

# FOCUS Agency League tables



## In the Spot Light

Development in the Docklands is growing in momentum with around 1.5 million sq. ft. under construction or refurbishment for completion over the next two years.

### ■ Docklands - E14

The start of 2007 has seen one large transaction in the Docklands. At 40 Bank Street, Barclays Capital Finance took 300,000 sq. ft. from Canary Wharf Group in April 2007. CB Richard Ellis and Knight Frank acted on behalf of Canary Wharf Group, Atisreal represented Barclays.

Otherwise the story is one of development. At 15 Canada Square the twin cores are approaching completion on KPMG's new headquarters. KPMG purchased the long leasehold interest in 400,000 sq. ft. of space from Canary Wharf Group on a 999-year lease at the end of 2006. Knight Frank and CB Richard Ellis acted on behalf of Canary Wharf Group, Jones Lang LaSalle represented KPMG. Construction is due to be completed by April 2009.

In a sign that this market is fast running out of new space, the largest on offer is 61,000 sq. ft. through DTZ and Knight Frank at South Quay on Marsh Wall, away from the main Canary Wharf Estate. Secondhand space scarcely fares any better with the largest space available, 137,000 sq. ft. at 1 Canada Square through Atisreal and Cherryman.

### ■ Southbank SE1 & SE11

New space is in short supply on the South Bank with the largest a mere 52,000 sq. ft. of refurbished space at Hannibal House where Kalmars and DTZ are instructed. County Hall has 243,000 sq. ft. of secondhand space available through Ereira Mendoza & Co and there is 47,000 sq. ft. at Elizabeth House on York Road through DE & J Levy.

Development is crucial for this market too. With the Bankside towers under offer, the 186,000 sq. ft. under construction at 160 Tooley Street and the 165,000 sq. ft. refurbishment of Kings Reach Tower are the main contenders. DTZ and Colliers CRE are instructed at Tooley Street, King Sturge at Kings Reach.

Transport for London (TFL) take the prize for the biggest transactions over the last year. In August 2006 they pre-let 300,000 sq. ft. at Palestra from Royal London and Blackfriars Investments and 239,000 sq. ft. at London Bridge from Broadway Malyan. DTZ acted for the landlords at Palestra. CB Richard Ellis and Savills Commercial acted for Broadway Malyan. Drivers Jonas represented TFL on both.

Top 5 Docklands Agents by Availability per Sq. Ft. (as at May 07)

Rank	Company	Sq. Ft.	Mkt Share
1	Knight Frank	617,273	23.16%
2	CB Richard Ellis	583,296	21.88%
3	Cherryman	555,583	20.84%
4	DTZ Debenham Tie Leung	205,332	7.70%
5	Atisreal	141,680	5.32%

Top 5 Docklands Agents by No. of Instructions (as at May 07)

Rank	Company	Instructions	Mkt Share
1	Cherryman	29	28.16%
2	Knight Frank	14	13.59%
3	SBH Page & Read	8	7.77%
4	PARC Properties Ltd	6	5.83%
5=	CB Richard Ellis	5	4.85%
5=	DTZ Debenham Tie Leung	5	4.85%
5=	GVA Grimley LLP	5	4.85%

Top 5 Docklands Agents by Disposals per Sq. Ft. (May 06 - April 07)

Rank	Company	Sq. Ft.	Mkt Share
1	CB Richard Ellis	1,468,369	44.09%
2	Knight Frank	1,441,474	43.28%
3	Cherryman	149,162	4.48%
4	GVA Grimley LLP	61,497	1.85%
5	Atisreal	47,134	1.42%

Top 5 Docklands Agents by Acquisitions per Sq. Ft. (May 06 - April 07)

Rank	Company	Sq.ft.	Mkt Share
1	Jones Lang LaSalle	625,267	40.8%
2	Atisreal	439,242	28.66%
3	CB Richard Ellis	366,801	23.94%
4	Morgan Pepper	40,302	2.63%
5	GVA Grimley LLP	12,040	0.79%

Top 5 Southbank Agents by Availability per Sq. Ft. (as at May 07)

Rank	Company	Sq. Ft.	Mkt Share
1	CB Richard Ellis	382,131	13.33%
2	DTZ Debenham Tie Leung	355,170	12.39%
3	Kalmars	276,238	9.63%
4	King Sturge	263,441	9.19%
5	Ereira Mendoza & Co	243,120	8.48%

Top 5 Southbank Agents by No. of Instructions (as at May 07)

Rank	Company	Instructions	Mkt Share
1	Kalmars	43	19.82%
2	Field & Sons	31	14.29%
3	EA Shaw	30	13.82%
4	Edward Symmons LLP	16	7.37%
5	Tuckerman	13	5.99%

Top 5 Southbank Agents by Disposals per Sq. Ft. (May 06 - April 07)

Rank	Company	Sq. Ft.	Mkt Share
1	DTZ Debenham Tie Leung	378,156	16.96%
2	Savills Commercial	274,071	12.29%
3	EA Shaw	257,015	11.53%
4	CB Richard Ellis	239,022	10.72%
5	Edward Symmons LLP	146,498	6.57%

Top 5 Southbank Agents by Acquisitions per Sq. Ft. (May 06 - April 07)

Rank	Company	Sq.ft.	Mkt Share
1	Drivers Jonas	557,182	58.27%
2	Jones Lang LaSalle	127,998	13.38%
3	King Sturge	52,804	5.52%
4	DTZ Debenham Tie Leung	47,581	4.98%
5	CB Richard Ellis	38,203	3.99%

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