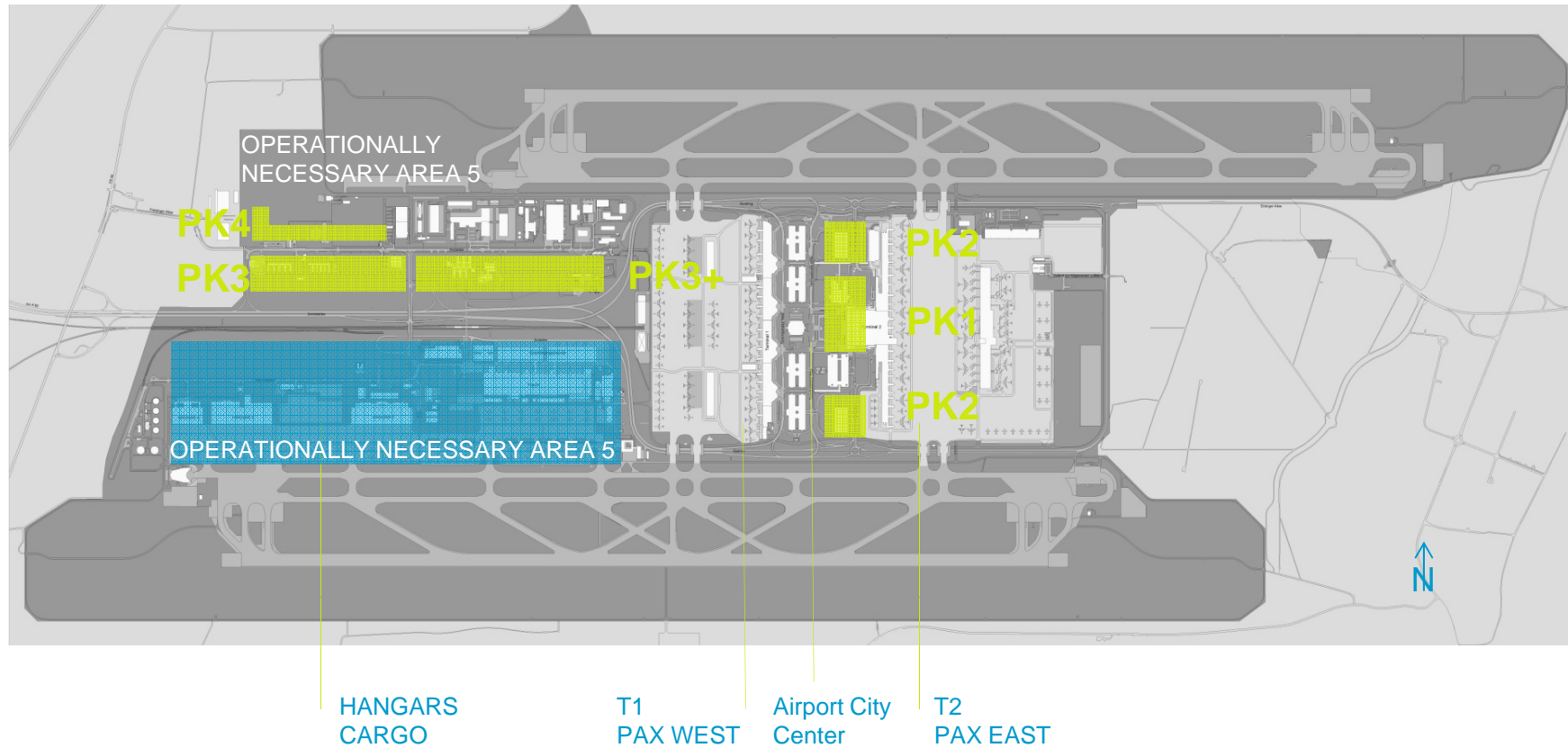


Development areas at Munich Airport



ADMIN./CATERING
MAINTENANCE

SATELLITE









1 Extension to Terminal 1

- Conversion and extension by an additional 16,000 m²
- Anticipated investment: €160 million
- Construction to begin in 2016

2 Extension to the Airport Hotel

- Extension offering 160 rooms
- Investment: approx. €36 million
- Construction to begin in 2015

3 Munich Airport Centre (existing property)

- 21,000 m² of flexible rental units with state-of-the-art office space
- Municon Conference Centre with 40 conference rooms, lounges and hospitality



4 Future development areas



5 Development area for air traffic – Terminal 2 satellite

- 52 new gates for up to 11 million passengers p.a., 27 aircraft parking positions
- 125,800 m² gross floor space, including shopping and hospitality zones
- Underground passenger transport system to Terminal 2
- Investment: approx. €650 million
- Completion in 2015



6 Office location with operational and administrative services

- Project development between Terminal 1 and 2
- Direct access to the gates possible
- Approx. 55,000 m² of gross floor space for office and conference rooms



7 Development potential for a new Business Quarter with an area of more than 50 hectares

- Focus: Offices, logistics, hospitality, entertainment and service
- Expansion of hotel capacities

8 Crèche at the Besucherpark (Visitors' Park)

- Commissioning in 2013

9 Planned BMW airport service

- Expansion of the service centre
- Construction planned in 2014

10 Planned Node West

- Direct access to the airtsite West
- Planned as of 2015

11 Planned Parking Centre West

- Planned as of 2015

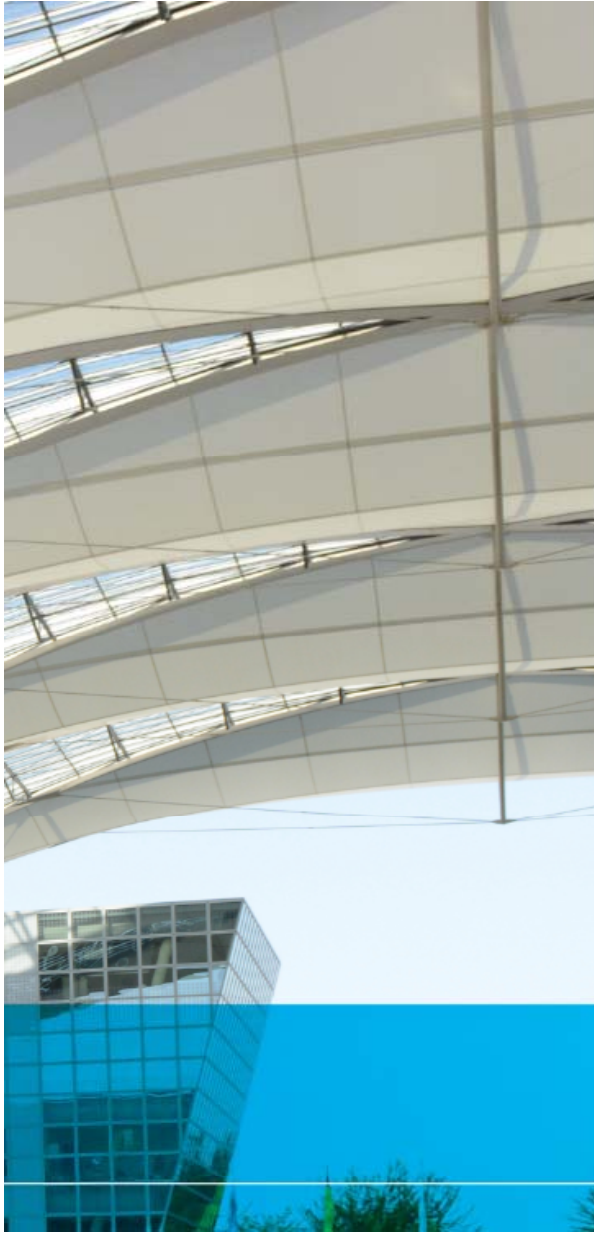
/ THE AIRPORT AS A REAL ESTATE LOCATION

Munich Airport has an international reputation as an extremely successful and attractive transport hub – but tends to be less known as a location for offices. Yet the “Franz Josef Strauß” airport in Munich has long grown to the size of a town, both as regards the number of people who work here and its infrastructure. The latter includes not only terminals and taxiways, but also a wide range of shops and services that can even make very normal working days very pleasant.

However, we will not just present everything the airport already has in the following, but also exciting project developments that are under construction, in planning or in the pipeline. If we have been able to arouse your curiosity, then get in touch with us personally. We look forward to your ideas on the subject of the “airport as a working environment.”

/ airtsite THE REAL ESTATE PRODUCTS

At Munich Airport there are numerous exciting real estate projects under construction, in the planning phase or as ideas for future development of the campus. The projects range from construction of state-of-the-art office and conference rooms, upmarket retailing and hospitality space to exciting extensions to new and existing hotels. The aim of the airtsites is to make it easier for you to find your bearings on the expansive airport campus so that you can get to where you want to go faster.



The airsite Centre is the commercial heart of Munich Airport and essentially comprises Terminal 1, Munich Airport Centre (MAC) and Kempinski Hotel. Terminal 1, with which Munich Airport commenced operations in the Erdinger Moos region in 1992, is being expanded by a further 16,000 square metres at a cost of €160 million.

Munich Airport Centre offers 21,000 square metres of flexible rental units with modern office areas, of which only few remain vacant. The

MAC was designed by the well-known architect Helmut Jahn, whose work includes internationally acclaimed buildings such as the Sony Centre in Berlin and the Highlight Towers in Munich. The Munico Conference Centre offers 40 conference rooms, lounges and hospitality.

An annex with 160 new rooms will be built onto the adjacent Kempinski Hotel, which was likewise designed by Helmut Jahn. Investments of around €36 million are earmarked for that.

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The airtsite East comprises the existing gates in Terminal 2, as well as the Terminal 2 satellite, which is under construction and will be completed in 2015. The new satellite is located on the airport's eastern apron and is a functional component of Terminal 2. The over 600-meter pier will have 52 departure gates with a capacity for 27 aircraft parking positions and capable of

handling 11 million passengers. The Terminal 2 satellite will offer all important service facilities over an area of more than 125,000 square meters. Attractive malls will be created in the centre at both passenger levels – over an area of more than 9,000 square metres, passengers will be offered a broad range of shops and restaurants.

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You can't get any closer to the terminals:
The airtsite South projects are located directly between Terminal 1 and 2 – and direct access to the gates is possible. Among other things, cutting-edge office and conference facilities will be cre-

ated here over a gross floor space of some 55,000 square metres. Do you have special ideas and visions for an exclusive branch for your company at the airport? The property offers a wide range of possibilities and adequate parking space.





If you look at the airport as a city, then a new district is being created called airtsite West, which has huge development potential with an area of 50 hectares. In line with the high standards of the overall campus, an urban planning concept is being developed as the basis for ensuring a high quality experience for people during their stay and successful business. Offices,

retailing, logistics, catering and hotels - the wide range of diverse shops, restaurants and facilities creates a lively mix in a generously apportioned area. The planning also envisages a modern service centre of BMW, a large parking centre and ideal traffic links. For example, the planned Node West will enable direct access to the airtsite West.

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GET IN TOUCH WITH US.

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