108 REAL ESTATE

## INDUSTRIAL PROPERTY MARKET

# REPORT Q1/2026

**CROATIA**

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# INDUSTRIAL MARKET IN CROATIA Q1/2026

## SUPPLY AND DEMAND IN THE INDUSTRIAL MARKET: CONSISTENT ACTIVITY

**450,000 sq m**
TOTAL STOCK

**7,300 sq m**
NET TAKE-UP

**116,000 sq m**
UNDER CONSTRUCTION

**6,25 EUR**
AVERAGE RENTS

**2.1 %**
VACANCY RATE

**31,400 sq m**
PREMISES DELIVERED

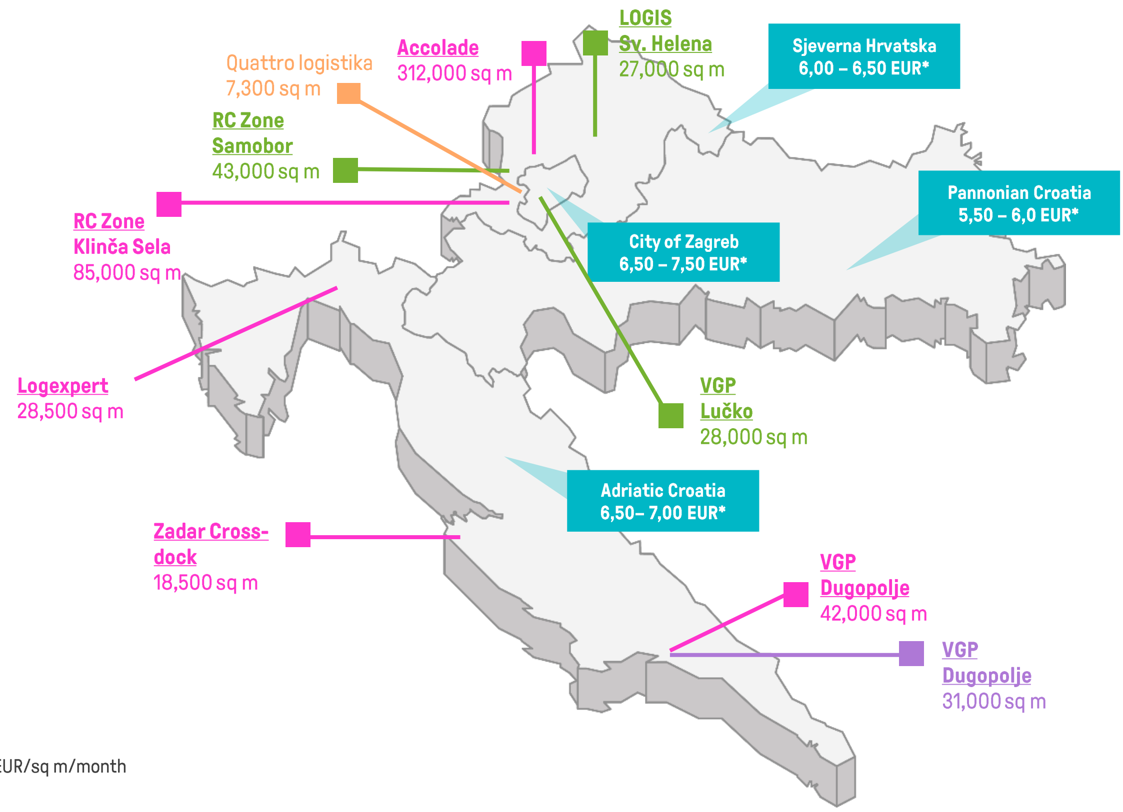
Croatia's industrial and logistics market opened 2026 with constrained supply and continued occupier demand. Q1 recorded a single logistic warehouse delivered in the Split area, while activity in the Zagreb market remained focused on leasing rather than new supply.

The notable contributor to net take-up was a retail company (100%) leased in Zagreb region. Prime headline rents remained stable at €6,50 per sq m per month, supported by low a 2.1% vacancy and limited availability of modern product.

- Croatia recorded 116,000 sq m under construction, 664,900 sq m in the pipeline, while the stock of "A" class industrial premises for lease reached 450,000 sq m.
- An annual GDP growth rate of approximately 3.1% for the first quarter of 2026.
- For Q1 2026, Croatia's inflation (CPI, year-over-year) trended upward and ended the quarter at 4.8% in March 2026.

### SELECTION OF TRANSACTIONS AND RENTS

SIGNED TRANSACTIONS · UNDER CONSTRUCTION · COMPLETED CONSTRUCTION · PLANNED CONSTRUCTION




Note: * = EUR/sq m/month

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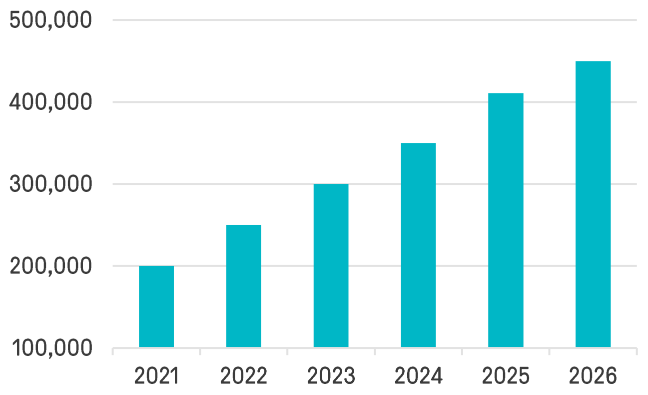
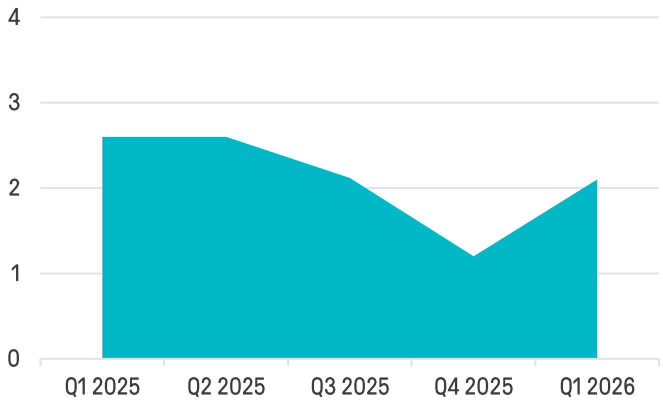
Croatia's logistics and industrial real estate market continued to be one of the most resilient segments of the commercial property sector, supported by consistent demand from 3PL operators, retailers, and distribution occupiers. Although smaller in scale than major Central European markets, the sector maintained strong supply-demand fundamentals in Q1 2026, with vacancies remaining low and availability constrained. Prime rents in key logistics hubs such as Zagreb and Rijeka remained stable at around €6.50–7.50 per sq. m. per month, underpinned by limited modern supply and elevated development costs.

## TOTAL STOCK IN SQ M



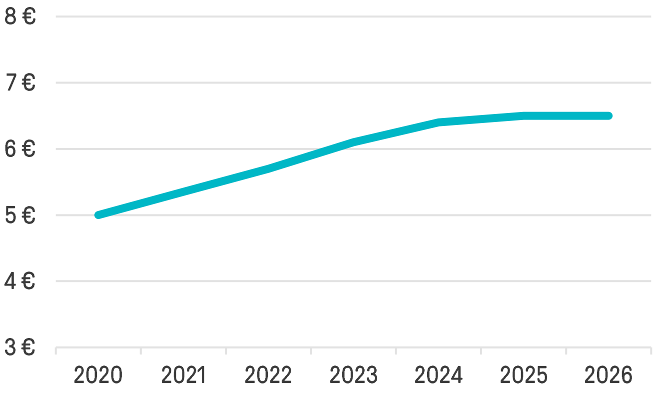

*Source: 108RE Research*

## VACANCY RATE %



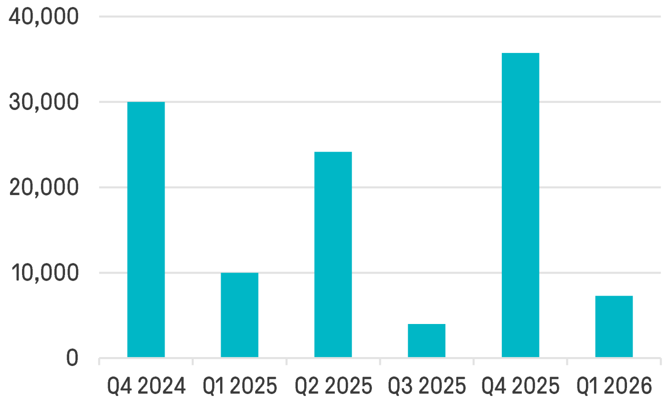

*Source: 108RE Research*

## PRIME RENTS – EUR/SQ M




*Source: 108RE Research*

## GROSS TAKE-UP IN SQ M




*Source: 108RE Research*

*"Looking beyond Q1 2026, Croatia's industrial and logistics real estate sector remains positioned for continued growth, supported by sustained demand, ongoing development activity, and modernization of existing stock. Looking ahead to Q2 2026, market conditions and demand are expected to remain broadly stable. A gradual increase in new supply may begin to ease pressure on availability in certain submarkets, although this is unlikely to significantly impact vacancies in the short term. Despite inflationary and supply-chain challenges, the outlook will remain positive, driven by expansion and growing investor interest."*

**DARIO TOMLJENOVIC**
Managing Director

# WE ARE COMMERCIAL PROPERTY EXPERTS

With years of experience in the CEE market, we combine our knowledge of commercial properties with a personal approach.

We always keep up with technological advances and innovations to help our clients continuously grow and succeed.

**1 000+** transactions

**2 500+** clients

**3 000+** properties

**108 REAL ESTATE** is a real-estate consulting agency which has been exclusively focused on commercial properties since 2009. Over the years, it’s over forty-member team has earned the trust of both domestic and foreign clients. 108 REAL ESTATE is the only commercial real-estate company on the European market which is one-hundred-percent Czech owned and run.

Since its founding, it has sold and rented more than 11.77 million square meters, and established a strong position on the Czech, Slovak and Hungarian markets. Clients turn to 108 REAL ESTATE for leasing and sales brokerage, investment and marketing advice, and development product management. At the end of 2021, 108 REAL ESTATE became the exclusive alliance partner of BNP Paribas Real Estate for the Czech Republic and became part of BNP network in whole of Europe.

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