Austria Logistics Figures H1 2026

▼ EUR 103 m
Investment Volume H1 2026

▲ 5.15%
Prime Yield Logistics

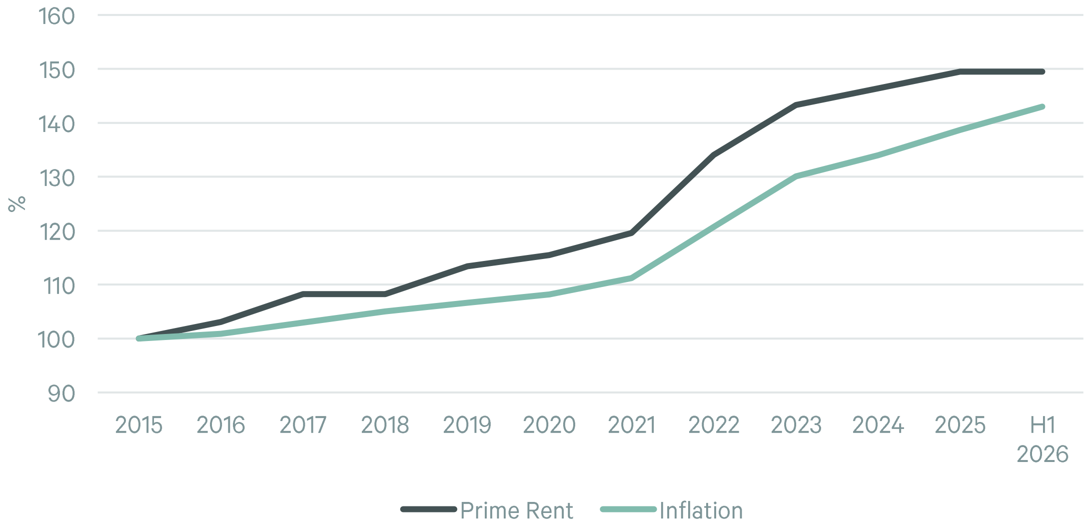
▼ 70,600 sq m
Completions

Arrows show change compared to H1 in previous year

A volatile pipeline leads to higher space absorption

- In the first half of 2026, approx. 71,000 sq m of new logistics space was completed in the Austrian logistics markets. With the exception of one project in Graz, 90% of this space was built in the Vienna market. This means that new construction volume has once again halved compared to the same period last year. Since many developers continue to adopt a wait-and-see approach, a similarly low level of completions is expected for the second half of the year as well.
- The take-up in the Vienna market totaled 108,000 sq m in H1 2026, of which approx. 31,000 sq m was attributable to completed owner-occupier projects. While this is the highest half-year figure since H1 2024, market uncertainties have not yet been resolved. The upturn can currently be attributed primarily to the emergence of alternative usage concepts and a broader mix of tenant sectors.
- Due to low construction activity coupled with increased leasing activity, vacant space is increasingly being absorbed by the market. As a result, the vacancy rate in Vienna (Class A+B) has fallen to 9.00% (-0.78 percentage points) since Q4 2025.
- The prime rent remained stable in the first half of 2026 and continues to stand at EUR 7.25/sq m/month. For H2 2026, we expect a moderate increase to around EUR 7.35/sq m/month.

Growth of Prime Rent vs. Inflation (Base=2015)



Source: CBRE Research

Since the beginning of 2026, regions of the Vienna logistics market have been expanded to include the Loosdorf region.

TRENDS FOR H2 2026

Pipeline →	Take-Up →	Vacancy ↘
Prime Rent ↗	Investment Volume ↗	Prime Yield ↗

LOGISTIC INDICATORS VIENNA & SURROUNDING H1 2026

Source: CBRE Research

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