

Logistics Market Report 2026





LOGISTICS MARKET REPORT

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GLOBAL REAL ESTATE EXPERTISE

Who is CBRE?

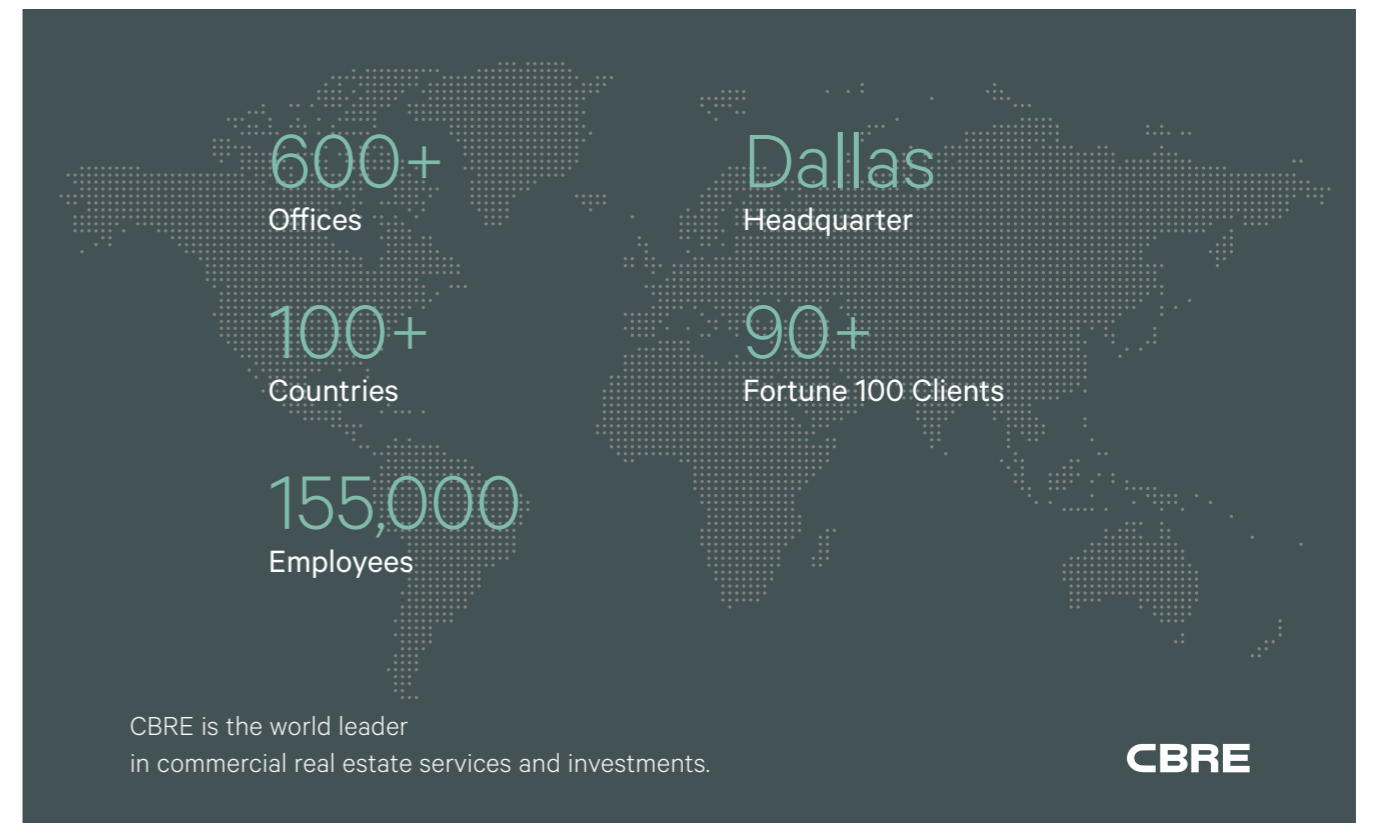
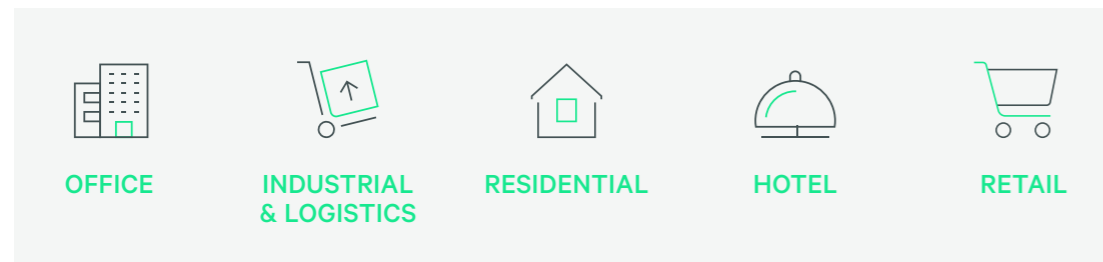
The CBRE Group* is listed on the Fortune 500 and S&P 500 stock index and is the world's leading commercial real estate services firm**.

The company which operates out of Dallas has more than 155,000 employees in over 600 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
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- ESG advisory and certifications
- Workplace & Design
- Commercial and Technical Property Management
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- Property valuation
- Market research, studies and analyses



* New York Stock Exchange: CBG ** Basis: revenue 2025

LOGISTICS MARKET EXPERTISE

Why logistics real estate is so important right now

The logistics market is undergoing ongoing change. We understand the challenges and can help you operate even more efficiently.

Following rapid growth in the logistics property market and in warehouse demand in recent years, there are now increasing signs of consolidation in the market. Economically challenging and geopolitically uncertain times are leading to caution regarding expansion plans and investment appetite. Companies are increasingly consolidating their sites, resources and capacities into strategically better-located and more suitable logistics properties, leading to further efficiency gains.

We help you respond effectively to the prevailing conditions and identify potential and efficiencies. Furthermore, we identify trends at an early stage and are happy to share this expertise with you. We know that a much more selective approach is being taken to site selection and that investments are being carefully considered. State-of-the-art logistics space remains the focus and is indispensable for profitable business operations. Parameters such as energy and cost efficiency, location criteria and staff retention 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 Manuel Bugl:
T +43 676 501 45 98



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

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General information



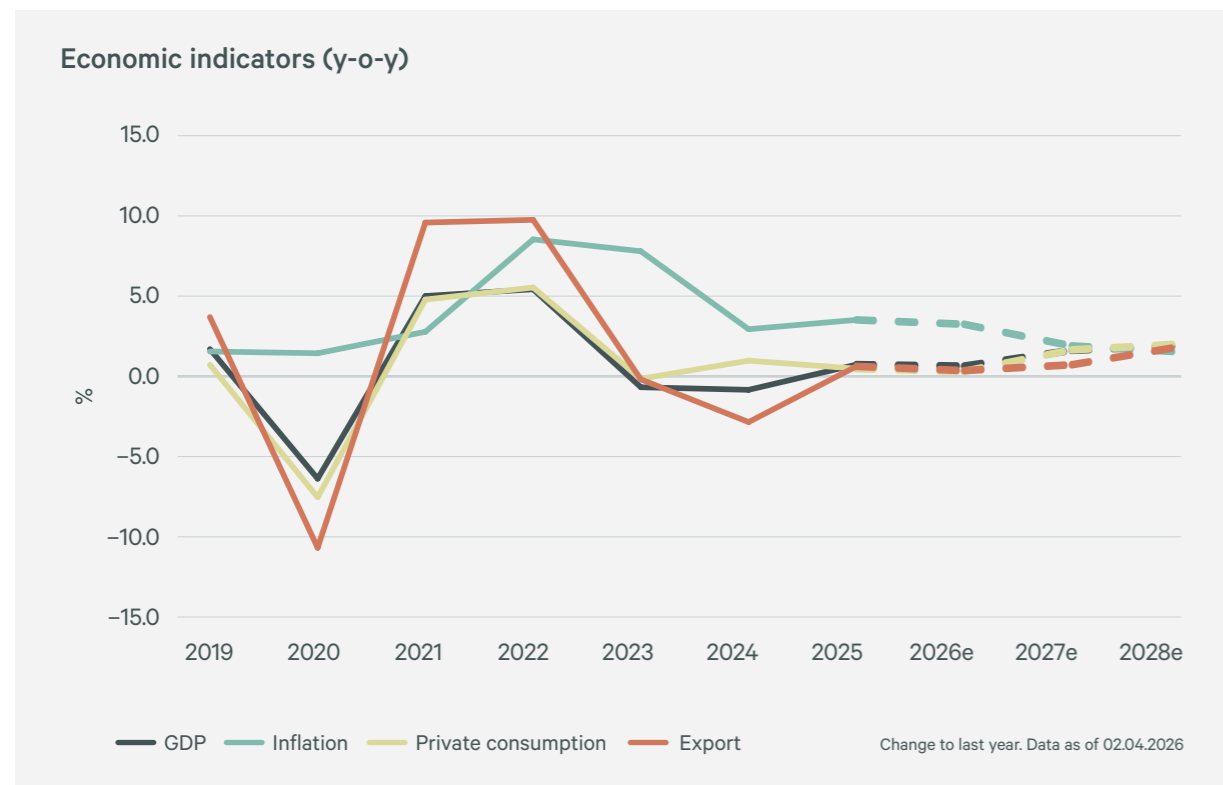
GENERAL INFORMATION

Return to economic growth despite ongoing external challenges

The economic recovery will continue

After two years of recession, 2025 saw the first small economic upturn in a long time. Gross domestic product grew by 0.7% and performed better than forecasted at the beginning of the year. A further increase in economic output of

around 0.7% is also expected in Austria in 2026. The upturn is being driven primarily by spillover effects from Germany's fiscal package as well as rising defense spending in other EU countries, from which the Austrian machinery and supplier industry in particular is benefiting. Accordingly, a slightly positive trend in the export sector



Source: CBRE Research, Oxford Economics



is expected later in the year. Although private consumption has been a key pillar of the economy in recent years, high energy prices and cautious household spending are currently limiting its role in driving growth.

Geopolitical risks that hinder growth

The geopolitical situation is largely weighing on the Austrian economy. The rise in energy and fuel prices triggered by the conflicts in the Middle East is once again putting pressure on various industries across Europe. Freight forwarders, in particular, have been struggling with sharply rising fuel prices since March 2026. In Austria, too, this is likely to cause inflation – which had stabilized toward the end of last year – to rise temporarily again, despite the government's announced fuel price cap. It is not yet possible to conclusively assess whether these are short-term factors or developments that will extend over a longer period. As a result, economic forecasts for the remainder of the year were revised slightly downward again in March.

Location strategy aims to support the logistics sector

To strengthen Austria as a business location, the Austrian government is currently developing a logistics location strategy. The measures, which will be published in the course of 2026, are intended to specifically strengthen one of Austria's most economically important sectors and position it for the future. The goal is to ensure that Austria can continue to maintain its central position in the heart of Europe as one of the leading logistics hubs – a role the country has underscored in recent years by consistently ranking among the top 10 in the World Bank's Logistics Performance Index.

GENERAL INFORMATION

Alternative drivers of demand are gaining a foothold

Through 2023, logistics demand was largely driven by the need for large-scale space from the retail sector and the supply industry. Fueled by a high export ratio and above-average private consumer demand, leases of more than 10,000 sq m were not considered the exception but rather the market norm. However, with the onset of economic challenges beginning in 2024 due to escalating trade conflicts and ongoing geopolitical factors, the market environment has shifted noticeably, and the dynamics of the industry have increasingly changed.

Demand is currently driven less by growth and more by companies' decisions regarding security, resilience, and infrastructure. Against the backdrop of volatile supply chains and heightened uncertainty, critical user industries are purposefully maintaining buffer capacity and adapting their logistics networks and structures. This is reflected in the market by an increasing demand for space from companies in the pharmaceutical and cold storage industries. For example, in 2024 and 2025, pharmaceutical companies leased more space in the Vienna market than in the four preceding years (2019–2023).

Focus on small to medium-sized spaces

Overall, it is also evident that medium-sized to small units – ranging from 1,000 sq m to 3,500 sq m – are currently in the highest demand on the market. The leasing market is more fragmented than it was three years ago. Tenants are mostly small and medium-sized enterprises that do not pursue a global strategy and can therefore operate on the market with greater resilience to economic crises. Developers are now also adapting to the changed demand conditions and planning smaller rental units in their new projects.

Given the current fragmented nature of market demand, spaces in the aforementioned size range (1,000 sq m to 3,500 sq m) in particular are being leased more quickly. Prime spaces in excellent locations also have a competitive edge in the leasing market, as location criteria have once again become significantly more important.

The food distribution sector also appears to be unaffected by external conditions. Various supplier industries closely linked to the life sciences and data center sectors are also expected to drive future demand.

Focus on efficiency

Currently, there is a growing trend toward consolidation in the market. Companies are increasingly consolidating their locations, resources, and capacities into logistics properties that are strategically better located and more suitable, leading to further efficiency gains.

At the same time, the shift from ownership to leasing, as part of an “asset-light” approach, is gaining importance as a way to reduce capital tied up in assets and focus more closely on the core business. The current market environment offers favorable conditions for this, as there is a wide range of options available and attractive leasing terms.



GENERAL INFORMATION

Influential factors on the logistics real estate market



Economy

Geopolitical tensions, particularly those related to the Iran conflict, continue to fuel heightened uncertainty and dampen momentum. Nevertheless, spillover effects from other markets could provide selective support over the course of the year and give the sector a positive boost.



Demand

The slump in market demand showed slightly positive signs toward the end of 2025. However, the current subdued demand for large spaces will allow for only a modest increase in 2026 as well.



Interest rate policy

The ECB's decision to keep interest rates unchanged in March 2026 reflects a cautious approach to maintaining stability. Any adjustment in 2026 will depend largely on geopolitical developments in the Middle East. Should inflation and energy prices rise in the longer term, another interest rate hike cannot be ruled out.



Supply

Until the new space completed in recent years has been fully absorbed, new projects will increasingly be undertaken only if there is sufficient pre-leasing.



Construction cost

The only moderate increase in construction costs over the past year has significantly eased cost pressures for many developers. The main cost drivers at present are higher labor costs, while material prices have largely stabilized.



ESG

The relaxation of the EU Supply Chain Due Diligence Directive (CSDDD) in 2026 will primarily provide some breathing room: the immediate regulatory pressure will ease, particularly for small and medium-sized enterprises, while large corporations and investors will continue to demand high ESG and supply chain standards.



Land prices

The slight rise in land prices is expected to continue into 2026. Not least because of the increasingly restrictive stance taken by many municipalities toward logistics projects, a sustained, moderate rise in prices is anticipated in the medium term.



Zoning restrictions

The generally restrictive stance taken by local governments in many areas toward rezoning land for logistics projects – in an effort to prevent further land sealing – will lead to a potential shortage of land in the medium term.

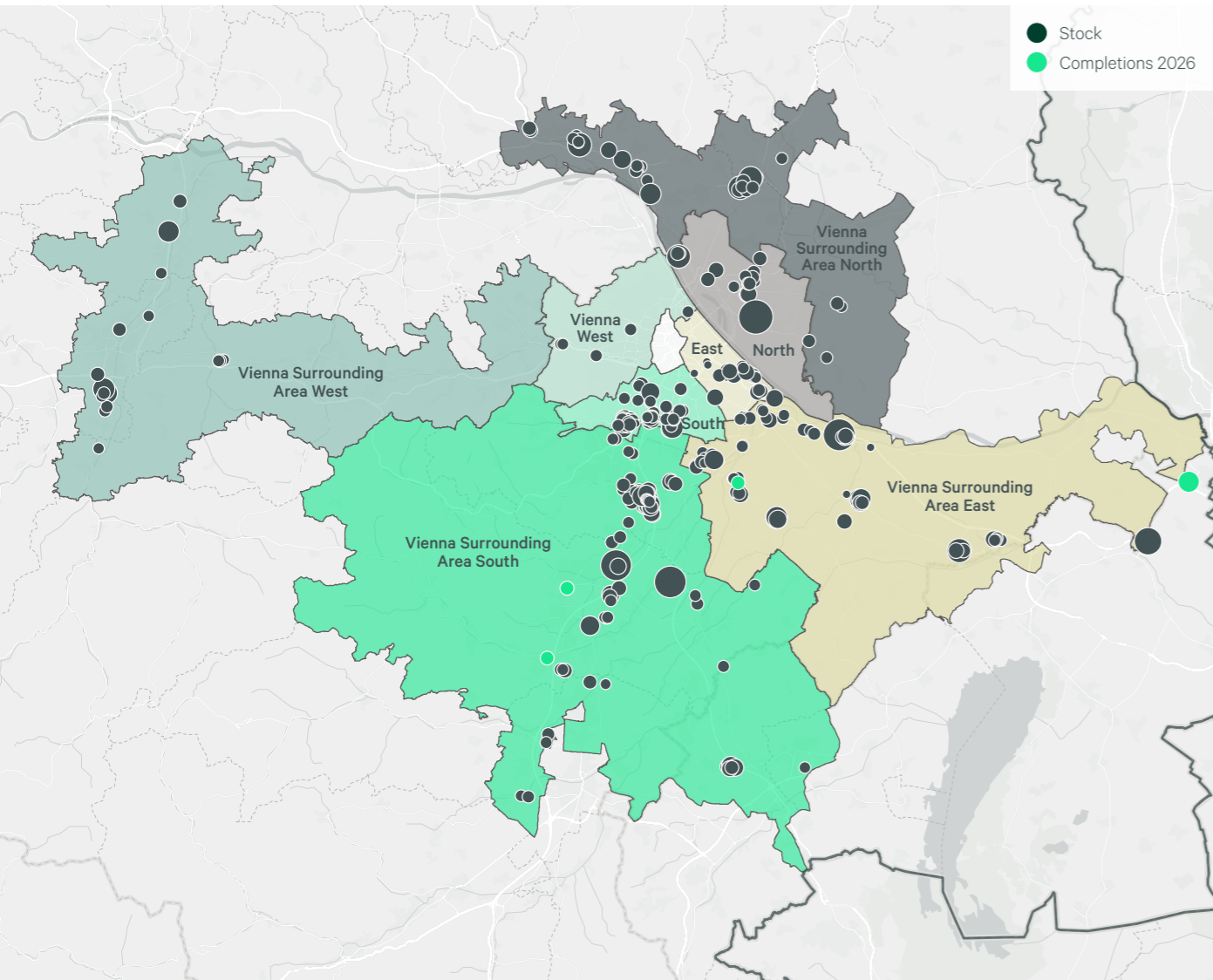
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Logistics market Vienna



LOGISTICS MARKET VIENNA

The Vienna market continues to face challenging times



Stock & Project pipeline

In 2025, approximately 128,000 sq m of new logistics space was completed in and around Vienna. 30% of this was accounted for by projects completed by owner-occupiers. The largest share of new space in 2025 was built in the submarket Vienna Surrounding Area East (24%), the Vienna Surrounding Area North (23%), and the Vienna Surrounding Area South (19%). However, in the Surrounding Area North, only one large-scale logistics project in Leobendorf was completed. As a result, a total of 57% of Vienna's current portfolio is classified as Class A.

In 2026, even less new construction space is expected. Due to the wait-and-see approach adopted by many developers, numerous projects are currently on hold or construction has not even started yet until a high pre-leasing rate is achieved. Consequently, the logistics pipeline is currently highly volatile. As things stand, the volume of new construction in 2026 totals approximately 110,000 sq m (-16% compared to 2025). Of this, slightly more than half consists of purely speculative logistics projects.

The pre-leasing rate for speculative space expected in 2026 currently stands at around 38%. The share of planned owner-occupied projects this year is 22%.

LOGISTICS MARKET VIENNA

Take-up & Vacancy

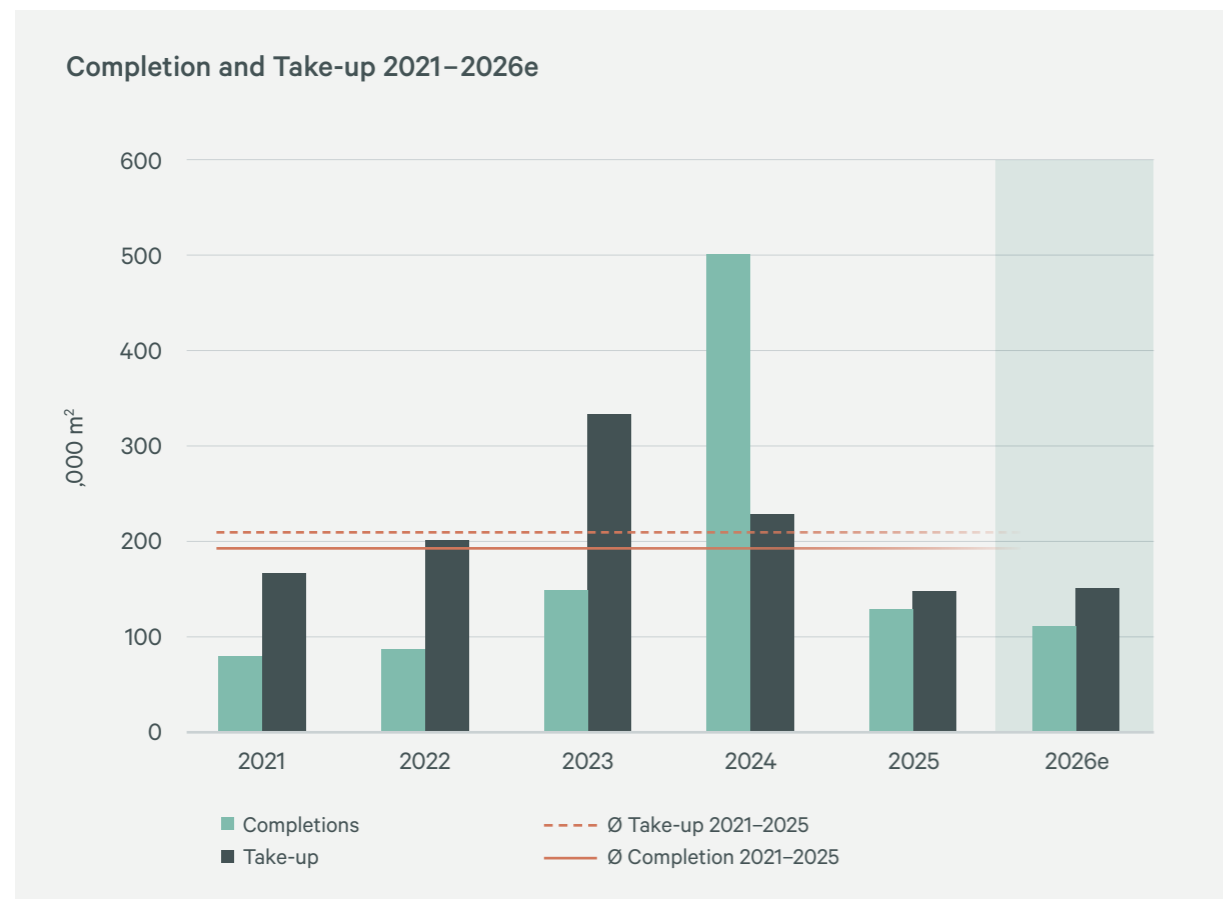
In 2025, the take-up of 147,000 sq m slightly exceeded the total amount of new construction space, with actual leasing activity in speculative projects totaling 109,000 sq m.

Although a moderate increase in leasing activity was observed in the second half of 2025, the sustainability of this momentum remains questionable in light of the geopolitical tensions surrounding the Iran war in 2026. Macroeconomic uncertainty continues to dampen the willingness of many tenants to make decisions, meaning that potential new

leases are currently being postponed in many cases. Against this backdrop, we currently anticipate only modest to stable growth in space turnover.

The vacancy rate for modern Class A and B office space stood at 9.8% at the end of 2025, in line with the current European market trend.

Due to a record number of completions in 2024, followed by a massive, geopolitically driven slump in demand, there is currently still a significant amount of new office space available for absorption. Accordingly, 52% of vacant space is in buildings completed in 2023



Source: CBRE Research

or later. The remaining vacancies result largely from existing buildings that have become vacant due to insolvencies. Overall, however, vacancy rates in Class A buildings are slightly lower than in Class B properties. The highest vacancy rates are found in the submarkets Vienna Surrounding Area West, Vienna East, and Vienna Surrounding Area East.

Against the backdrop of ongoing geopolitical uncertainties, the vacancy rate trend in 2026 remains subject to heightened risks.

Rents

Prime rents at Austria's most important logistics hub in and around Vienna are expected to rise moderately from the current EUR 7.25/sq m/month to EUR 7.35/sq m/month by the end of 2026.

The current abundance of speculative development continues to have a stabilizing effect on rent levels and limits short-term upside potential to inner-city locations and prime properties. In the medium term, depending on economic developments and the absorption rate, more significant rent increases are expected once again.

Currently, however, the market offers increased potential, particularly for tenants, thanks to attractive incentives and room for negotiation, though this trend is expected to level off in the future.

Prime rent Q1 2026 & year-end trend – big box logistics



€ 7.25
sq m/month



Source: CBRE Research

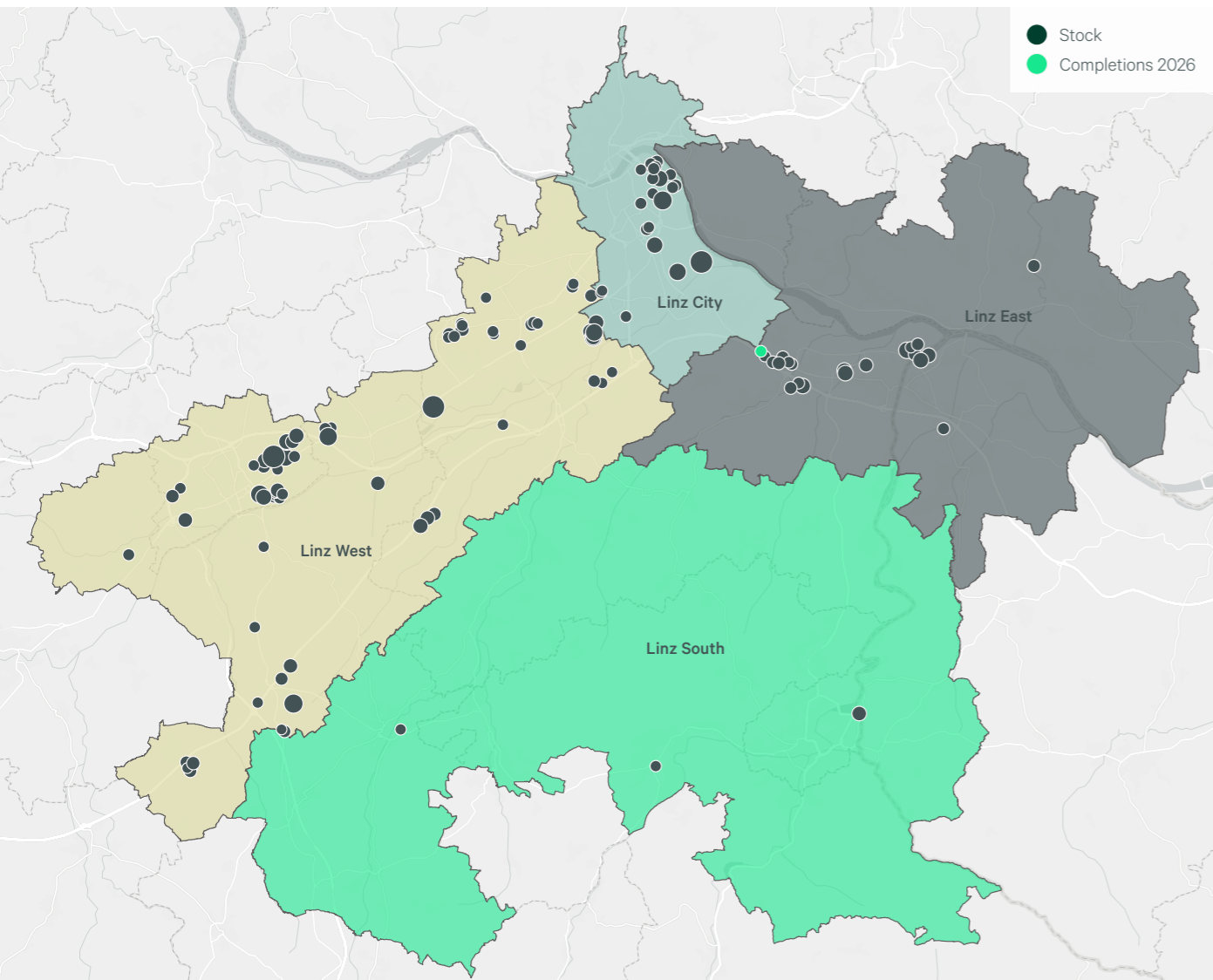
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Logistics market Linz



LOGISTICS MARKET LINZ

A diversified customer base and limited new construction activity



Source: CBRE Research

Stock & Project pipeline

With a total stock of nearly 2 million sq m, Linz is Austria's second-largest and second-most important logistics market. Driven by the local steel and heavy industry, the closely intertwined manufacturing sector, and trade-related logistics service providers, the location boasts a comparatively broad and diversified demand base. This structural diversity represents a clear locational advantage, particularly in economically challenging times.

Last year, two owner-occupier projects and one speculative logistics project were completed in the submarkets Linz East and Linz West. In total, approximately 70,000 sq m of new logistics space came onto the market.

Currently, the only project planned for 2026 is the construction of a built-to-suit logistics center by Bauunion in St. Florian, with a floor area of approximately 7,000 sq m, which is intended to serve the northern Austrian region. In addition to the Linz submarkets, a distribution center covering approximately 29,000 sq m is being built in Pinsdorf.

Due to project-related delays, a logistics project in the west of Linz that had initially been planned on a speculative basis has been postponed until 2027. Overall, a rise in new construction activity is expected again in the Linz logistics market in 2027.

Demand for additional logistics space remains strong overall, particularly for modern rental space. This is especially significant given that Class A buildings currently account for only about 46% of the total stock.

Rents

Following a steady rise in prime rents over the past few years, the Linz logistics market is set to enter a period of stabilization in 2026. We therefore do not currently anticipate any further changes for the current year – the prime rent will remain at EUR 7.00/sq m/month.

However, should the supply of modern logistics space become scarce, prime rents are expected to rise again in the medium term.

Prime rent Q1 2026 & year-end trend – big box logistics



€ 7.00
sq m/month



Source: CBRE Research

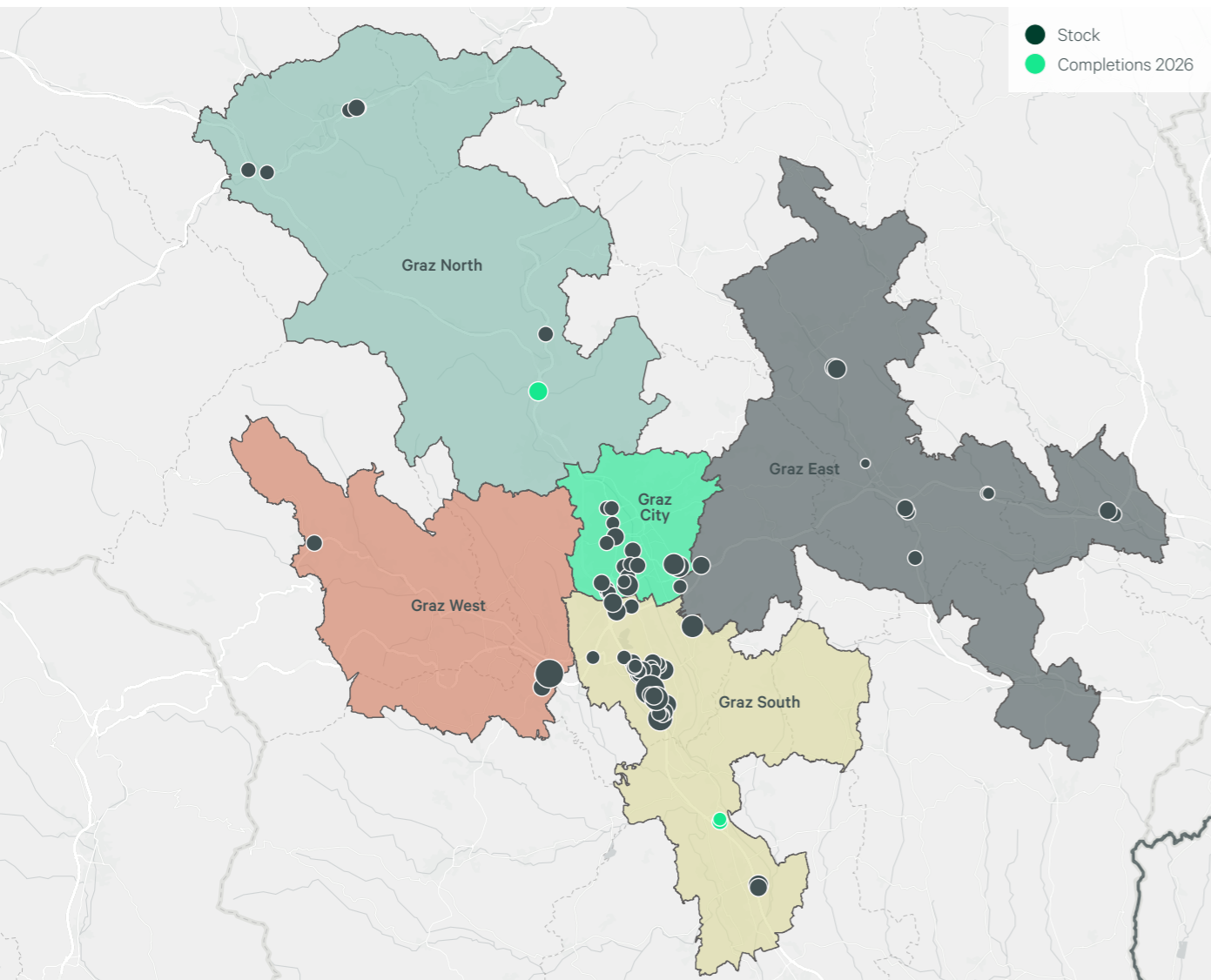
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Logistics market Graz



LOGISTICS MARKET GRAZ

High quality stock and subdued new construction activity



Source: CBRE Research

Stock & Project pipeline

With stock accounting just under 1.2 million sq m, the Graz logistics market ranks third in Austria. However, with 73% of its stock consisting of Class A buildings, it boasts the most modern logistics stock among Austria's major markets.

In 2025, only owner-occupier projects were completed. Three projects totaling 77,000 sq m were delivered in the submarkets Graz South and Graz East, including a large-scale food distribution center in Werndorf.

As of 2026, there are three speculative projects in the pipeline with a total area of approximately 36,000 sq m. These include a logistics warehouse in Friesach, north of Graz, as well as two adjacent logistics properties located along the main logistics corridor in the south of Graz.

In Graz, too, some projects were delayed because the required pre letting levels were not met.

Overall, positive trends are currently evident in the market, which is heavily influenced by the automotive industry. Due to the improving supply situation in the industrial automotive sector, several previously subleased spaces are now being returned to owner-occupancy as a result of increased in-house demand from a major tenant. This is having a somewhat stabilizing effect on the overall market situation in Graz.

The opening of the Koralmbahn in late 2025 provided additional momentum for growth. The expansion of this rail corridor strengthens

connectivity and leads to an even closer link between the Graz market and the Klagenfurt–Villach logistics cluster. As a result of the expansion, travel time for both freight and passenger traffic on the route has been reduced by 75%, bringing the journey time down to 45 minutes.

Rents

Nevertheless, the prime rent for logistics space in Graz remains stable at EUR 6.45/sq m/month for the time being. It remains to be seen how geopolitical and economic conditions will affect the Graz market.

Prime rent Q1 2026 & year-end trend – big box logistics



€ 6.45
sq m/month



Source: CBRE Research

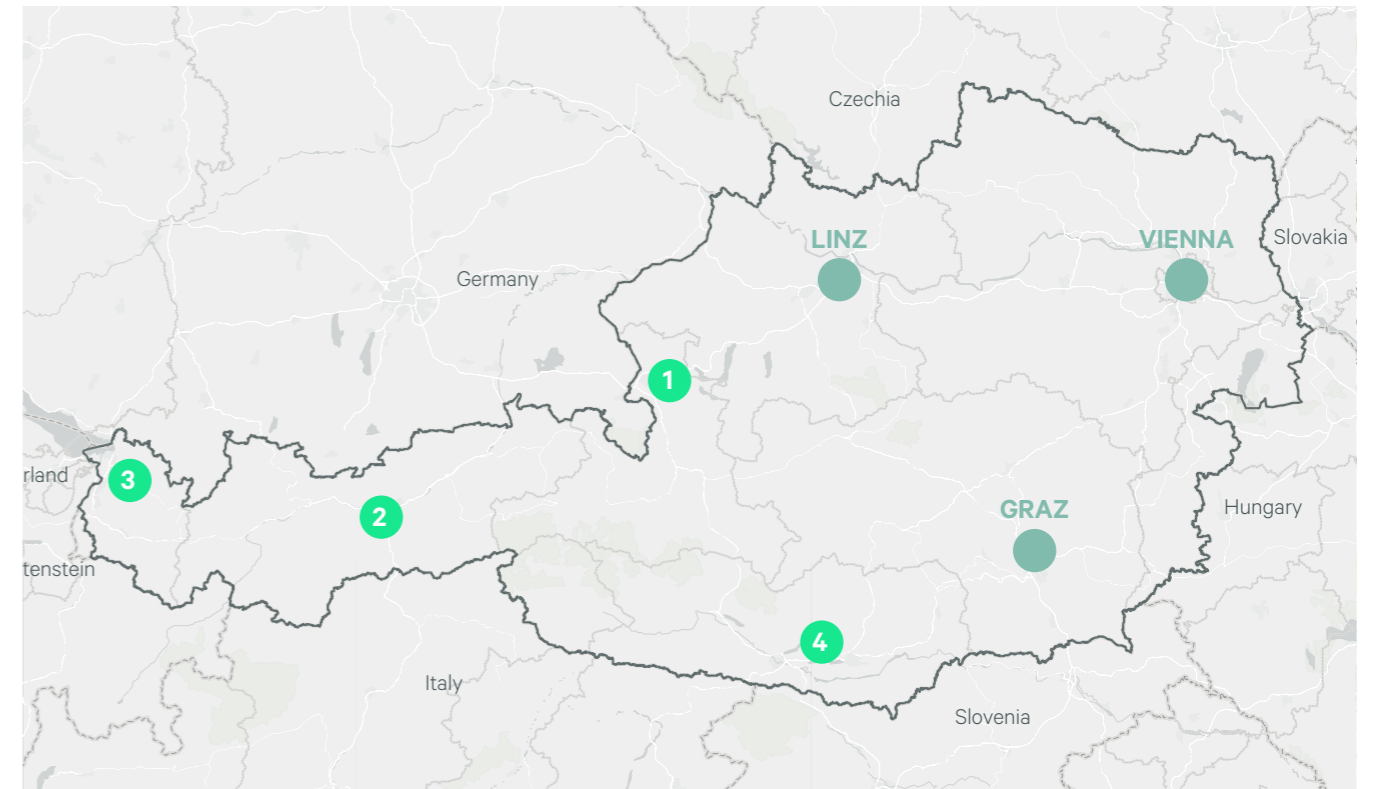
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Other logistics hubs in Austria



OTHER LOGISTICS HUBS IN AUSTRIA

Logistics locations outside Austria's main markets



1 Salzburg: High demand, low activity

Outside of the three main markets, Salzburg follows with a logistics stock of approximately 490,000 sq m. Despite existing demand, no new logistics projects have been completed in recent years, primarily due to a severe shortage of land. As a result, Austrian Post also searched in vain for a suitable location for a new distribution center. As a result, the Austrian Post AG was also unable to find a suitable site for a new distribution center. Consequently, the plans had to be revised, ultimately leading to the expansion and refurbishment of the existing facility in Wals, west of Salzburg.

The limited availability of suitable land plots highlights the current challenges facing this fundamentally attractive market environment along the German border. High land costs also make it difficult to develop new speculative logistics properties in a financially viable manner. As a result, developers are increasingly turning to border locations in Upper Austria, also along the A1 highway.

2 Innsbruck-Tirol: The transportation hub in the Alpine region

The logistics real estate market in Innsbruck and the surrounding area is characterized by topographical and structural constraints – even more so than in Salzburg. Innsbruck primarily serves as a regional supply hub in the Alpine region. Despite its strategically advantageous location along the A12 Inntal Autobahn and the Brenner corridor, its development potential is significantly limited by a severe shortage of land, high property prices, and transportation and environmental regulations.

Project developments are therefore primarily tailored to specific users, which is why built-to-suit projects, brownfield revitalizations, and owner-occupier models dominate the market. Demand remains stable but is clearly regionally focused. The primary demand comes from regional logistics service providers, retail and utility companies, as well as construction and industrial suppliers.

3 Vorarlberg: Export-oriented region

The logistics market in Vorarlberg is fragmented and limited in its potential geographical scope. At the same time, it is of great importance due to its strategic location at the intersection of four countries (Austria, Germany, Switzerland, and Liechtenstein). With the Wolfurt freight terminal, the region boasts one of the most important intermodal logistics hubs in western Austria. This role is also reflected in Vorarlberg's high export rate of around 56%, which forms the foundation of the region's logistics volume.

Growth opportunities therefore stem less from additional space and more from efficiency gains and repurposing, particularly through densification, replacement construction, and the modernization of existing sites. One example of this is the Gebrüder Weiss high-bay warehouse, completed at the end of 2025, which was built using a high-density design in the immediate vicinity of the existing site and the freight yard.

4 Villach-Klagenfurt: Logistics hub in the south

Although the logistics market in the Villach-Klagenfurt area is relatively small, it is strategically very well positioned. The region benefits in particular from its location in the Alps-Adriatic region, its proximity to the Adriatic ports, and an efficient road and rail infrastructure. With the opening of the Koralmbahn at the end of 2025, railway connections to the markets in Graz and Vienna were further significantly strengthened. Demand is driven primarily by freight forwarders, industrial warehousing, cross-border distribution, and local (supplier) companies in the microelectronics industry. In addition, the Villach-Fürnitz area in particular – home to the Logistik Center Austria Süd and the adjacent rail marshalling yard – offers further potential for future development.

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

EXCLUSIVE SALE

© Walter Ebenhofer



1230 Vienna

Object type: Commercial site
Land plot size: approx. 7,900 sq m
Net rentable area: approx. 4,000 sq m

© CBRE



2351 Wiener Neudorf

Object type: Commercial site
Land plot size: approx. 30,000 sq m
Net rentable area: approx. 7,500 sq m

© Hartwig Zögl



2560 St. Veit an der Triesting

Object type: Industrial site
Land plot size: approx. 98,000 sq m
Net rentable area: approx. 26,000 sq m

EXCLUSIVE RENTAL

© DLH



1110 Vienna

Size: approx. 7,900 sq m
Completion: 2027
Separable from: Single tenant

© CBRE



1230 Vienna

Size: approx. 22,000 sq m
Completion: available
Separable from: approx. 7,500 sq m

© Panattoni Austria Development GmbH



2325 Himberg

Size: approx. 27,000 sq m
Completion: 2027
Separable from: approx. 3,000 sq m

© CBRE



2474 Gattendorf

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

© Traiskirchen Verwaltungsgesellschaft mbH



2512 Traiskirchen

Size: approx. 17,000 sq m
Completion: 2027
Separable from: approx. 6,500 sq m

© GARBE



2542 Kottingbrunn

Size: approx. 34,000 sq m
Completion: available
Separable from: approx. 2,500 sq m

6

Investment market



INVESTMENT MARKET

Steady demand, selective market environment

Following a strong year for investment in the logistics asset class in 2025, it remains to be seen to what extent the current geopolitical conditions will influence future market dynamics. Regardless, international investors in particular are showing continued strong interest in fully leased new-build properties.

In 2025, investment volume in the logistics asset class on the Austrian market reached EUR 384 m, marking yet another 28% increase over the previous year. The average transaction size remained unchanged year-over-year and continues to stand at around EUR 18 m. Large-volume transactions thus remain rare: Apart from a single deal with a volume of over EUR 100 m in the previous year, the majority of transactions are concentrated in the EUR 20 m to EUR 30 m range.

The currently well-stocked pipeline of tradable properties for 2026 points to an overall stable trend in logistics investment volume. Given the current selective market environment, this outlook should be viewed as positive. In particular, factors such as high pre-leasing rates and long-term lease agreements have once again come into sharper focus for investors due to the challenging situation in the leasing markets. Accordingly, (unleased) forward deals are currently of little relevance

and have almost completely disappeared from the investment landscape. Sale-and-leaseback transactions, on the other hand, are seeing noticeably growing interest, as they offer investors a comparatively low-risk investment opportunity with stable cash flows.

On the buy-side, the focus is currently on core properties in prime locations, as well as select value-add properties with clear development potential. Given the current very limited supply of core properties, investor interest in this segment is exceptionally high.

High demand for logistics in Europe

The buyer side continues to be heavily dominated by international investors. Foreign investors accounted for approximately 38% of the total logistics investment volume in 2025. Transactions with values between EUR 20 m and EUR 30 m, in particular, saw strong demand among this group of investors and represented the preferred price range.

The 2026 Investor Intention Survey conducted by CBRE shows that, by European standards, the logistics asset class remains one of the most sought-after segments, surpassed only by the residential real estate sector. Overall, 25% of the investors surveyed intend to invest in logistics real estate this year. In addition, 49% of those investors who are already active in the logistics segment plan to further expand their presence in Austria and increase their investments in this asset class.

Yield development

Following a period of stabilization last year, the prime yield for logistics real estate has risen again by 10 basis points in the short term and currently stands at 5.10%. This development is attributable, among other things, to the fact that no market-defining deals with competitive pricing have been concluded in the core segment to date.

However, given that buyers' and sellers' price expectations have already converged significantly over the past year, it remains to be seen to what extent geopolitical developments will influence the market in the future. Against the backdrop of increasing demand and growing market competition, however, a slight compression of yields and an adjustment of the prime yield to around 5.00% are expected over the remainder of the year.



Investment volume (2025) and Prime yield (Q1 2026) – Logistics, Austria



EUR 384 m



5.10%

SUSTAINABILITY WITH ADDED VALUE

ESG Services shaping the logistics real estate of tomorrow

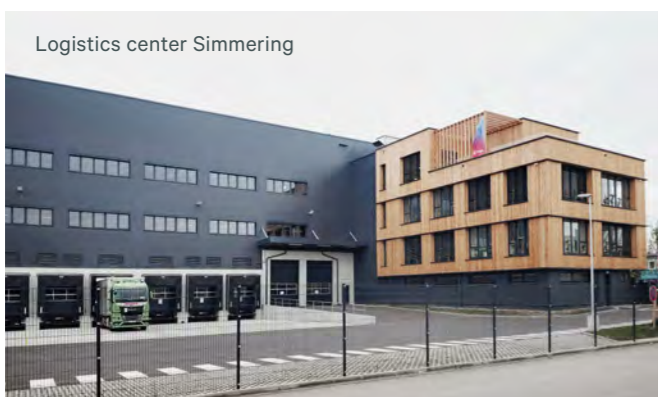
Sustainability is no longer a “nice to have” – it has become a central factor in the real estate industry become. Our ESG team accompanies you holistically on the way to a future-proof property and offers tailor-made services in line with current standards and legal requirements.

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

Our ESG team has successfully assessed the **logistics property in Simmering** against the EU taxonomy for new buildings and received confirmation from ÖGNI. The **Traiskirchen logistics center** has also been successfully certified under the BREEAM in-use scheme, achieving the second-highest rating of “Excellent”.



Logistics center Simmering



Logistics center Traiskirchen

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.

Elvis Penjo
Director, Head of ESG
T +43 664 885 06 112
elvis.penjo@cbre.com

More information on
ESG and sustainability:



CBRE

Making the right decisions thanks to solid data

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)

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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.

Marc Steinke
Associate Director
T +43 676 501 78 26
marc.steinke@cbre.com

Maximilian Stimpfl
Research Analyst
T +43 676 339 63 92
maximilian.stimpfl@cbre.com

Marlene Hohenecker
Associate Research Analyst
T +43 676 394 74 70
marlene.hohenecker@cbre.com

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

In 2024, the Vienna logistics submarkets were expanded. Since then, the expansion of the coverage area in the Vienna submarkets has allowed us to include an even larger region in our analyses. The Vienna Extensive Area South submarket was expanded toward Wiener Neustadt and Eisenstadt, and the Vienna Extensive Area West submarket was extended 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.

Your CBRE
logistics expert is
glad to assist you:

AGENCY

Daniel Pfeiffer

Director
Head of Sector Industrial & Logistics Leasing
T +43 664 518 45 12
daniel.pfeiffer@cbre.com

Lukas Schwarz

Managing Director
T +43 1 533 40 80
lukas.schwarz@cbre.com

SENIOR ADVISOR TO THE BOARD

Andreas Ridder

T +43 1 533 40 80
andreas.ridder@cbre.com

INVESTMENT

Manuel Bugl

Director | Head of
CBRE Capital Markets GmbH
T +43 676 501 45 98
manuel.bugl@cbre.com

VALUATION

Christian Aplienz

Senior Director
Head of Valuation
T +43 664 851 57 46
christian.aplienz@cbre.com

ESG

Elvis Penjo

Director
Head of ESG
T +43 664 885 06 112
elvis.penjo@cbre.com

AGENCY

Patrick Schild

Senior Director | Head of
Leasing, Workplace & Design
T +43 664 885 06 108
patrick.schild@cbre.com

PROPERTY MANAGEMENT

Petra Kern

Director
Head of Property Management
T +43 664 887 13 881
petra.kern@cbre.com

RESEARCH

Marc Steinke

Associate Director
Head of Research
T +43 676 501 78 26
marc.steinke@cbre.com

RETAIL

Walter Wölfler

Senior Director
Head of Retail Leasing
T +43 664 544 25 60
walter.woelfler@cbre.com

PROJECT MANAGEMENT TURNER & TOWNSEND

Nadja Proewer

Senior Director
Business Unit Lead Austria
T +43 676 500 48 13
nadja.proewer@cbre.com

Our locations and contact details

Office Vienna

CBRE GmbH
Am Belvedere 10
1100 Vienna
T +43 1 533 40 80
cbrevienna@cbre.com

cbre.at

LinkedIn: CBRE Austria

Office Graz

Liebenauer Hauptstraße 34
8041 Graz
T +43 316 231 125 02

Sigrid Filzmoser

Director | Lead Region South
Advisory Services
T +43 676 500 21 33
sigrid.filzmoser@cbre.com

Office Salzburg

Rainbergstraße 3A
5020 Salzburg
T +43 662 234 553 02

Christoph Obberger

Director | Lead Region West
Advisory Services
T +43 676 501 45 97
christoph.ossberger@cbre.com

