Retail Market Austria Q2 2026

▲ 5.75%	▲ 5.95%	▲ 4.75%	▲ €16,50/sq m/month	▶ €100/sq m/month	▲ €380/sq m/month
Yield Retail Parks	Yield Shopping Centres	Yield High Streets	Prime Rent Retail Parks	Prime Rent Shopping Centres	Prime Rent High Streets

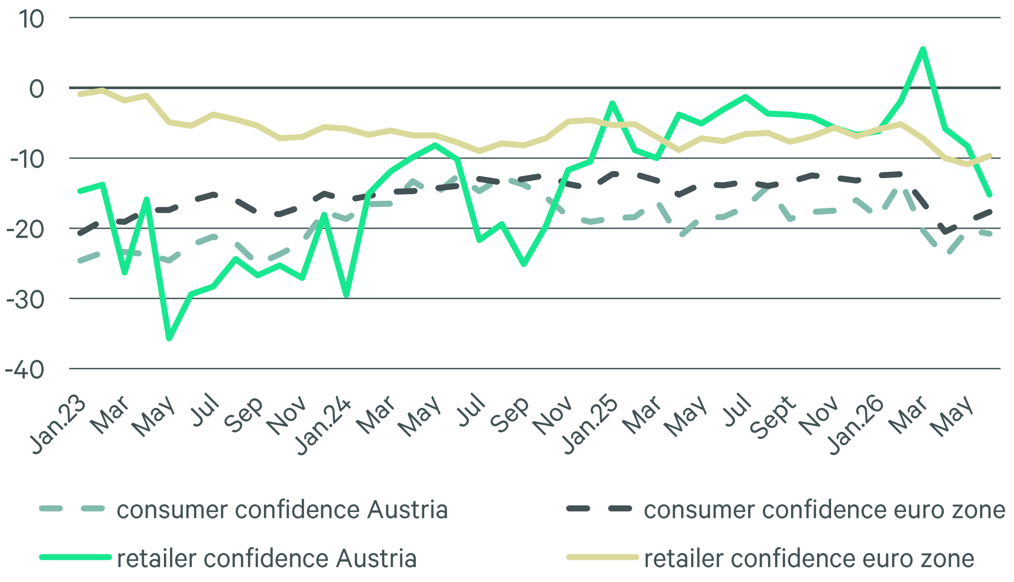
Arrows indicate changes to the quarter in the previous year.

Solid market performance despite weaker consumer sentiment

- Retailers are clearly focusing on flagship stores in prime locations. Whilst compromises may be possible regarding the size of the space, location remains the decisive factor. Brands are opting for fewer locations but are investing significantly more in them. At the same time, longer lease terms and the return of key money reflect landlords' strengthened position.
- Prime yields for retail parks, shopping centres and high-street retail properties have risen by 5 basis points compared with the same quarter last year.
- Prime rents in high-street locations and retail parks have also risen slightly compared with the same quarter last year. Moderate rent growth is expected in both segments later in the year.
- Following a strong upturn at the start of the year, retailer confidence in Austria has recently declined again. The main factor was the downbeat outlook regarding future business performance. At the same time, consumer confidence has also deteriorated since April, pointing to more moderate consumer demand.

CONFIDENCE INDICES Austria – Euro Zone

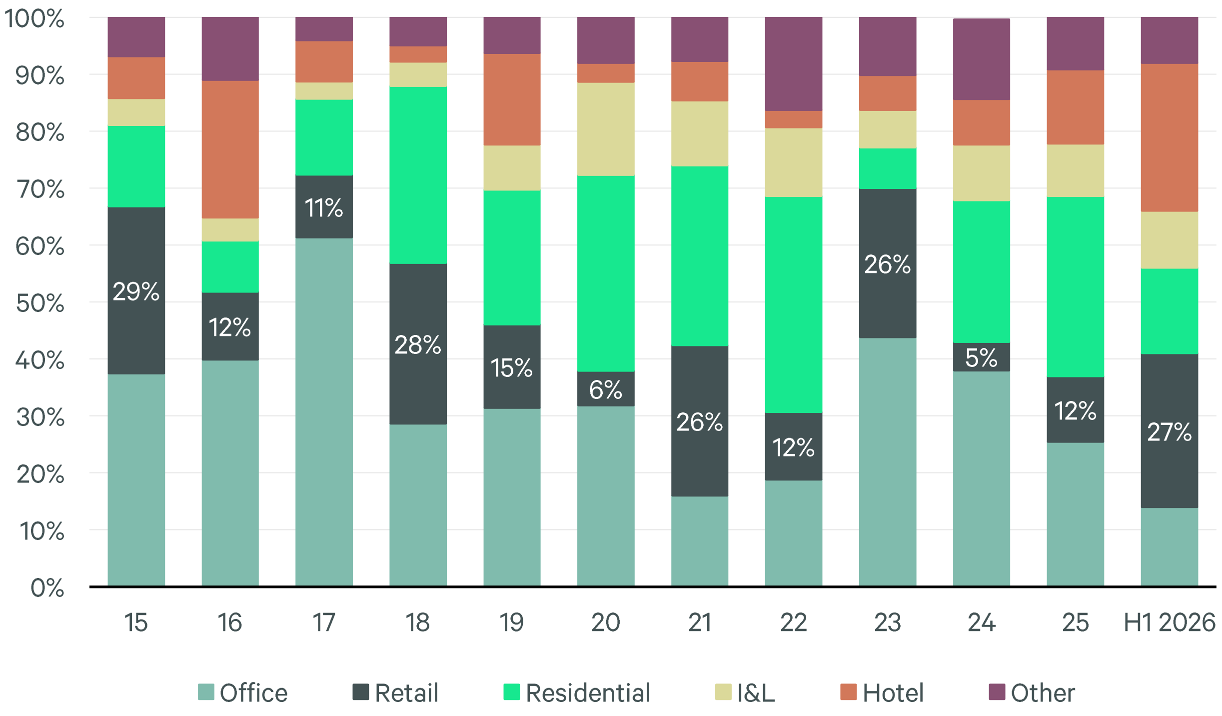
2023 – Q2 2026, seasonally adjusted



Source: Eurostat

Investment volume by asset class

Austria



Source: CBRE Research

Retail with the highest investment volume of all asset classes

– With a 27% share, retail led the ranking of asset classes on the Austrian investment market in the first half of 2026. Some of the largest individual transactions included the Pro Kaufland in Linz, the Arcade Meidling and Kärntner Straße 12 in Vienna's city centre.

– Retail investment volume reached around EUR 266 million in the first half of 2026, more than three times the figure for the same period last year. International investors played a key role in market activity and accounted for 63% of the total retail investment volume.

– Investors continue to focus on high-quality core assets and trophy properties in established locations. Retail parks with a large catchment area, a strong role in local supply and sustainable cash flows are in particularly high demand.

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