

Press Release

Vienna Research Forum

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Logistics/Industrial Market Vienna and Surrounding Area The 2nd Half of 2025

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The 2nd half of 2025 in a nutshell

- New total stock following expansion approx. 8.24 million m²
- Space turnover in H2 2025 at 71,069 m²
- Largest letting accounted for approx. 35.18% of total take-up
- Vacancy rate recorded for the first time: 4.0%

Market Development

In the second half of 2025, space turnover in the logistics and industrial market in Vienna and the surrounding area totalled 71,069 m². This is the conclusion reached by the Vienna Research Forum Logistics/Industry (VRF-LI) following the evaluation of the latest key data. Logistics space is only considered by the VRF if it meets defined quality criteria such as hall height, manoeuvring areas and proximity to motorways.

By the end of 2024, VRF-LI completed the analysis and inclusion of the three submarkets Eisenstadt, Wiener Neustadt & Baden and St. Pölten. As a result, total stock increased compared to the end of 2023 and currently stands at 8.24 million m².

Total space turnover including areas not classified by the VRF amounted to 79,256 m² in the second half of 2025 (2024: 82,980 m²). Approximately 49.02% of classified space meets the highest quality standards (Logistics Class A), around 35.71% is classified as Class B and 15.09% as Class C. For production and industrial space, all properties currently used for this purpose and meeting minimum criteria (e.g. hall size) were included.

According to VRF-LI, the largest space turnover of 25,000 m² occurred in the Vienna Surrounding South submarket, accounting for around 35.18% of total logistics and industrial take-up in the second half of 2025. When analysing space turnover by use, 85.20% is attributable to logistics space and 17.38% to production and industrial space.

Strong Increase in the Second Half of 2025

In total, 104,357 m² of lettings were reported by the Vienna Research Forum Logistics/Industry (VRF-LI) in 2025. This represents a decline of 59.19% compared to the record year 2023 (255,734 m²). Compared to the previous year, letting performance decreased by 11.05% (2024: 117,325 m²).

With a take-up of 71,069 m², the second half of 2025 was well above the average of the past three years (42,622 m²).

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.



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Logistics/Industrial Market Vienna and Surrounding Area Submarket Analysis H2 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 Quartal
Vienna North	795 184	314 021	105 000	123 139	85 882	481 163	7 460
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	8 638
Vienna West	44 823	21 823	0	7 500	14 323	23 000	0
Vienna Surrounding North	1 263 683	461 060	342 060	70 100	48 900	802 623	9 144
Vienna Surrounding East	964 156	803 156	651 156	85 000	67 000	161 000	7 000
Vienna Surrounding South	1 308 435	837 728	364 048	410 908	62 772	470 707	31 027
Eisenstadt	206 100	100 100	88 100	5 000	7 000	106 000	0
Wiener Neustadt-Baden	1 594 561	407 761	100 261	208 600	98 900	1 186 800	7 800
St Pölten	263 687	233 387	73 187	129 700	30 500	30 300	0
Total	8 246 125	4 034 527	1 985 187	1 440 592	608 748	4 211 598	71 069

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 8,246,905 m², of which approximately 48.93% is attributable to production and industrial space and 51.07% 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.*

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