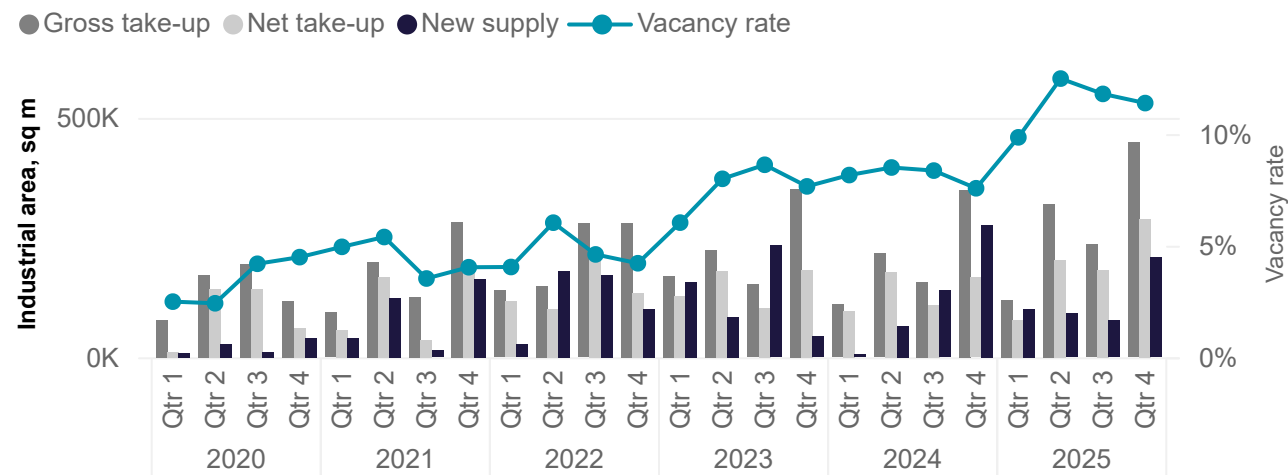
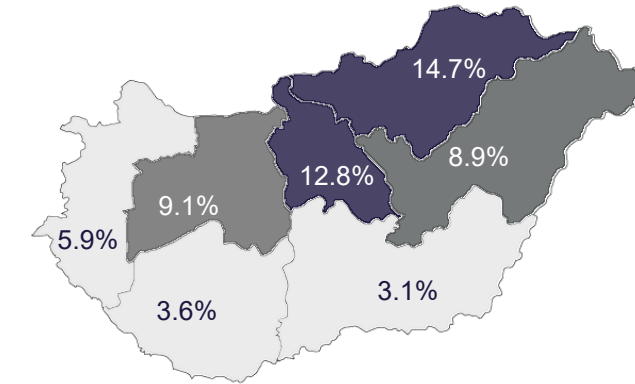


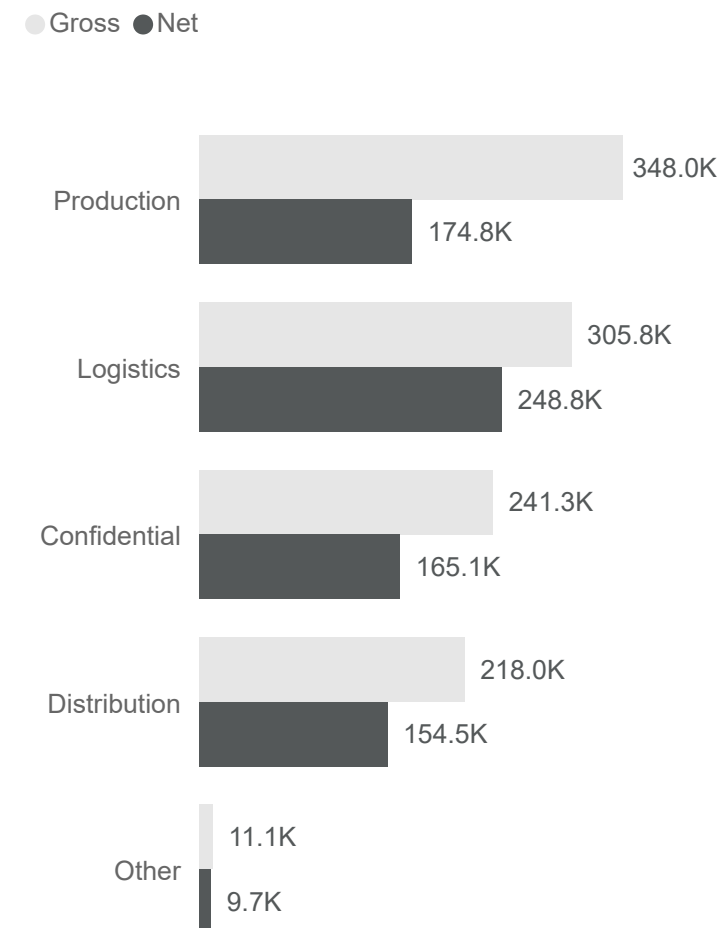
**Current Quarter Performance Indicators:**

<b>6,132,200</b> Total stock	<b>11.4%</b> Vacancy rate	<b>448,700</b> Gross take-up	<b>208,400</b> New supply	<b>539,300</b> Under construction	<b>€ 5.70</b> Prime rent	<b>6.75%</b> Prime yield
<b>10%</b> YoY Change	<b>3.8%</b> YoY Change	<b>29%</b> YoY Change	<b>-25%</b> YoY Change	<b>9%</b> YoY Change	<b>0.0%</b> YoY Change	<b>-25 bps</b> YoY change

**Vacancy rates by regional markets**



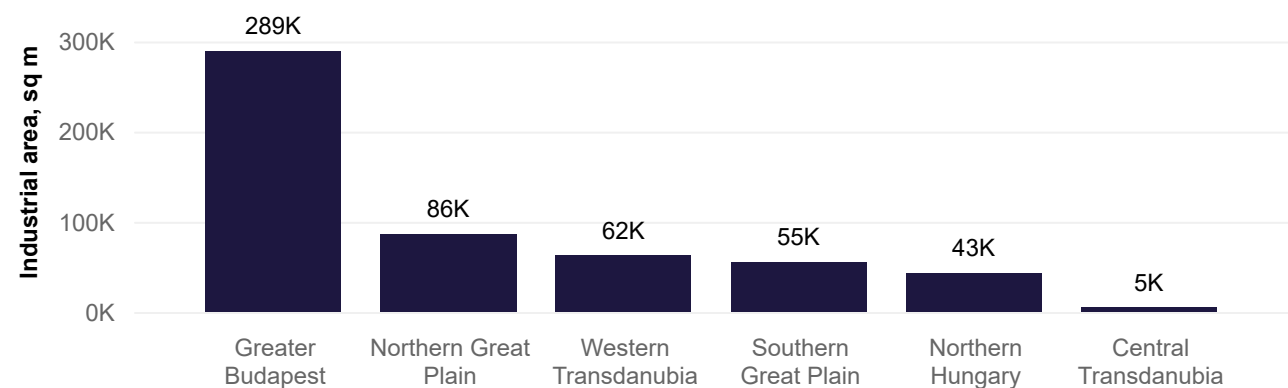
**YTD Take-up by Sector (sq m)**



**Current Quarter Completions (sq m)**

Property name	Building	Region	Total size	Delivery	Developer
VGP Park Kecskemét	G	Southern Great Plain	18,500	2025 Q4	VGP
IGPark Kecskemét - South	A (Phase II)	Southern Great Plain	6,300	2025 Q4	Innovinia
IGPark Kecskemét _ South	C	Southern Great Plain	16,400	2025 Q4	Innovinia
CTPark Tatabánya	TTBN01B	Central Transdanubia	5,500	2025 Q4	CTP

**Pipeline Under Construction (sq m)**



**Planned Completions in the next 9 months**

Logistics Park	Building	Region	Total size	Delivery	Developer
Panattoni Mosonmagyaróvár	A	Western Transdanubia	51,000	2026 Q3	Panattoni
VGP Park Kecskemét	F	Southern Great Plain	43,500	2026 Q2	VGP
WLP Debrecen West - Ebes	Phase II	Northern Great Plain	32,900	2026 Q3	Weerts
IGPark Nyíregyháza		Northern Great Plain	31,900	2026 Q2	Innovinia
InPark Miskolc		Northern Hungary	23,000	2026 Q1	InPark
Horváth Rudolf Hatvan	R10	Northern Hungary	19,800	2026 Q1	Horváth Rudolf



# Greater Budapest Industrial Market

## Fresh Data, Q4 2025



### Current Quarter Performance Indicators:

Greater Budapest

**4,082,400**

Total stock

**12.8%**

Vacancy rate

**261,600**

Gross take-up

**201,700**

Net take-up

**161,600**

New supply

**288,700**

Under construction

**€ 5.50**

Prime Rent

**9%**

YoY Change

**4.8%**

YoY Change

**16%**

YoY Change

**147%**

YoY Change

**13%**

YoY Change

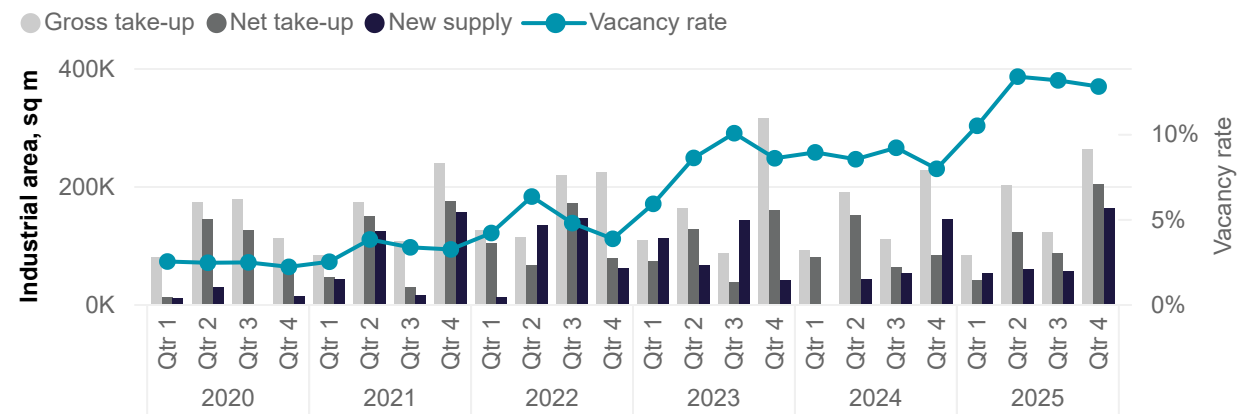
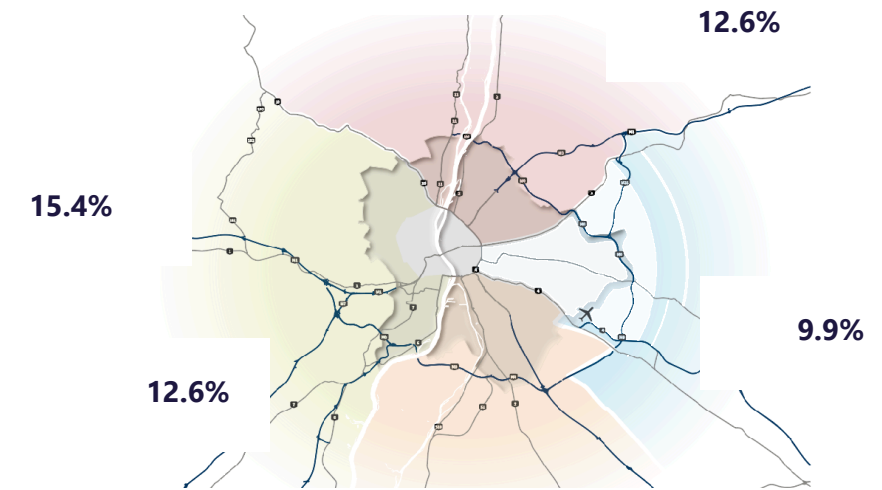
**-8%**

YoY Change

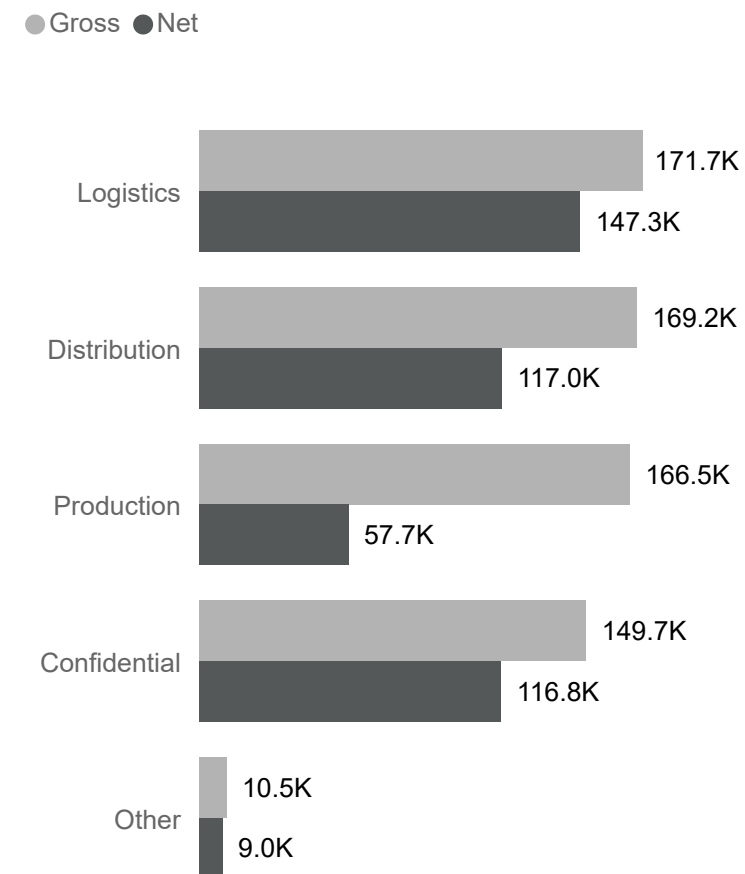
**-3.5%**

YoY Change

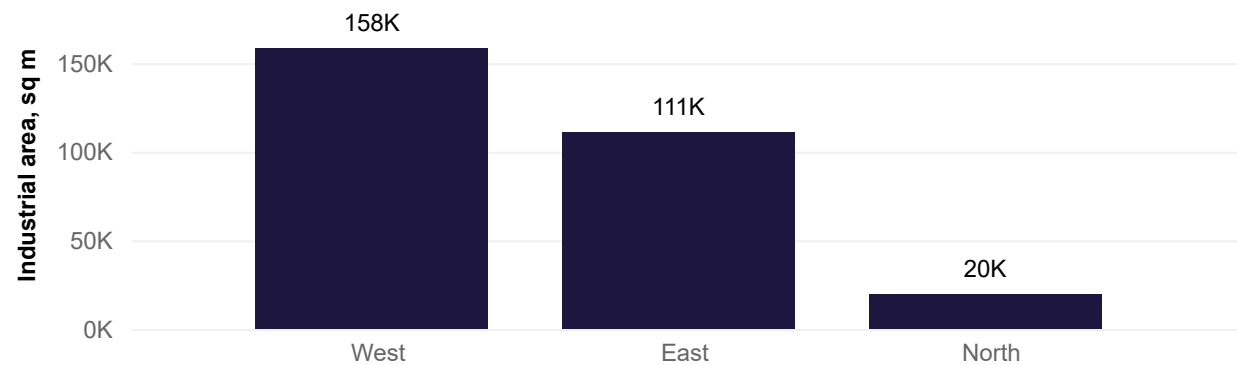
### Vacancy rates by submarkets



### YTD Take-up by Sector (sq m)



### Pipeline Under Construction (sq m)



### Top Completions in the last 9 months

Logistics Park	Building	Subregion	Total size	Delivery	Developer
CTPark Budapest Érd	BERD01	West	77,200	2025 Q4	CTP
HelloParks Alsónémedi	AN1	South	59,300	2025 Q2	HelloParks
Rossmann HQ		East	32,000	2025 Q3	Panattoni
CTPark Vecsés	BVCS04A	East	30,900	2025 Q4	CTP
CTPark Budapest West	BIA10A	West	27,400	2025 Q4	CTP
HelloParks Fót	FT3/1	North	26,100	2025 Q4	HelloParks

### Planned Completions in the next 6 months

Property name	Building	Subregion	Total size	Delivery	Developer
CTPark Budapest Érd	BERD05	West	80,200	2026 Q3	CTP
HelloParks Maglód	MG4	East	46,000	2026 Q3	HelloParks
CTPark Vecsés	BVCS04B	East	42,900	2026 Q3	CTP
HelloParks Páty	PT5	West	41,800	2026 Q1	HelloParks
CTPark Budapest West	BDPW12	West	26,800	2026 Q4	CTP
HelloParks Fót	FT3/2	North	19,500	2026 Q2	HelloParks
VGP Park Aerozone II	C	East	13,900	2026 Q3	VGP
Faedra Business Park		West	9,400	2026 Q1	Faedra Group