



Hungary Industrial Market

Fresh Data, Q3 2025



Current Quarter Performance Indicators:

5,923,800

Total stock

11.8%

Vacancy rate

235,700

Gross take-up

76,800

New supply

472,800

Under construction

€ 5.70

Prime rent

6.75%

Prime yield

12%

YoY Change

3.4%

YoY Change

50%

YoY Change

-45%

YoY Change

-30%

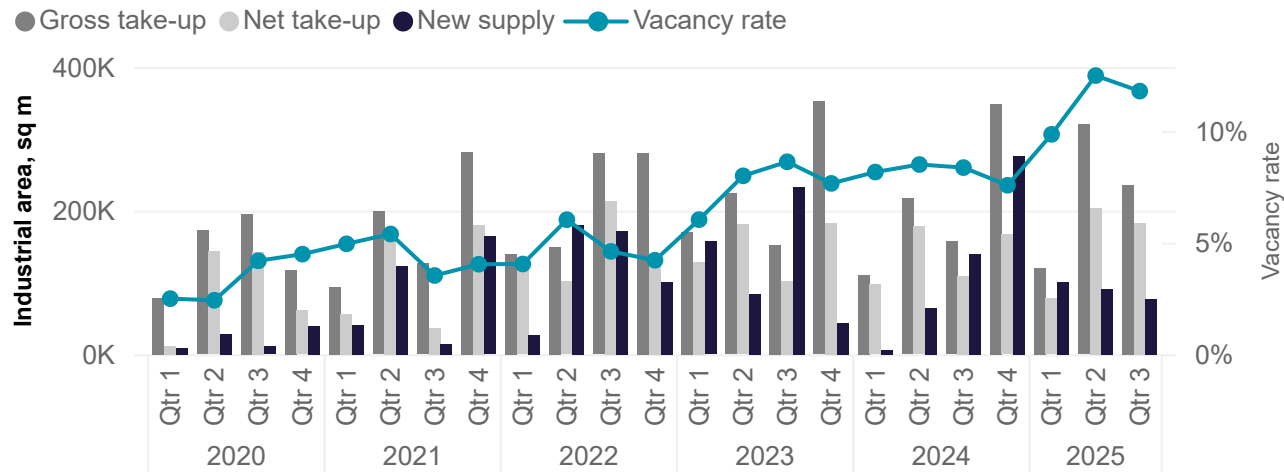
YoY Change

-1.7%

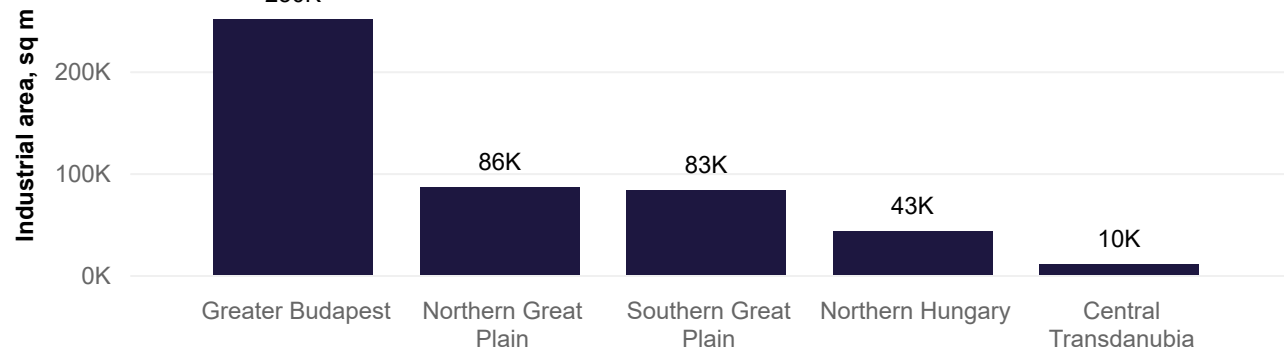
YoY Change

0

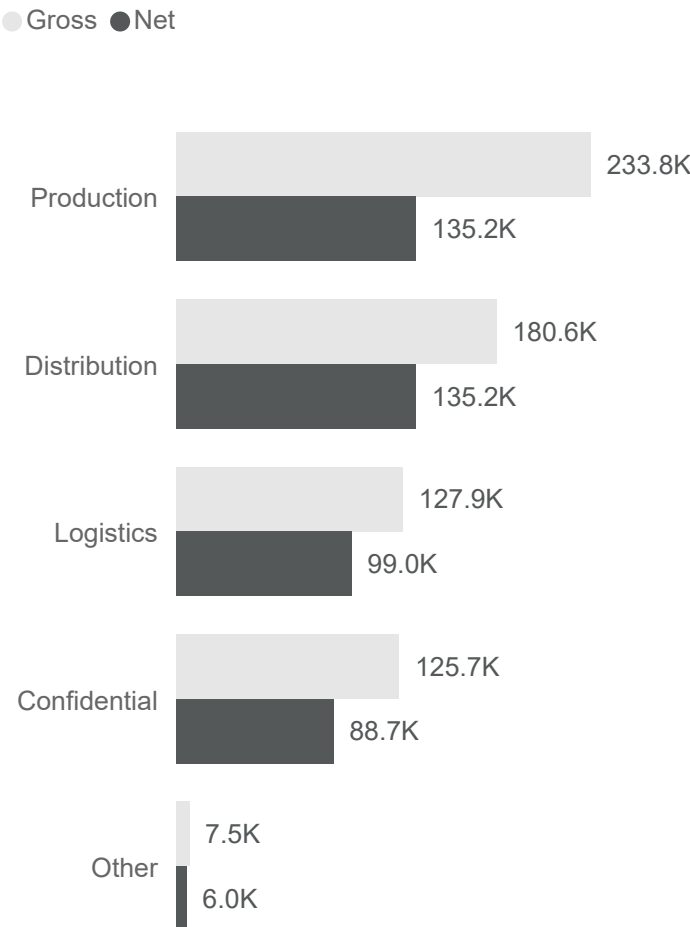
YoY Change



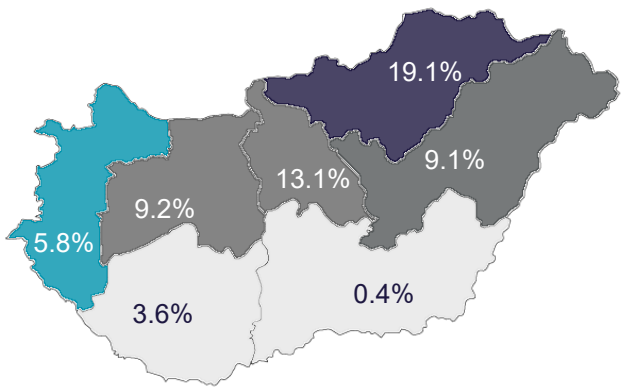
Pipeline Under Construction (sq m)



YTD Take-up by Sector (sq m)



Vacancy rates by regional markets



Current Quarter Completions (sq m)

Property name	Building	Region	Total size	Delivery	Developer
Rossmann HQ		Greater Budapest	32,000	2025 Q3	Panattoni
Debrecen Déli Gazdasági Övezet	Xanga Park	Northern Great Plain	22,000	2025 Q3	Xanga
VGP Park Aerozone I B	B/2	Greater Budapest	12,200	2025 Q3	VGP
Késmárk Ipari Park		Greater Budapest	5,800	2025 Q3	IPD
VGP Park Aerozone I A	A1/3	Greater Budapest	4,900	2025 Q3	VGP

Planned Completions in the next 6 months

Logistics Park	Building	Region	Total size	Delivery	Developer
VGP Park Kecskemét	F	Southern Great Plain	44,500	2026 Q1	VGP
WLP Debrecen West - Ebes	Phase II	Northern Great Plain	32,900	2026 Q1	Weerts
IGPark Nyíregyháza		Northern Great Plain	31,900	2026 Q2	Innovinia
InPark Miskolc		Northern Hungary	23,000	2026 Q2	InPark
IGPark Kecskemét - South	A (Phase II)	Southern Great Plain	21,000	2025 Q4	Innovinia
Horváth Rudolf Hatvan	R10	Northern Hungary	19,800	2025 Q4	Horváth Rudolf
Inkubátorcsarnok		Northern Great Plain	9,400	2026 Q1	Xanga



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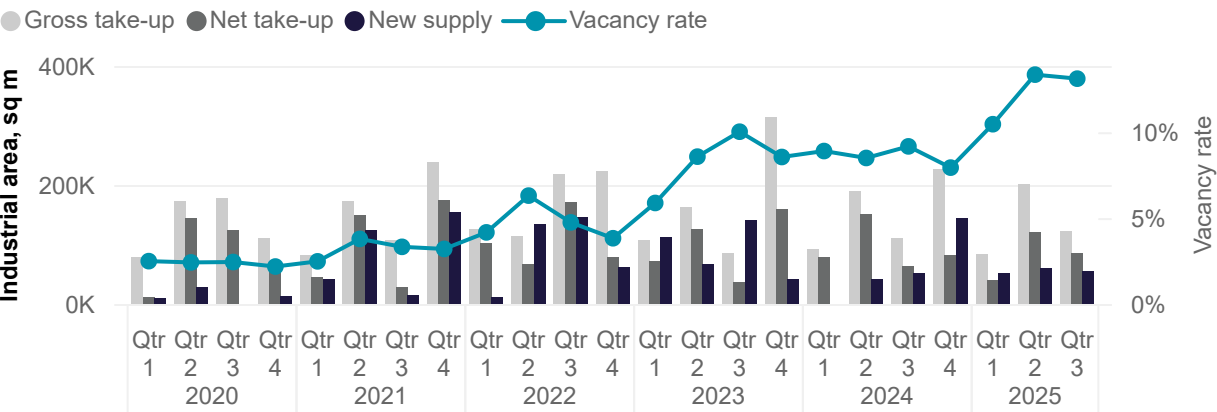
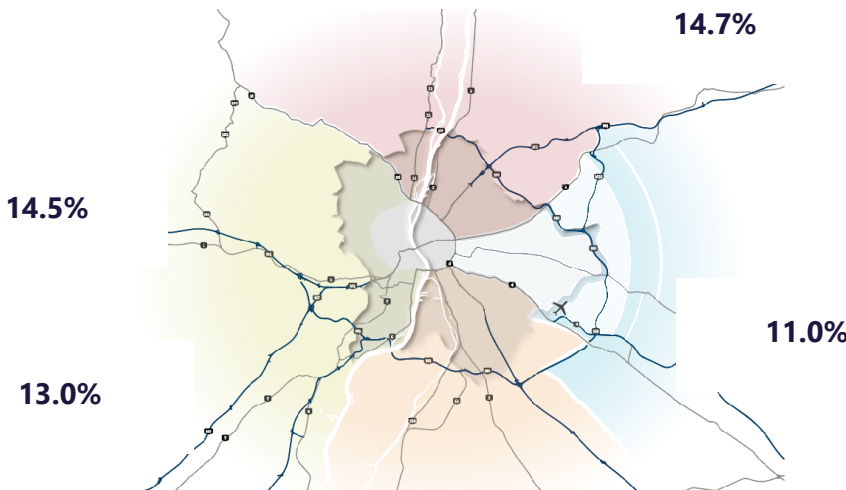


Current Quarter Performance Indicators:

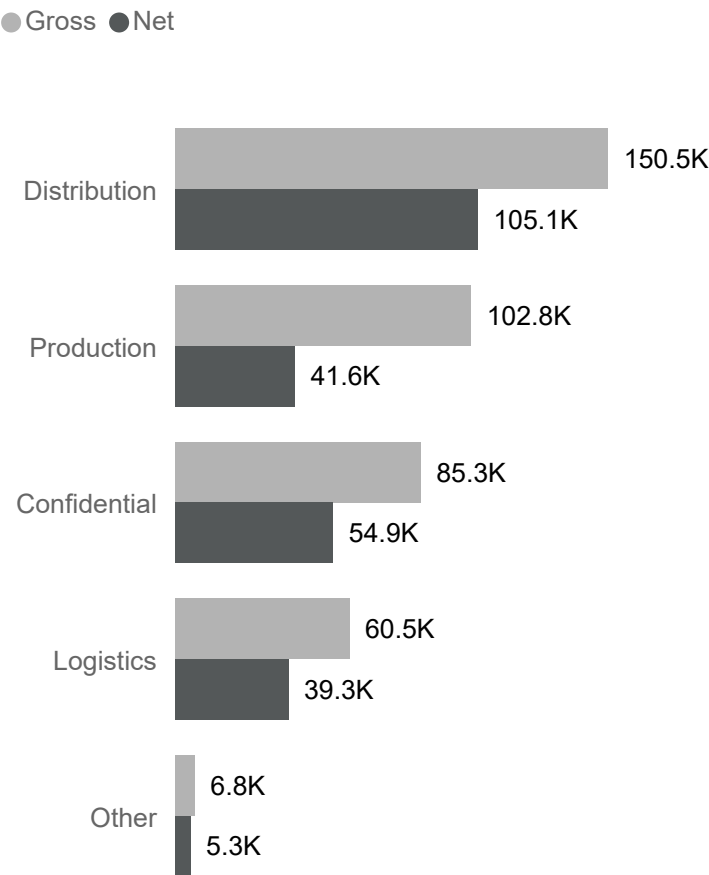
Greater Budapest

3,920,900	13.1%	121,900	85,600	54,800	250,500	€ 5.50
Total stock	Vacancy rate	Gross take-up	Net take-up	New supply	Under construction	Prime Rent
9%	3.9%	11%	37%	6%	-34%	-5.2%
YoY Change	YoY Change	YoY Change	YoY Change	YoY Change	YoY Change	YoY Change

Vacancy rates by submarkets



YTD Take-up by Sector (sq m)



Top Completions in the last 9 months

Logistics Park	Building	Subregion	Total size	Delivery	Developer
HelloParks Alsónémedi	AN1	South	59,300	2025 Q2	HelloParks
HelloParks Páty	PT3	West	42,500	2025 Q1	HelloParks
Rossmann HQ		East	32,000	2025 Q3	Panattoni
VGP Park Aerozone I B	B/2	East	12,200	2025 Q3	VGP
East Gate PRO	B2	North	9,300	2025 Q1	WING
Késmárk Ipari Park		North	5,800	2025 Q3	IPD

Planned Completions in the next 6 months

Property name	Building	Subregion	Total size	Delivery	Developer
CTPark Budapest	ERD1	West	53,000	2025 Q4	CTP
HelloParks Fót	FT3	North	45,300	2025 Q4	HelloParks
HelloParks Páty	PT5	West	41,800	2025 Q4	HelloParks
CTPark Vecsés	VCS4	East	29,200	2025 Q4	CTP
CTPark Budapest West	BIA10A	West	26,800	2025 Q4	CTP
CTPark Budapest Érd	ERD2	West	23,000	2026 Q1	CTP
Faedra Business Park		West	9,400	2025 Q4	Faedra Group
VGP Park Aerozone I	A1/4	East	8,100	2026 Q1	VGP

Pipeline Under Construction (sq m)

