Czechia Warehouse Market Report

H1 2026

Czech logistics ends 2025 with record leasing and a swelling development pipeline

Prague · Brno · Ostrava · Plzeň

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National overview — Czechia Warehouse

The Czech industrial and logistics market delivered its strongest leasing year on record in 2025, with roughly 2.1–2.17 million m^2 of gross take-up (~41% up year-on-year) and Q4 posting the year's highest gross take-up at 642,000 m^2 (net 371,500 m^2). Producers accounted for about 44% of demand. Modern stock closed 2025 at roughly 13.3–13.7 million m^2, with national vacancy at 4.9–5.5%. Prime headline rents for a 10,000 m^2 unit held at €7.50/m^2/month in Prague (≈€90/m^2/year), €6.50 in Brno (≈€78/year), €5.90 in Plzeň (≈€70.8/year) and €5.60 in Ostrava (≈€67.2/year). Prime industrial yields sit around 5.00–5.25% — the lowest in CEE. Over 1.6 million m^2 is under construction.

PRIME RENT CITED
€90/m^2/yr
Savills · Q4 2025

PRIME YIELD CITED
5–5.25%
CBRE · 2025

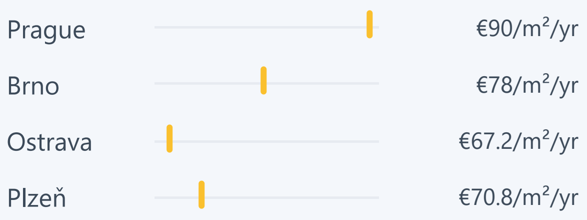
VACANCY RATE CITED
4.9–5.5%
Cushman & Wakefield · Q4 2025

TAKE-UP CITED
2,100,000–2,170,000 m^2
Savills · FY 2025 (gross)

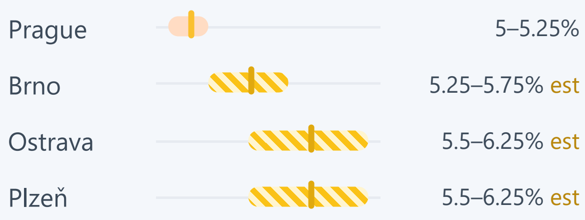
PIPELINE CITED
1,600,000 m^2
Colliers · Q4 2025 (under construction)

TOTAL STOCK CITED
13,300,000–13,700,000 m^2
Cushman & Wakefield · Q4 2025

PRIME RENT BY CITY (€/M²/YR)



PRIME YIELD BY CITY (%)



Outlook. With more than 1.6 million m^2 under construction and record-level demand, the market should absorb new supply while vacancy stays comparatively low. Prime rents are expected to hold broadly stable — firm in Prague and Brno, with mild softening risk in secondary regions (Plzeň, Ostrava) — and prime yields should remain the tightest in CEE.

Methodology & data provenance

Every figure in this report is attributed to named commercial real-estate research, marked as a labelled estimate, or shown as “not published”. Nothing is stated without provenance.

CITED FIGURES	LABELLED ESTIMATES	NOT PUBLISHED
11	**9**	**10**
from third-party research	interpolated, basis stated	no source this period

CITED

Sourced from research houses

Prime rent, yield, vacancy, take-up, pipeline and stock are drawn from published market reports by leading research houses such as JLL, CBRE, Cushman & Wakefield, Colliers, BNP Paribas Real Estate, Savills and Knight Frank. The specific sources used in this report are named on the Sources page. Where a house quotes a range (e.g. a prime-yield band), the range is shown. Each figure carries its source and as-of period.

- **Prime rent** — Top achievable rent, best-in-class space (€/m²/yr).
- **Prime yield** — Net initial yield, prime fully-let asset (%).
- **Vacancy rate** — Vacant ÷ total stock (%).
- **Take-up** — Space leased in the period (m²).
- **Pipeline** — Under construction / to be delivered (m²).
- **Total stock** — Total modern stock (m²).

ESTIMATE

Estimates & gaps

The major research houses cover capital cities and the primary axes closely, but publish little for smaller regional markets. Where no figure is published, we either show “not published” or a clearly-tagged estimate range with its basis stated on the figure (typically interpolation from the national prime and a regional discount). Estimates are our own and are never presented as third-party data.

Reporting periods differ by source (e.g. Q1 2026, H2 2025, FY 2025); each figure shows its own as-of date. Data compiled 2026-07-02, market data as of Q4 2025 – Q1 2026 (latest published).

City markets

Prague

Praha · 4 of 6 metrics published

Largest logistics submarket (~27% of national stock). Prime rent €7.50/m²/month.

PRIME RENT CITED
€90/m²/yr
Savills · Q4 2025

PRIME YIELD CITED
5–5.25%
CBRE · 2025

VACANCY RATE ESTIMATE
4.9–5.5%
Est. · National vacancy 4.9–5.5%; no separate Prague-only figure in cited sources

TAKE-UP
not published

PIPELINE
not published

TOTAL STOCK ESTIMATE
3,600,000–3,700,000 m²
Est. · Prague ~27% of national ~13.3–13.7M m² stock (Savills share)

Brno

3 of 6 metrics published

Major South-Moravia logistics hub. Prime rent €6.50/m²/month.

PRIME RENT CITED
€78/m²/yr
Savills · Q4 2025

PRIME YIELD ESTIMATE
5.25–5.75%
Est. · Regional prime industrial yields modestly above Prague prime (~5.0–5.25%)

VACANCY RATE ESTIMATE
4.9–5.5%
Est. · No separate Brno vacancy in cited sources; assumed near national

TAKE-UP
not published

PIPELINE
not published

TOTAL STOCK
not published

City markets

Ostrava
3 of 6 metrics published

Moravia-Silesia logistics submarket. Prime rent €5.60/m²/month, the lowest of the four cities.

PRIME RENT CITED
€67.2/m²/yr
Savills · Q4 2025

PRIME YIELD ESTIMATE
5.5–6.25%
Est. · Secondary-region prime industrial yields above Prague prime

VACANCY RATE ESTIMATE
4.9–5.5%
Est. · No separate Ostrava vacancy in cited sources; assumed near national

TAKE-UP
not published

PIPELINE
not published

TOTAL STOCK
not published

Plzeň
4 of 6 metrics published

Second-largest Czech logistics submarket (~14% of national stock). Prime rent €5.90/m²/month.

PRIME RENT CITED
€70.8/m²/yr
Savills · Q4 2025

PRIME YIELD ESTIMATE
5.5–6.25%
Est. · Secondary-region prime industrial yields above Prague prime

VACANCY RATE ESTIMATE
4.9–5.5%
Est. · No separate Plzeň vacancy in cited sources; assumed near national

TAKE-UP
not published

PIPELINE
not published

TOTAL STOCK ESTIMATE
1,860,000–1,920,000 m²
Est. · Plzeň region ~14% of national ~13.3–13.7M m² stock (Savills share)

Sources & disclaimer

CITED THIRD-PARTY RESEARCH

- **Savills** — Market in Minutes: Czech Republic Industrial Market Q4 2025 (prime rents Prague €7.50, Brno €6.50, Plzeň €5.90, Ostrava €5.60 /m²/month; take-up 2.17M m²) (Q4 2025).
  https://www.savills.co.uk/research_articles/229130/388716-0
- **Cushman & Wakefield** — MarketBeat — Czech Republic Industrial Q4 2025 (stock ~13.3M m², vacancy 4.9%, gross take-up 642,000 m²) (Q4 2025).
  https://www.cushmanwakefield.com/en/czech-republic/insights/czech-republic-marketbeat
- **Colliers** — Industrial Market Overview Q4 2025 (over 1.6M m² under construction) (Q4 2025).
  https://www.colliers.com/en-cz/research/q4-2025-industrial-report
- **CBRE** — Czech Republic Industrial & Logistics Q4 2025 (prime industrial yield ~5.0%, lowest in CEE) (Q4 2025).
  https://www.cbre.cz/en-gb/press-releases/cbre-forecast

Disclaimer. Figures are attributed to the third-party research houses named above and reflect their respective definitions and reporting periods; WarehouseRentInfo does not warrant their accuracy. Figures tagged “estimate” are WarehouseRentInfo’s own labelled approximations for markets where no figure is published, and must not be read as third-party data. Reporting periods and market definitions differ between houses. This report is provided for information only and does not constitute investment, valuation or letting advice.