

REVIEW LOGISTICS MARKET

DÜSSELDORF Q4 2025

RESEARCH & INSIGHTS



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Real Estate for a changing world



Q4 2025

LOGISTICS MARKET
DÜSSELDORF

- SECOND BEST RESULT IN THE LAST 10 YEARS
- PRIME RENTS: THIRD PLACE BEHIND MUNICH AND FRANKFURT

KEY FIGURES

335,000

Take-up (in sqm)

△ +5.3 % y/y

8.70

Prime rent (in €/sqm)

△ +2.4 % y/y

7.00

Average rent (in €/sqm)

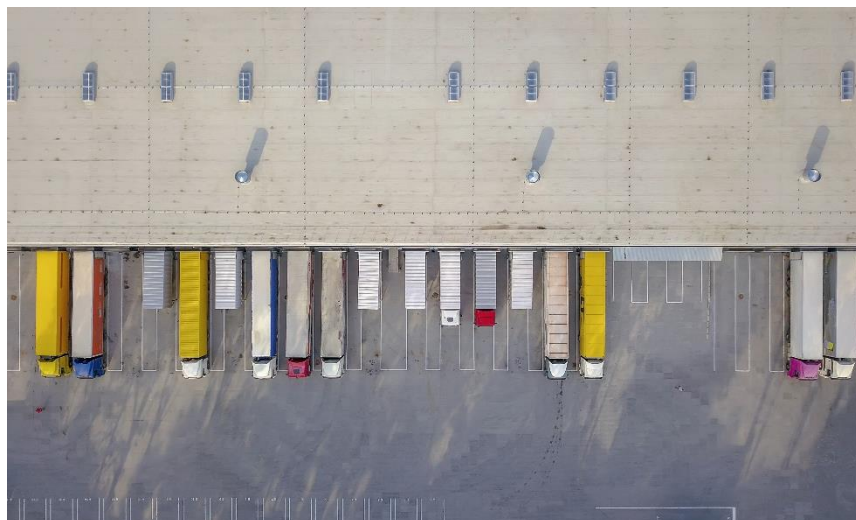
△ +2.9 % y/y

MARKET OVERVIEW

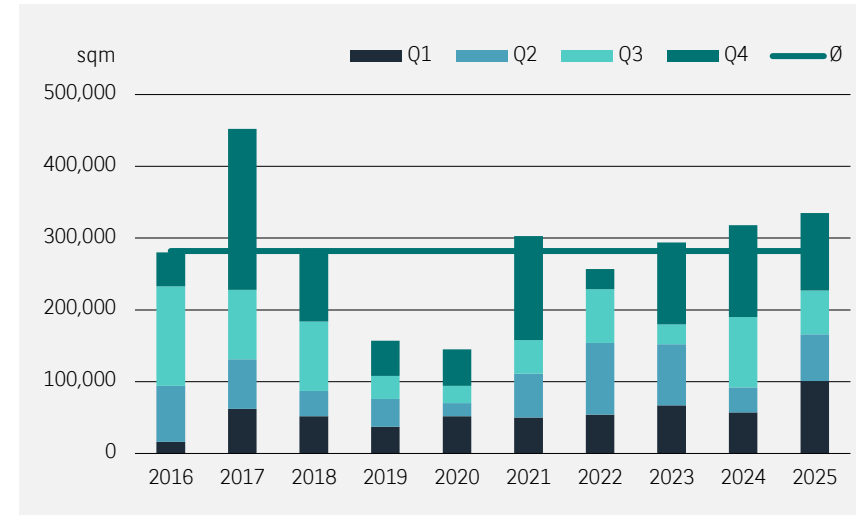
The Düsseldorf logistics market recorded a pleasing overall result in many respects in 2025: With take-up of 335,000 qm, the logistics region of the Rhine metropolis recorded both the third consecutive increase in take-up (+5% compared to 2024) and a significantly above-average result (19% above the ten-year average). The fact that the overall balance sheet with the highest take-up since 2017 (around 452,000 qm) was achieved is a further indication of the lively market activity in 2025 as a whole.

It is particularly noteworthy that the majority of the very good total volume was realised in the existing segment. Consequently, space outside the new construction sector accounted for around 69% of take-up. Nevertheless, the major deals concluded by GV Logistik in Mönchengladbach (around 23,000 qm) and Chemofast Anchoring in Willich (around 18,000 qm) and Solago in the Düsseldorf city area (16,000 qm) show that new construction space has also made a significant contribution to the high market dynamics.

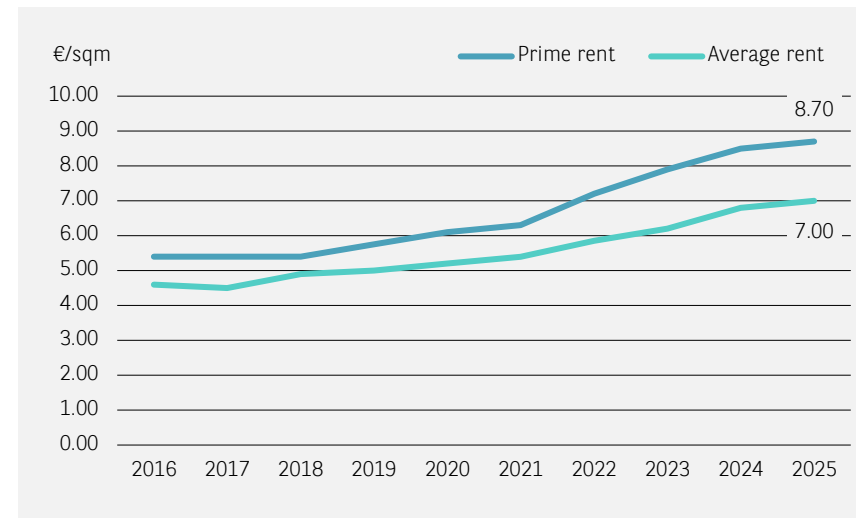
The high demand pressure on the limited premium space in the best locations in the Düsseldorf logistics region has had a noticeable impact on the rental price level. Against this background, the prime rent is now €8.70 per qm (+2.4% compared to 2024). The average rent also continued to rise, reaching the €7.00 per qm mark (+2.9% compared to 2024).



Development of warehouse and logistics take-up



Prime and average rents



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- LOGISTICS SERVICE PROVIDERS
WITH RECORD VOLUME
- A TOTAL OF SIX CONTRACTS WITH
MORE THAN 15,000 SQM

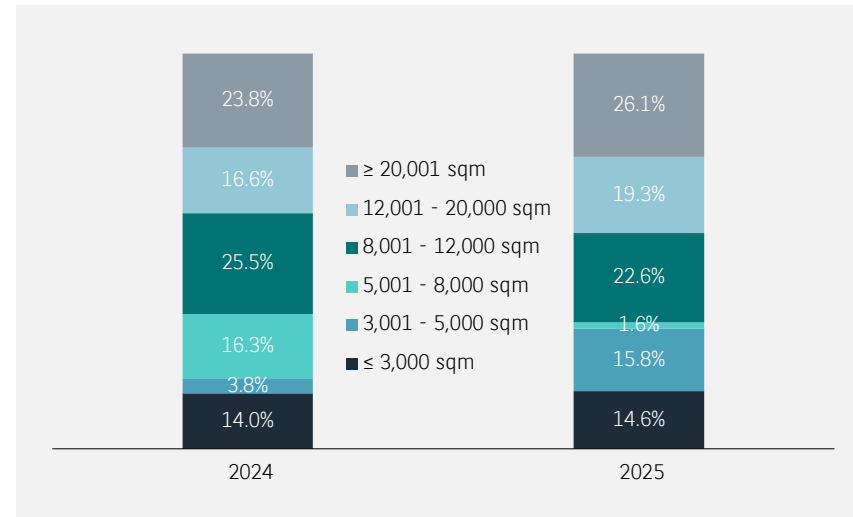
STRUCTURE OF TAKE-UP

In terms of sector distribution, logistics service providers were the main drivers and were able to achieve a new all-time high: with around 175,000 qm and a share of 52%, they accounted for the majority of the volume. Since the two major deals between Goodcang Logistics (43,200 qm) and Nordlicht (21,200 qm) in Mönchengladbach are attributable to companies in the retail logistics sector, the lower take-up (61,000 qm), which is directly attributable to the retail sector (a good 18% proportionately), is put into perspective.

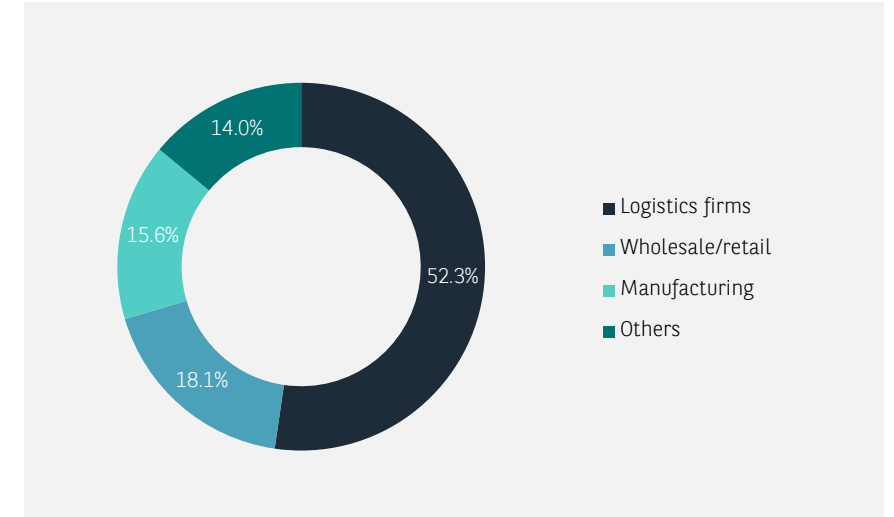
It is precisely this interface between retail and logistics that is currently providing very high demand impulses in the Düsseldorf market, especially among internationally active e-commerce players from the Asian region. In addition to the two top sectors mentioned above, the industrial sector is represented in the ranking as another important pillar of the logistics market with almost 16%. With the owner-occupier Chemofast Anchoring (18,200 qm in Willich) and the lease of the producer of photovoltaic solutions Solango (16,000 qm in Düsseldorf), this sector also contributes two large-volume deals to the total volume.

Not only in terms of sectors, but also in terms of size categories, the Düsseldorf market can be attested to a wide range of letting activity. As a result, both the small segment (up to 8,000 qm; 32%) and the medium (8,000 to 20,000 qm; 42%) and large categories (from 20,000 qm; 26%) each receive high premiums.

Take-up by size category



Take-up by sector



Major contracts

Quarter	Company	Location	sqm
Q1	Goodcang Logistics	Mönchengladbach	43,200
Q1	Nordlicht	Mönchengladbach	21,200
Q3	Chemofast Anchoring	Willich	18,200
Q4	YQN Logistics	Dormagen	16,900
Q2	Solango	Düsseldorf	16,000



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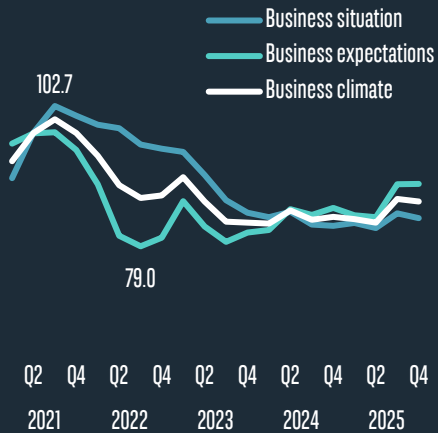


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- DEMAND REMAINS GOOD WHEN MARKET CONDITIONS PLAY ALONG
- RENTS ARE LIKELY TO CONFIRM THE HIGH LEVEL IN Q1

BVL LOGISTICS INDICATOR

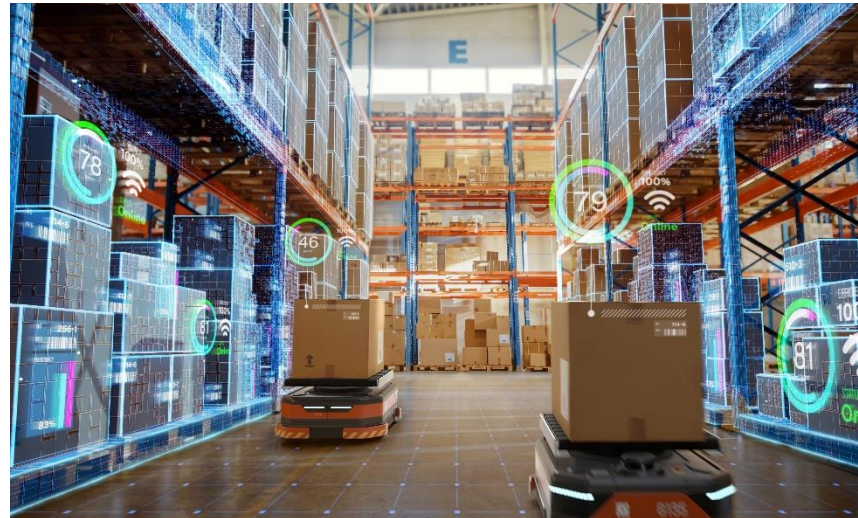


Source: BVL/jfo

OUTLOOK

After a very good market development in the last twelve months and the fourth above-average result since 2021, the Düsseldorf logistics market is in the starting blocks for continued good take-up in 2026. The broad distribution of demand across the size classes and quarters underlines that the leasing momentum has currently levelled off at a consistently good level and is less attributable to individual drivers or periods of the year. The main reason for this is that the return of confidence in the logistics markets will not be put to the test again by geopolitical trouble spots. Developments that can have global effects in particular always have the potential to have a noticeable influence on the framework conditions for or against leasing decisions due to the international networking of the logistics division.

In order to achieve a good result again, especially in the larger space categories, the basis must also be created on the supply side in the modern segment or in the new construction sector. Although many properties were leased last year, some new projects and sublet space are also coming onto the market, so that there are currently no fundamental changes in the supply-demand ratio. The same applies to prime rents, where no significant adjustments are expected due to the already high level at the beginning of the year.



Logistics market data Düsseldorf

RENTS AND TAKE-UP	2024	2025	%-DIFFERENCE
Prime rent (in €/sqm)	8.50	8.70	2.4%
Average rent (in €/sqm)	6.80	7.00	2.9%
Total take-up (in sqm)	318,000	335,000	5.3%

SECTORS	2024	2025	LONG-TERM Ø
Logistics firms	38.3%	52.3%	39.4%
Wholesale/retail	32.3%	18.1%	37.2%
Manufacturing	18.2%	15.6%	16.1%
Others	11.2%	14.0%	7.3%

SIZE CATEGORIES	2024	2025	LONG-TERM Ø
Share of deals > 20,000 sqm	23.8%	26.1%	25.1%
Share of deals ≤ 20,000 sqm	76.2%	73.9%	74.9%

OWNER-OCCUPIERS/ NEW BUILDING SHARE	2024	2025	LONG-TERM Ø
Share of owner-occupiers	2.1%	6.7%	16.3%
Share of new buildings	42.3%	30.6%	49.3%



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Source: BNP Paribas Real Estate GmbH, December 31, 2025



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MARKET REPORTS

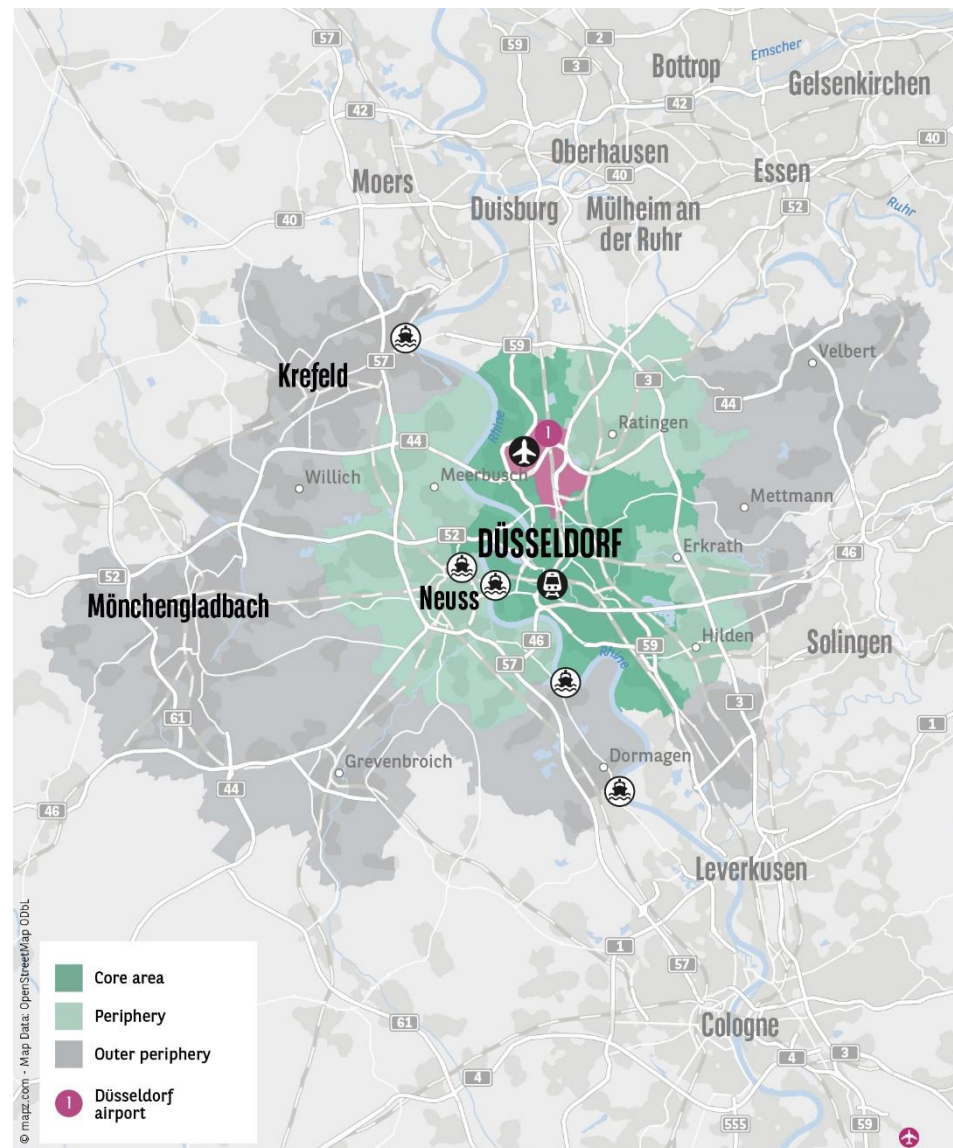


DASHBOARDS



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