



## THE SLOUGH TRADING ESTATE *A COMPELLING BUSINESS LOCATION*

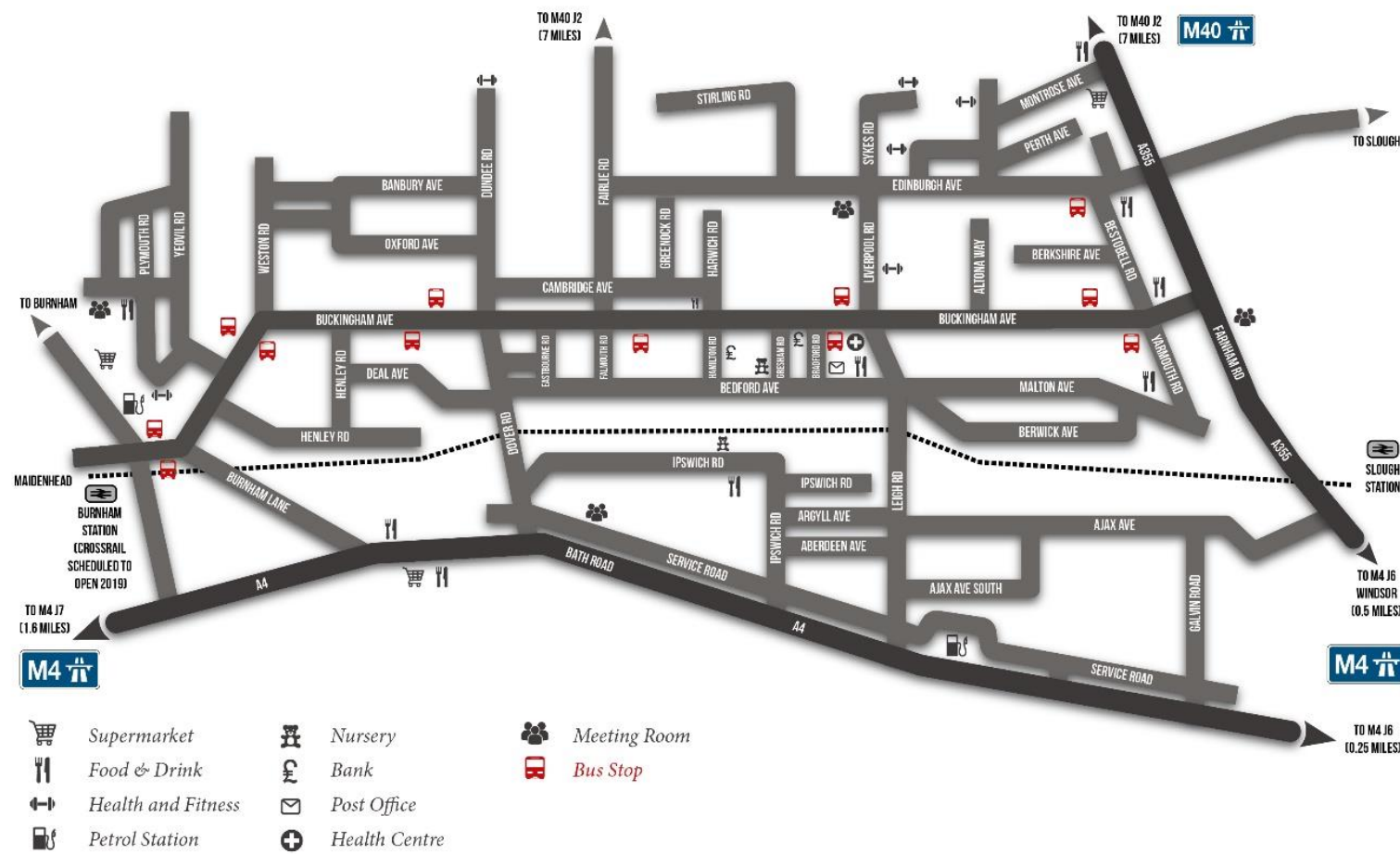
SEPTEMBER 2019







# Servicing a wide range of businesses servicing London and South-East England



No. 1

Voted best town or city to work in

1st

UK's most productive town

52,000

Parcels sorted for delivery by 5am

200,000

Magazines printed by 5am

1,200

Loaves baking in the oven by 5am



WE CREATE THE SPACE THAT ENABLES **EXTRAORDINARY** THINGS TO HAPPEN

SEGR**O**

320

Customers

£1.6bn

Capital Value

£69.4m

Rental Income

5.5m  
sq ft

Built space

97.5%

Occupancy



## A long history of development and building strong customer relationships

- Site developed in 1918 to service military automobiles
- Acquired by SEGRO and commenced trading in 1920
- Customer base has shifted from manufacturing to a broad mix across varied industries and sectors
- Businesses grow within the estate — Hanovia since 1924; Stanley Black & Decker since 1927; Ragus since 1928 & Mars Chocolate since 1932





**1924**

**Stanley  
Black &  
Decker**

**1927**

**Ragus®**  
Specialists  
in Sugars



**1928**

**MARS  
WRIGLEY**  
confectionery

**1932**





Slough Trading Estate at present

Broad customer base without reliance on any particular customer or sector

Simplified Planning Zone allows for expedient development pipeline

Largest Data Centre cluster in Europe, the second in the world

Strong fundamentals driving continued success

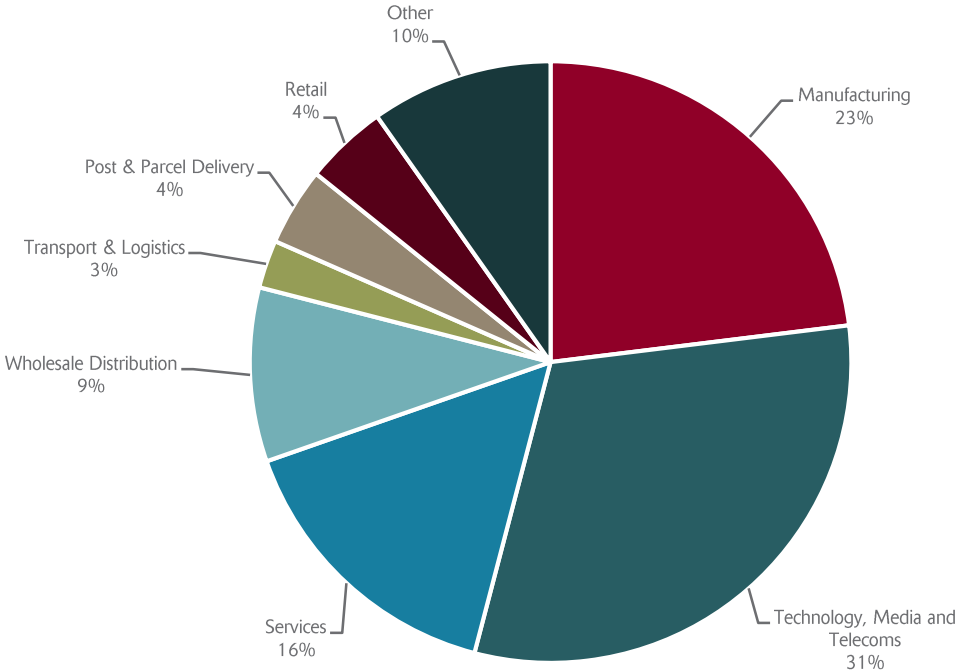
# Diverse customer base

## TOP 10 CUSTOMERS

CUSTOMER (BY HEADLINE RENT)	CUSTOMER TYPE
Equinix	Technology, Media and Telecoms
Virtus	Technology, Media and Telecoms
Mars Chocolate UK Ltd	Manufacturing
Unnamed Financial Provider	Services
Cyxtera Technology UK Ltd	Technology, Media and Telecoms
BFS Group Ltd	Wholesale & Retail Distribution
Iron Mountain (UK) Data Centre Ltd	Technology, Media and Telecoms
UCB SA	Research & Development
NSG Global Ltd	Manufacturing
Travis Perkins	Retail

Our top 10 customers represent £26 million headline rent in aggregate, 36% of the Estate’s headline rent as at 30 June 2019

Customer type by headline rent  
(as at 30 June 2019)





## Diverse customer base

### Technology & Communications



### Retail & Services



### Parcel Delivery



### Manufacturing & Pharmaceutical







Equinex Data Centre, Liverpool Road

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## Simplified planning zone

- Ability to re-develop the Estate with minimal planning requirements
- Permits industrial, warehouse, research and development and data centre uses
- Allows development to commence subject to rules on height, density, parking and usual building regulation consents
- Operational until November 2024 with option to extend





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**SEGRO**









## 22 Developments completed in 5 years

### Urban warehouses



### Data centres and higher value use



1,110,500  
sq ft

Completed  
developments

100%

Let or  
Under Offer

£100m

Capital  
expenditure

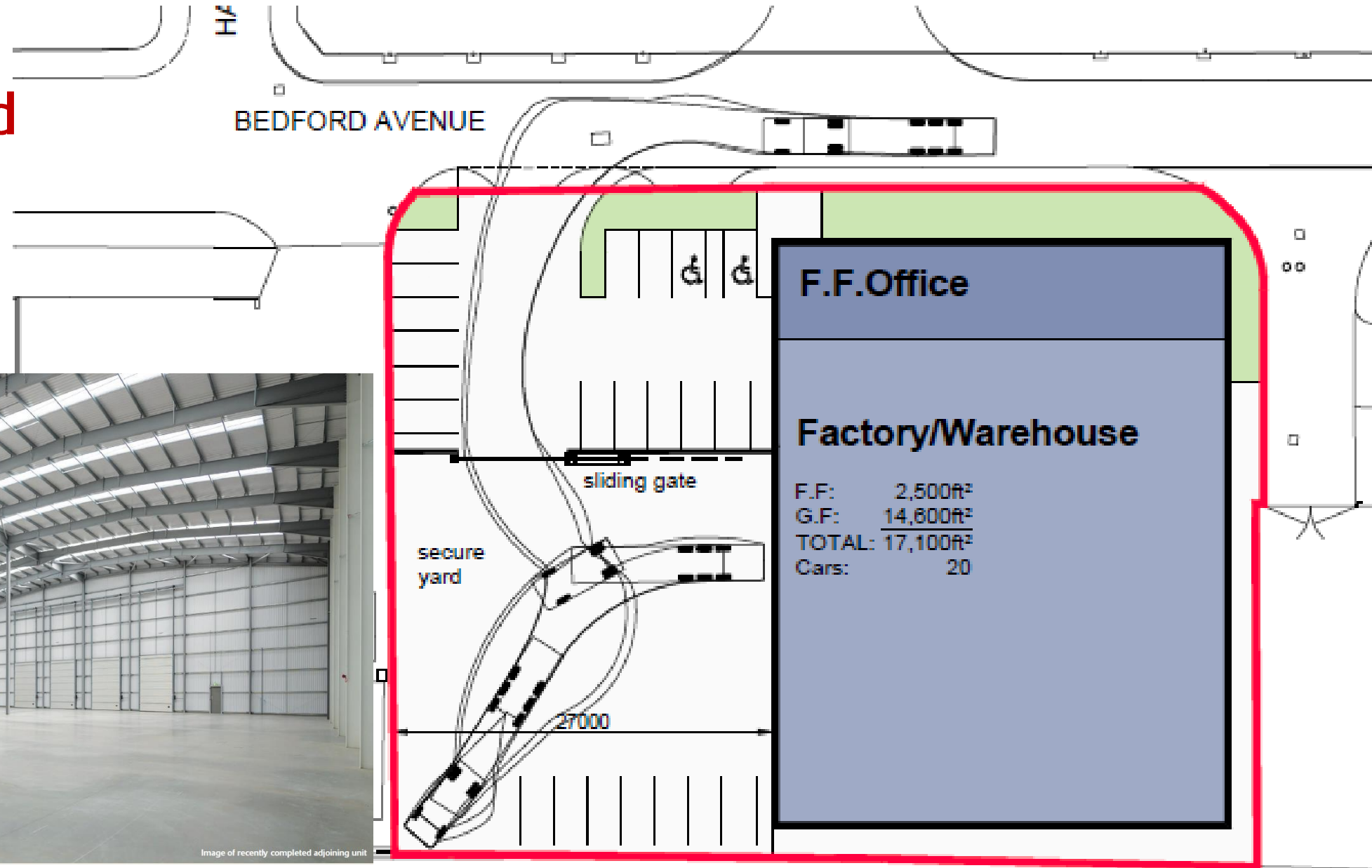


**2019 Live Projects**  
**489,000 sq ft**  
*90% prelet*





## 2019 Proposed Developments





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Broad customer base without reliance on any particular customer or sector

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Strong fundamentals driving continued success

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*“By most analyses, Slough would be considered the 2<sup>nd</sup> largest global data centre cluster behind Ashburn”*

## A QUARTER OF ALL EQUITIES TRADES ORIGINATES HERE

Over the next five years, global IP traffic will increase nearly threefold, reaching 2.3 zettabytes per year by 2020<sup>1</sup>, by which time, the Internet of Things is estimated to comprise 212 billion connected devices<sup>2</sup>.

The Slough Trading Estate is responding to the demands of the Digital Age by accommodating the growing demand for data storage. By most analyses, it's now considered to be the second largest global cluster of data centres.

Power availability, excellent connectivity, a strategic location and tight security create a strong data centre ecosystem on the Estate. It's a compelling draw for the globe's leading data centre providers, bringing with them high-quality and sustainable jobs.

<sup>1</sup> Cisco - The Zettabyte Era: Trends and Analysis, July 2016  
<sup>2</sup> Gartner



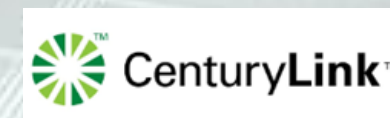
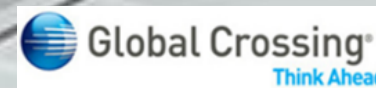
## Europe's leading data centre cluster

27

Data centres —  
largest cluster in  
Europe



Equinix Data Centre, Buckingham Avenue







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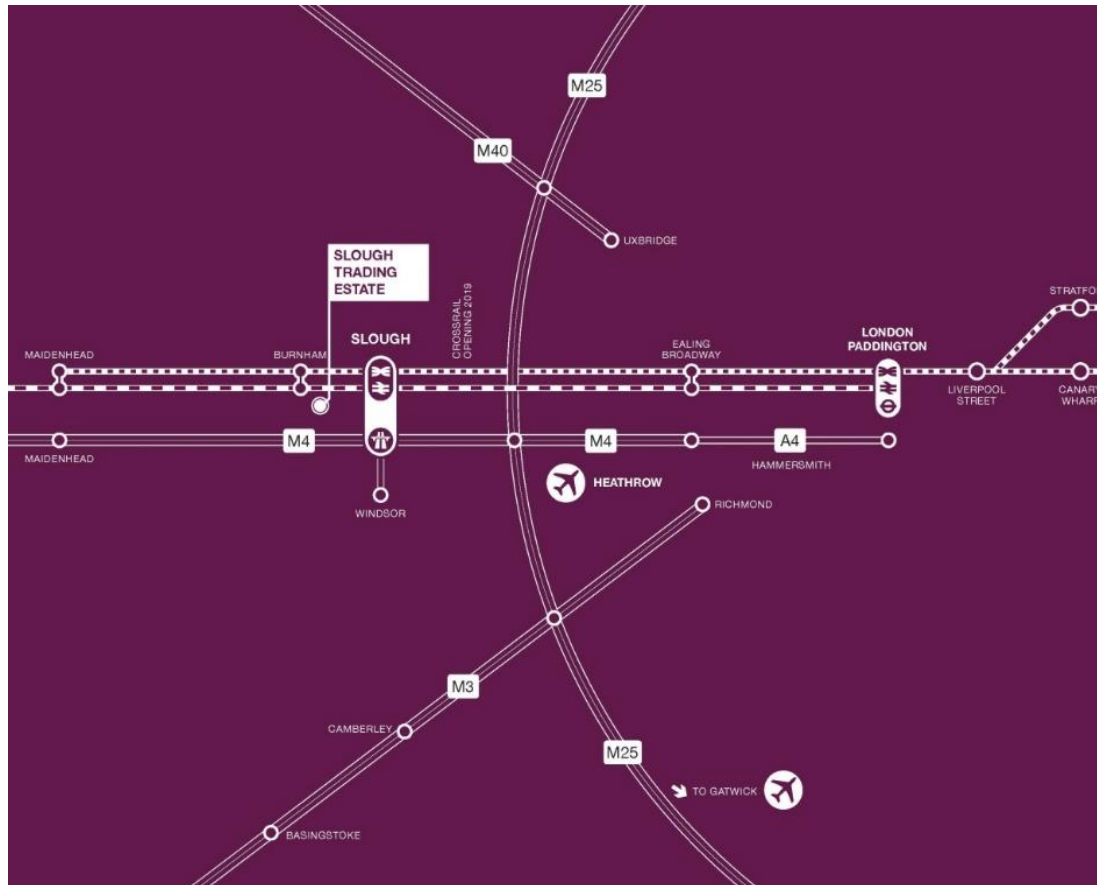
Largest Data Centre cluster in Europe, second in the world

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Strong fundamentals driving continued success



## Strong fundamentals driving continued success



Work  
Force

1.6 million quality labour force within one hour drive

Transport

17 minutes train to Central London

- 10 miles to Heathrow
- close proximity to M4, M40 and M25

Network

Dense fibre network with high connectivity to City of London, US and Europe

Power

On site biomass power station backed by connections to National Grid

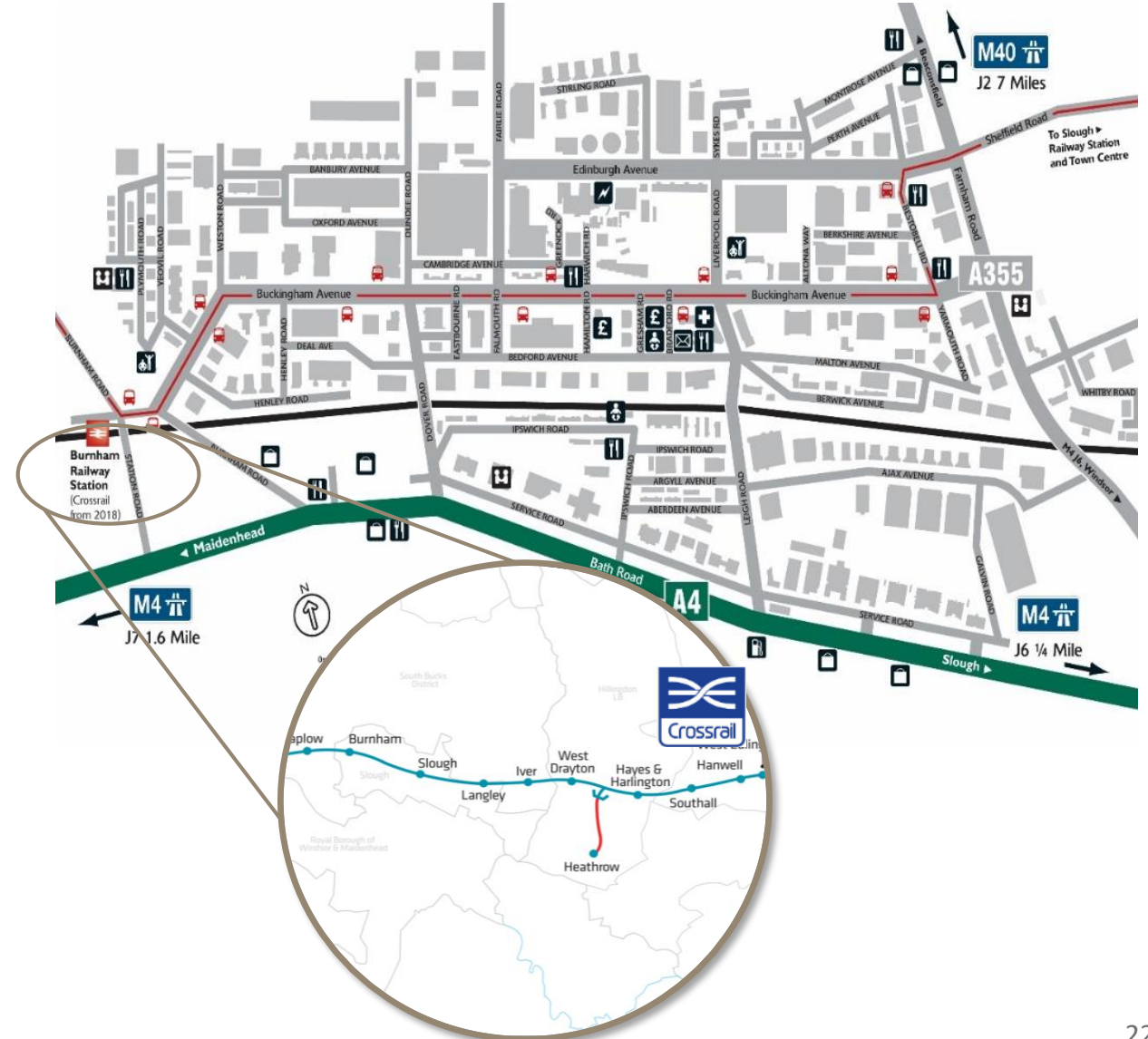


# Future value created by connection to Crossrail from 2019

- Serving Burnham Station at western edge of the Estate providing four trains per hour
- Improved connectivity to central and east London
- Western Rail Access to Heathrow completing in 2024 – journey to Terminal 5 will be seven minutes

## Journey times from Burnham Station

	Bond Street	Liverpool Street	Canary Wharf	Reading
Current Journey Time	52 mins	1 hr 4 mins	1 hr 10 mins	26 mins
Crossrail Journey Time	35 mins	43 mins	49 mins	18 mins





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# Leigh Road Park





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## Supporting our Community



# Slough Trading Estate competitive advantages: great potential to add value



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## Location

— Access to London and Heathrow

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## Modern, flexible buildings

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## Single ownership

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## Simplified Planning Zone

— Land bank and development opportunities

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**SLOUGH TRADING ESTATE IS...**  
**HAVING AN IDEA & MAKING IT HAPPEN,**  
**BUILDING FOR THE FUTURE,**  
**A COLLABORATION BETWEEN PEOPLE & MACHINES,**  
**HARD-WORKING, EFFICIENT, PRODUCTIVE, PERSISTENT,**  
**PASSIONATE, ENTHUSIASTIC & COMMITTED —**  
**INDUSTRY AS A STATE OF MIND**