

Docklands - E14

In total FOCUS records some 850,000 sq. ft. of transactions over the past year in Docklands. At the start of 2006 State Street Bank & Trust Co pre-let 363,286 sq. ft. at 20 Churchill Place advised by CB Richard Ellis. At 1 Churchill Place Cantor Fitzgerald spin off, BGC International, took 100,000 sq. ft. of space. CB Richard Ellis and Knight Frank acted for Canary Wharf Group plc, the landlord. In October the London Organising Committee of the Olympic Games Ltd took almost 100,000 sq. ft. advised by AtisReal. CB Richard Ellis and Knight Frank again acted on behalf of Canary Wharf Group plc.

In March 2006 business continuity specialists, Sungard Systems Ltd, took 76,000 sq. ft. at 25 Canada Square. Cushman & Wakefield and Hargreaves Goswell Down acted on behalf of the landlord. At 25 Bank Street, Morgan Stanley took some 25,000 sq. ft. of space. CB Richard Ellis and Knight Frank acted on behalf of Canary Wharf Group plc.

As far as new or refurbished space is concerned, CB Richard Ellis and Knight Frank share the largest space available in Docklands at 40 Bank Street where 420,000 sq. ft. remains available. Hargreaves Goswell Down have 115,000 sq. ft. available at 25 Canada Square and 33,000 sq. ft. remains available at 1 Churchill Place. Away from Canary Wharf, Cherryman have 18,000 sq. ft. available at Selsdon Way, jointly with Peter Galan and out of the Isle of Dogs altogether, Dobbin & Sullivan have 23,000 sq. ft. available at Quebec Wharf. Cherryman are also jointly instructed at 1 Canada Square with AtisReal where 137,000 sq. ft. of secondhand space is available.

Southbank - SE1 & SE11

The South Bank market saw around 1.25 million sq. ft. transacted over the last year. At the end of 2005 the London Fire & Emergency Planning Authority took 123,000 sq. ft. at 169 Union Street on assignment from Sainsburys. AtisReal and Cushman & Wakefield acted on behalf of Sainsburys. Dron & Wright acted for the Authority. At 6 More London, Research International Group Ltd took 62,000 sq. ft. of space advised by James Andrew International. Knight Frank and Jones Lang LaSalle acted on behalf of More London.

At the end of 2005, the London Development Agency pre-let 59,000 sq. ft. at Palestra. DTZ Debenham Tie Leung acted on behalf of the landlord. CB Richard Ellis represented London Development Agency.

Aside from the balance of space available at Palestra through DTZ, the largest new space available in the South Bank market is at More London where Jones Lang LaSalle and Knight Frank are instructed on some 129,000 sq. ft. overall. Elsewhere EA Shaw and Colliers CRE have 49,000 sq. ft. on Lavington Street and Kalmars have 40,000 sq. ft. available at 151 Tower Bridge Road.

As far as secondhand space is concerned DTZ and Kalmars have nearly 90,000 sq. ft. available at Hannibal House in Elephant & Castle while DE & J Levy have 52,000 sq. ft. available at Elizabeth House on York Road.

Top 10 Docklands Agents by Sq. Ft. Available (as at May 06)

Rank	Company	Sq. Ft.	Mkt Share
1	Knight Frank	981,527	28.07%
2	CB Richard Ellis	925,017	26.46%
3	Cherryman	538,996	15.42%
4	AtisReal	291,987	8.35%
5	Hargreaves Goswell Down	115,857	3.31%
6	Cushman & Wakefield	73,153	2.09%
7	Allsop	65,413	1.87%
8	DTZ Debenham Tie Leung	63,672	1.82%
9	Dron & Wright	49,577	1.42%
10	King Sturge	47,399	1.36%

Top 10 Southbank Agents by Sq. Ft. Available (as at May 06)

Rank	Company	Sq. Ft.	Mkt Share
1	DTZ Debenham Tie Leung	543,802	16.48%
2	CB Richard Ellis	399,597	12.11%
3	Kalmars	354,064	10.73%
4	EA Shaw	307,924	9.33%
5	Knight Frank	217,426	6.59%
6	Edward Symmons & Partners	176,489	5.35%
7	Jones Lang LaSalle	172,106	5.22%
8	DE & J Levy	132,987	4.03%
9	Tuckerman	113,351	3.44%
10	Savills Commercial	106,895	3.24%

Top 10 Docklands Agents by Disposals per Sq. Ft. (May 05 - April 06)

Rank	Company	Sq. Ft.	Mkt Share
1	Knight Frank	790,677	39.38%
2	CB Richard Ellis	773,156	38.51%
3	Cushman & Wakefield	114,187	5.69%
4	Cherryman	107,863	5.37%
5	Hargreaves Goswell Down	76,203	3.80%
6	AtisReal	49,064	2.44%
7	King Sturge	23,272	1.16%
8	SBH Incorporating Page & Read	14,920	0.74%
9	Parc Properties Ltd	12,389	0.62%
10	Dobbin & Sullivan	12,019	0.60%

Top 10 Southbank Agents by Disposals per Sq. Ft. (May 05 - April 06)

Rank	Company	Sq. Ft.	Mkt Share
1	AtisReal	220,622	17.04%
2	Cushman & Wakefield	151,806	11.73%
3	EA Shaw	125,183	9.67%
4	Kalmars	92,704	7.16%
5	Edward Symmons & Partners	89,728	6.93%
6	Knight Frank	85,685	6.62%
7	DTZ Debenham Tie Leung	84,637	6.54%
8	Jones Lang LaSalle	62,010	4.79%
9	Savills Commercial	49,621	3.83%
10	Field & Sons	40,177	3.10%

Top 3 Docklands Agents by Acquisitions per Sq. Ft. (May 05 - April 06)

Rank	Company	Acquisitions	Mkt Share
1	CB Richard Ellis	445,386	63.65%
2	AtisReal	145,197	20.75%
3	DTZ Debenham Tie Leung	53,901	7.70%

Top 3 Southbank Agents by Acquisitions per Sq. Ft. (May 05 - April 06)

Rank	Company	Acquisitions	Mkt Share
1	Dron & Wright	126,372	30.69%
2	CB Richard Ellis	84,535	20.53%
3	James Andrew International Ltd	62,010	15.06%

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