

Australia Logistics Real Estate Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

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Report description:

Australia Logistics Real Estate Market TrendsThe growth of the Australia logistics real estate market is supported by strong economic growth, which drives the demand for warehousing and distribution spaces. Its strategic location within the Asia-Pacific region makes it an important trade hub, attracting international logistics firms. The rise in e-commerce further increases the need for efficient logistics infrastructure. Additionally, with world-class transport infrastructure and a growing population, the demand for logistics facilities, especially within consumer goods supply chains, continues to rise. In January 2024, Swire Projects, a division of Swire Shipping, launched the Western Australia Express (WAX) service. This monthly semi-liner shipping service connects major ports across China, South Korea, Japan, Singapore, and Southeast Asia, enhancing logistics and transport options for the region's supply chain. Opportunities in the Australia logistics real estate market are strengthened by the high demand for warehousing, which fuels the logistics sector. Australia's global connectivity further enhances its potential in the industry. Technological advancements, such as automation and smart systems, increase logistics efficiency and demand for properties.

Australia Logistics Real Estate Market GrowthThe Australia logistics real estate market revenue is impacted by ongoing government infrastructure upgrades, which support market growth. There is a rising emphasis on sustainability, driving the adoption of green building practices and energy-efficient properties. Proximity to key markets, such as urban centres and ports, ensures stable rental yields and reduced transportation costs. In October 2023, URB-E shifted its focus to last-mile delivery, while GoodBytz secured USD 12 million in funding, along with capital for regenerative agriculture startups like Overstory, GoodBytz, and FarmInsect.

Australia logistics real estate market development is further supported by government initiatives and investments in infrastructure. The sector's diversification into industries like manufacturing, retail, and agriculture creates abundant opportunities. With low vacancy rates in prime areas and strengthened by international trade agreements, Australia's logistics hub status is enhanced. Additionally, the sector's resilience to economic downturns ensures stability.

Australia Logistics Real Estate Market Insights- The 2022 National Freight and Supply Chain Strategy Annual Report highlights that Australia's freight sector managed approximately 900 million tonnes of goods in the 2020-2021 period, showing the importance of logistics infrastructure. This high volume of goods handled creates substantial demand for logistics real estate, especially distribution centres.- As per the industry reports, in the 2020-21 period, e-commerce retail contributed 41.5% to the growth in value added by digital activities. This surge in online

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shopping drives demand for efficient logistics properties, especially fulfillment centres and warehouses, supporting the growth of the logistics real estate market.- The Australian Business Growth Fund (ABGF) announced its 2022 investment in HUBBED, a technology-driven solution for last-mile delivery and returns logistics. As e-commerce grows, such investments promote the expansion of logistics properties, offering opportunities for modern, high-tech distribution hubs in Australia's logistics real estate market. Industry News January 2025 AustralianSuper, Australia's largest superannuation fund, partnered with Oxford Properties Group to create a joint venture in Europe, acquiring a 50% stake in Oxford's EUR840 million industrial and logistics portfolio. The partnership aims to grow the European Supply Chain Income Partnership (ESCIP) to EUR4.5 billion in 3-5 years. July 2024 Goldman Sachs Alternatives acquired seven last-mile logistics properties in Australia, located in Adelaide, Brisbane, Perth, and Melbourne. The properties, leased to e-commerce and transport companies, were added to Goldman Sachs' real estate portfolio. This investment, part of their USD 13 billion Australian commitment, reflects their focus on Australian logistics assets.

Australia Logistics Real Estate Market Drivers

E-Commerce Growth and Demand for Last-Mile Distribution Centres The swift expansion of e-commerce has had a profound impact on the Australia logistics real estate market revenue. With online shopping on the rise, there has been a significant increase in demand for last-mile distribution centres situated close to urban areas. These facilities facilitate quicker delivery times and better customer service, which are crucial for retailers. Logistics providers are actively looking for properties near key population centres to optimise delivery routes, lower transport costs, and meet customer demands. This trend is also prompting investment in automated and advanced warehouses, improving operational efficiency, and streamlining order fulfilment processes. In July 2024, Stockland unveiled its inaugural multi-storey logistics facility, Stockland Momenta, a 15,000 square metre warehouse situated in south Sydney. Positioned close to vital infrastructure, it features modern amenities such as a rooftop garden and 1,600 square metres of office space. The facility is designed for maximum efficiency, boosting last-mile business operations.

Sustainability and Green Building Practices Sustainability is a significant trend in the Australia logistics real estate market. Developers and investors are focusing on eco-friendly, energy-efficient buildings in line with global environmental objectives. New developments are seeking green certifications like Green Star and NABERS, prioritising energy reduction, renewable energy use, and sustainable materials. Driven by corporate sustainability targets, businesses aim to lower their environmental impact and enhance efficiency. Consequently, the demand for green logistics spaces is rising as companies aim to reduce carbon footprints and cut utility costs. In 2024, Mirvac and its partner, Australian Retirement Trust, launched their first carbon-neutral industrial warehouse. The 34,000 square metre facility, located at the Aspect Industrial estate in Kemps Creek, Western Sydney, is leased to CEVA. The estate is valued at USD 660 million and aims to create over 1,700 jobs.

Opportunities in the Australia Logistics Real Estate Market

Automation and advanced technologies are influencing the Australia logistics real estate market dynamics and trends. The integration of robotics, artificial intelligence (AI), and Internet of Things (IoT) is creating a demand for state-of-the-art logistics spaces with high-tech capabilities. Automated systems improve warehouse management, inventory control, and order fulfilment, boosting efficiency and reducing errors. Additionally, real-time data analytics enable logistics companies to optimise supply chains, enhancing decision-making. This focus on automation is driving the need for top-tier, tech-enabled facilities, essential for businesses aiming to maintain a competitive edge in a rapidly digitising environment. In October 2024, The LEGO Group expanded its partnership with Kuehne+Nagel by opening a 26,500-square-metre distribution centre in Truganina, Victoria, designed to serve B2C and B2B customers across Australia and New Zealand. The facility uses advanced automation and sustainable technologies, including solar panels and water-saving features, achieving a 5-star Green Star Rating.

Market Restraints

The Australia logistics real estate market faces several challenges, including rising land and property costs due to increasing demand, particularly in urban areas like Sydney and Melbourne. The limited availability of suitable land, especially near transport hubs, constrains the market. Regulatory and zoning restrictions further hinder new developments. Environmental pressures, such as sustainability requirements, add to costs and complexity. Infrastructure bottlenecks at key transport hubs cause delays and inefficiencies. Labour shortages, particularly in warehouses and transportation, increase operational costs. The reliance on global supply chains exposes the market to disruptions. High energy costs and competition from e-commerce firms also add pressure, while technological investment barriers limit smaller companies' ability to stay competitive.

□Australia Logistics Real Estate Market Report and Forecast 2025-2034□ offers a detailed analysis of the market based on the following segments:

Market Breakup by Type of Property- Warehouse and Distribution Centers- Fulfillment Centers- Cold Storage- Industrial Parks- Industrial Parks

Market Breakup by Tenant Type- E-commerce- Third-Party Logistics (3PL) Providers- Manufactures

Market Breakup by Size and Scale- Small Scale- Medium Scale- Large Scale

Market Breakup by Region- New South

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Wales- Victoria- Queensland- Australian Capital Territory- Western Australia- OthersAustralia Logistics Real Estate Market Share Market Analysis by Type of Property According to the Australia logistics real estate market analysis, warehouse and distribution centres are essential for improving supply chain efficiency in the country. They help businesses optimise inventory management, reduce transport costs, and meet the growing demand for fast deliveries, especially due to the surge in e-commerce. These centres provide scalability, better storage solutions, and support for a range of industries. In November 2024, Amazon Australia launched a USD 90 million Fulfilment Centre (FC) in Horsley Park, Western Sydney, with the Minister for Climate Change and Energy, Chris Bowen, attending the opening. The facility is expected to generate over 360 local jobs, offering various roles, training, competitive wages, and comprehensive benefits. The growth of the Australia logistics real estate market is driven by the key advantages that fulfilment centres offer to e-commerce businesses, particularly in terms of fast and efficient order processing. They offer businesses the capability to store, pick, pack, and ship products directly to consumers. The surge in online shopping has spurred increased demand for these facilities, which help businesses reduce operational costs, enhance speed, and improve customer satisfaction. In May 2021, Woolworths appointed Richard Crookes Constructions to construct the Moorebank National Distribution Centre at Moorebank Logistics Park. The USD 700-780 million investment will generate over 1,300 construction jobs and enhance Woolworths' supply chain efficiency. The demand for the Australian logistics real estate market is driven by the essential role of cold storage facilities for businesses managing perishable goods, including food, pharmaceuticals, and chemicals. These facilities maintain appropriate storage conditions to prevent spoilage and reduce waste. As the demand for fresh and temperature-sensitive products rises, cold storage solutions enable businesses to comply with regulations, ensure quality, and enhance logistics efficiency. In October 2023, Lendlease's Australian Prime Property Fund Retail (APPF Retail) was recognised as Australia's most sustainable unlisted retail fund in theGRESB Real Estate Assessment. This achievement marked the fifth time in six years that the fund attained this recognition by improving sustainability through energy efficiency, tenant collaboration, and operational upgrades. Opportunities in the Australia logistics real estate market are increasing as industrial parks in Australia provide several benefits, including their close proximity to transport hubs like ports and airports, which improves connectivity and helps reduce transportation costs. These parks accommodate a variety of industries, supporting logistics, manufacturing, and distribution operations. They also provide long-term leasing options, improved infrastructure, and flexibility for businesses. In October 2022, ESR Australia solidified its leadership in the Australian industrial, logistics, and commercial property market. Managing assets exceeding AUD 12.1 billion, ESR maintains a strong pipeline of developments, underscoring its commitment to expanding its presence within the Australian market. Market Analysis by Tenant Type The Australia e-commerce sector significantly influences the Australia logistics real estate market through its demand for efficient fulfilment and distribution centres. These logistics properties allow for faster order processing, last-mile delivery optimisation, and better inventory management. As online shopping expands, logistics facilities enable quicker deliveries, cost reduction, and improved customer satisfaction, promoting business growth. The Australia logistics real estate market experiences growth as third-party logistics (3PL) providers benefit from strategically located logistics properties, including warehouses and distribution centres. These facilities allow 3PL companies to optimise operations, provide scalable solutions, and meet the rising demand for outsourced logistics services, leading to reduced costs and timely deliveries. The demand for the Australia logistics real estate market is boosted as manufacturers gain from access to warehouses, distribution centres, and industrial parks that enhance storage and transportation efficiency. These logistics properties improve inventory management, speed up customer deliveries, and shorten lead times. With better infrastructure and proximity to transport hubs, manufacturers can increase operational efficiency and supply chain flexibility. Market Analysis by Size and Scale According to the Australia logistics real estate market report, small-scale logistics operations in Australia benefit from affordable warehouse solutions that enable businesses to optimise storage and distribution within budget constraints. These flexible facilities provide short-term leases and scalable spaces, allowing small businesses to manage inventory and enhance delivery speed without large investments. In February 2024, Smeg Australia moved its Sydney head office to new administration and warehouse facilities, driven by growth and sustainability efforts. After 25 years in Banksmeadow, warehousing shifted to Ingleburn, and administration staff moved to Alexandria's Woolstores. The demand for medium-scale logistics in the Australia logistics real estate market is increasing, with businesses benefiting from larger distribution centres that offer enhanced storage capacity and operational efficiency. These facilities help streamline supply chains, optimise inventory, and reduce transportation costs, enabling businesses to serve local and regional markets more effectively. In November 2024, a 17,000-square-metre agricultural parts warehouse was established in Victoria, revolutionising agricultural

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logistics. With 130,000 unique storage locations, this facility enhances farmers' access to essential machinery components, reflecting Australia's commitment to advancing the agricultural sector with modern infrastructure and technology. The growth of the Australia logistics real estate market is driven by large-scale logistics operations in Australia benefit from advanced infrastructure, expansive warehouses, and proximity to critical transport hubs, supporting high-capacity operations and reducing costs. These state-of-the-art facilities offer automated systems, fast delivery, and better inventory management, providing businesses with a competitive advantage. In August 2023, Amazon Australia announced plans to open a 209,000-square-metre fulfilment centre in Craigieburn, Melbourne, by 2025. The facility will store 25 million small items and create 4,000 jobs, making it 9,000 square metres larger than the Sydney robotics site, managed by AustralianSuper and LOGOS.

Australia Logistics Real Estate Market Regional Insights New South Wales Logistics Real Estate Market Overview According to the Australia logistics real estate industry analysis, New South Wales benefits from a strong logistics real estate market, driven by its strategic location and robust transport infrastructure. The demand for warehouse and distribution spaces continues to rise, with its proximity to key ports and urban centres enhancing supply chain efficiency. In 2022-23, New South Wales allocated AUD 27.5 billion to health services, with part of this investment aimed at improving logistics infrastructure to support the growing e-commerce sector.

Queensland Logistics Real Estate Market Trends Queensland's logistics real estate market is growing rapidly due to the expansion of e-commerce and a rising need for warehouse and distribution facilities. The state's focus on improving transport infrastructure and its favourable climate make it an ideal hub for logistics. According to the Queensland Government's Department of State Development, e-commerce now accounts for about 10% of the state's retail sales. Investments in logistics infrastructure are further supporting this growth by enhancing delivery capabilities and improving connections between businesses and consumers.

Western Australia Logistics Real Estate Market Dynamics Western Australia's logistics real estate market benefits from its reliance on remote energy solutions and efficient transport networks. Its proximity to key ports strengthens logistics operations, while ongoing infrastructure investments contribute to supply chain efficiency. For 2024-25, the Australian Government projects a 24% rise in winter crop production, reaching 18.4 million tonnes, which exceeds the 10-year average. This growth is expected to enhance logistics operations and reduce operational costs for businesses in the region.

Competitive Landscape The Australia logistics real estate market key players provide services including property management, investment sales, leasing, and advisory. Operating across over 100 countries, these companies cater to clients ranging from multinational corporations to small businesses. Known for their expertise, they deliver real estate solutions that improve business operations and optimise property portfolios. Their innovative approaches and comprehensive services have helped them establish a strong position as some of the world's leading and most successful commercial real estate firms.

Key Industry Players

CBRE Group Inc.: Headquartered in California, United States, CBRE Group Inc. was established in 1906. It is a global leader in real estate services, offering services across property management, leasing, and investment. With over 100,000 employees, CBRE has a strong presence in the logistics real estate market worldwide, including Australia.

Jones Lang LaSalle Inc.: Founded in 1783, Jones Lang LaSalle Inc. (JLL) is headquartered in Chicago, United States. JLL is a global real estate services firm, providing expertise in property investment, management, and advisory services. The company has a significant footprint in Australia, delivering real estate solutions across various sectors, including logistics.

Goodman Group: Goodman Group, established in 1989 and headquartered in Sydney, Australia, is a leading global industrial property group. The company focuses on logistics and warehouse development and investment, owning and managing a large portfolio of properties in key markets worldwide, including Australia, with a strong presence in logistics real estate.

Cushman & Wakefield Plc: Cushman & Wakefield Plc, founded in 1917 and headquartered in Chicago, United States, is a global real estate services firm offering services in property management, leasing, and investment. The company has a strong presence in the Australian logistics real estate market, providing integrated solutions for both investors and occupiers.

Other key players in the Australia logistics real estate market report are Blackstone Inc., Savills plc, and Colliers International, among others.

Recent Development

September 2024 Abot Properties, a leading investor and developer of logistics properties, acquired a 19,819-square-meter logistics facility at 42-52 Raymond Avenue, Matraville, South Sydney, for AUD 137.6 million (USD 91.8 million) from LaSalle Investment Management. This marks their first acquisition in Sydney, aligning with their strategy to invest in prime global logistics markets.

August 2024 HMC Capital expanded its HomeCo Last Mile Retail Logistics (LML) Fund with the USD 107.5 million acquisition of Brandon Park Shopping Centre in Melbourne's south-east. The deal, facilitated by JLL and CBRE, involved Newmark Capital, which had acquired the site in 2017 and received development approval in 2022.

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