

FIGURES | DENMARK LOGISTICS | Q1 2026

Momentum steadily building across Danish logistics

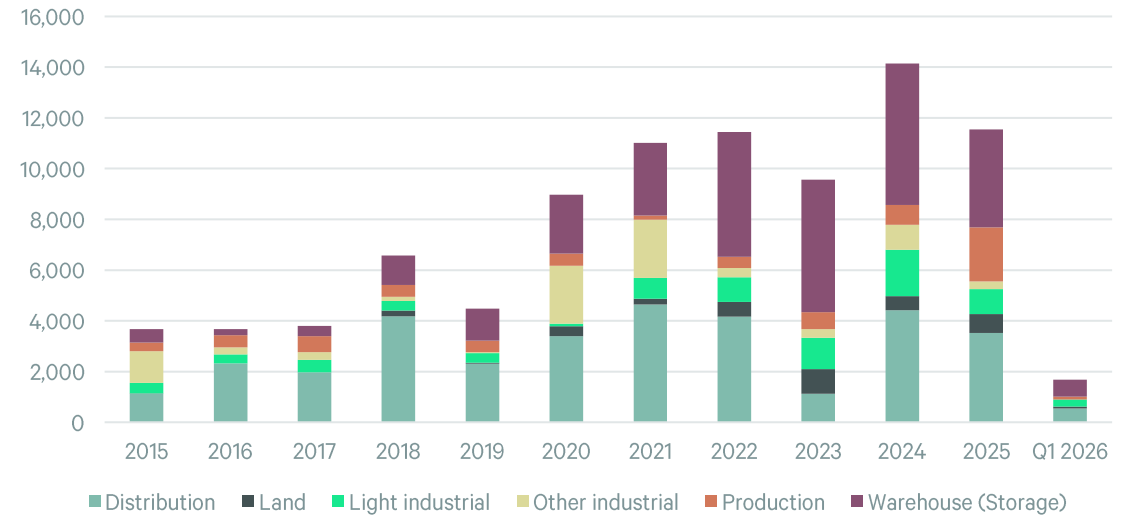
LOGISTICS INVESTMENT MARKET KEY FIGURES Q1 2026



Note: *Cut-off at DKK 5 million; Arrows indicate change y-o-y, except for Prime yield (q-o-q)

- The Danish Industrial & Logistics sector witnessed a y-o-y decline of 25% TTM and came in as the third most liquid investment category in Denmark, accounting for approximately 18% of overall investment activity in the first quarter.
- The prime Logistics yield remain stable for the South Corridor at 5.00% while the yield gap to the Triangle Region has widened, now standing at 35 bps.
- Transactions from the first quarter worth highlighting includes Catena’s purchase of a pan-Nordic logistics portfolio from Urban Partners, which included one property in Denmark.
- While the sector continues to attract investor interest, the geopolitical climate remains a key factor to monitor. Although interest rate have increased since the outbreak of the war in Iran, it remains too early to assess the impact on the transaction market.

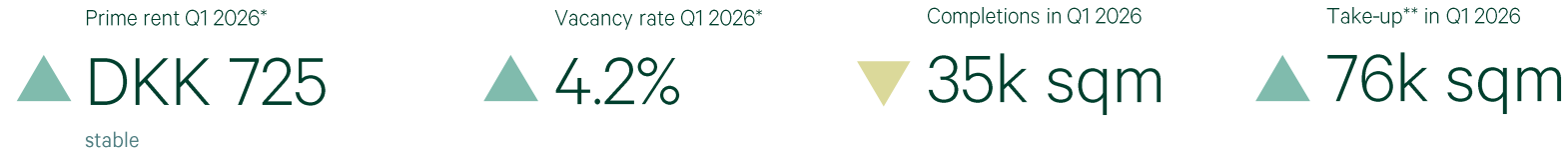
I&L TRANSACTION VOLUME (DKKm)



Source: CBRE Research, Erhvervsmaeglerens Branchedata

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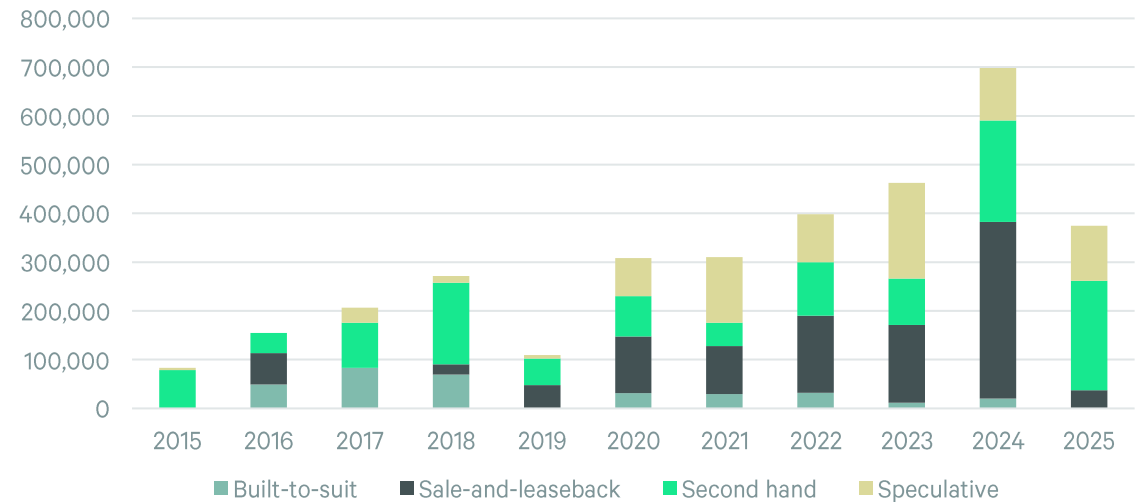
DENMARK LOGISTICS OCCUPIER MARKET KEY FIGURES



*South Corridor, **modern logistics Built after 2000 and unit size >500 sq m; Note: Arrows indicate change q-o-q

- Leasing activity had a stronger start to 2026 compared to 2025, with an increase in take-up of 31% in Q1 2026 compared to the same period last year. With a share of 82% of the total take-up in the first quarter, second hand continues to play a bigger role in the overall take-up in the Danish market.
- Vacancy levels have increased in the South Corridor following consolidation that has led to the release of larger distribution facilities in Køge and Greve. In addition, a new speculative development on Idunsvej, acquired by Catena through a forward funding structure, has now been completed.
- New stock deliveries and space currently under construction remain on the lower side driven by higher construction costs and more cautious developer sentiment. Despite ongoing instability in the Middle East, overall market sentiment remains positive.

LOGISTICS TAKE-UP* (SQ M)



*2024 is skewed due to the DSV Horsens sale-and-leaseback. Source: CBRE Research

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