

Elevating opportunities in Portuguese Self Storage

PORTUGAL

26TH OF JUNE 2025





Agenda

10:30 – 10:35

Welcome and Opening Remarks

Duarte Cardoso Ferreira

Senior Director, Head of Strategic Advisory | CBRE

10:35 – 10:55

CBRE Inquiry Launch

José Moutinho | CBRE Research

Diana Silva | CBRE Research

10:55 – 11:30

Self Storage Ecosystem and Solutions

Martyn Dickinson | Janus | Partitions

Patrick Blanc | Stora | Software

Andrew Smith | Reason Global | Insurance solutions

11:30 – 11:50

Roundtable: The Role of the Association in an Emerging Market

Paola Barraza | FEDESSA

Francisco Parreira do Amaral | Control Space

José Maria Moutinho | CBRE

11:50 – 12:15

Closing Remarks & Coffee Break

12:15 – 13:30

Portuguese Self Storage Association Meeting

CBRE Inquiry launch

1. Market overview

- The Self Storage network
- The promising fundamentals and counterweights to the market growth

2. Proposed research and next steps

Despite its upward trajectory, the self storage market remains underexplored

Portugal self-storage assets geographical distribution

176

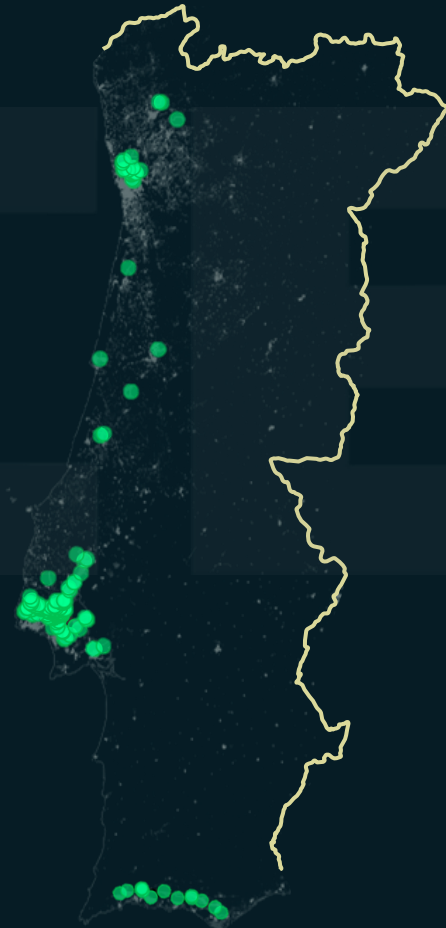
Facilities

51

Operators

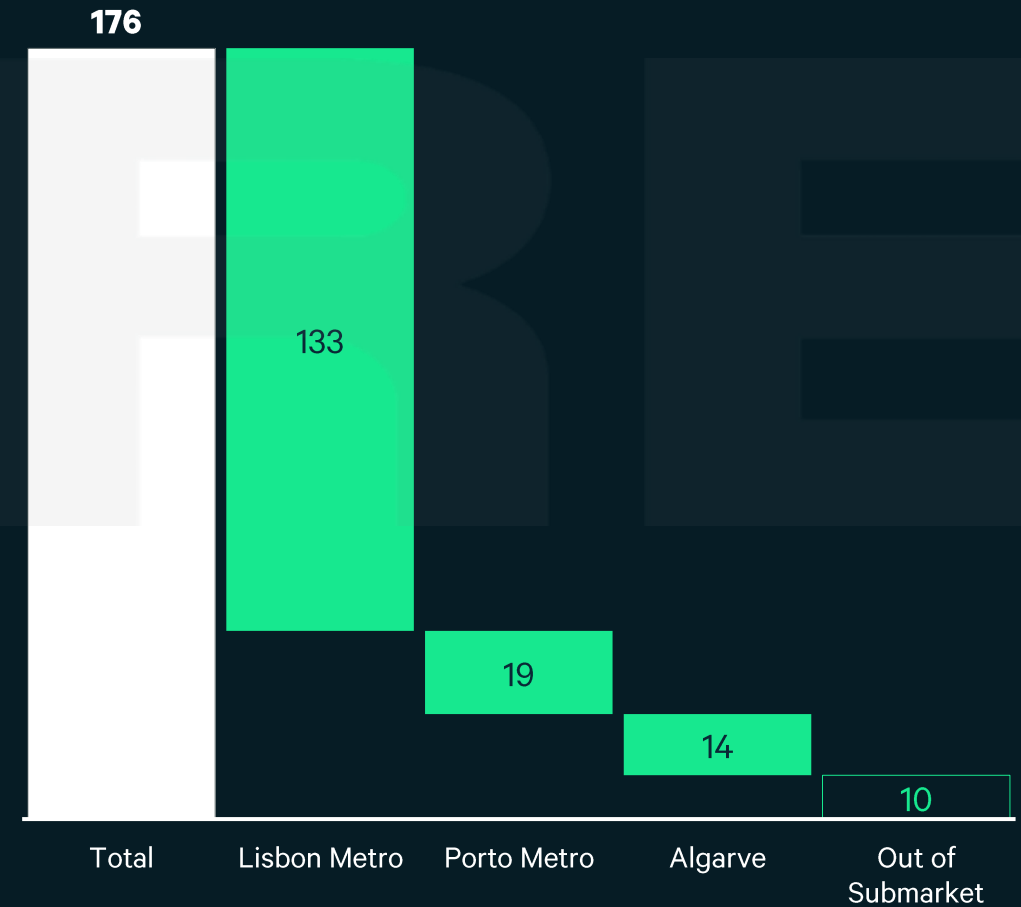
9

Districts



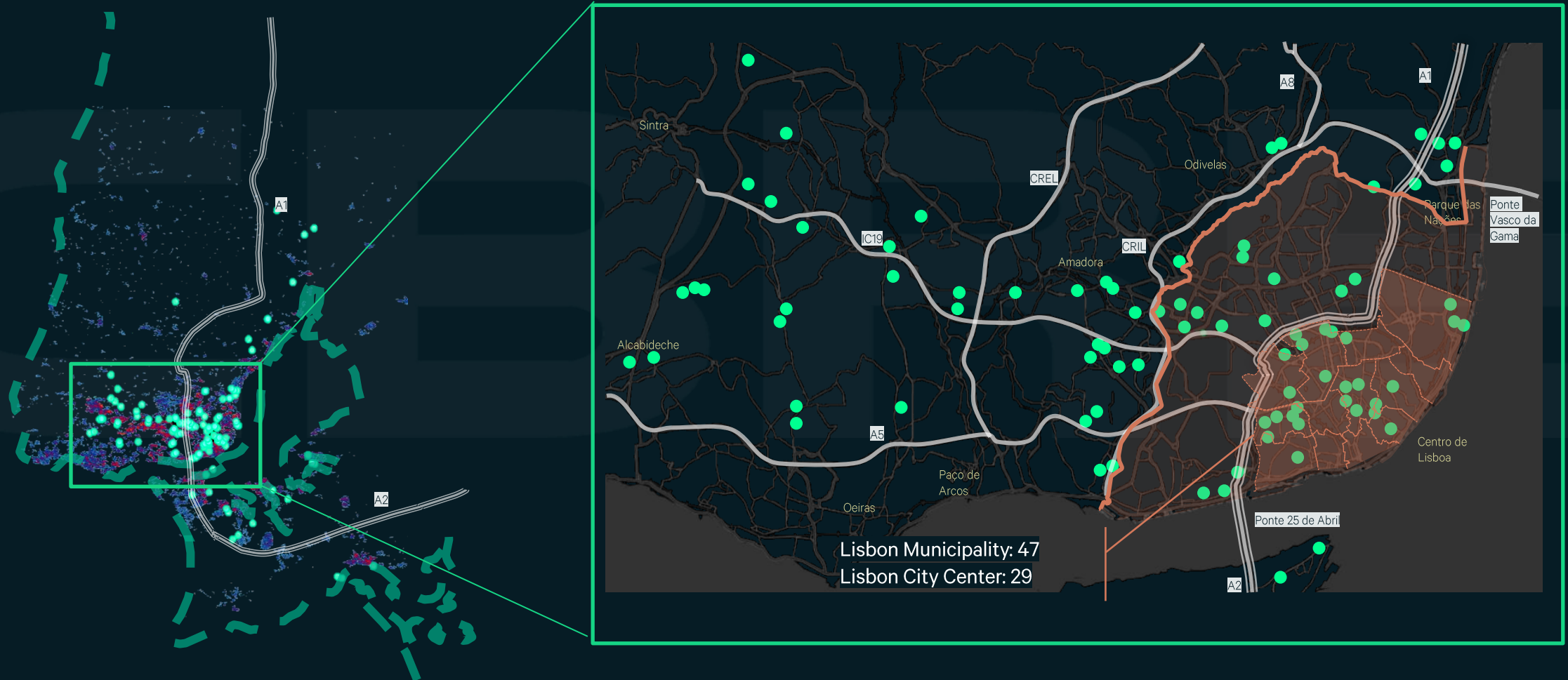
Self-Storage assets distribution by submarkets

[# units]



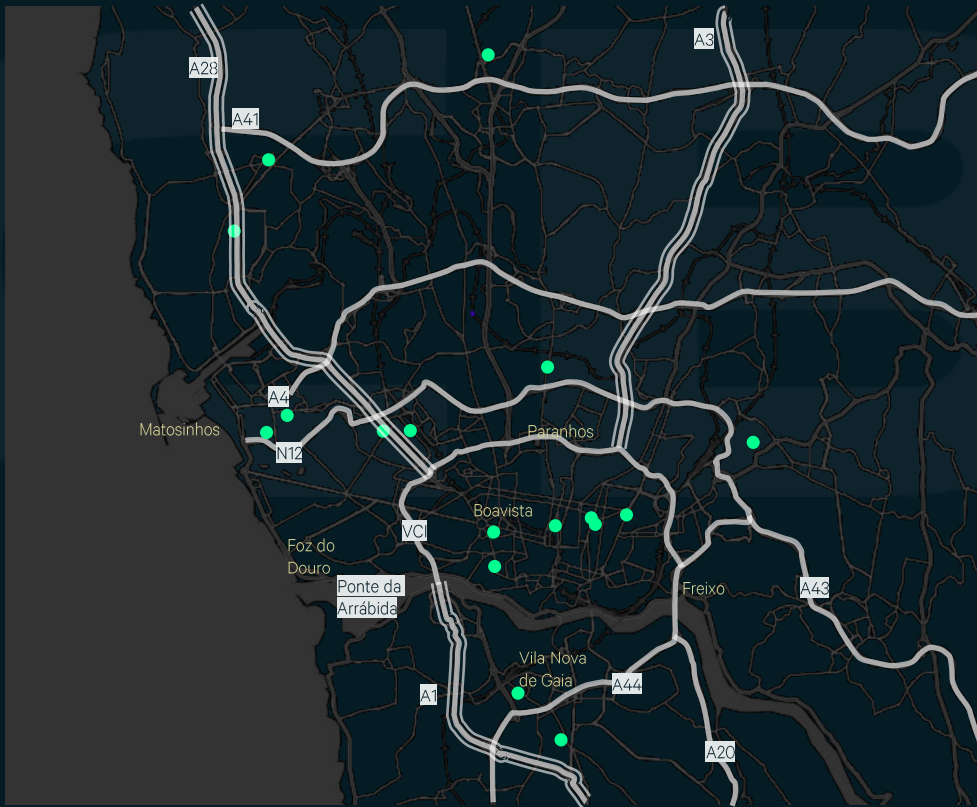
Lisbon's self storage market: a mature urban core with expanding peripheral demand

Lisbon self-storage assets geographical distribution

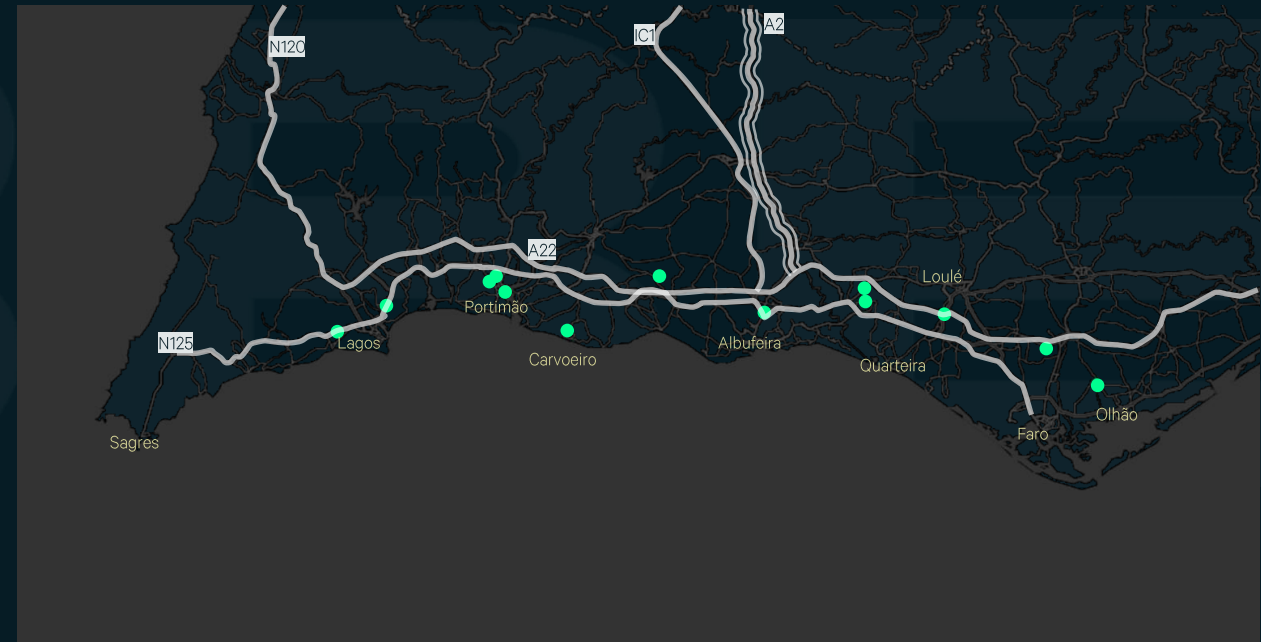


Porto's self storage market: emerging demand with strong growth potential

Porto self-storage assets geographical distribution



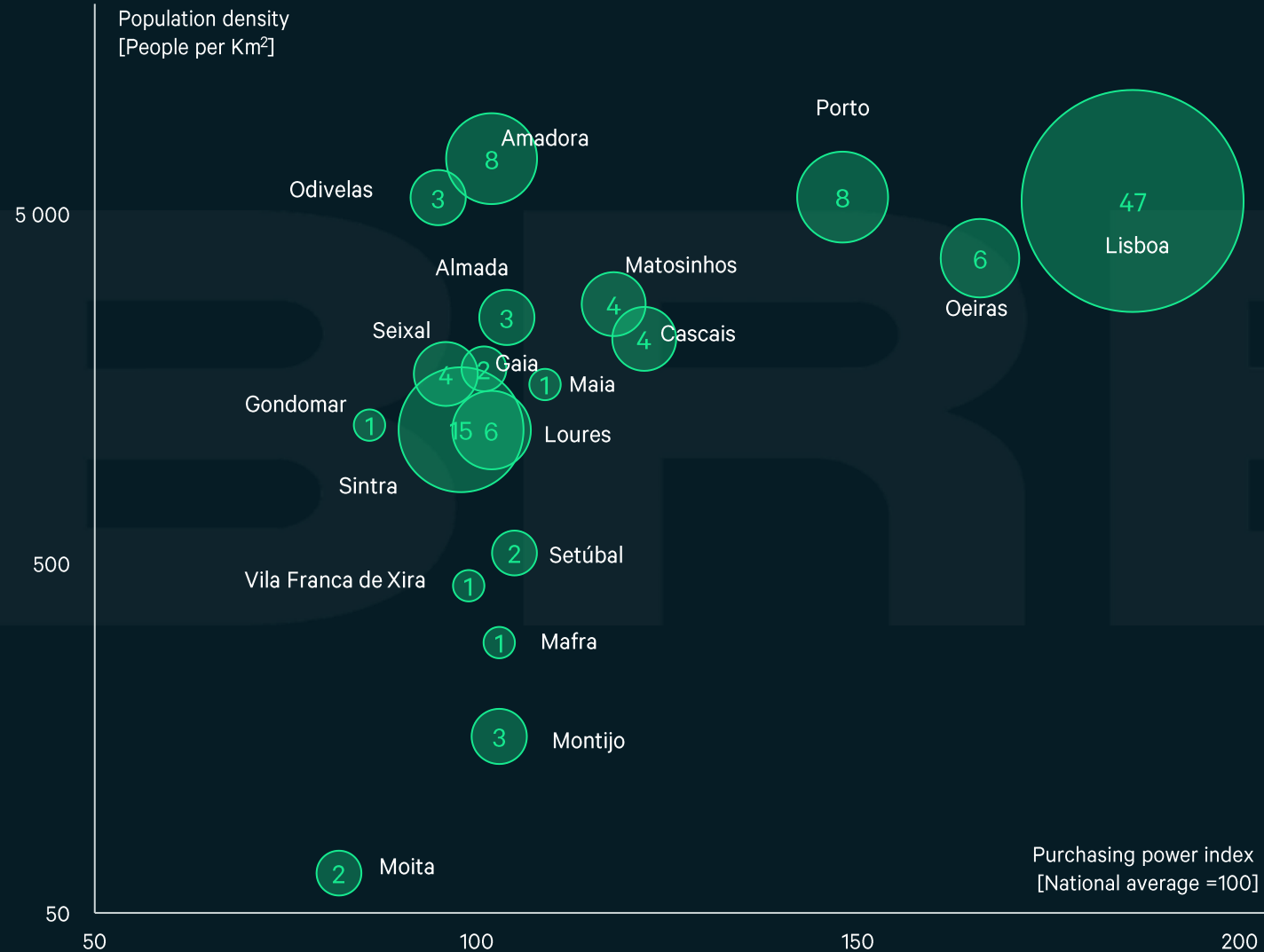
Algarve self-storage assets geographical distribution



The operators' catchment strategy is more nuanced than the density and purchasing power fundamentals

Looking at two Self Storage fundamentals:

Population Density and disposable Income




 **Business uses**



 **Life events**



Self Storage use cases



 E-commerce 

 Micro-logistics 


 Displacement 

 Downsize 

 Divorce 

 Death 

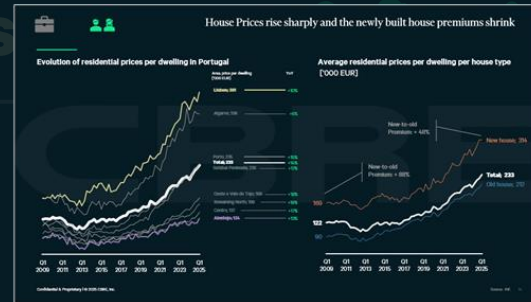
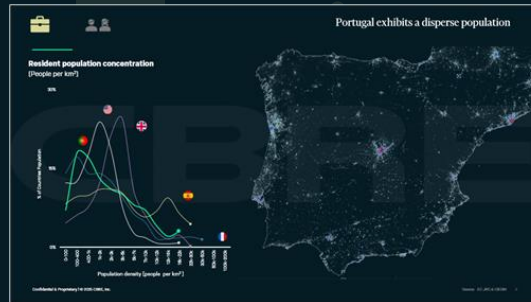
Substitute Real Estate

 Retail & Logistics

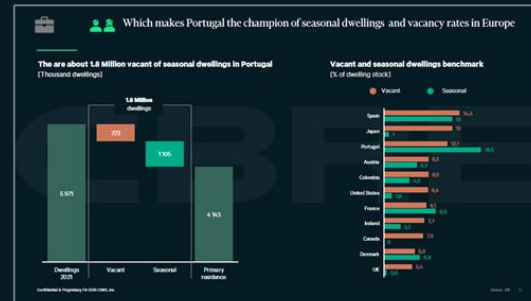
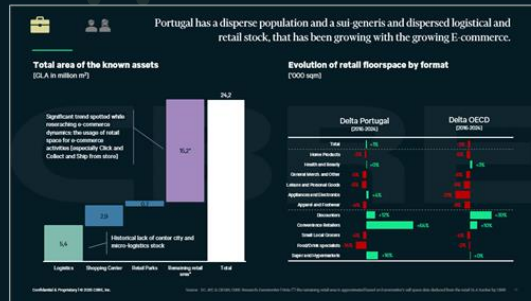
 Residential

Further perspectives for event participants

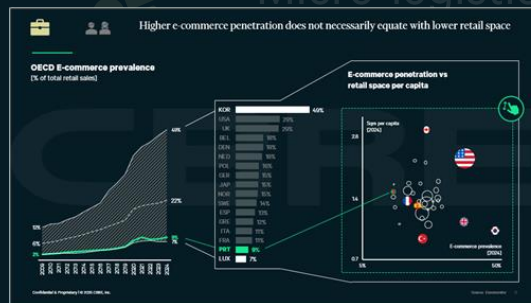
Identifying typical self storage use cases



Self Storage use cases



Substitute Real Estate



Residential

CBRE Inquiry launch

1. Market overview

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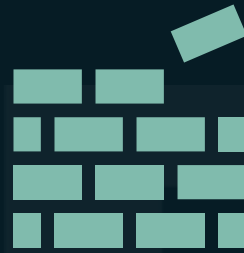
The opportunities for research in the self-storage sector



Stock

Describing existing
Assets

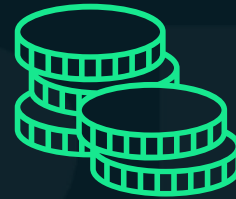
of boxes
Sizes of boxes
Total sqm
Year of construction



Pipeline

Describing assets under
construction

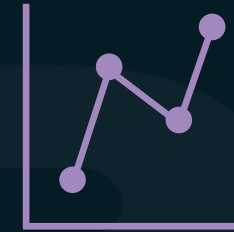
of boxes
Sizes of boxes
Total sqm
Estimated year of
completion



Rents

Describing pricing

Price per 1 sqm box
Price per 5 sqm box
Price per 10 sqm box
Price per 30 sqm box



Occupation

Describing the current
occupation of assets

Number of free boxes
Total free sqm



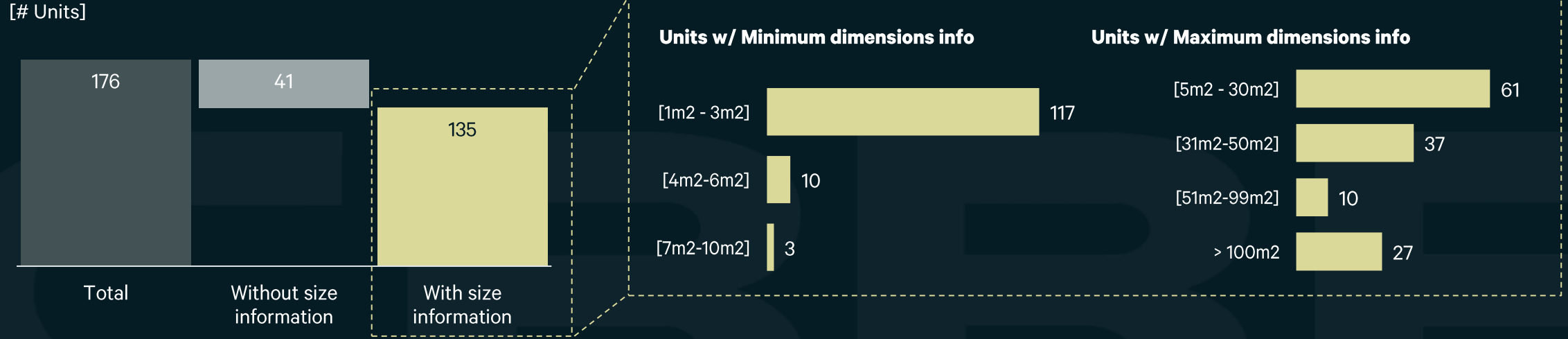
Take-Ups & Churns

Describing commercial
dynamic

New Contracts
Terminated contracts
[in boxes and sqm]

Most operators are willing to publicly display some information about the boxes size, but not prices.

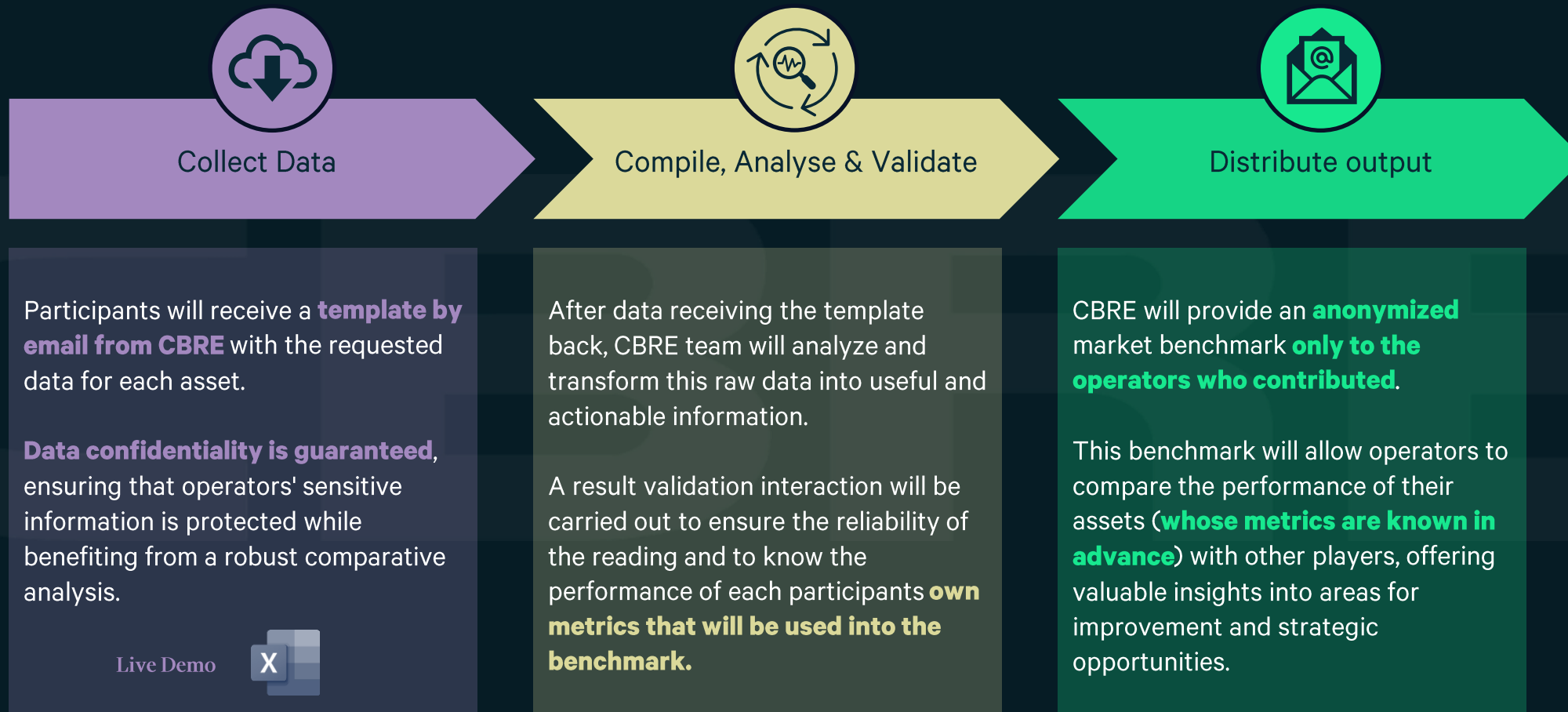
Size information



Price per sqm information



Data can **unlock actionable insights**
while **maintaining confidentiality**



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