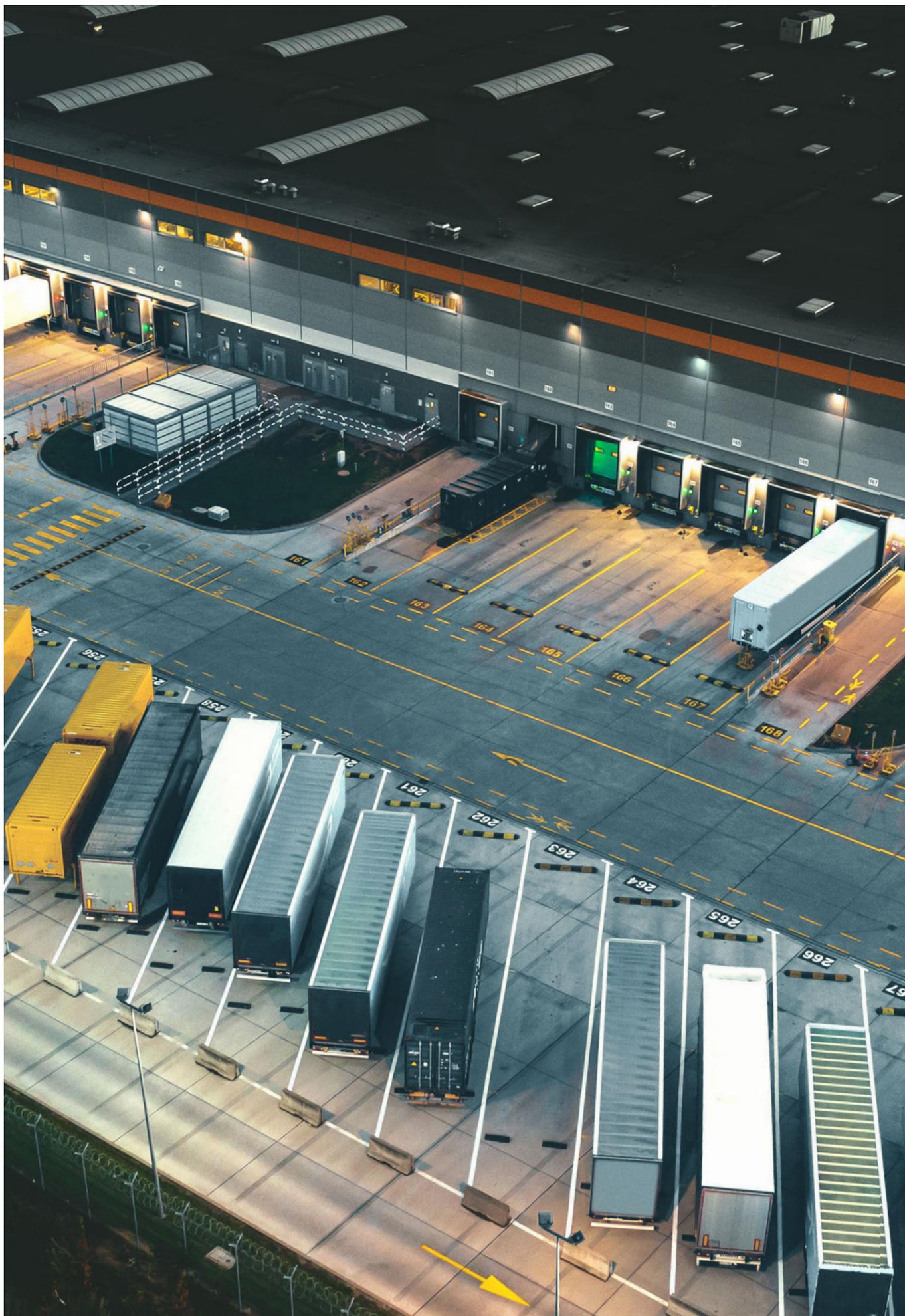


Logistics Market Report 2025





LOGISTICS MARKET REPORT

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GLOBAL REAL ESTATE EXPERTISE

Who is CBRE?

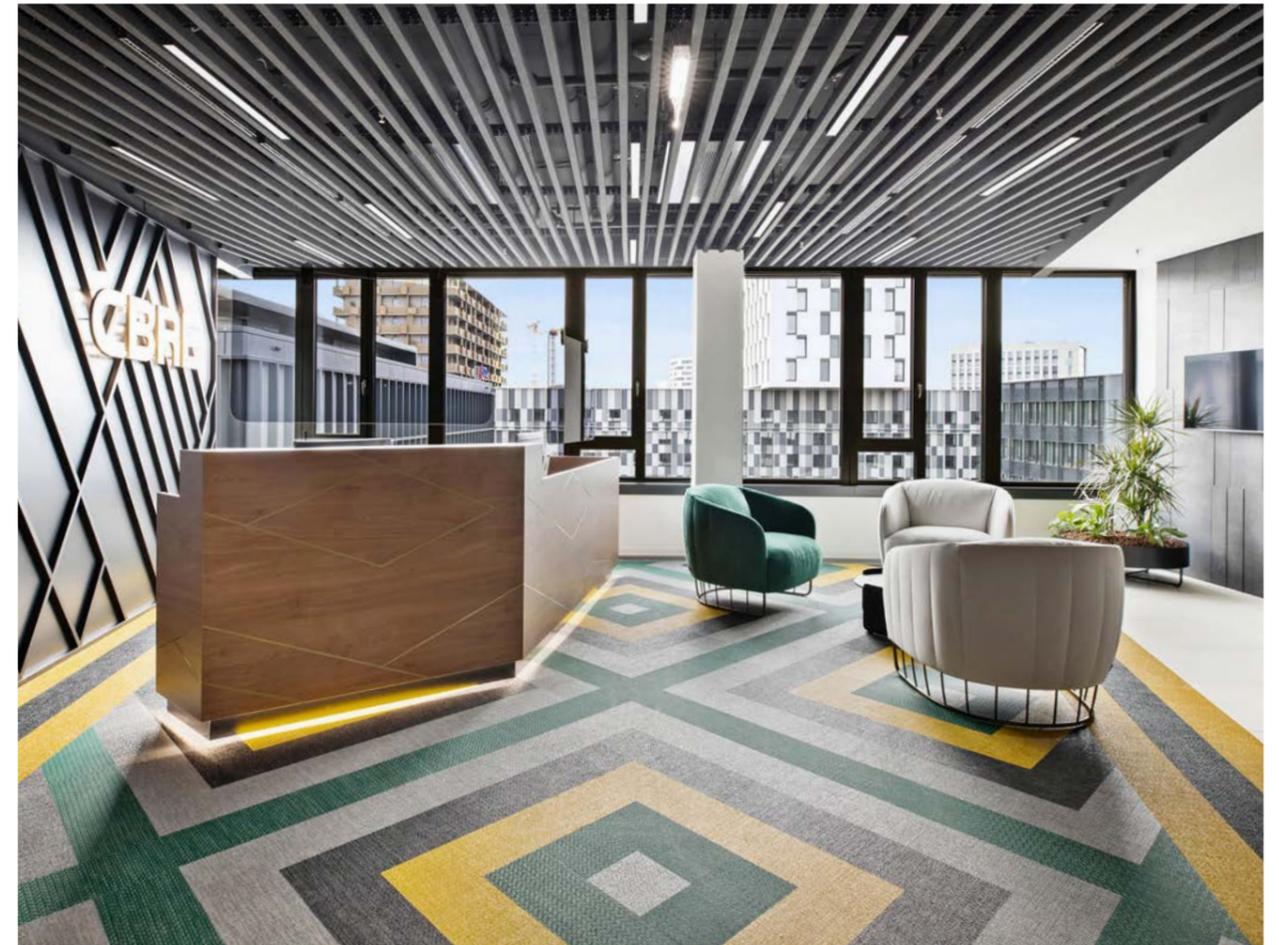
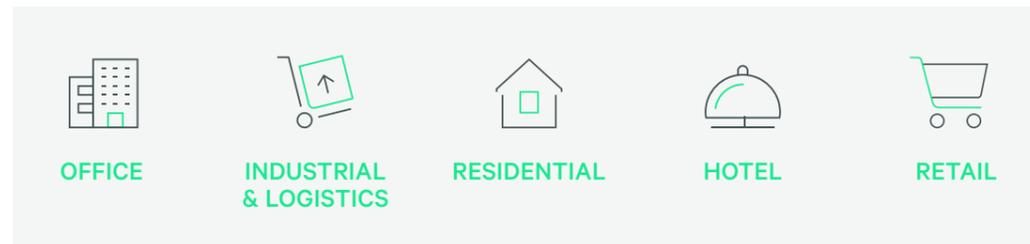
The CBRE Group* is listed on the Fortune 500 and S&P 500 stock index and is the world's leading commercial real estate services firm**.

The company which operates out of Dallas has more than 140,000 employees in over 500 offices across the globe (excluding branches and partner offices) and serves property owners, investors and tenants all over the world. Based in Vienna, CBRE has been represented in Austria since 1991.

At CBRE Austria, around 140 employees advise owners, investors, property developers and tenants in all aspects concerning real estate. The interdisciplinary team adopts a holistic approach when working on all projects. CBRE is therefore the only service provider in the market that offers an all-in-one solution for real estate.

CBRE Services – Office, Industrial & Logistics, Residential, Retail and Hotel:

- Renting and letting advisory services
- Acquisitions and sales advisory services
- Management and development
- Technical consulting
- ESG advisory and certifications
- Architecture & workplace strategy
- Commercial property management
- Fund services
- Property valuation
- Market research, studies and analyses
- Operation & optimization for owner-occupiers



* New York Stock Exchange: CBG WWW** Basis: revenue 2024

LOGISTICS MARKET EXPERTISE

Why logistics real estate is so important right now

**The logistics market is facing major changes.
We know these and can help you to act even more efficiently.**

Following rapid growth in e-commerce and local warehousing requirements in recent years and the resulting sharp rise in demand for logistics space, the logistics market has been facing changes again since last year. Economically challenging and unclear times are leading to restrained consumer behaviour and a decline in export performance, which in turn is causing demand for warehouse space to fall. This is a snapshot in time and it can be assumed that demand will increase again as soon as the economic situation has recovered.

We can help you to prepare the best way possible. We recognize trends early and are happy to share our expertise with you. We are aware that location selection is being approached much more selectively and investments are carefully considered. Modern logistics spaces stay in focus and are essential for profitable business operations. Parameters such as ESG, supply chain directives, and taxonomy regulations must be taken into account.

We support both users as well as investors and developers in understanding the changing conditions and provide optimal solutions for logistic use.

Integrated solutions for industry and logistics: From leasing to maintenance

With our exclusive access to the world's largest broker network, our market-leading research and our local expertise, we develop integrated solutions for the entire property life cycle.

Our service spectrum ranges from leasing, operations to modernization, conversion or sale of logistics and industrial properties. With this broad expertise, we enhance value potentials, minimize risks, and reduce operating and energy costs of industrial and logistics properties.



Are you looking to buy or sell industrial and logistics properties?

**Contact our
Head of Investment Lukas Schwarz:
T +43 676 799 51 60**



Are you looking for new industrial and logistics space, are you looking for a tenant or would you like to find out about completely new uses for your property?

**Contact our
Logistics Expert Daniel Pfeiffer:
T +43 664 518 45 12**



Would you like to speak with a logistics specialist on-site in your region?

**Austria south: Sigrid Filzmoser
T +43 676 500 21 33
Austria west: Christoph Oßberger
T +43 676 501 45 97**

1

General information



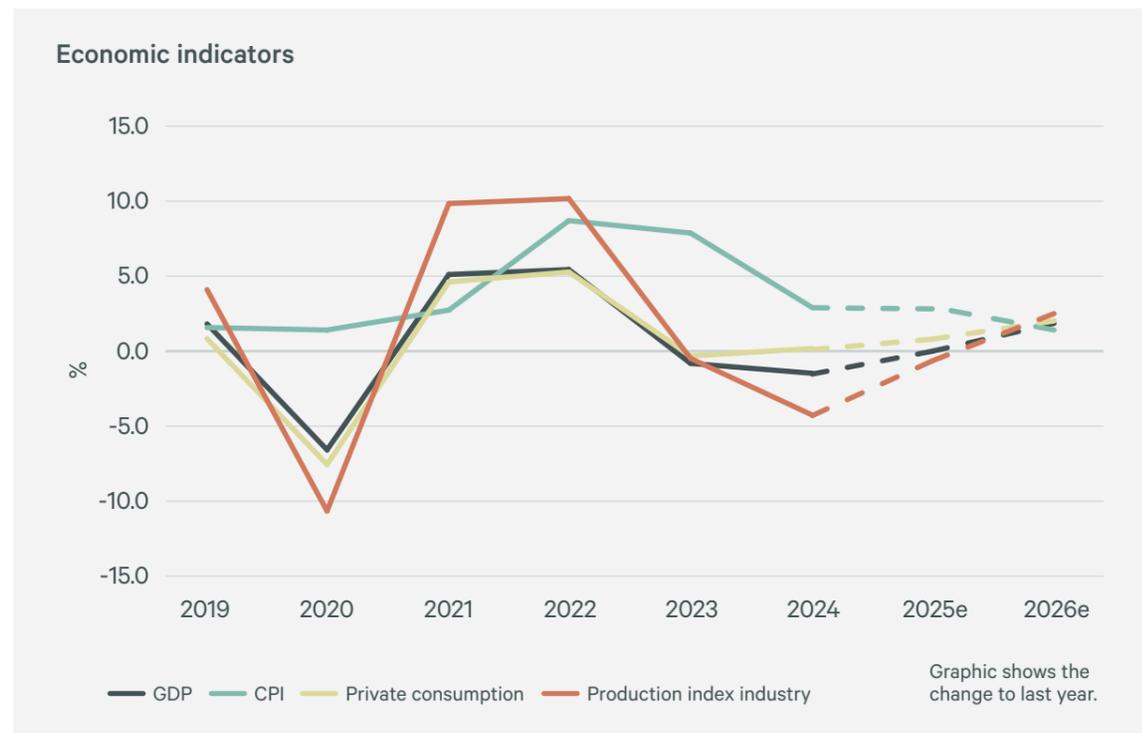
GENERAL INFORMATION

Trade conflicts weigh on economic growth

Dampened economic expectations for 2025

Hopes for an economic recovery in Austria were significantly dampened at the start of 2025. After forecasts initially predicted an end to the two-year recession and moderate growth in gross

domestic product (GDP), this assessment has since been revised. Following a decline of 1.5% in 2024, a further, albeit smaller, fall of 0.1% is now expected for 2025. Further predictions remains uncertain – especially against the backdrop of growing global uncertainties.



Source: CBRE Research, Oxford Economics



International trade conflicts as a negative factor

The current tensions in the global trade environment – particularly between the US, Europe and China - are having a dampening effect on economic growth. They are not only affecting GDP, but also the export sector, which traditionally plays a key role in the Austrian economy.

The resulting risks for supply chains, supplier structures and consumer behaviour are causing many companies – particularly in the logistics sector – to take a cautious stance. Investment decisions are increasingly being postponed in order to better weigh up potential risks. Demand for logistics space also remains subdued as a result of these developments.

It is not yet possible to conclusively assess the extent to which the restrained willingness

to invest will affect the market. However, an economic upturn in the coming years could trigger a rapid countermovement – provided there is convincing economic policy stimulus at both national and international level. The pace of a possible market recovery will depend not least on the course taken by the new government and the decisions made by global players.

Inflation remains a challenge

Inflation will continue to be less favourable than expected in 2025. Current forecasts assume an inflation rate of around 3% – which is still noticeably higher than the target of 2%. Nevertheless, there are cautious hopes for an easing of the situation in the medium term: an increased focus on marketing European products could have a stabilizing effect and thus contribute to a gradual dampening of the price level.

GENERAL INFORMATION

Flexibility as a response to uncertainty

The persistently challenging economic situation is increasing the importance of flexible framework conditions for tenants of logistics and production properties. In a market environment characterized by uncertainty, needs-based strategies increasingly serve to minimize risk – and are thus becoming more attractive, at least until clear economic prospects emerge again.

Shorter-term leases as a response to uncertainty

A clear trend is emerging in current lease negotiations: shorter terms and flexible extension options are increasingly being requested. A shorter planning horizon allows tenants to react more quickly to changes in the economic environment and adapt space accordingly – whether through expansion or reduction.

Owner-occupiers are switching to the rental market

In view of the uncertain market situation, more and more companies are opting to sell their logistics and production properties and are thus increasingly orienting themselves towards more adaptable usage concepts. The motivations are varied: in addition to increased adaptability to changing operational requirements, the release of tied-up capital plays a particularly important role. This increase in liquidity enables investments in

the core business – an argument that makes sale-and-leaseback models more and more attractive. As a result, not only is interest in such transactions increasing, but so is the number of owner-occupiers seeking space on the rental market.

At the same time, landlords and developers are also confronted with changing market conditions. Declining demand combined with increasing supply is noticeably lengthening marketing processes – these are significantly more time-consuming than just a few years ago. At the same time, the incentives offered to attract potential tenants are increasing.

Strategies for space optimization

Project developers are meeting these challenges with an increased willingness to adapt: on the one hand, through flexibly designed space layouts targeted at a broad user group, and on the other hand, through customized solutions specifically tailored to the needs of individual tenants.

Additional supply from existing stock

In addition to new buildings, the supply is growing due to available space in existing stock, which is coming onto the market, primarily as a result of space consolidation. These spaces are often subleased and therefore do not appear in the official space turnover, but nevertheless significantly expand the market supply.

Influential factors on the logistics real estate market



Economy

Trade uncertainty and the impact of existing and impending tariffs continue to weigh on economic development in Austria. At the same time, sustained robust private consumption is providing some stabilization and partially offsetting the negative effects.



Construction costs

Construction costs declined slightly towards the end of 2024. Many construction companies are currently willing to negotiate to secure orders, which provides additional flexibility for project developers.



Demand

The currently subdued demand in the logistics real estate market is leading to noticeably longer marketing processes. However, an economic recovery could quickly lead to a revival of market dynamics.



ESG

Sustainability certifications have now become established as a standard for both investors and tenants.



Interest rate policy

The European Central Bank's interest rate cuts have already noticeably improved financing conditions. With further measures expected in 2025, the situation for investors and project developers should ease further.



Land prices

Price pressure is increasing – not least due to the growing reluctance of many municipalities to grant new zoning permits for logistics uses. The availability of suitable development sites remains limited.



Supply

The current discrepancy between completions and leasing is expected to narrow somewhat this year. This is due to the declining project pipeline, which is leading to lower space growth.

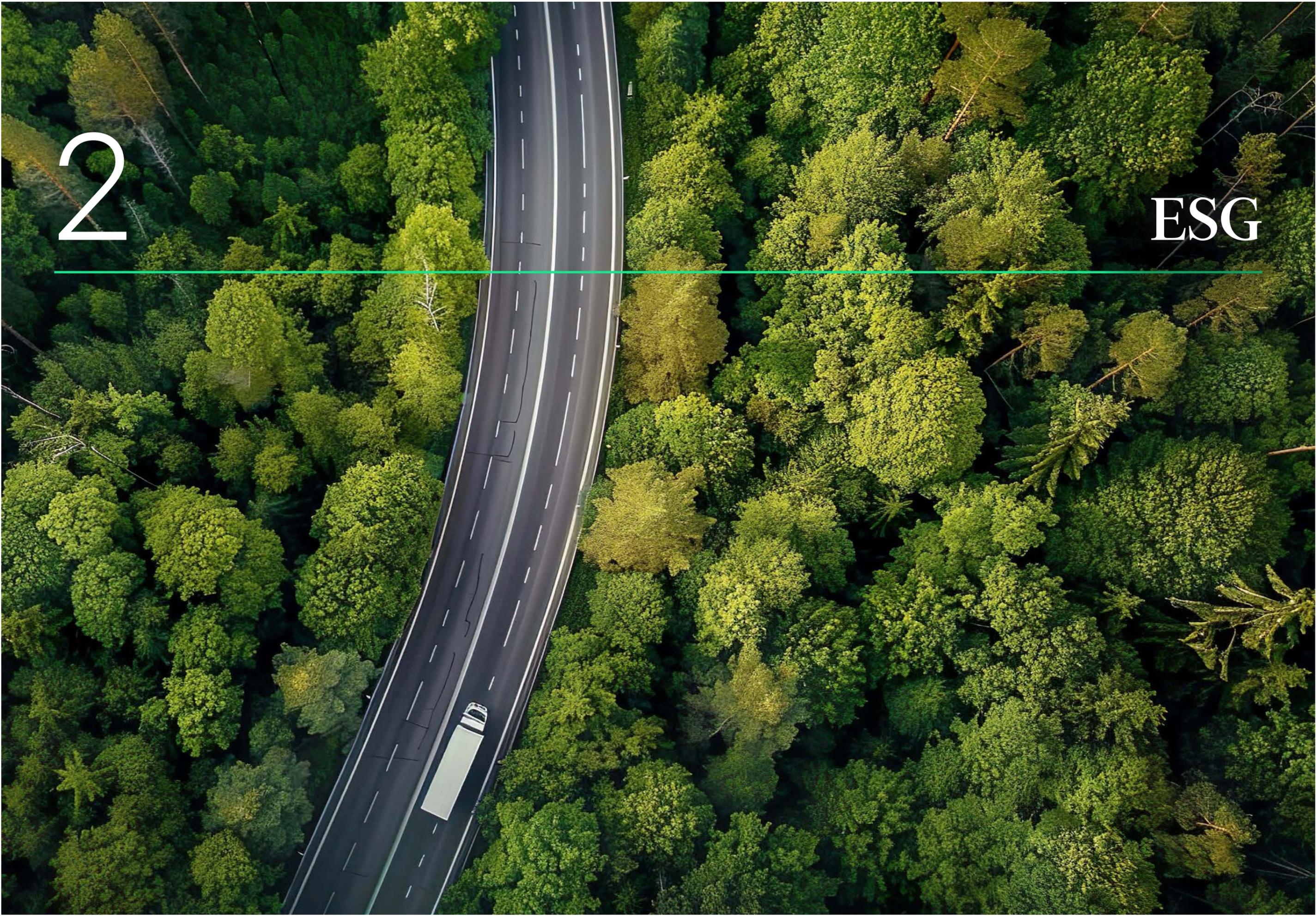


Zoning restrictions

Many municipalities are pursuing increasingly restrictive strategies for new land use planning to avoid additional land sealing. This trend is making the realization of new logistics projects particularly difficult in urban areas.

2

ESG



ESG

ESG certifications as the new standard in the logistics real estate market

Certified sustainability is gaining importance

The relevance of ESG-compliant logistics properties is currently higher than ever before. This is clearly reflected in the increasing number of certified projects in recent years. In the Vienna market, in particular, all newly constructed leased logistics properties

were awarded one of the common ESG certificates (DGNB, ÖGNI, or BREEAM) in 2024 and 2025.

Owner-occupied projects, on the other hand, are usually not certified – since they remain in the portfolio for the long term and are not intended for sale, there is often no immediate incentive for certification.

Share of certified logistics projects in the Vienna market 2020 – 2025e



Source: CBRE Research



Certification as a success factor in transactions

ESG certification has become a key criterion in transactions. It not only improves long-term leasing potential but also protects against the risk of so-called stranded assets. Stranded assets are properties that no longer meet current sustainability criteria and are subject to significant loss of value due to the associated limited leasing potential.

At the same time, certification provides information about any renovation or investment needs, thus creating planning and investment security for buyers and investors.

Furthermore, certification broadens the potential buyer group and increases the attractiveness of the property on the market. Certified properties can also appeal to a broader target group on the tenant side – which further facilitates marketing.

ESG

Greenfield vs. Brownfield

EU Taxonomy Regulation complicates greenfield developments

With the EU Taxonomy Regulation, which came into force in mid-2024, the protection of unsealed green spaces was significantly strengthened across Europe. The development of new logistics areas on so-called “greenfields” – previously undeveloped areas such as fields, meadows, or forests – thus presents an additional challenge. The aim of this regulation is to counteract the increasing sealing of soil and the encroachment on natural habitats.

The decisive factor for classification is the condition of the property at the time of acquisition – its designated zoning for building or industrial purposes play no decisive role.

Brownfields gaining importance

The new framework increasingly focuses on already used or unused land – so-called “brownfields” and “greyfields”. Those seeking EU Taxonomy compliance for future logistics projects must therefore rely on existing sites that can be revitalized, renovated, or repurposed.

Rising demand – but limited supply

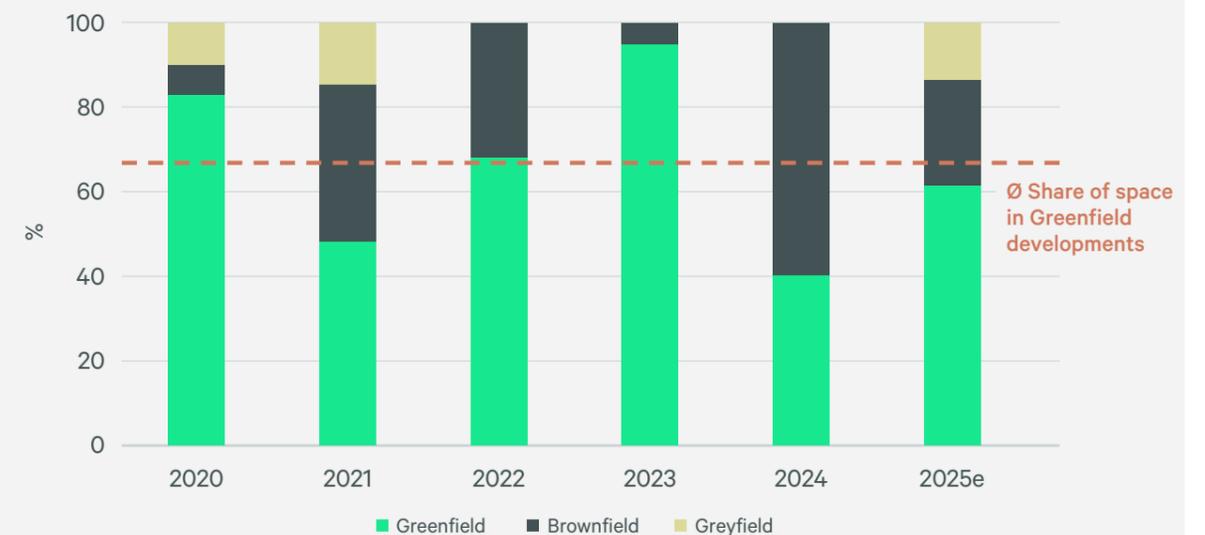
Currently, there are still some potential sites for brownfield or greyfield developments in the Austrian logistics market. However, given the growing demand for ESG-compliant logistics properties – from both tenants and investors – a shortage of available supply is to be expected in the medium term.

Competition for suitable brownfield sites will continue to intensify, particularly in metropolitan areas and established logistics locations. This development underscores the importance of sustainable land-use strategies and early site analyses for future project developments.



Property condition	Definition
Greenfield	Undeveloped plots of land, where a de facto “greenfield” development is taking place. No development has taken place here before and there is no sealed area. Frequent conversion of agricultural land into building land.
Brownfield	Developed land that has already been used for other buildings or structures and is polluted or contaminated. As a rule, demolition is necessary to ensure a new use, e.g. petrol stations, production halls or car workshops.
Greyfield	Developed but unutilised plots of land whose building fabric is incorporated into the new development. These are unencumbered or contaminated properties with buildings or areas that are no longer sufficiently used, e.g. car parks, logistics halls, former retail locations such as furniture stores.

Share of space by property condition in the Vienna market 2020 – 2025e



Source: CBRE Research

ESG

Reuse of Brownfields and Greyfields in Vienna

Building types and trends in urban development

The increasing scarcity of space in urban areas such as Vienna and the need for sustainable urban development are increasingly placing brownfields and greyfields at the centre of planning and investment strategies.

Intelligent reuse is creating new building typologies characterized by high adaptability, hybrid forms of use, and site-specific solutions. In Vienna, three dominant building concepts can be identified: city logistics hubs, urban business parks, and specialized buildings for specific user needs.

City Logistics Hubs: efficiency in the last mile

With the rapid rise of e-commerce and the growing importance of environmentally friendly

“last-mile” logistics, inner-city logistics units are gaining strategic importance. In Vienna, this trend is reflected in the targeted conversion of centrally located brownfield or greyfield sites into city logistics hubs. These serve as local transshipment points, supplied by higher-level warehouse structures (e.g., outside the city limits). From here, the goods are distributed to end customers in densely populated urban areas.

The architectural requirements of these building types include:

- High spatial flexibility and good serviceability
- Integration of low-emission mobility (e.g., electric delivery vehicles, cargo bikes)
- Reduction of logistics emissions and noise pollution
- Modularity for future adaptation



Example City Logistics Hub: CLC Schusslinie (DLH Deutsche Logistik Holding)



Example of an Urban Business Park: Citypark Vienna (GoAsset Development)



Example of Special-Purpose Buildings: CAE Schwechat (Propel Industrial)

Urban Business Parks: multimodal production and workspaces

Interest in modern business parks with a multi-use concept is growing steadily. These facilities combine various commercial uses in a compact space and differ significantly from the monofunctional commercial zones of the past. The focus is on flexible, modular space concepts and targeted mixed use in order to appeal to a broad spectrum of tenants – from light manufacturing companies, trades and research to showrooms and laboratory facilities.

Characteristic features of this building typology:

- Combination of warehouse, workshop, office, and presentation space
- Synergy effects due to the proximity of various companies
- Attractiveness for startups, the creative industries, and urban production
- Possibility of integrating co-working, shared services, and restaurants

Special-Purpose Buildings: tailor-made corporate locations

In addition to flexible and multifunctional building structures, there is still a demand for custom-made special-purpose buildings,

particularly for headquarters (HQs), research facilities, or technologically sophisticated uses. These projects are characterized by a high degree of customization and offer companies the opportunity to integrate architecture and function with their corporate identity.

Characteristics of this type are:

- Sites are often located in transformation areas with high development potential
- Sustainable construction (e.g., wood-hybrid structures, DGNB certifications)
- Representative facade design and high interior quality
- Adaptation to specific processes such as laboratory logistics, clean rooms, or testing facilities

Conclusion and outlook

The reuse of brownfield and greyfield sites in Vienna opens up new perspectives for sustainable, resource-efficient urban development.

While city logistics and multi-use business parks focus on efficiency and flexibility, special-purpose buildings enable targeted urban planning and corporate strategy positioning. Key success factors for these developments are forward-looking spatial planning, investment-friendly framework conditions, and a holistic understanding of urban value creation.

The transformation of these areas offers not only economic but also social and ecological potential for the city of Vienna in the context of the 21st century.

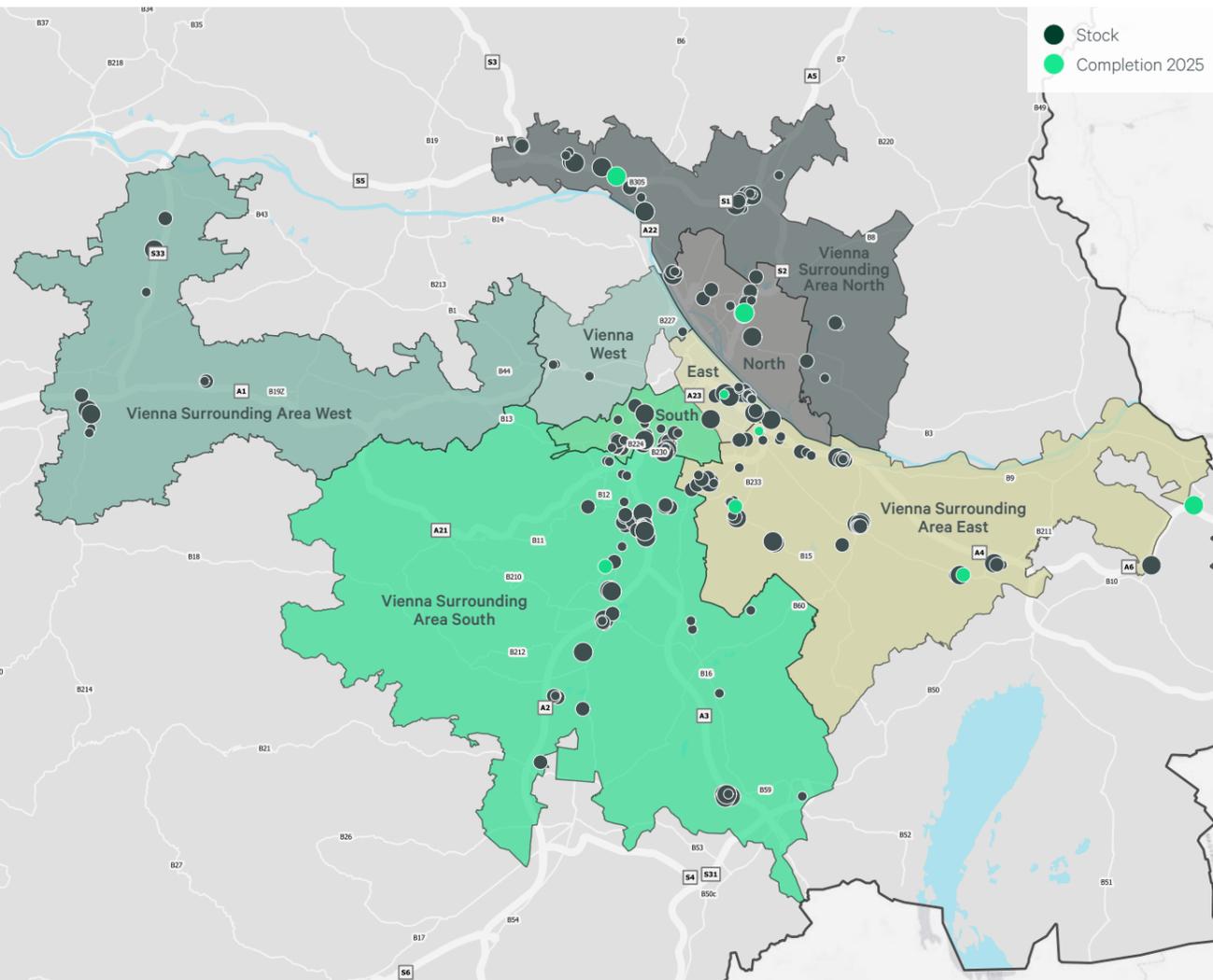
3

Logistics market Vienna



LOGISTICS MARKET VIENNA

Trend reversal on the Vienna market



Stock & Project pipeline

Due to extensive expansions in 2024, the Vienna logistics market currently encompasses approximately 4 million sq m. The share of modern Class A space increased by 6 percentage points to 58%.

Of the approximately 474,000 sq m of newly created logistics space, over half was in the submarket Vienna Surrounding Area East, followed by 26% in the southern surroundings.

A significantly reduced completion volume of approximately 150,000 sq m is expected for 2025. This volume reflects the currently subdued market dynamics – many developers are waiting for higher pre-letting rates before starting construction, which has led to the pause or postponement of speculative projects.

The pre-let rate for 2025 projects is currently 29%, while 16% of the planned space will be realized as owner-occupier projects.

LOGISTICS MARKET VIENNA

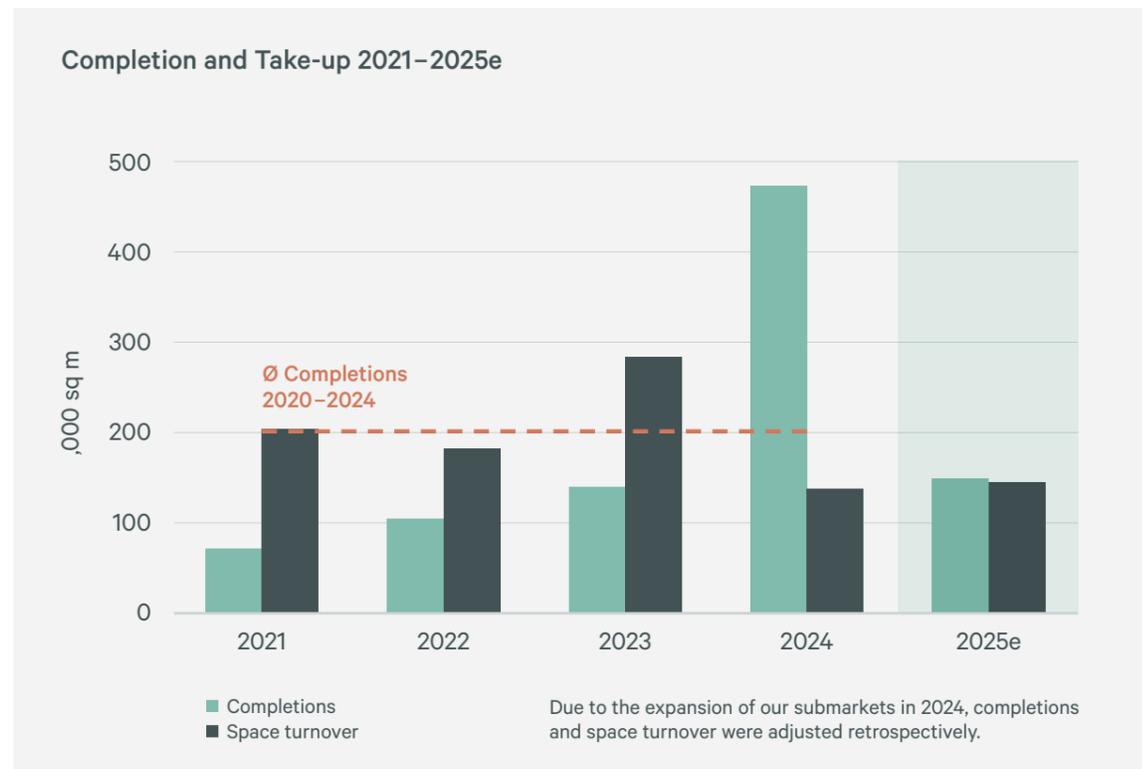
Take-up & vacancy

For the first time since 2019, the completion volume exceeded the leasing performance in 2024. Demand is declining due to macro-economic uncertainty, especially compared to previous record years. A similar take-up of space is expected for 2025 as in 2024 (137,000 sq m).

Due to the weaker demand, many companies are optimizing their existing space through consolidation or switching to modern new buildings. This has led to an increased supply of available existing space.

The vacancy rate for modern spaces (Class A & B) was 4.75% at the end of 2024. This market situation strengthens the negotiating position of prospective tenants.

Developers are responding with ESG-compliant, flexible solutions to meet occupiers' increased demands. Projects in attractive, well-connected locations are experiencing correspondingly shorter marketing periods.



Source: CBRE Research

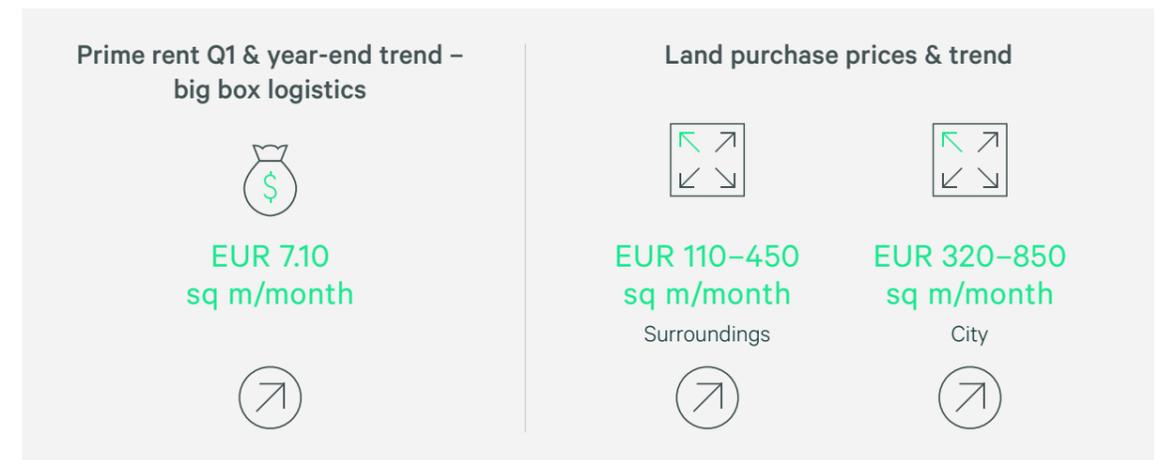
Rents & land purchase prices

The prime rent for traditional big-box logistics space in the Vienna area rose by 2.2% to EUR 7.10/sq m/month in 2024. However, due to the decline in demand, rental growth is slowing. A further moderate increase to EUR 7.25/sq m/month is forecast for 2025 – particularly for high-quality properties in prime locations.

Inner-city logistics space, which is gaining in importance, sometimes achieves significantly higher rents.

Land prices in the surroundings of Vienna currently range between EUR 110/sq m and EUR 450/sq m. In the Vienna metropolitan area, the range is between EUR 320/sq m and EUR 850/sq m, with inner-city locations being particularly sought after due to the variety of user groups.

For brownfield developments, potential demolition and renovation costs must also be considered.



Source: CBRE Research

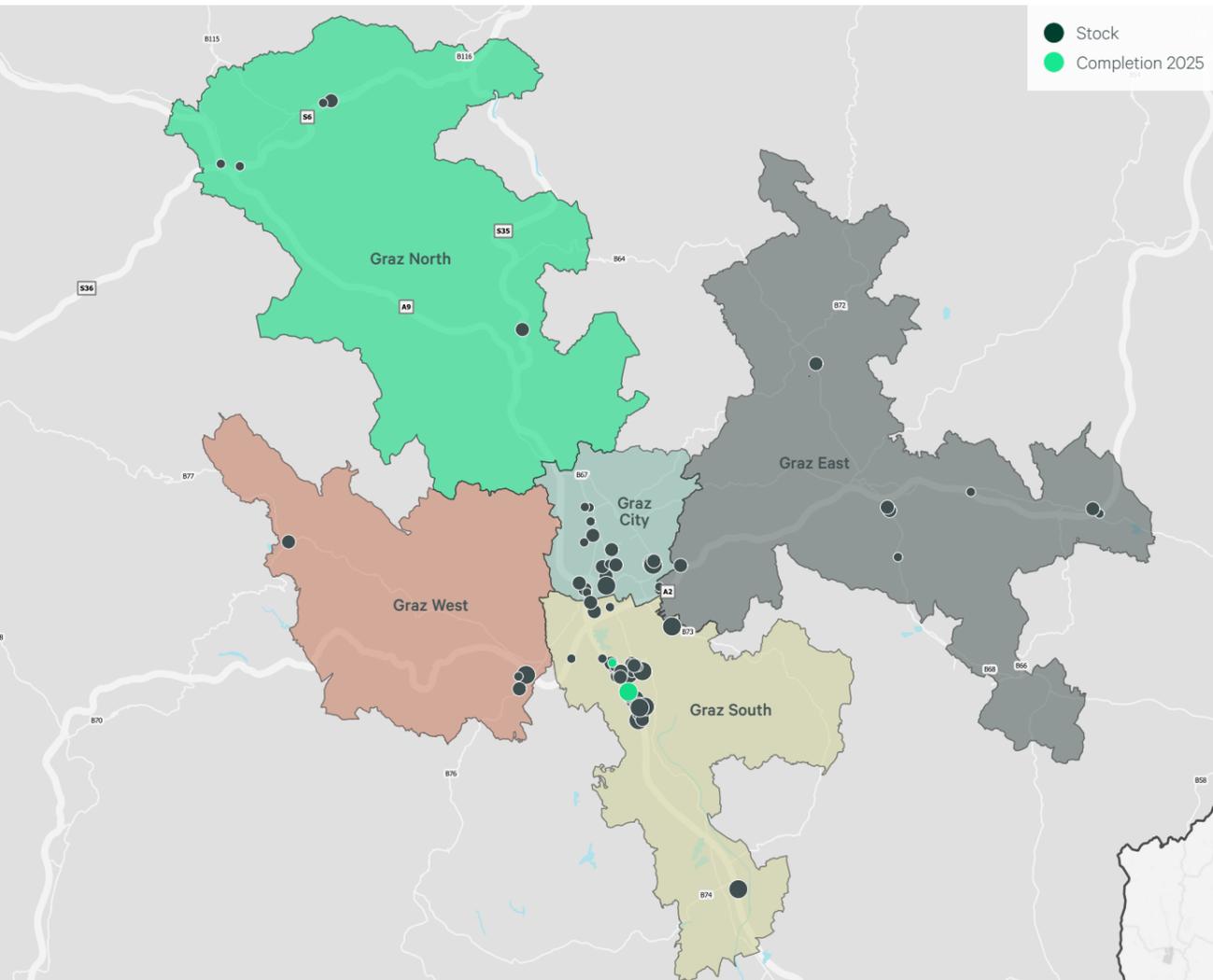
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Logistics market Graz



LOGISTICS MARKET GRAZ

Austria's most modern logistics hotspot



Source: CBRE Research

Stock & Project pipeline

With over 1 million sq m of space, Graz is Austria's third-largest logistics market. The high proportion of modern space is remarkable: over 70 % of the space is classified as Class A, making Graz the most modern logistics market among Austria's major markets.

New developments are concentrated almost exclusively in the southern region – particularly along the axis from Feldkirchen to Leibnitz.

Only one new project with approximately 50,000 sq m is planned for 2025: Lidl is building a logistics centre in Werndorf for its own use.

Two speculative projects are currently planned for 2026 – subject to change, as postponements are possible due to the uncertain framework conditions.

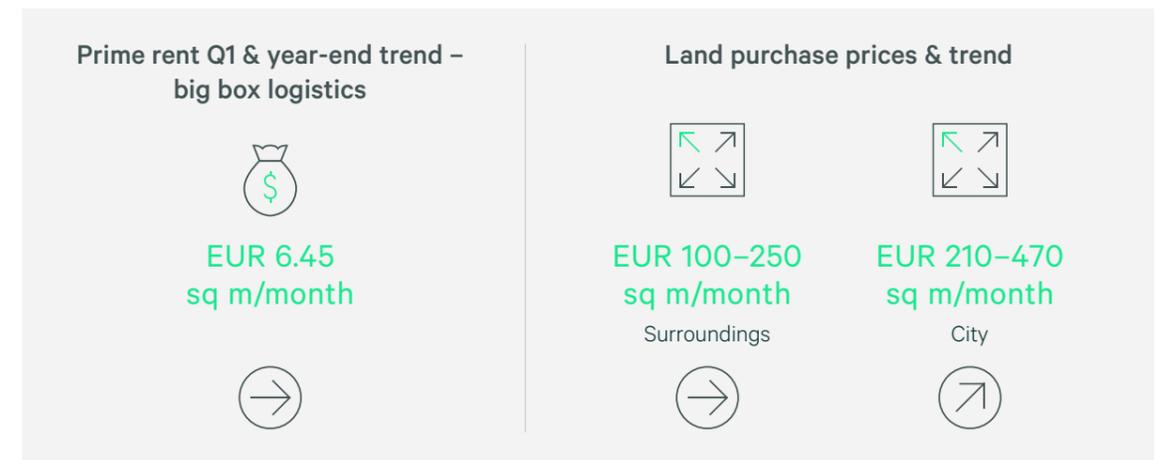
A key location advantage lies in its transport links: the Graz South submarket benefits greatly from its accessibility, including connections to the Adriatic ports. The planned commissioning of the Koralm tunnel (end of 2025) between Klagenfurt and Graz will further enhance the location and strengthen freight transport by rail.

Rents & Land purchase prices

The Graz market is currently under pressure – particularly due to economic challenges in the European automotive industry.

The prime rent for logistics space is stable at EUR 6.45/sq m/month in 2025. Should the economic situation improve, further rent increases can be expected in the medium term.

Land prices in the surrounding area range between EUR 100/sq m and EUR 250/sq m, and within the city of Graz between EUR 210/sq m and EUR 470/sq m. As in all markets, the specific micro-location is crucial for pricing.



Source: CBRE Research

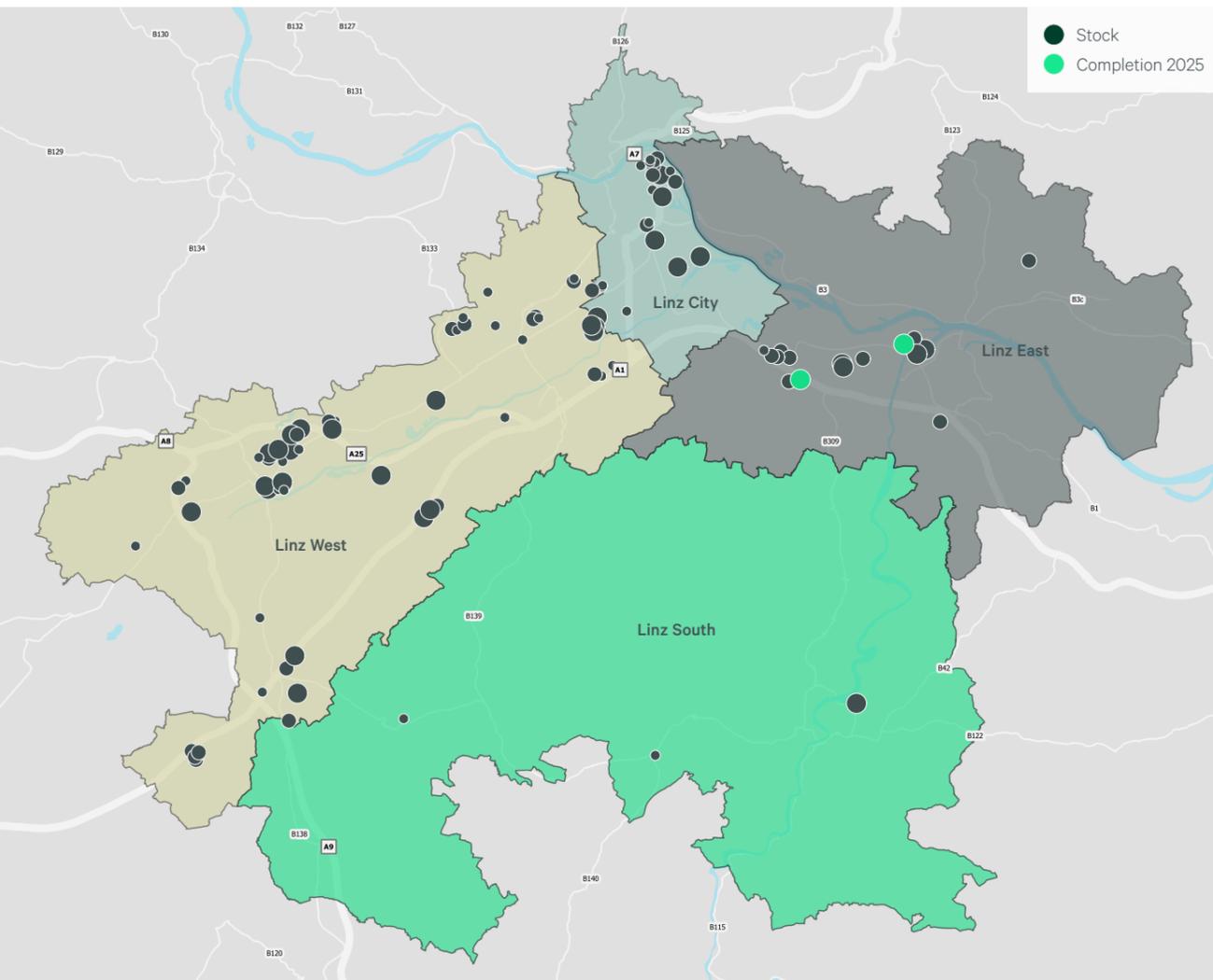
5

Logistics market
Linz



LOGISTICS MARKET LINZ

Stable market with continued demand for space



Source: CBRE Research

Stock & Project pipeline

With approximately 1.9 million sq m, Linz is not only the second largest but also the second most important logistics market in Austria. Its strategically favourable location on the A1 motorway and its proximity to the German border make the region a key hub for national and international freight transport.

In contrast to other locations, the industrial and manufacturing companies in and around Linz are currently proving more resilient to economic challenges.

However, the share of modern space remains limited: Only approximately 45% of the existing space is in Class A buildings. The resulting gap creates further development potential.

35,000 sq m of speculative space in Enns and an owner-occupier project of approximately 30,000 sq m in Asten are planned for 2025.

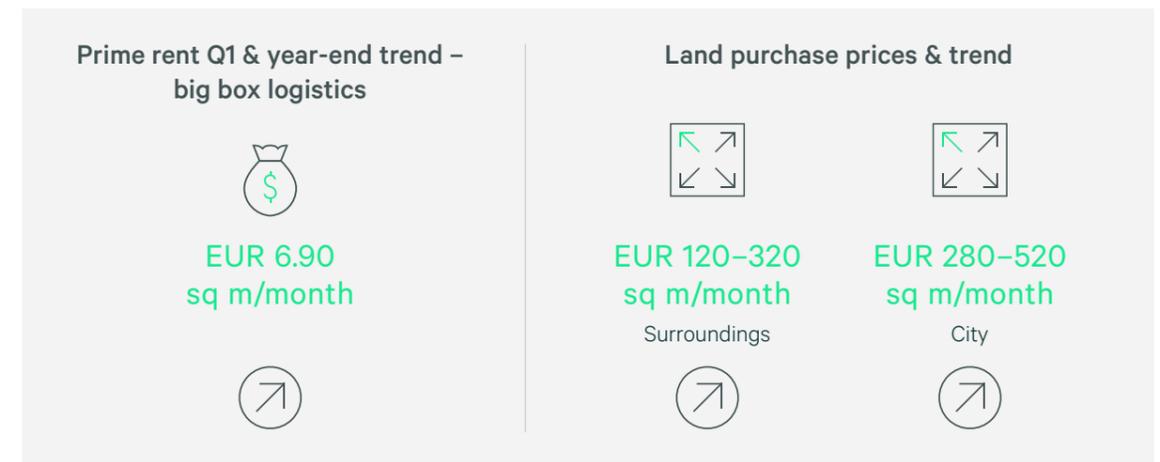
Demand for modern logistics space remains high. At the same time, strict zoning criteria, limited land reserves, and complex approval procedures are making the implementation of new projects increasingly difficult.

Rents & Land purchase prices

The tight supply of modern space is leading to continuous rent growth. The prime rent rose by 6% in 2024 to the current EUR 6.90/sq m/month level. Due to the continued low completion rate in 2025, further rent increases are foreseeable.

Land prices in the surrounding area range between EUR 120/sq m and EUR 320/sq m, and within the city of Linz between EUR 280/sq m and EUR 520/sq m.

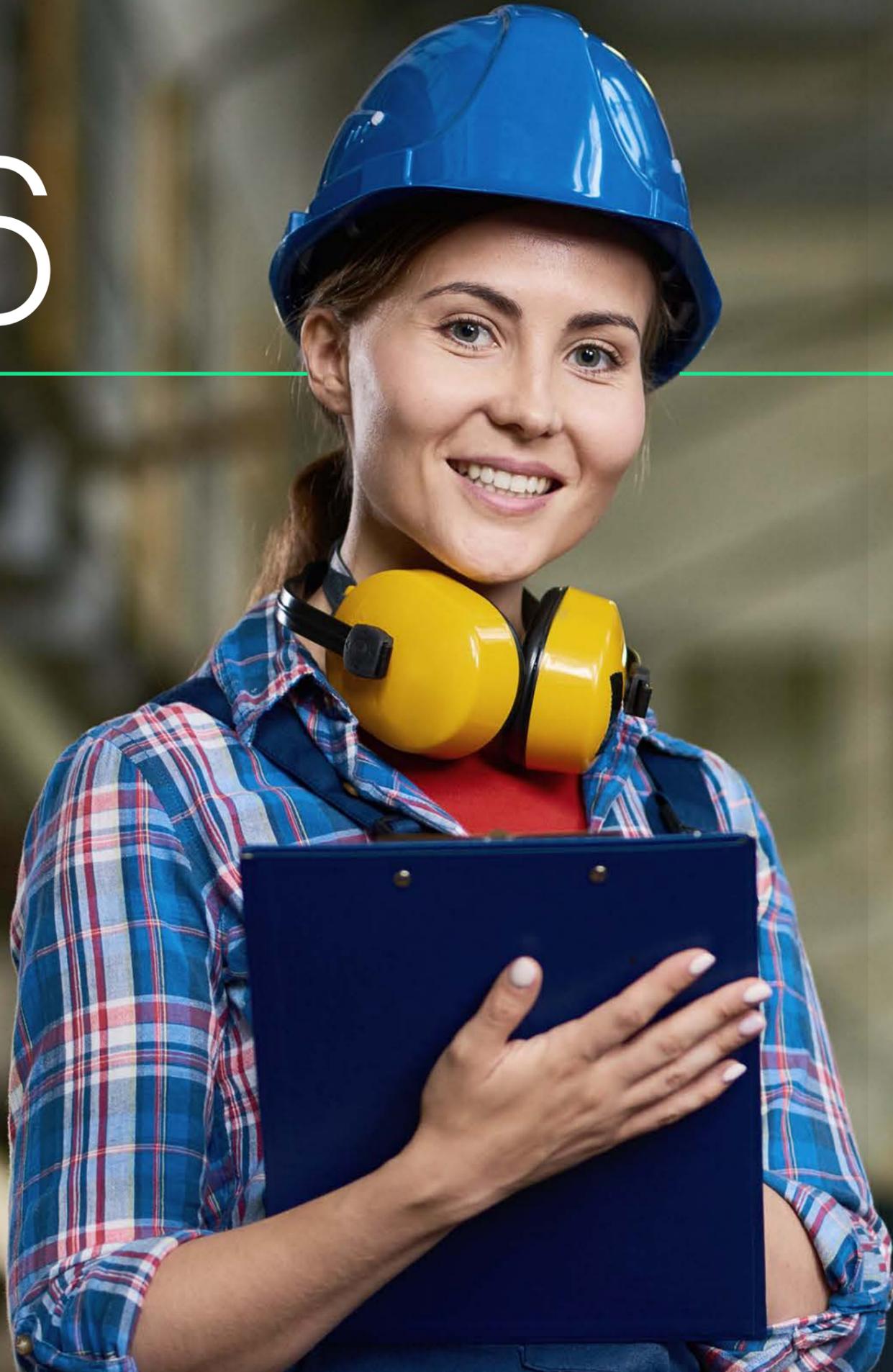
A limiting factor for land development is the low willingness of owners to sell – not least due to sometimes excessive asking prices.



Source: CBRE Research

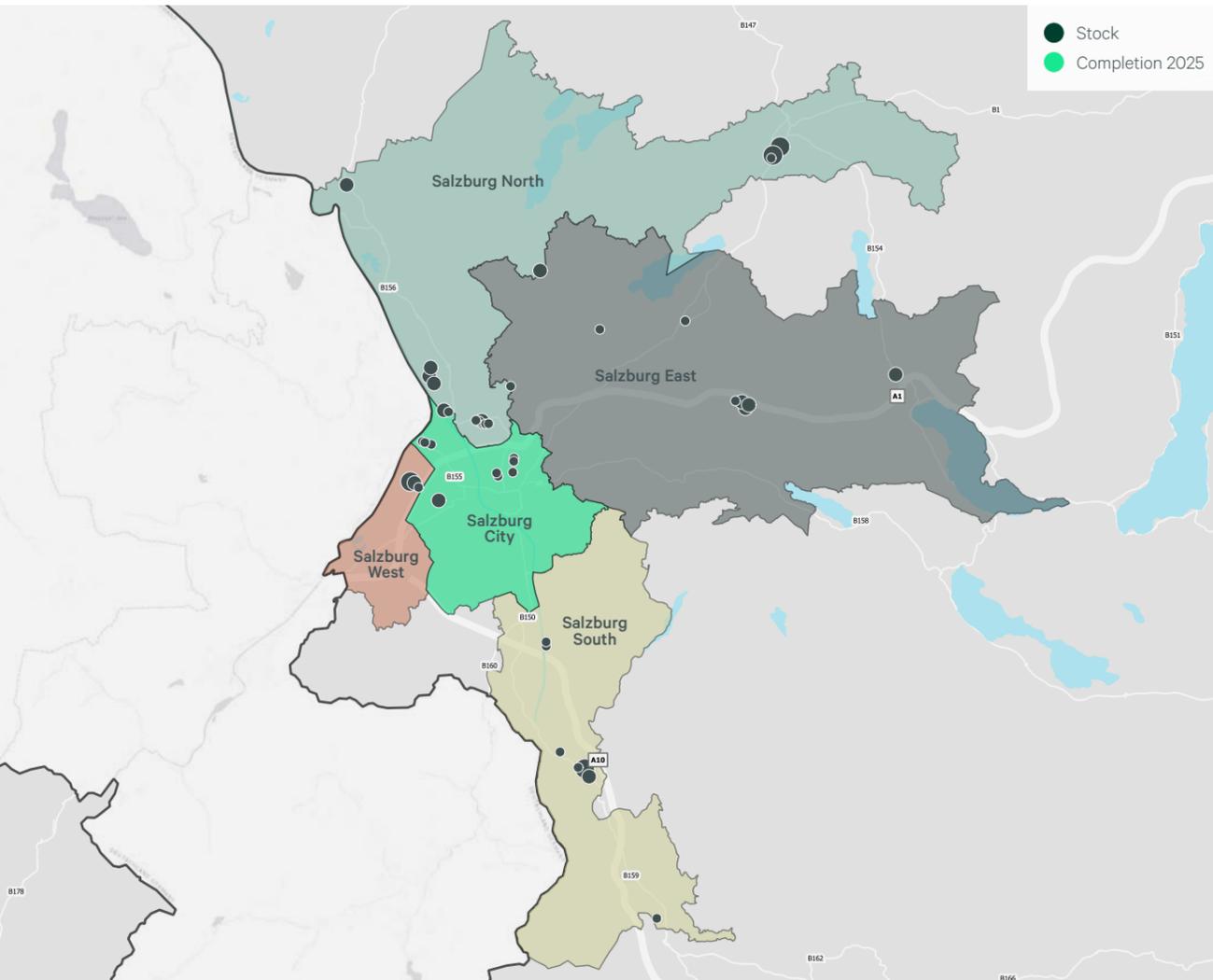
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Logistics market Salzburg



LOGISTICS MARKET SALZBURG

High space requirements under challenging conditions



Source: CBRE Research

Stock & Market dynamics

The Salzburg logistics market has a comparatively small total stock of around 480,000 sq m, which has not changed since the last completions in 2023.

A large portion of the stock – approximately 80% – falls into building classes B and C. These older spaces increasingly no longer meet current user requirements, leading to a growing need for modern logistics solutions.

Development Barriers

Despite high demand, particularly in the strategically located north of Salzburg (with a strong orientation towards Germany), the development of new land remains difficult.

Key obstacles include the limited available land reserves, high land prices, and restrictive zoning and emissions regulations imposed by the city and municipalities (e.g., regarding noise, traffic, or operating hours).

These framework conditions significantly limit both speculative and owner-occupied new developments.

Rents & Land purchase prices

Limited supply is meeting stable to rising demand – resulting in tight rental conditions.

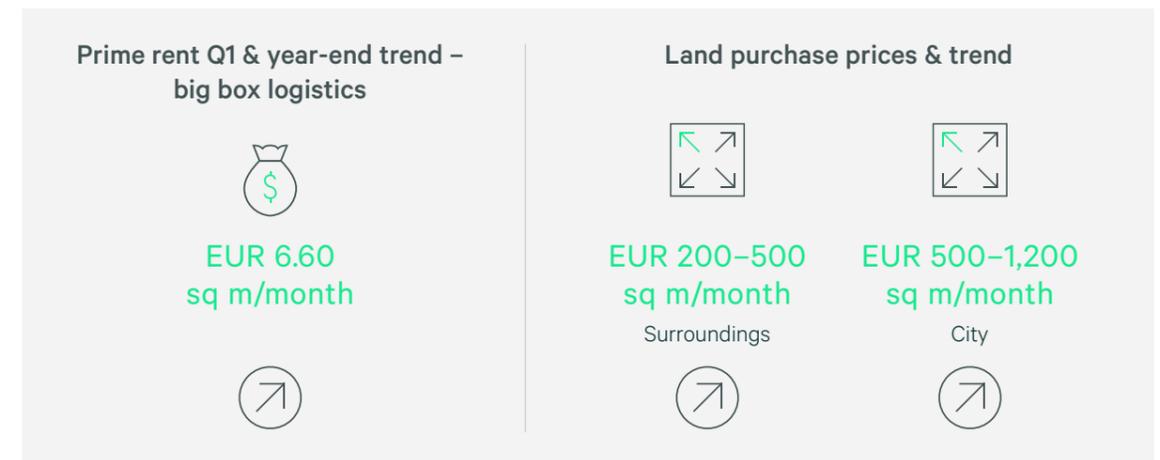
The prime rent for big box logistics space has risen to EUR 6.60/sq m/month, although due to the low level of construction activity, few prime rents have actually been signed. Prime new builds could potentially achieve higher rents beyond EUR 7.00/sq m/month.

Further potential for rent increases exists, as new speculative space is unlikely to enter the market in the foreseeable future.

Land prices are among the highest in Austria. In the city of Salzburg, prices range from EUR 500/sq m to EUR 1,200/sq m, and in the surrounding area, prices range from EUR 200/sq m to EUR 500/sq m.

This price trend is exacerbated by the very limited permanent settlement area and the cautious land use policy of local authorities.

For many developers, this makes economically viable implementation more and more difficult. As a result, project developments are increasingly focused on alternative locations in Upper Austria or Bavaria in order to still serve the region efficiently.



Source: CBRE Research

7

Investment market



INVESTMENT MARKET

Strong interest on the investment market

The purchasing restraint of recent years appears to have been overcome. As an asset class, logistics has also shown positive developments over the past year. Initial declines in yields and an increased investment volume signaled a new market cycle. Investor interest in logistics properties is underlined by the current CBRE Investor Intention Survey.

In 2024, around EUR 278 m was invested in logistics properties on the Austrian market – an increase of more than 50 % compared to the previous year. While 2023 was still characterised by many smaller transactions, 2024 saw an increase in the number of larger tickets concluded, with an average amount of EUR 21 m (+114 % compared to 2023). The decisive factors here were the ECB's continuous interest rate cuts, which gave the market a sustained boost, as well as the high demand for logistics properties.

The noticeably increased pipeline of logistics investment products that are currently on the market or in preparation should also be emphasised. Due to the record number of completions last year, there is a particularly large amount of product available, some of which has already been purchased by investors or is currently being finalised. In total, the potentially still available and investment-relevant product in Q1 2025 –

which is already on the market or scheduled for completion by 2026 – amounts to around 230,000 sq m or EUR 350 m.

Classic big-box properties with a core and core+ character are on investors' wish lists. Due to the reduced risk appetite, investors are primarily looking for projects that have already been completed or are nearing completion. Logistics properties that are already fully let are therefore finding buyers more quickly than those with a higher vacancy rate or very short lease terms. Valid building certification has already become a necessity anyway – especially for international investors – in order to finalise a sale.

Sale & leaseback transactions are also still in high demand among owner-occupiers of light industrial space. This not only gives them greater flexibility to adapt to future developments in demand but also has the advantage of tying up less capital.

A few years ago, forward deals were in high demand from buyers, but in recent years they have also become much more risk-averse and switched to joint ventures. Accordingly, the search for new forward deals is currently still in vain.

Strong international demand for logistics

In contrast to all other asset classes, the buyer profile of logistics investors is more diverse. In 2024, 64 % (2023: 33 %) of the capital invested in logistics properties came from international investors – led by Germany with 19%. The remaining 36 % is accounted for by Austrian buyers, with the majority of these focusing on assets with value-add potential.

The "Investor Intention Survey 2025" conducted by CBRE shows that more than 780 European investors surveyed see logistics as the second most popular asset class (after residential). According to the survey, 68 % of investors specializing in I&L intend to expand their purchases this year. In Austria, the asset class even ranks first among the participating investors. The survey also suggests a clear trend towards core (14 %) and core+ (29 %) investments, alongside the popular value-add strategies (33 %).



Yield development

The prime yield fell again for the first time in 2024 – after a further increase of 15 basis points into the second quarter of 2024. Following the first decline in yields since 2021, the prime yield currently stands at 5.00 %. The continuous interest rate cuts by the ECB, returning international investor interest and more core products on the market were a decisive factor here. A further decline in yields is expected in the current year 2025.

Investment volume and prime yield Logistics Austria 2024



EUR 278 m



5.00 %

Current top logistics properties

Be quick and take your chance! Contact +43 1 533 40 80 33.
More information about these top properties at immo.cbre.at



1110 Vienna

Size: approx. 7,900 sq m
Completion: Q1 2026
Separable from: total letting



1220 Vienna

Size: approx. 45,000 sq m
Completion: available
Separable from: approx. 1,300 sq m



2351 Wiener Neudorf

Size: approx. 21,500 sq m
Completion: available
Separable from: approx. 4,500 sq m



2421 Kittsee

Size: approx. 70,000 sq m
Completion: Q3 2025 construction stage 1
Separable from: approx. 3,500 sq m



2474 Gattendorf

Size: approx. 57,000 sq m
Completion: available
Separable from: approx. 4,000 sq m



2512 Traiskirchen

Size: approx. 17,000 sq m
Completion: Q2 2026
Separable from: approx. 6,500 sq m



4470 Enns

Size: approx. 35,000 sq m
Completion: Q2 2025
Separable from: approx. 3,000 sq m



4694 Ohlsdorf/Ehrenfeld

Size: approx. 78,000 sq m
Completion: partially completed
Separable from: approx. 5,000 sq m



8141 Premstätten

Size: approx. 16,500 sq m
Completion: Q3 2025
Separable from: approx. 3,100 sq m

SUSTAINABILITY WITH ADDED VALUE

ESG Services shaping the logistics real estate of tomorrow

Sustainability is no longer a “nice to have” – it has become a central factor in the real estate industry become. Our ESG team accompanies you holistically on the way to a future-proof property and offers tailor-made services in line with current standards and legal requirements.

Our service portfolio

- **Green Building certifications** (e.g. BREEAM, ÖGNI): International seals of approval create trust and increase the market attractiveness of your property – in existing buildings as well as in new buildings.
- **EU taxonomy compliance:** We analyse your property for compliance with ESG criteria in accordance with EU taxonomy and identify potentials for a green classification.
- **Energy certificates & consumption analyses:** Transparent, legally compliant and optimised – our Energy certificates help you to uncover energetic weaknesses and take targeted countermeasures.
- **ESG check/Due Diligence:** Whether buying or selling – we check your property for ESG compliance and accompany you through the entire transaction process with a well-founded evaluation.

Practical examples that convince

The **logistics center in Enns** was successfully audited by our team with regard to the EU taxonomy. The **Ottenschlag logistics center** is currently undergoing the certification process (BREEAM existing building certification) with the goal: Excellent. In addition, two logistics properties of the **SAGER Group in Peggau** were also awarded the BREEAM certificate Excellent.



Logistics center Ottenschlag



Logistics center SAGER Group Peggau

Would you like to make your property ESG-ready? We accompany you on the way to sustainable Logistics real estate – competent, individual and with real added value. Contact us today.

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More information on
ESG and sustainability:



CBRE



“
Fact
check first.”

Marc Steinke
Associate Director, Head of Research

In a world of fake news, it has become even more important to rely on trustworthy information. At CBRE, we operate in over 100 countries with access to profound data, analyzed by a global network of research experts.

CBRE Research offers forward-looking insights into global real estate trends and strategies, providing tailored analyses and recommendations that are crucial for decision-making. With the help of interactive dashboards, customer-specific portfolios are created. This way, our clients can keep an eye on their portfolio at any time without much effort.

Our CBRE Research Services at a Glance:

- Customized studies and reports
- Market forecasts
- Quarterly market data for all asset classes
- Market and location analyses
- Competitive analyses
- Client access to the global data platform (ERIX)

Good to know.

Here you can
find our latest
CBRE Research
Reports for review:



Feel free to contact our Austrian CBRE Research experts! We look forward to providing you with an in-depth insight into the local and global real estate market.

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CBRE

Glossary

The **prime rent** is achieved in logistics properties with the best fittings and in the best location. It reflects the top quantile of rents achieved for logistics space.

Take-up is defined as the traditional leasing performance including the space of completed owner-occupied properties.

The range of **land purchase prices** shown reflects the usual prices that were registered in the respective logistics region in the past year. Developed plots were used for comparison. Due to a strong dependency on the respective micro-locations and ownership structures, the prices are only indicative.

Regions

The Vienna logistics submarkets were expanded in 2024. As a result of the expansion in the area surrounding Vienna, an even larger part is now covered and is included in our data. On the one hand, the submarket Vienna Surrounding Area South was expanded towards Wiener Neustadt and Eisenstadt and the area in the west was also expanded along the A1 to St. Pölten.

Vienna submarkets

Vienna South: 10., 12. and 23. district

Vienna Surrounding Area South: The districts Mödling, Baden and parts of the district Wiener Neustadt (Land) in Lower Austria as well as parts of the district Eisenstadt and Eisenstadt (Land) in the north of Burgenland.

Vienna West: 13. to 20. district

Vienna Surrounding Area West: Various municipalities along the A1 motorway in the district St. Pölten (Land) as well as St. Pölten (Stadt).

Vienna North: 21. and 22. district

Vienna Surrounding Area North: Parts of the Lower Austrian districts of Klosterneuburg and Gänserndorf.

Vienna East: 2., 3. and 11. district

Vienna Surrounding Area East: The district of Bruck an der Leitha in Lower Austria.

Graz submarkets

Graz City: The whole city area of Graz.

Graz South: Various municipalities along of the Südbahnstrecke to Leibnitz and Wagna.

Graz West: Municipalities along the A2 motorway and north of it as far as Köflach.

Graz North: Municipalities on the A9 to Leoben and on the S35 to Frohnleiten.

Graz West: Municipalities along the A2 to Ilz, as well as in the north towards Weiz and in the south towards Feldbach.

Linz submarkets

Linz City: The entire city area of Linz.

Linz South: The southern municipalities along the Enns as far as Steyr, as well as to the west as far as Kremsmünster and Wartberg an der Krems.

Linz West: Various municipalities from Leonding and Traun along the A25 to Wels and Sattledt.

Linz East: Municipalities along the A1 to St. Valentin (Lower Austria), as well as the municipalities from Steyregg to Perg north of the Danube.

Salzburg submarkets

Salzburg City: The entire Salzburg city area.

Salzburg South: Various municipalities in the south of Salzburg along the Salzach, from Elsbethen to Kuchl.

Salzburg West: The municipality of Wals-Siezenheim.

Salzburg North: The northern municipalities from Bergheim to Oberndorf bei Salzburg, and in the east to Straßwalchen.

Salzburg East: The municipalities northeast of the city of Salzburg along the A1, from Hallwang, Seekirchen am Wallersee to Mondsee.

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