

Press Release

Vienna Research Forum

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Logistics/Industrial Market Vienna and Surrounding Area The 1st Half of 2025

Press Contact:

Dkfm. Frank Brün FRICS SIOR
Vienna Research Forum
Marc-Aurel-Straße 12/Top12
1010 Wien

presse@viennaresearchforum.at
T: +43 699 181 15 181

About the Vienna Research Forum:

The Vienna Research Forum was initiated by the Association for the Promotion of Quality in the Real Estate Industry (immQu) with the leading agents on the Vienna office real estate market, CBRE GmbH, Colliers International Immobilienmakler GmbH, EHL Immobilien GmbH, OPTIN Immobilien GmbH, ÖRAG Immobilien Vermittlung GmbH, OTTO Immobilien GmbH and Spiegelfeld International GmbH.

They enter the most important parameters, such as letting performance, vacancy rates and building completions into the VRF database anonymously and independently of each other. These are then published quarterly in the interests of comparability and as support for investors and companies.

The 1st half of 2025 in a nutshell

- Total stock approx. 8.19 million m²
- Space turnover in H1 2025 at around 33,228 m²
- Largest letting responsible for approx. 33.04% of turnover

Sharp Decline but Well Above 2023 Levels

In the first half of 2025, space turnover in the logistics and industrial market in Vienna and the surrounding area totalled 33,228 m². This is the conclusion reached by the Vienna Research Forum Logistics/Industry (VRF-LI) after evaluating the latest key data. Logistics space is only taken into account by the VRF if it meets certain quality criteria such as hall height, manoeuvring space and distance from the motorway.

At the end of 2024, the VRF-LI completed its analysis and recording of the three submarkets – 'Eisenstadt', 'Wiener Neustadt & Baden' and 'St. Pölten'. This increased the portfolio to 8.19 million square metres compared to the end of 2023.

Total space turnover, including space not considered by the VRF, amounted to 39,065 square metres in the first half of 2025.

Approximately 51.12% of the classified space meets the highest quality standards, known as logistics class A properties, while approximately 30.59% is classified as class B and 18.29% as class C. In the case of production and industrial space, all properties that are currently used for this purpose and meet certain minimum criteria, such as hall size, were included. According to VRF-LI, the largest space turnover of 11,000 m² took place in the Vienna Southern Suburbs submarket. This corresponds to around 33.04% of the space turnover in the logistics and industrial market in the first half of 2025.

Looking at space turnover by share of logistics and industrial space, 66.96% is attributable to logistics space and 33.04% to production and industrial space.

Stagnation at a low level

With a rental performance of only 33,000 m², the first half of 2025 was significantly below the average of the past four half-years (average: 51,811 m²). In order to achieve the rental result of 2024, almost 84,000 m² would have to be let in the second half of the year.

Logistics/Industrial Market Vienna and Surrounding Area Submarket Analysis H1 2025:

Submarket Name	Properties Total Area in m ²	Logistics Properties Total Area in m ²	Logistics Properties Total Area in m ² Class A	Logistics Properties Total Area in m ² Class B	Logistics Properties Total Area in m ² Class C	Production / Industrial Properties Total Area in m ²	Total Space Turnover H1 2025
Vienna North	795,184	314,021	105,000	123,139	85,882	481,163	8,777
Vienna East	707,612	282,982	55,270	216,222	11,490	424,630	0
Vienna Süd	1,113,504	535,563	200,482	153,100	181,981	577,941	0
Vienna West	44,823	21,823	0	7,500	14,323	23,000	0
Vienna Surrounding North	1,243,683	441,060	322,060	70,100	48,900	802,623	0
Vienna Surrounding East	957,156	796,156	651,156	78,000	67,000	161,000	5,739
Vienna Surrounding South	1,273,135	815,928	354,048	287,408	174,472	45,207	11,000
Eisenstadt	206,100	100,100	88,100	5,000	7,000	106,000	0
Wiener Neustadt-Baden	1,583,980	397,180	163,680	134,600	98,900	1,186,800	7,772
St Pölten	263,800	233,500	73,300	129,700	30,500	30,300	0
Total	8,188,977	3,938,313	2,013,096	1,204,769	720,448	4.250.664	33,288

The VRF-LI surveyed the total stock of logistics, production and industrial space in Vienna and the surrounding area for the first time in November 2019 and updated it at the end of H1 2025: It therefore amounts to 8.188.977 m²*, of which around 51.91% is accounted for by production and industrial space and around 48.09% by logistics space.

** Vienna Research Forum registers new rentals and pre-lettings as rental performance but not lease renewals. Subleases are recorded but not reported.*

** Due to regular adaptation of unclassified properties, conversions and completions, the portfolio may change from quarter to quarter.*

Members of the Vienna Research Forum:

CBRE GmbH

T +43 1 533 40 80

Management:

Dr. Andreas Ridder, FRICS
andreas.ridder@cbre.com

Research:

Marc Steinke, MSc
marc.steinke@cbre.com

Colliers International

Immobilienmakler GmbH

T +43 1 535 53 05

Management:

Georg Muzicant, MRICS, MBA,
georg.muzicant@colliers.com
Thomas Belina, Mag. (FH),
thomas.belina@colliers.at

Research:

Florian Bogner, BA,
florian.bogner@colliers.at

EHL Gewerbeimmobilien GmbH

T +43-1-512 76 90

Managing Director:

Mag. Stefan Wernhart, MRICS,
s.wernhart@ehl.at

Research:

DI Alexandra Bauer, MRICS,
a.bauer@ehl.at

immQu - Verein zur Förderung

der Qualität der

Immobilienwirtschaft

T +43 699 181 15 181

Founding Director of immQu
and Head of VRF

Dkfm. Frank Brün FRICS SIOR
office@immqu.at

OPTIN Immobilien GmbH

T +43 1 934 69 60 - 201

Management /Research:

Mag. (FH) Mag. Alexander Fenzl,
alexander.fenzl@optin.at

ÖRAG Immobilien Vermittlung GmbH

T +43 1 534 73 214

Management:

Mag. Johannes Endl, MSc, MRICS,
endl@oerag.at

Research:

Mag. (FH) Elisa Stadlinger, MRICS,
stadlinger@oerag.at

OTTO Immobilien GmbH

T +43 1 512 77 77

Management:

Dr. Eugen Otto, MRICS,
eugen@otto.at

Research:

Martin Denner, BSc,
m.denner@otto.at

Richter Industriemakler

T +43 1 513 23 13-0

Management /Research:

Lukas Richter
richter@industriemakler.at

