

AUSTRIA | RETAIL | Q1 2026

Retail Market Austria Q1 2026

▲ 5.70%

Yield Retail Parks

▶ 5.90%

Yield Shopping Centres

▶ 4.70%

Yield High Streets

▲ €16,50/sq m/month

Prime Rent Retail Parks

▶ €100/sq m/month

Prime Rent Shopping Centres

▲ €380/sq m/month

Prime Rent High Streets

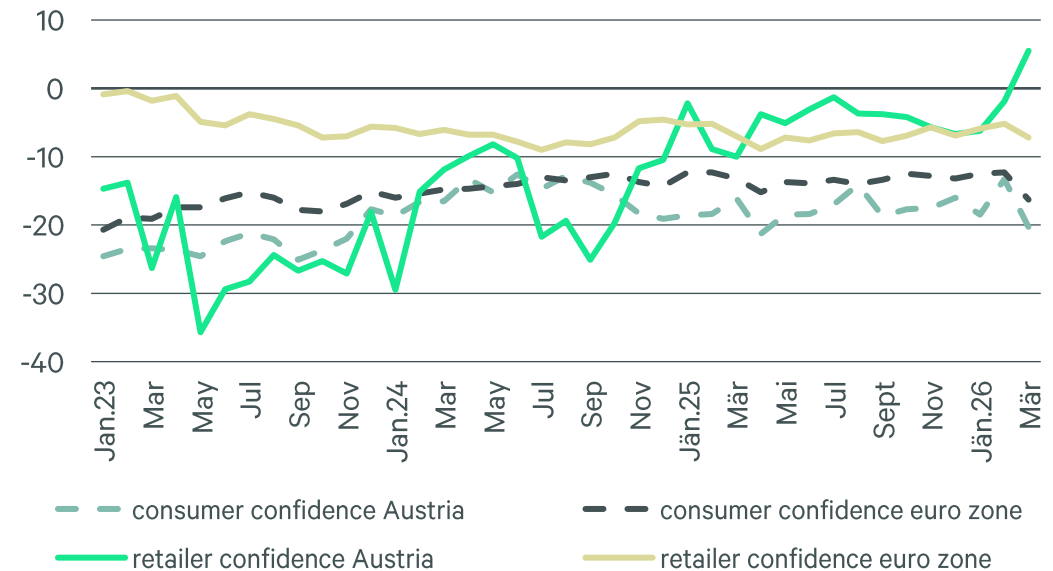
Arrows indicate changes to the quarter in the previous year.

Widely stable market performance and high levels of investment activity

- Retail sales rose slightly by 0.8% in 2025, adjusted for inflation. The key drivers of growth remain the food retail sector and e-commerce, which continues to grow.
- Retailer confidence was almost consistently above the EU average in 2025 and has increased further since the start of 2026. Although consumer confidence has recovered, it remains below the EU average.
- With a market share of 31% in the first quarter of 2026, the retail sector is the strongest asset class in the investment market. The volume results from a Europe-wide portfolio of factory outlet centres as well as ongoing investor interest in retail parks and specialist retail outlets.
- There is also a noticeable trend for investment deals to be either very large-scale or in the smaller segment, with investors from Central and Eastern Europe being very active in the Austrian market.

CONFIDENCE INDICES Austria – Euro Zone

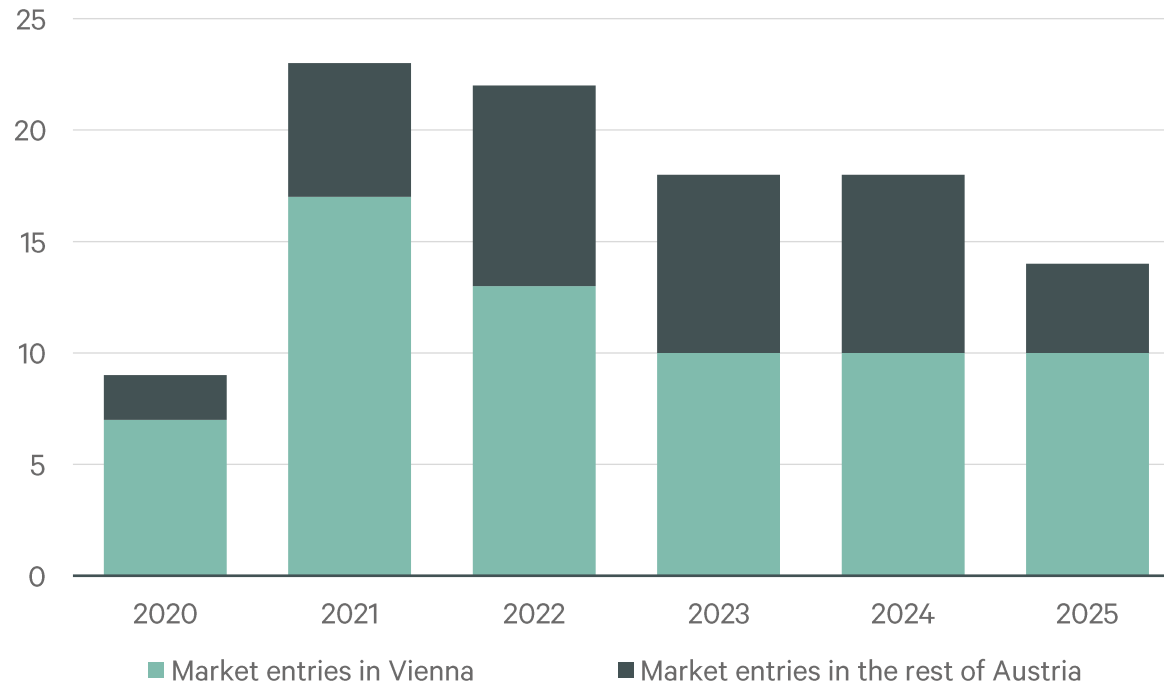
2023 - Q1 2026, seasonally adjusted



Source: Eurostat

International market entries in Austria

2020-2025



Source: CBRE Research

Retail market developments

- Key new entrants in 2025 included Arket on Mariahilfer Straße and the two luxury brands Celine and Loewe on Kohlmarkt. The Australian luxury clothing brand Zimmermann opened in Vienna’s city centre in March 2026; another new arrival in March was the Danish drugstore chain Normal AS on Mariahilfer Straße.
- In July, On Running will open its own store on Neubaugasse. Abercrombie & Fitch and other well-known international brands are also planning to enter the Austrian market.
- The deficit-ridden sports retailer Hervis is expected to have to close some of its stores following a change of ownership. The sports retailer Decathlon, on the other hand, is expanding and is set to move into the Gerngross shopping centre in the middle of the year.
- IKEA Klagenfurt is reducing its retail space and leasing around 2,600 sq m to Thomas Phillipps, a German home and garden discounter.
- Discounters such as Action and Woolworth are continuing their expansion.

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