Press Release

Vienna Research Forum

www.viennaresearchforum.at

Logistics/Industrial Market Vienna and Surrounding Area

The 1st Half of 2026

Press Contact:
Dkfm. Frank Brün FRICS SIOR
Vienna Research Forum
Löwengasse 47A
1030 Wien

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

The 1st half of 2026 in a nutshell

- Total stock: approx. 8.61 million m^2
- Take-up in the first half of 2026: 103,971 m^2
- The largest let accounted for approx. 20.22 per cent of take-up
- Vacancy rate for logistics/industrial properties: 3.5 per cent

Market Development

In the first half of 2026, take-up in the logistics and industrial market in Vienna and the surrounding area totalled 103,971 m^2. (First half of 2025: 33,288 m^2). This represents a substantial increase of 212.34 per cent year-on-year.

This is the conclusion reached by the Vienna Research Forum Logistics/Industry (VRF-LI) following an analysis of the latest key figures. Logistics space is only taken into account by the VRF provided it meets certain quality criteria, such as hall height, manoeuvring space and distance from the motorway.

Total space let, including space not taken into account by the VRF, amounted to 107,918 m^2 in the first half of 2026. (First half of 2025: 39,065 m^2)

Approximately 52.31 per cent of the classified spaces meet the highest quality standards – so-called 'Class A logistics' properties – whilst around 33.67 per cent are classified as Class B and 13.69 per cent as Class C. In the case of production and industrial spaces, all properties currently used for this purpose and meeting certain minimum criteria – such as hall size – were included. According to VRF-LI, the highest take-up, at 21,000 m^2, occurred in the Vienna Southern Suburbs submarket. This represents around 20.20 per cent of the space taken up in the logistics and industrial market in the first half of 2026.

When space taken up is broken down by the proportion of logistics and industrial space, 84.24 per cent is accounted for by logistics space and 15.76 per cent by production and industrial space.

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 every six months to facilitate comparison and to provide support for investors and companies.

Logistics/Industrial Market Vienna and Surrounding Area
Submarket Analysis H1 2026:

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 Quartal
Vienna North	795 184	314 021	105 000	123 139	85 882	481 163	2 220
Vienna East	668 512	294 482	93 770	189 222	11 490	374 030	0
Vienna Süd	1 136 984	561 009	167 605	211 423	181 981	575 975	5 060
Vienna West	44 823	21 823	0	7 500	14 323	23 000	0
Vienna Surrounding North	1 292 883	490 260	371 260	70 100	48 900	802 623	17 430
Vienna Surrounding East	1 125 069	964 069	812 069	100 000	52 000	161 000	0
Vienna Surrounding South	1 329 435	858 728	385 048	410 908	62 772	470 707	40 197
Eisenstadt	213 550	107 550	95 550	5 000	7 000	106 000	7 450
Wiener Neustadt-Baden	1 607 561	420 761	113 261	208 600	98 900	1 186 800	28 114
St Pölten	395 048	305 048	139 848	134 700	30 500	90 000	3 500
Total	**8 609 049**	**4 337 751**	**2 269 211**	**1 460 592**	**593 748**	**4 271 298**	**103 971**

VRF-LI first surveyed the total stock of logistics, production and industrial space in Vienna and the surrounding area in November 2019 and updated it at the end of H2 2025. The total stock now amounts to 8,609,049 m^2, of which approximately 49.61% is attributable to production and industrial space and 50.39% to 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.*

Memebers of the Vienna Research Forum:

CBRE GmbH
T +43 1 533 40 80
Management:
Lukas Schwarz
lukas.schwarz@cbre.com

Research:
DI Maximilian Stimpfl
maximilian.stimpfl@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:
Martin Ofner, BA
martin.ofner@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