**Press Release**

Prague, 22 October 2026

# Q3 2026: Modern industrial stock exceeds 14 million sq m

*Industrial Research Forum Announces Industrial Market Figures for Q3 2026*

- **Modern industrial stock in the Czech Republic crossed 14 million sq m.**
- **Gross take-up reached 455,500 sq m, remaining broadly stable compared to the previous quarter.**
- **At the end of Q3 2026, 938,500 sq m of industrial space was under construction, with 29% being built speculatively.**
- **The vacancy rate fell to 5.3%.**
- **Prime headline rents in Prague remained stable standing at €7.00–€7.50 per sq m per month.**

## COMMENTARY

**Miroslav Kotek, Head of Industrial Agency, Colliers**, **comments**:

*"The Czech industrial market remains resilient. Despite global challenges, the market is staying stable with steady demand, a consistent volume of buildings under construction and high flow of new stock. We expect this trend to continue, although we do have slight concerns about global stability and its potential impact on our local market.*

*At the same time, we are finally seeing fresh demand (both realised and ongoing) coming from the APAC region. As these investors expand their geographical scope beyond industrial hubs in Poland and Hungary, with Czech Republic and Slovakia newly entering their radar, companies are moving further west to keep up with their strategic business needs, bringing a new wave of activity to our local market."*

## TOTAL STOCK & NEW SUPPLY

The total stock of modern industrial space for lease in the Czech Republic reached 14.03 million sq m. In Q3 2026, a total of 269,900 sq m of new warehousing space was delivered to the market across 9 industrial parks. This represents a 77% increase compared to the previous quarter and a 95% increase compared to the same period last year.

The largest completed project in Q3 2026 was the BMW distribution center in Ostrava Airport Multimodal Park (125,700 sq m). The second largest completed project was in Garbe Park Klášterec and Ohří II (35,000 sq m) and the third was CTPark Prague North (31,100 sq m). Both projects were fully leased upon completion.

## PROJECTS UNDER CONSTRUCTION

At the end of Q3 2026, a total of 938,500 sq m of warehouse and manufacturing space was under construction in the Czech Republic. Construction activity fell by 13% quarter-on-quarter and decreased by 24% year-on-year. Approximately 35% of the total space under construction is situated in Prague & Central Bohemia, followed by South Moravian and Ústí nad Labem regions both with a 16% share.

The share of speculative construction increased from 23% to 29% from previous quarter. At the same time, developers commenced new construction of just 149,300 sq m of modern industrial space in Q3 2026, with approximately 25% of this space being constructed on a speculative basis.

## INDUSTRIAL TAKE-UP

During Q3 2026, gross take-up (including renegotiations) reached 455,500 sq m. This represents almost no change compared to the previous quarter and a decrease of 26% year-on-year. Renegotiations accounted for 45% of total gross take-up, same as in the previous quarter.

Net take-up in Q3 2026 amounted to 250,200 sq m, decreasing by only 1% quarter-on-quarter and by 47% year-on-year.

The largest transaction of the quarter was a new lease at EQT Park Prague North, totalling 44,500 sq m, signed by Ecologistics, a logistics and transportation company. The second largest transaction was a 31,400 sq m renegotiation at Panattoni Pilsen Park West, signed by logistics and transportation company DHL Supply Chain. The third-largest transaction was a 29,900 sq m renegotiation at CTPark Ostrava, signed by automotive manufacturer ITT Holdings Czech Republic.

## VACANCY

At the end of Q3 2026, the vacancy rate in the Czech Republic stood at 5.3%, representing a year-on-year increase of 49 basis points and a quarter-on-quarter decrease of 14 basis points. As of the end of Q3 2026, there was approximately 749,600 sq m of modern industrial space available for immediate occupancy. Vacancy in Prague and the Central Bohemian Region has decreased, reaching 4.1% at the end of Q3 2026.

## RENT

Prime headline rents in Prague remained stable at €7.00–€7.50 per sq m/month in Q3 2026. Prime headline rents for city logistics projects in Prague reached €8.25–€10.00 per sq m/month. Headline rents in selected prime locations outside of Prague reach around €5.50–€6.60 per sq m/month. Rents for mezzanine office space stood between €9.50–€12.50 per sq m/month. Service charges typically range between €0.75–€1.00 per sq m/month.

## Industrial Research Forum

The Industrial Research Forum was established in 2010 with the aim of providing clients with consistent, accurate, and transparent data about the Czech industrial real estate market. The members of the Industrial Research Forum – CBRE, Colliers, Cushman & Wakefield, and iO Partners – share non-sensitive information and believe the establishment of the Industrial Research Forum enhances transparency on the Czech industrial market.

**For further information please contact any member of the Industrial Research Forum:**


| CBRE | Colliers | Cushman & Wakefield | iO Partners |
|---|---|---|---|
| Ivana Procházková | Helena Tabakovová | Martina Pavlíková | Lucia Bee |
| +420 771 288 023 | +420 725 388 554 | +420 736 606 905 | +420 602 852 045 |


**Definitions:**

**Total stock and new supply:**
Modern developer-led warehouse and industrial production space of A-class quality owned by a developer or investor for lease to third parties. It does not include owner-occupied stock. New supply includes the above-mentioned space completed during the given period including office space.

**Under construction:**
A-class developer-led warehouse and industrial production space that is under active construction during the given period. It does not include projects in the shell & core phase. Owner-occupied projects are not included.

**Take-up:**
Take-up represents the total floor space that was let or pre-let over the specified period of time. A property is taken-up when the lease or future lease contract is signed. This includes only long-term leases of a period longer than one year. Gross take-up includes renegotiations and sub-leases. Net take-up excludes these and includes only new leases, pre-leases, and expansions of space within existing lease contracts.

**Vacancy rate:**
Ratio of physically vacant space in completed buildings to the total stock of warehouse and industrial space, including office areas.

**Prime rent:**
Represents the top open market rent that could be expected for a notional distribution warehousing unit of the highest quality and specification in the prime location within a market as at the survey date (normally at the end of each quarter). The rent quoted is based on a prime unit of 5,000 sq m of gross internal space leased for a period of five years, with ceiling heights of over 8 metres, used primarily for distribution/warehousing uses. Selected prime locations outside of Prague include the 3 major hubs (Pilsen, Brno and Ostrava)

**City logistics:**
City logistics represents the final stage in the distribution of goods to consumers living in urban areas, sometimes referred to as last-mile delivery. City logistics projects support fast fulfilment, last-mile functions, and broader distribution activity. In Prague, city logistics projects are centrally located in an urban area, but not necessarily directly linked to the last mile delivery process.


**COPYRIGHT © Industrial Research Forum 2026**

This publication is the sole property of Industrial Research Forum and must not be copied, reproduced or transmitted in any form or by any means, either in whole or in part, without mentioning Industrial Research Forum as the source of information. The information contained in this publication is indicative and has been obtained from sources generally regarded to be reliable. However, no representation is made, or warranty given, regarding the accuracy of this information. We welcome notifications of any inaccuracies so that we may correct them. The Industrial Research Forum does not accept any liability in negligence or otherwise for any loss or damage suffered by any party as a result of reliance on this publication.


**For further information and download our press releases please visit our website** https://www.industrialresearchforum.cz/