

# TRŽIŠTE NEKRETNINA U SRBIJI

GOVORNIK: UROŠ NOVKOVIĆ

MRICS RV, REV, LICENIRANI PROCENITELJ I SUDSKI VEŠTAK  
DIREKTOR DATA INVESTMENT DOO

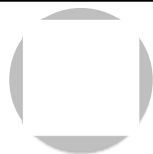
# SADRŽAJ

1



**OSVRT NA TRŽIŠTE NEKRETNINA U SRBIJI**

2



**TRŽIŠTE NEKRETNINA U BEOGRADU**

3



**TRŽIŠTE NEKRETNINA U NOVOM SADU**

4



**ZAKLJUČAK**

A nighttime photograph of a city street scene, likely in Belgrade, featuring a prominent modern building with a curved glass facade. The scene is illuminated by streetlights and building lights, creating a warm, orange glow. A large, white, stylized number '1' is overlaid in the center of the image. The background shows a hillside with residential buildings and a road curving through the city.

# 1

## OSVRT NA TRŽIŠTE NEKRETNINA U SRBIJI

# SRBIJA DANAS

3-3,8%

GDP

18,5 %

NEZAPOSLENOST

3,4 %

INFLACIJA

## RAST PROSEČNE PLATE

7,2 %

NOMINALNO

3,6 %

EFEKTIVNO

## Kamata na pozajmice banaka prema visoko kvalifikovanim projektima nepokretnosti



RASPON ZA NOVE PROJEKTE



RASPON ZA PROJEKTE GENERISANE PRIHODIMA

Banke u Srbiji su otvorene za pružanje finansijske podrške kako novim investicijama, tako i postojećim nekretninama koje generišu prihode.

**€10 - €13  
MIL**

PROSEK ODOBRENIH  
KREDITA OD STRANE  
BANAKA

**€11 - €28  
MIL**

VELIČINA OČEKIVANOG  
IZNOSA KREDITA



Strani investitori - posebno Južnoafrikanci, Izraelci i Austrijanci su dominirali investicionim i razvojnim aktivnostima



**2017**

Akvizicija Belgrade Plaza-e od strane izraelske kompanije BIG Shopping Centers



IMMOFINANZ

**2017**

Immofinanz, RC Reinvest i Aviv Arlon su saopštili razvoj retail parkova širom države



## PRIME YIELDS Q1 2018

**9,25%**



**7,75%**



**11,25%**



# TEKUĆE STANJE I TRENDovi

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STATISTIKA KATASTRA NEPOKRETNOSTI  
NA DNEVNOM NIVOU

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**18.831.727**

BROJ PARCELA  
U KN

**4.748.421**

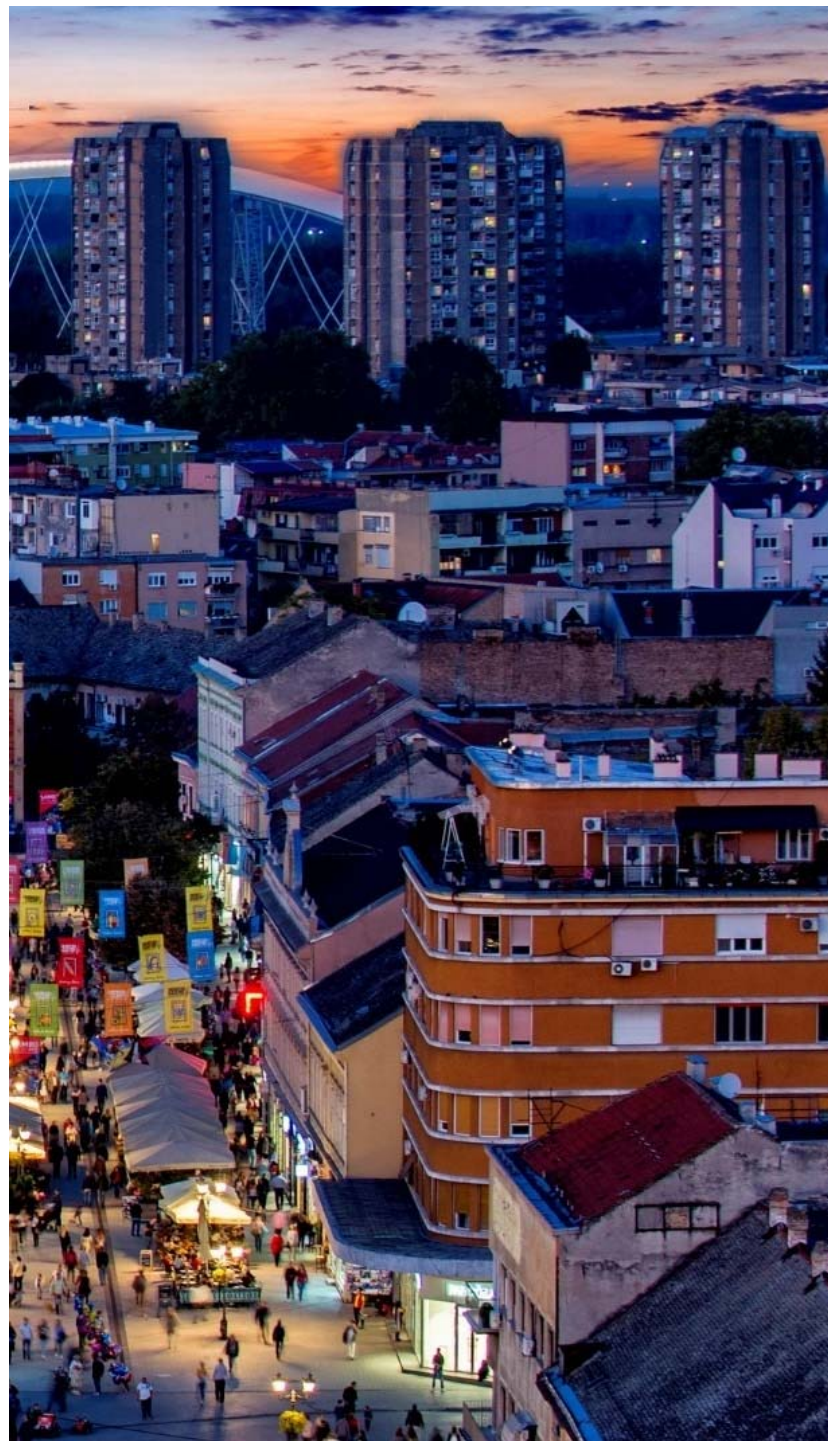
BROJ OBJEKATA  
U KN

**1.113.698**

BROJ POSEBNIH  
DELOVA U KN

**1.029.950**

BROJ HIPOTEKA  
U KN



A nighttime photograph of a cityscape, likely Belgrade, featuring a prominent cable-stayed bridge on the left and a large domed cathedral on the right. The city lights are visible against a dark blue sky. A semi-transparent red rectangular overlay covers the center of the image.

# 2

**TRŽIŠTE BEOGRADA**



# 2.1

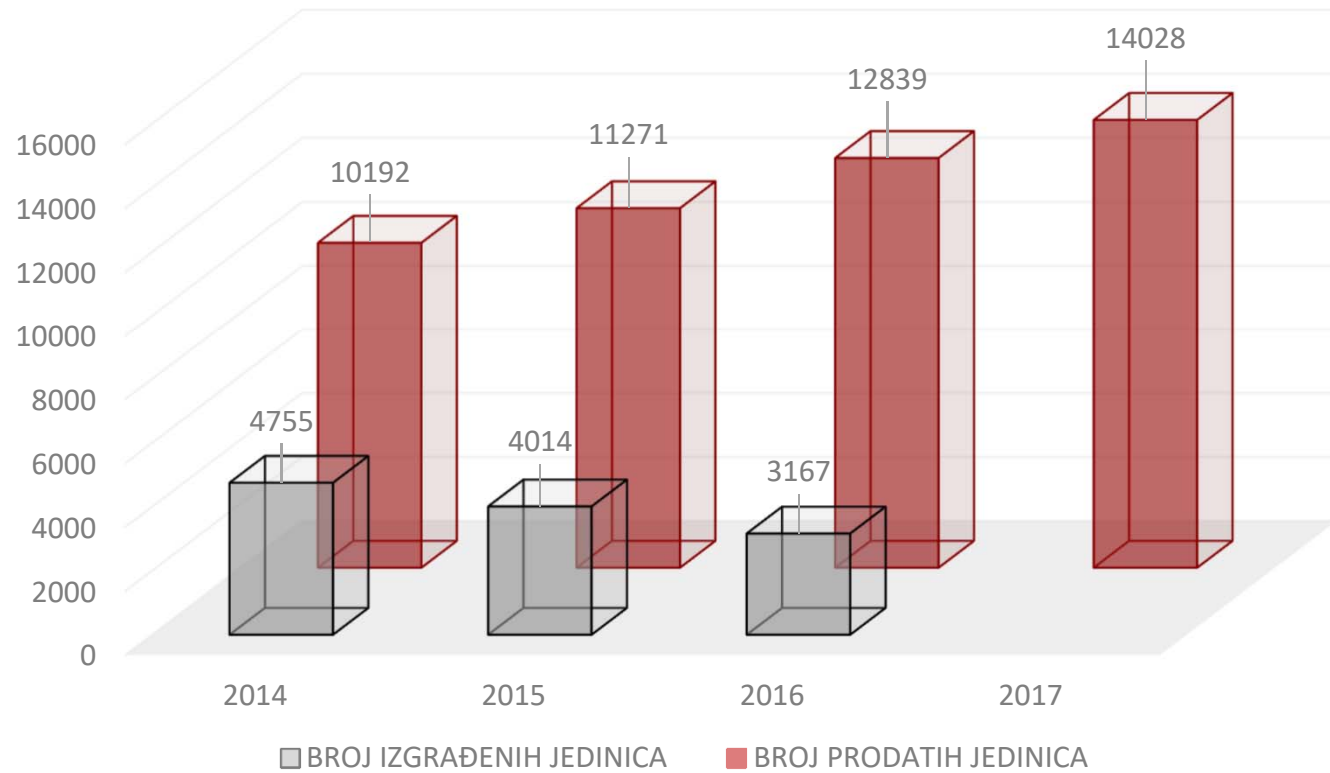
**STAMBENE NEKRETNINE**





# STAMBENE NEKRETNINE

## ODNOS PONUDE I TRAZNJE





# STAMBENE NEKRETNINE

## STAMBENI PROJEKTI U IZGRADNJI

RED. BR.	PROJEKAT	VELIČINA PROJEKTA CCA.	LOKACIJA	INVESTITOR
1	CENTRAL GARDEN	500 JEDINICA, 4. FAZA – 67 JEDIN.	CENTAR	AFI EUROPE SHIKUN & BENUI GROUP
2	VOŽDOVE KAPIJE	700 JEDINICA, 1. FAZA – 129 JEDIN. 2. FAZA – 106 JEDIN.	VOŽDOVAC	SHIKUN & BENUI GROUP
3	WEST 65	512 JEDINICA 4. FAZA – 100 JEDIN.	NOVI BEOGRAD	PSP FARMAN
4	BELGRADE WATERFRONT	BW REIDENCES – 296, BW VISTA – 228 BW PARKVIEW - 244	CENTAR	EAGLE HILLS
5	SANNYVILLE	252 JEDINICE 2. FAZA – 94 JEDIN.	PALILULA	CONSTANTINE THE GREAT
6	SANNYVILLE ENERGOPROJEKT	215 JEDINICA	PALILULA	ENERGOPROJEKT
7	PANORAMA VOŽDOVAC	187 JEDINICA	VOŽDOVAC	ALPROS INVEST
8	PAUNOV BREG	200 JEDINICA 2. FAZA – 94 JEDIN.	VOŽDOVAC	CPI GROUP
9	NEW SOUTH	129 JEDINICA	JUŽNI BULEVAR	EX-ING B&P
10	KAPIJE VRAČARA	250 JEDINICA	JUŽNI BULEVAR	ALEKSANDAR GRADNJA
11	ZEMUNSKKE KAPIJE	1.700 JEDINICA 1. FAZA – 323 JEDIN. 2. FAZA – 366 JEDIN.	ZEMUN	THE BUILDING DIRECTORATE OF SERBIA
12	ZELENA AVENIJA	239 JEDINICA 3. FAZA – 90 JEDIN.	ZEMUN	MONTEX
13	GORNJI GRAD ZEMUN	184 JEDINICA	ZEMUN	WORLD TRADE CAPITAL

A photograph of a modern, multi-story building with a glass facade, taken at dusk. The sky is a deep blue, and the building's windows are reflecting the ambient light. A semi-transparent red rectangular overlay is centered on the image, containing the text '2.2' and 'POSLOVNE NEKRETNINE'.

**2.2**

**POSLOVNE NEKRETNINE**



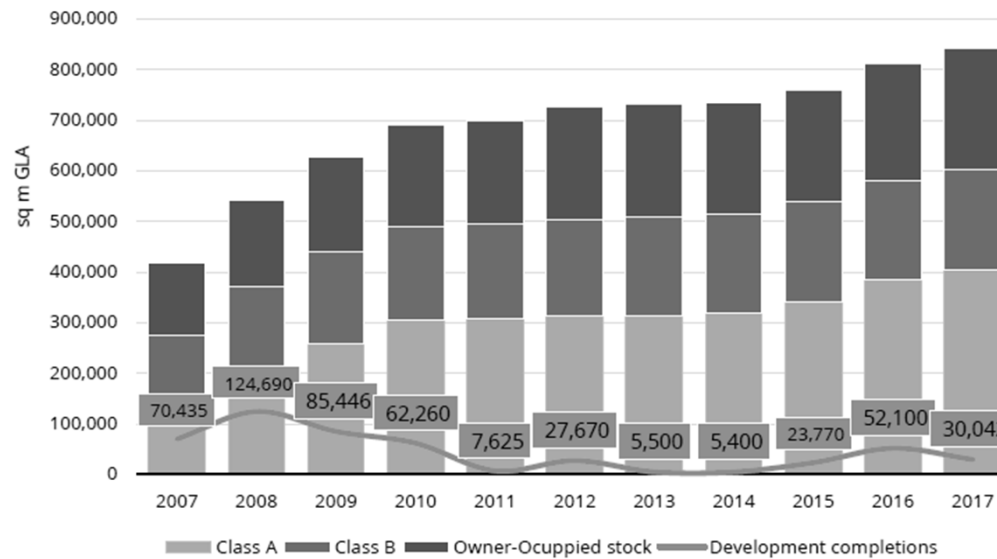
# POSLOVNE NEKRETNINE TRŽIŠTE

**6,5 %**

VACANCY RATE

**8,5 – 9,0 %**

PRIME YIELD



Izvor: Data Investment Research

**14,5-16,5  
EUR/m<sup>2</sup>**

POSL. PROSTOR  
A KLASE

**10-12  
EUR/m<sup>2</sup>**

POSL. PROSTOR  
B KLASE

**842.000 m<sup>2</sup>**

POVRŠINA POD  
POSLOVNIM  
OBJEKTIMA

**30.000 m<sup>2</sup>**

POVRŠINA  
NOVOIZGRAĐENOG  
POSL. PROSTORA U  
2017. GOD

**97.850 m<sup>2</sup>**

OBUHVAT  
IZNAJMLJIVANJA  
POSL. PROSTORA U  
2017. GOD

**Q4 2017**



# POSLOVNE NEKRETNINE

## POSLOVNI PROJEKTI

RED. BR.	PROJEKAT	VELIČINA PROJEKTA CCA.	STATUS	INVESTITOR
1	N HOUSE	10.700 m <sup>2</sup>	U IZGRADNJI	NAPRED
2	ZIEGEL HOUSE	5.000 m <sup>2</sup>	U IZGRADNJI	TRGOMEN NEKRETNINE
3	POSLOVNA ZGRADA	4.500 m <sup>2</sup>	U IZGRADNJI	ROAMING
4	GREEN HEART	46.000 m <sup>2</sup>	U IZGRADNJI	GTC
5	KINESKI KULTURNI CENTAR	9.000 m <sup>2</sup>	U IZGRADNJI	SHANDONG HI SPEED GROUP
6	BUSINESS GARDEN	16.000 m <sup>2</sup>	ZAVRŠENO	AFI EUROPE SHIKUN & BINUI
7	SKYLINE	30.000 m <sup>2</sup>	U IZGRADNJI	AFI EUROPE
8	UŠĆE KULA 2	22.000 m <sup>2</sup>	PLANIRANO	MPC PROPERTIES
9	NAVIGATOR 2	27.000 m <sup>2</sup>	PLANIRANO	MPC PROPERTIES
10	GTC SQUARE	46.000 m <sup>2</sup>	U IZGRADNJI	GTC
11	SIRIUS	14.000 m <sup>2</sup>	ZAVRŠENO	ERSTE GROUP



An aerial night photograph of a city. On the left, a tall, modern skyscraper with a glass facade is illuminated, with a communication tower on top. In the center and right, a large, multi-story commercial building with a flat roof and a mix of brick and concrete is visible. The surrounding area includes roads with light trails from cars, parking lots, and other city buildings under a dark blue sky with some clouds. A semi-transparent red rectangle is overlaid on the center of the image, containing the text.

# 2.3

**RETAIL I INDUSTRIJSKE  
NEKRETNINE**

# RETAIL I INDUSTRIJSKE NEKRETNINE TRŽIŠTE

## CENE IZDAVANJA RETAIL PROSTORA U BEOGRADU

LOKACIJA	< 50 m <sup>2</sup>	50 – 150 m <sup>2</sup>	150 – 500 m <sup>2</sup>	> 500 m <sup>2</sup>
KNEZ MIHAILOVA	DO 120	80 - 100	60 - 80	40 - 60
TERAZIJE/KRALJA MILANA	50 - 70	40 - 60	25 - 50	20 - 40
BUL. KRALJA ALEKSANDRA	70 - 100	50 - 80	30 - 60	20 - 50
SEKUNDARNE ULICE	30 - 50	30 - 40	15 - 30	DO 20
RETAIL PARKOVI	DO 20	15 - 20	DO 15	DO 10
MODERNI ŠOPING CENTRI	DO 70	50 - 70	40 - 60	DO 40

## CENE IZDAVANJA INDUSTRIJSKOG PROSTORA U BEOGRADU

4 – 5  
EUR/m<sup>2</sup>

1.623.000 m<sup>2</sup> UKUPNA POVRŠINA POD  
INDUSTRIJSKIM NEKRETNINAMA





# RETAIL I INDUSTRIJSKE NEKRETNINE PROJEKTI

RED. BR.	PROJEKAT	VELIČINA PROJEKTA	LOKACIJA	INVESTITOR	STATUS
1	RAJIĆEVA SHOPPING CENTAR	15.500 m2	KNEZ MIHAILOVA	AVITAL	ZAVRŠEN
2	BIG FASHION BEOGRAD	32.000 m2	KARABURMA	BIG FASHION	ZAVRŠEN
3	IKEA	30.000 m2	BEOGRAD	IKEA	ZAVRŠEN
4	CAPITOL PARK	21.000 m2	RAKOVICA	7POSEIDON GROUP AND MITISKA REIM	ZAVRŠEN
5	ADA MALL	31.000 m2	RADNIČKA ULICA	GTC	U IZGRADNJI
6	BW GALLERY	93.000 m2	CENTAR	EAGLE HILLS	PLANIRANO
7	BIG FASHION VIDIKOVAC	70.000 m2	VIDIKOVAC	BIG FASHION CENTERS	PLANIRANO
8	INDUSTRIAL PARK BELGRADE 3	7.244 m2	ŠIMANOVCI		PLANIRANO
9	PHOENIX	7.000 m2	ŠIMANOVCI		2017 ZAVRŠEN
10	LIDL	NOVA PAZOVA	78.000 m2		ZAVRŠEN

## PLANIRANI PROJEKTI U SRBIJI

11	EYEMAXX / 2. FAZA	STARA PAZOVA	30.000 m2		PLANIRANO
12	YAZAKI	ŠABAC	30.000 m2		PLANIRANO
13	QUASS	INĐIJA	5.000 m2		PLANIRANO
14	ZUMBOTEL	NIŠ	40.000 m2	ZUMBOTEL GROUP	U IZGRADNJI

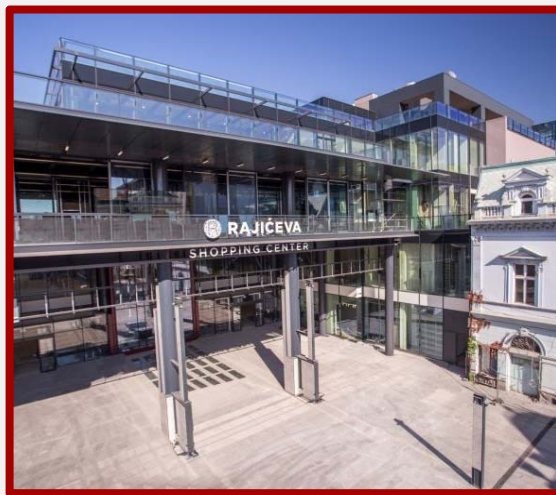




# 2.4

**TIMELINE PROJEKATA**

# ZAVRŠENI PROJEKTI



- Pristup mostu preko Ade – Lot 1
- Rajičeva Shopping Center
- BIG Fashion Karaburma
- GTC Fortyone
- EDB Block 32
- Societe Generale Offices
- Navigator Business Center
- Aviv Park Zvezdara
- Courtyard by Marriott Hotel
- Vojvode Stepe ulica
- Most Zemun – Borča
- Crown Plaza
- Gazela most i rekonstrukcija Mostarske petlje



- Kompleks Stari mlin
- Bulevar kralja Aleksandra
- Zeland Complex
- Falkensteiner Hotel
- Raiffeisen Bank HQ
- Imperial Gradnja Blok 11
- Hipodrom petlja
- West End
- Metropolitan Apartments
- Hotel Metropol
- VIG Plaza
- GTC 19 Avenue
- Rekonstrukcija Nemanjine ulice
- Kula Ušće



# PROJEKTI U IZGRADNJI

- Autoput Surčin – Obrenovac
- Panorama Voždovac
- Kineski kulturni centar
- Obilaznica oko Beograda
- GTC „Ada Mall“
- Voždove kapije
- A blok
- Sirius Business Center
- West 65
- Central Garden
- Skyline Belgrade



# PLANIRANI I ZAUSTAVLJENI PROJEKTI



- Napred Blok 41A
- Beko Kompleks
- Nano Center
- Centar za promociju nauke



- Železnička stanica Prokop
- EPS/EDB Kompleks Blok 20
- Petlja "Radnička"
- Kalemegdan Park apartmani
- Verano Blok 23
- Tri Lista Duvana



A nighttime photograph of Novi Sad, Serbia, featuring the illuminated spire of the Holy Trinity Cathedral as the central focus. The city lights are visible against a dark sky. A large, white, stylized number '3' is centered over a semi-transparent red rectangular area that covers most of the image.

3

**TRŽIŠTE NOVOG SADA**

# PROJEKTI

RED. BR.	PROJEKAT	VELIČINA PROJEKTA	GODINA ZAVRŠETKA
1	NOVI „ŽEŽELJEV“ MOST		
2	ZGRADA ZAVODA ZA HITNU MEDICINSKU POMOĆ	2.700 m2	
3	NAUČNO-TEHNOLOŠKI PARK	30.000 m2	
4	ZGRADA MUZIČKO-BALETSKE ŠKOLE		KRAJ 2019.
5	NOVA ZGRADA RTV-A	17.500 m2	SREDINA 2019.
6	NEPI PROMENADA	150.000 m2 (1.500 PM)	KRAJ 2018.
7	BIG CEE	40.000 m2	
8	DEPARTMENT STORE	32.000 m2	
9	PUPINOVA PALATA	30.000 m2 13.500 m2 (OFFICE A) 11.000 m2 (STANOVI)	
10	KRALJEV PARK	538 STANOVA	KRAJ 2018.
11	CITY GRADNJA	14.000 m2 126 STANOVA 190 PM	JUN 2018.
12	UNIVEREXPORT	30.000 m2	ZAVRŠENO
13	LEAR	29.000 m2	ZAVRŠENO

1.206

BROJ NOVIH  
STANOVA U  
2016.

4.500

BROJ PRODATIH  
STANOVA U  
2017.



POSLEDNJIH 7 GODINA  
BROJ PRODATIH STANOVA PRELAZI  
BROJ IZGRAĐENIH

A nighttime photograph of a large-scale construction project. Several tall yellow tower cranes are positioned around a multi-story building that is still under construction. The building's structure is visible through the scaffolding and formwork. The scene is illuminated by the warm lights of the cranes and the building's interior lights, contrasting with the dark night sky. A semi-transparent red rectangle is overlaid on the center of the image, containing the number '4' and the word 'ZAKLJUČAK'.

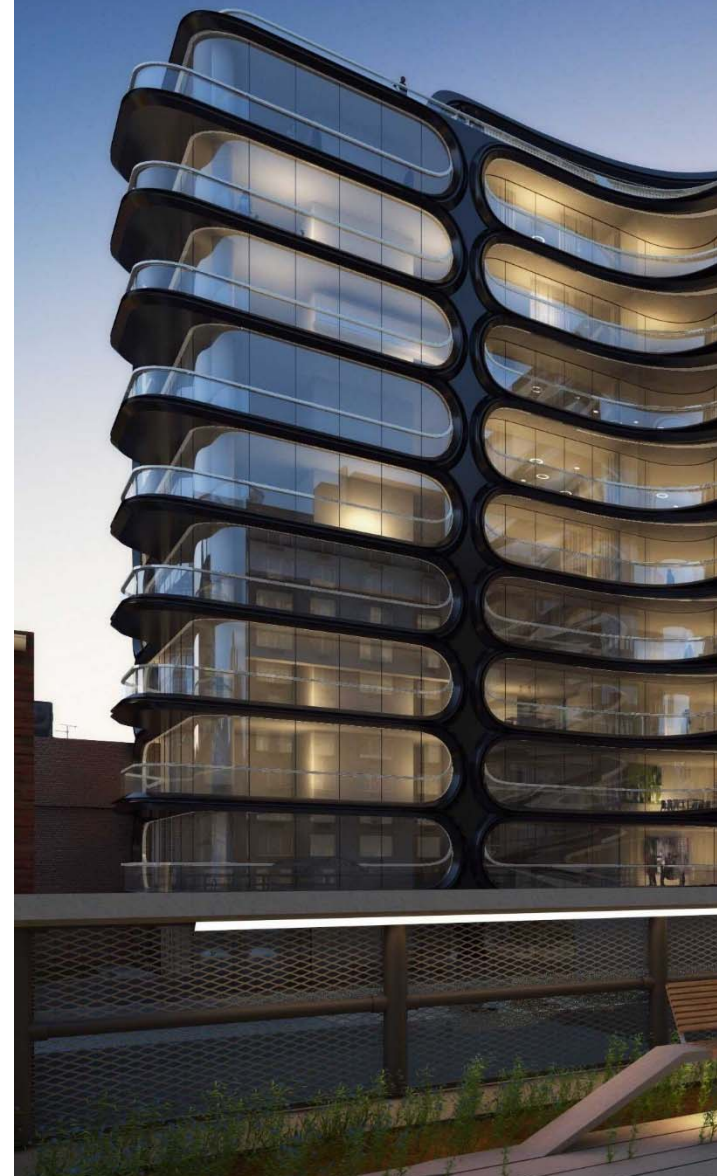
4

ZAKLJUČAK

# PROŠLOST



# SADAŠNJOST





**Hvala na pažnji.**

**Kontakt: [info@datainvestment.rs](mailto:info@datainvestment.rs)**

