

Hungary Warehousing And Storage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Hungary Warehousing And Storage Market Analysis

The Hungary Warehousing And Storage Market is expected to grow from USD 1.12 billion in 2025 to USD 1.18 billion in 2026 and is forecast to reach USD 1.56 billion by 2031 at 5.65% CAGR over 2026-2031.

Accelerated foreign direct investment, the 9% corporate tax rate-the lowest in the European Union-and Hungary's role along Pan-European Transport Corridor IV collectively underpin steady demand for modern logistics space. Rapid e-commerce adoption, with 70% of residents shopping online, heightens the need for fulfillment centers near Budapest, while large-scale manufacturing reshoring programs from the automotive and battery sectors stimulate specialized storage requirements. Government-financed rail and motorway upgrades, together with the 5G-enabled East-West Gate Intermodal Terminal, are strengthening multimodal connectivity that lowers first-mile and last-mile costs for operators. Energy-price stability secured through long-term gas contracts supports refrigerated facilities, positioning the Hungary warehousing and storage market for sustained margin resilience.

Hungary Warehousing And Storage Market Trends and Insights

Expansion of E-commerce & Omnichannel Retail

Hungary's online retail penetration has surged as consumers adopt same-day and next-day delivery expectations, prompting retailers to redesign distribution footprints around micro-fulfillment nodes in Budapest. International platforms routinely integrate

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Hungarian addresses into regional delivery promises, demanding cross-docking efficiency to keep parcel costs low. Operators therefore invest in high-bay racking and automated sortation that minimizes labor touches and accelerates throughput. Local parcel volumes climbed in 2024, tightening vacancy rates in the Budapest sub-market despite rising land costs. Warehouse developers respond by converting brownfield plots and leveraging mezzanine configurations, ensuring the Hungary warehousing and storage market maintains flexibility for omnichannel workflows.

Near/Reshoring of Manufacturing into Hungary

Hungary attracted more than USD 104 billion in cumulative FDI in the past 35 years, with notable inflows from Asian electric-vehicle battery makers. These projects demand proximate storage for lithium-ion components, separator films, and finished packs under stringent fire-safety protocols. Just-in-time production practices shorten allowable transit windows, making on-site or adjacent warehousing essential. Automotive suppliers also consolidate inbound parts from Austria and Slovakia for synchronized delivery to plants in Gyor and Debrecen, reinforcing national demand for specialized spaces with ESD flooring and controlled humidity. Consequently, the Hungary warehousing and storage market experiences deeper integration with manufacturing campuses, blurring the line between production and logistics real estate.

High Land Acquisition and Construction Costs in the Budapest Metro Area

Industrial land in Budapest trades at premiums over Central European peers because limited plots near ring-road junctions attract competing developers. Construction inputs climbed 12% in 2024, and tighter monetary policy raised financing costs for speculative builds. Developers mitigate these pressures by shifting to secondary cities such as Gyor, yet they face longer lead times to secure anchor tenants willing to accept added carriage distance. The scarcity of affordable plots constrains supply growth, causing landlords to prioritize renewals and indexation clauses, allowing the Hungary warehousing and storage market to sustain rent escalations above inflation.

Other drivers and restraints analyzed in the detailed report include:

Government Infrastructure Investments in Road-Rail Corridors
Rapid Growth of Cold-Chain Demand from Pharma and Agri-Food Exporters
Skilled-Labor Shortage and Accelerating Wage Inflation for Warehouse Personnel

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Total leasable general warehousing accounted for 60.45% of the Hungary warehousing and storage market size in 2025, generating stable cash flows from diversified tenant mixes. Refrigerated facilities, although representing a smaller footprint, are on track for a 5.03% CAGR through 2031, buoyed by bio-pharma export contracts and agri-food modernization. Favorable electricity tariffs, averaging 30% below the EU mean, strengthen operational cost competitiveness for blast-freezers and deep-chill chambers. Investors target yield premiums of 75-100 basis points over ambient assets, reflecting entry barriers created by temperature-mapping, backup power, and GDP certifications. With DHL and Kuehne + Nagel both adding GDP-compliant hubs, the Hungary warehousing and storage market anticipates a gradual rise in cold-storage vacancy only after 2028, when pipeline deliveries peak.

Growing cross-docking demand at the East-West Gate Intermodal Terminal further blurs lines between general and chilled storage, as operators embed modular refrigeration zones within high-volume warehouses to serve both categories. Such hybrid configurations support multi-tenant leasing strategies and mitigate single-use risk. Additionally, ESG-minded occupiers seek facilities equipped with rooftop photovoltaics and reclaimed-heat systems to offset the higher energy intensity of cold stores.

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Developers responding to green financing incentives find this segment advantageous, reinforcing refrigerated warehousing as the Hungary warehousing and storage market's premium growth engine.

The Hungary Warehousing and Storage Market Report is Segmented by Warehouse Type (General Warehousing and Storage and Refrigerated Warehousing and Storage), Ownership (Private Warehouses and Public Warehouses), End-User Industry (E-Commerce & Retail, Food & Beverage, Pharma & Healthcare, Automotive, Manufacturing & Engineering Goods, and Others). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Waberer's Group Raben Group Trans-Sped Group DHL Supply Chain Rhenus Logistics QLM Logistics Solutions ADR Logistics Kuhne + Nagel UPS Hellmann Worldwide Logistics CEVA Logistics Airmax Cargo Transemex Ltd Mag-Log TM Kft Door to Door Express Kft . Rohlig Logistics Dachser Truck Force One Kft 2hm Logistics Kft Gebruder Weiss

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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