

A high-contrast, black and white close-up photograph of a car's alloy wheel and tire. The wheel features a multi-spoke design with a prominent Y-shaped or V-shaped pattern. The tire tread is visible at the bottom of the frame.

**SPECIALIST PROPERTY SECTORS
AUTOMOTIVE**

Knight Frank's specialist Automotive team is a leading advisor to the automotive and roadside property sectors. We operate across the UK and overseas, advising occupiers, developers, landlords and lenders on cardealership, service area, petrol station and roadside retail assets. We provide unparalleled advice and support to our clients and back this up with industry-leading technology and market research.

We are supported by a network of 84 Knight Frank offices across the globe offering local knowledge that simply does not exist at the majority of other real estate practices. Combine this with our personal, impartial and tailored advice and the service is truly unrivalled.

We ensure that value from automotive property assets is maximised at all levels. Our clients' trust is our primary goal, which is achieved through providing clear and honest advice, adopting a pro-active approach, and by continually exceeding expectations.



ADAM CHAPMAN
National Head of Automotive

**“...the rare ability to provide
both an occupational perspective
as well as detailed investment advice”**

JOHN HUMBERSTONE
Orchard Street Investment Management

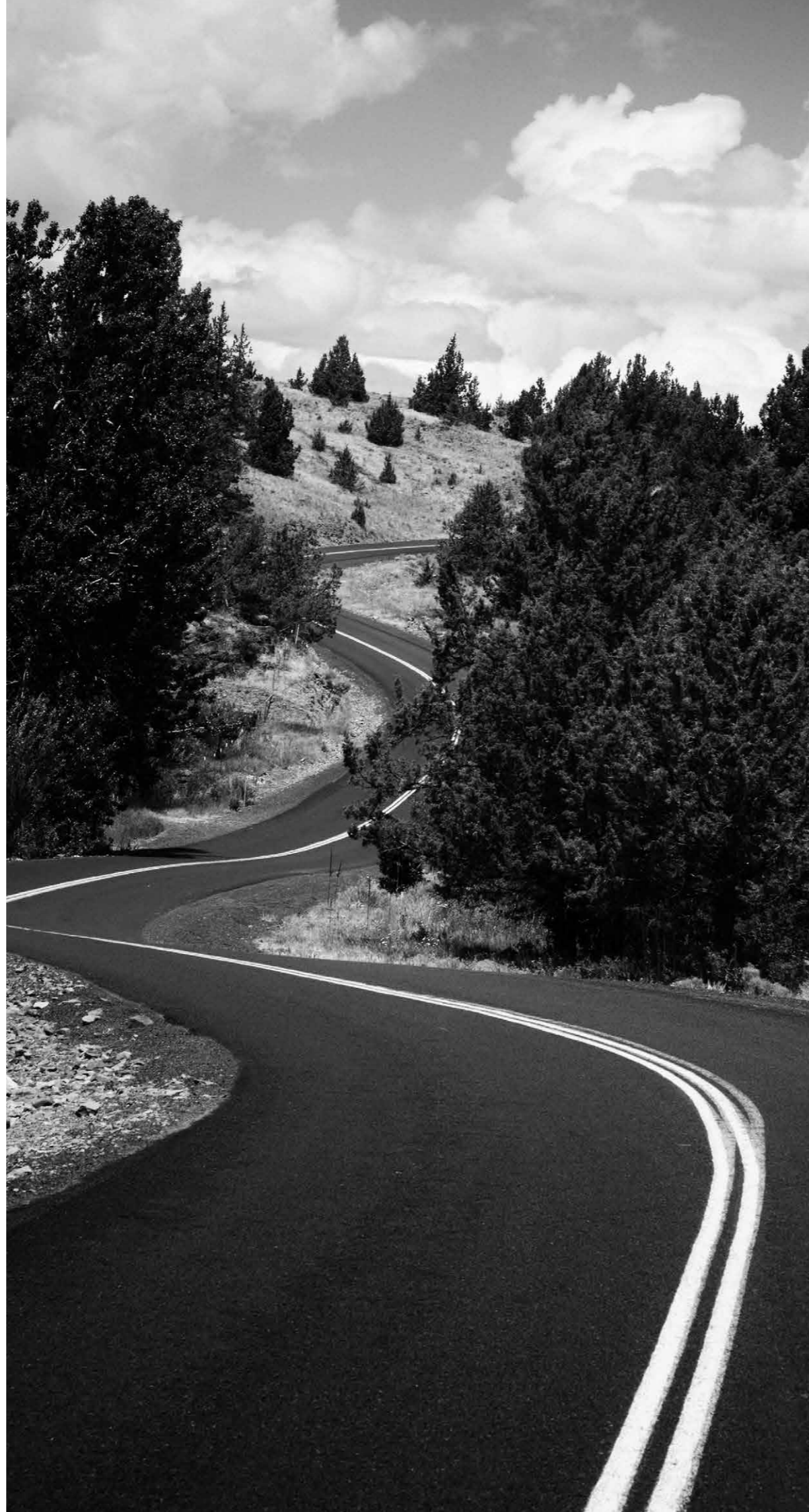


CAR DEALERSHIPS

Franchised car dealership property in the UK has a total asset value of over £5bn. Knight Frank Automotive has excellent relationships with leading manufacturers as well as dealer groups. Unlike typical mainstream property assets, the influence of the incumbent manufacturer franchise, and the power of the brand, cannot be understated, and indeed this often truly drives value. An in-depth understanding of Corporate Identity standards, market territories and specific property requirements is therefore imperative, and requires genuine expert advice.

PETROL STATIONS AND SERVICE AREAS

This sector has a UK 'bricks and mortar' market value in the order of £7bn and has seen a considerable amount of activity in recent years. Within the petrol station sector there has been huge consolidation alongside the mass exit of major Oil Companies from the retailing arena, instead focusing on upstream activities. This has presented unprecedented opportunities for petrol retailers to expand aggressively. The Service Area sector is much smaller, but conversely individual asset values are far higher (typically over £20m). Knight Frank Automotive is widely regarded as the leading advisor in this highly niche field, having provided advice on over 75% of the UK network, as well as overseas assets.



ROADSIDE FACILITIES

Knight Frank Automotive has vast experience dealing with all roadside retail assets, which can range from tyre and exhaust centres to drive-thru coffee units and fast food outlets. The foodstore convenience store sector in particular has seen significant growth and we have strong relationships and experience in dealing with the major operators across the industry. The team also has specialist expertise with respect to truck stops and car parks and are highly skilled in identifying new development opportunities whether on brownfield land or through conversion of existing property.

OUR SERVICES

Unlike traditional real estate advisory teams that focus on a single discipline, Knight Frank Automotive offers the full spectrum of agency and consultancy services, including:

- Investment Transactions
- Occupational Agency
- Portfolio Reviews & Valuations
- Bank Valuations
- Due Diligence for Business Acquisitions
- Site Finding
- Development Consultancy
- Lease Renewals & Surrenders
- Rent Reviews & Lease Consultancy

We have an extensive track record of dealing with large-scale portfolios and individual assets, whether for major institutions or private clients.

**“...genuine automotive specialists.
We have been delighted with the work
they have undertaken for us”**

PETER GRIFFITHS
Renault UK



LAND ROVER / HONDA / MAZDA BIRMINGHAM
 CLIENT: Knight Frank Investment Management
 ROLE: Acquisition of a new sale and leaseback investment
 VALUE: £17m



SPIRE AUTOMOTIVE
 CLIENT: Group 1 Automotive
 ROLE: Pre-acquisition due diligence
 VALUE: c. £15m



PEUGEOT WEST LONDON
 CLIENT: Blackstone
 ROLE: Sale of freehold interest to the incumbent tenant
 VALUE: Confidential



MERCEDES-BENZ, BIRMINGHAM / MANCHESTER TERRITORIES
 CLIENT: Lei Shing Hong
 ROLE: Pre-acquisition due diligence
 VALUE: c. £25m

“...have added genuine value to our UK real estate, working with a personal, efficient and professional approach at all times”

DANIEL MCHENRY
 Group 1 Automotive



SPIRIT PORTFOLIO
 CLIENT: Hudson Advisors
 ROLE: Sale of three petrol station investments
 VALUE: c. £4m



SNAX 24 PORTFOLIO
 CLIENT: Kennedy Wilson
 ROLE: Rent review negotiations on portfolio of 13 petrol stations
 VALUE: Portfolio value enhancement c. £1m



FORD DAGENHAM
 CLIENT: AXA
 ROLE: Sale of a new to market investment
 VALUE: £6.62m



NISSAN BRISTOL
 CLIENT: AVIVA
 ROLE: Acquisition of a new to market investment
 VALUE: £6.03m



JUICE PORTFOLIO
 CLIENT: Investra Capital Limited
 ROLE: Acquisition of 14 petrol station investments
 VALUE: c. £30m



LANDMARK CARS WEST LONDON
 CLIENT: Landmark Cars
 ROLE: Leasehold disposal of bespoke showroom
 VALUE: Rental £475k



WOOLLEY EDGE MOTORWAY SERVICE AREA
 CLIENT: Orchard Street Investment Management
 ROLE: Investment valuation advice
 VALUE: c. £35m



AUDI MILTON KEYNES
 CLIENT: F&C
 ROLE: Valuation advice in respect of the acquisition of the investment
 VALUE: c £10.75m



BASINGSTOKE AUTOPLAZA
 CLIENT: BlackRock
 ROLE: Leasehold disposals of Ford and Peugeot
 VALUE: Rental £360k



BMW MINI TRING
 CLIENT: Lightstone Properties
 ROLE: Disposal
 VALUE: c £7m



ELMS BMW PORTFOLIO
 CLIENT: Bedfordia Group
 ROLE: DISPOSAL OF THREE BMW BUSINESSES
 VALUE: c. £30m



NCP CAR PARK PORTFOLIO
 CLIENT: CPCO (Blackstone / RBS)
 ROLE: Investment disposal
 VALUE: c £500m (under offer)

“A diligent and professional approach with a high level of expertise in the motorway service area sector”

ANDREW LONG
 Extra MSA



CORNWALL SERVICES
 CLIENT: Cornish Gateway Limited
 ROLE: Sole development and letting advisor
 VALUE: c £14m



WELCOME BREAK PORTFOLIO
 CLIENT: Extra MSA Group
 ROLE: Formal valuation advice
 VALUE: Confidential



PFS INVESTMENT PORTFOLIO
 CLIENT: BlackRock
 ROLE: Acquisition of four prime investment assets
 VALUE: c £11m



GLAZE PORTFOLIO
 CLIENT: Lightstone Properties
 ROLE: Investment acquisition
 VALUE: c. £10m



JAGUAR LAND ROVER MANHATTAN

CLIENT: BNF NY LLC
ROLE: Leasehold acquisition of high profile showroom
VALUE: c. \$ 250m



MERCEDES-BENZ COTE D'AZUR

CLIENT: Lei Shing Hong
ROLE: Valuation and building condition surveys
VALUE: c. 23m



BMW PLANT THAILAND

CLIENT: BMW (Thailand)
ROLE: Acquisition of assembly plant, c. 75,000 sq ft
VALUE: Confidential



PETROL STATIONS, AUSTRALIA

CLIENT: Various
ROLE: Disposal of 14 petrol stations
VALUE: c. \$30m AUD



CHRYSLER TECH CENTRE, CHENNAI, INDIA

CLIENT: Chrysler India Automotive
ROLE: Leasehold acquisition
VALUE: c. INR 54.5m



JAGUAR LAND ROVER FRANKFURT

CLIENT: Glinicke
ROLE: Leasehold acquisition/value
VALUE: €180,000 rental



DEBT FREE & INDEPENDENT

\$800M

WORLD TURNOVER
(EXCLUDING THE AMERICAS)

411 OFFICES

59 COUNTRIES



KNIGHT FRANK TRANSACTION SUMMARY

	US\$	£	€
Land and Buildings valued	1,340 billion	887 billion	1,211 billion
Commercial sales and purchases	44 billion	29 billion	39 billion
Residential sales and purchases	17 billion	11 billion	15 billion

	Sq M	Sq Ft
Commercial space let and acquired	25 million	268 million
Commercial space being marketed at the year end	33 million	351 million
Total space managed	49 million	528 million

Currency conversion as at 31 March 2016



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