

The Logistics Market

France

Q2 2026

Occupier and investment

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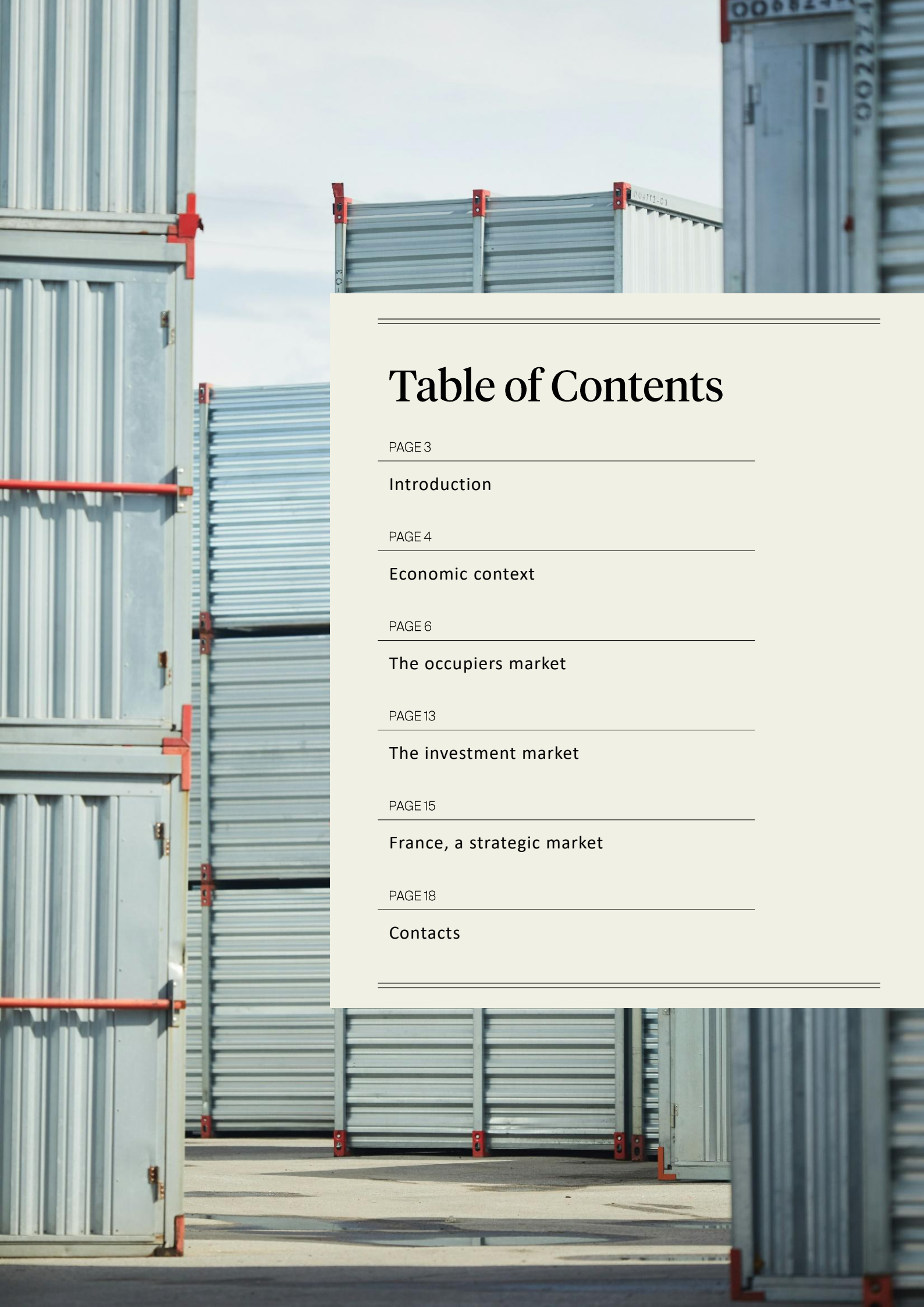


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Selective recovery in the occupiers market & a lull in the investment side

Following a particularly disappointing first quarter, with only 409,000 sq. m transacted, the logistics market regained momentum thanks to a selective recovery in leasing activity. During the second quarter, take-up exceeded the one million sq. m threshold, bringing H1 2026 volumes to 1.4 million sq. m, down 15% year-on-year. This rebound, however, has only benefited certain areas of the country. Greater Paris recorded 322,000 sq. m during H1 2026, including 255,000 sq. m in Q2 alone, while secondary markets accounted for 884,000 sq. m. The expansion strategies of major e-commerce players, primarily Amazon, and logistics operators such as FM Logistics and ID Logistics are reshaping the hierarchy of logistics markets, with a clear focus on secondary locations and, during this period, particularly on the Grand Est region.

In line with the trend observed in 2025, investor uncertainty regarding logistics asset pricing persisted throughout H1 2026. Only €391 million was invested during the period, marking a historic low. One of the key features of the market was the complete absence of significant logistics portfolio transactions. Larger ticket sizes remained largely avoided amid limited visibility on pricing levels.

As hopes for a definitive resolution to the conflict in Iran continue to fade, uncertainty surrounding growth and inflation prospects remains elevated. This has contributed to higher borrowing costs following the ECB's latest policy rate increase in June. Investors therefore remain cautious. Against a backdrop of persistently high French 10-year government bond yields (3.59% at the end of June), prime logistics yields softened by a further 10 basis points to reach 5.00% by the end of June 2026.



Economic context

WEAKER GROWTH THAN EXPECTED

The conflict in the Middle East has generated greater uncertainty and inflationary pressures than initially anticipated for the major European economies. According to Banque de France forecasts, French GDP growth is expected to reach only 0.5% in 2026, broadly in line with Germany and Italy.

However, these forecasts remain sensitive to future inflation trends. In an optimistic scenario, growth could be revised upwards as inflation continues to moderate. In France, inflation has already fallen below 2%, potentially supporting household consumption. Conversely, a renewed escalation of the conflict could reverse these gains and further weaken already subdued business confidence. Nevertheless, France's macroeconomic outlook appears more favorable over the next two years.

MANUFACTURING OUTPUT AND TRANSPORT SERVICES REMAIN IN POSITIVE TERRITORY

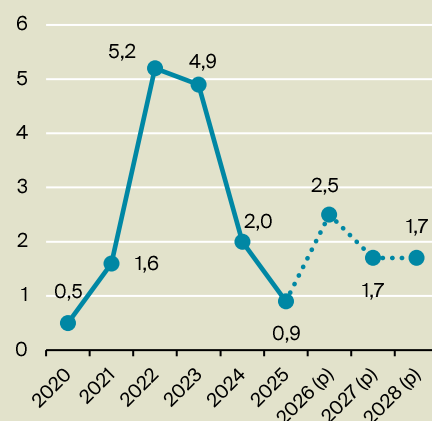
Manufacturing output continues to outperform the wider economy, increasing by 1.8% year-on-year in May 2026. While all manufacturing subsectors contributed to this growth, transport equipment manufacturing remained the key driver.

Activity within transport and warehousing services also expanded, rising by 2.8% year-on-year in April 2026. Meanwhile, distance-selling volumes continue to grow strongly, increasing by 4.6% year-on-year.

For the time being, logistics activity remains relatively insulated from the weak economic backdrop. The sector continues to benefit from favourable structural trends, including government efforts to support reindustrialisation, strong growth in the defence industry and the continuing popularity of e-commerce among consumers.

Inflation in France

In %



Sources: INSEE and Banque de France
(f) forecasts

ECB RATE HIKES ARE NO LONGER A CERTAINTY

Although most forecasts anticipated three ECB rate increases during 2026, this is no longer considered the central scenario.

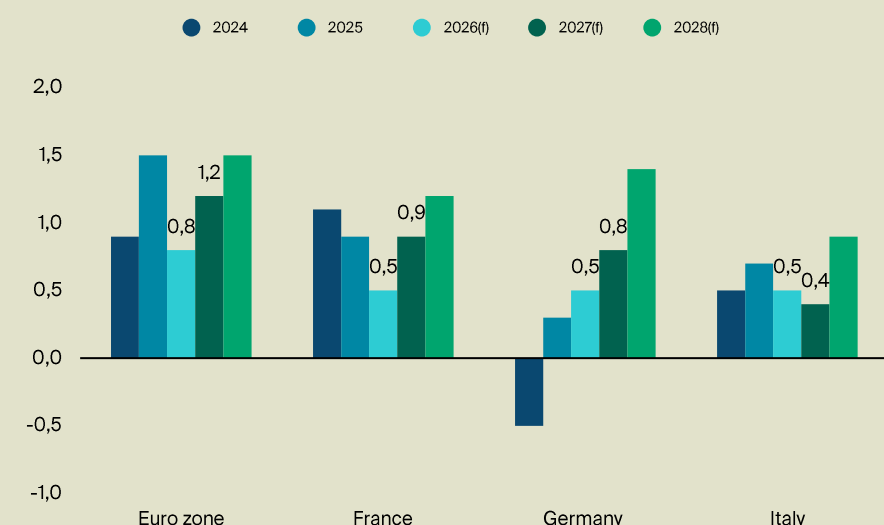
The ECB implemented an initial rate increase in June. However, before this move had time to fully impact the economy, inflation fell more rapidly than expected, dropping below 3% in June.

As a result, the ECB now faces less pressure to continue tightening monetary policy, especially as long-term interest rates remain elevated across major European economies. The ECB could therefore choose to implement only one additional increase or even maintain current rates should inflation continue to ease.

A significant part of the decision will depend on developments in the Middle East conflict. The breakdown of the ceasefire in July has so far had a less severe effect on oil prices than during the first three months of the conflict between the United States and Iran. Brent crude was trading at around \$80 per barrel in mid-July, compared with levels consistently above the symbolic \$100 threshold between April and June.

Gross Domestic Product

In %, annual average



Source: Banque de France, International Monetary Fund / (f) forecasts

Economic indicators for France - Logistics

	2024	2025	2026 (Fcst.)	2027 (Fcst.)	2028 (Fcst.)
GDP*	+ 1.1 %	+ 0.9 %	+ 0.5 %	+ 0.9 %	+ 1.2 %
Inflation*	+ 2.0 %	+ 0.9 %	+ 1.8 % (June)	+ 1.7 %	+ 1.7 %
Business climate – Transport and Warehousing**	96,2	98	95.0 (June)	-	-
Business creations – Transport and Warehousing*** (including micro-entrepreneurs)	107 945	112 839	-	-	-
Business failures – Transport and Warehousing*** (excluding micro-entrepreneurs)	2 995	3 201	3 227 (May)	-	-
Output – Transport and Warehousing*	+ 3.2 %	+ 3.5 %	+ 2.8 % (April)	-	-
Output – Manufacturing industry*	- 0.2 %	+ 0.6 %	+ 1.8 % (May)	-	-
Sales volumes – Distance selling*	+ 3.9 %	+ 2.9 %	+ 4.6 % (April)	-	-
Exports*	+ 2.4 %	+ 2.4 %	+ 0.3 %	+ 3.2 %	+ 3.1 %
Imports*	- 1.3 %	+ 2.9 %	- 0.3 %	+ 2.2 %	+ 2.3 %

- Cumulative percentage change over one year; where a month is specified, the calculation covers the months available (e.g. if Oct, the first 10 months of 2025 relative to the first 10 months of 2024)
- ** The business climate index is expressed in base 100; it reflects pessimistic expectations (below 100) or optimistic ones (above 100)
- *** cumulative over the last 12 months

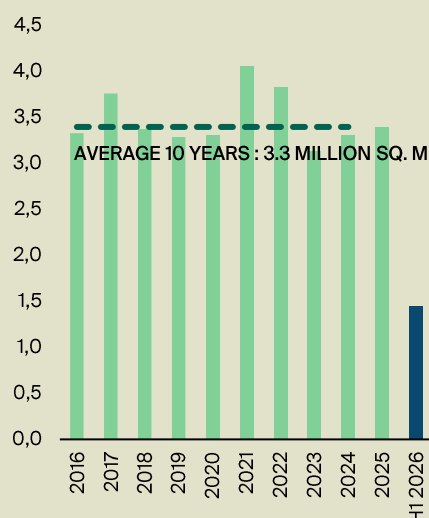
Sources: INSEE, Banque de France and Knight Frank calculations

The occupier market

LEASING ACTIVITY REBOUNDS IN GREATER PARIS AND SECONDARY MARKETS

After a slow first quarter, with only 408,000 sq. m transacted, the logistics warehouse market regained momentum and exceeded one million sq. m of take-up during Q2. This strong performance, the highest quarterly volume since Q3 2023, lifted H1 2026 take-up to 1.4 million sq. m. This compares with 1.7 million sq. m at the same point in 2025, representing a year-on-year decline of 15%. Greater Paris, which had a difficult start to 2026 with only 67,000 sq. m transacted during Q1, recovered to more typical levels during Q2 with almost 255,000 sq. m leased. H1 take-up therefore reached 322,000 sq. m. Conditions were very different in the Lyon and Marseille regions, where only around 8,000 sq. m was transacted in each market during Q2, bringing H1 totals to just 33,000 sq. m and 38,000 sq. m respectively. In contrast, the Hauts-de-France region recorded more than 170,000 sq. m of take-up during H1, including over 102,000 sq. m during Q2

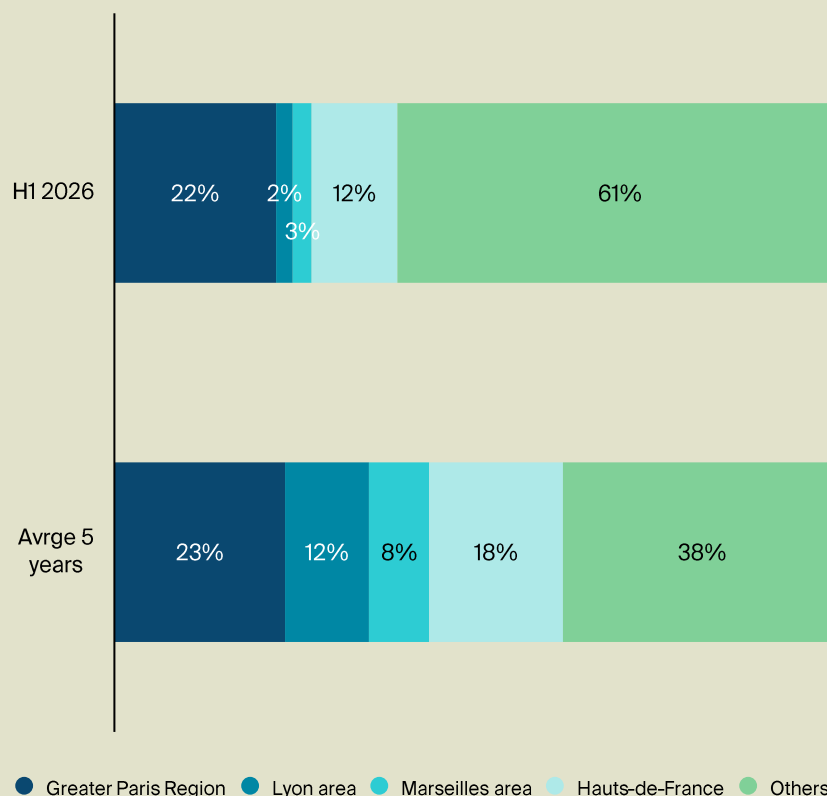
Logistics warehouse take-up In France, in millions of sq. m



Source: Immostat / Knight Frank

Geographic distribution of warehouse take-up in France

As % of total volume



Source: Knight Frank

FOCUS ON EASTERN FRANCE

Secondary logistics markets remained particularly active during H1 2026, accounting for nearly 885,000 sq. m of take-up. With 280,000 sq. m leased, including Amazon's new 190,000 sq. m build-to-suit facility in Ensheim (Bas-Rhin), the Eastern region overtook Centre-Val de Loire, which reached 150,000 sq. m.

Elsewhere, regions such as Pays de la Loire, Bourgogne-Franche-Comté and Normandy recorded between 50,000 and 75,000 sq. m over the first six months of the year.

AVAILABLE SUPPLY STABILISES

Immediately available warehouse space has stabilised at approximately 4.8 million sq. m nationwide, two-thirds of which is located along the French logistics corridor ("Dorsale"). This represents a year-on-year increase of nearly 30%.

However, vacancy levels vary considerably across markets, ranging from 1% to 12%, compared with a national average of around 7.5%. In several areas, the imbalance between supply and demand is compounded by a mismatch in technical specifications, while speculative development activity remains relatively limited.

The occupier market

Y-O-Y PRIME RENTAL GROWTH IN PARIS REGION AND LYON, STABILITY ELSEWHERE

The stronger take-up recorded in the Paris region during H1 2026 has been accompanied by growth in prime rents (+6% year-on-year), which have increased from €85/sq. m/year to €90/sq. m/year for the best locations in the outer suburbs with excellent motorway access.

Prime rents in the Lyon market have risen by 4% to reach €71/sq. m/year. However, this level has remained stable over the last

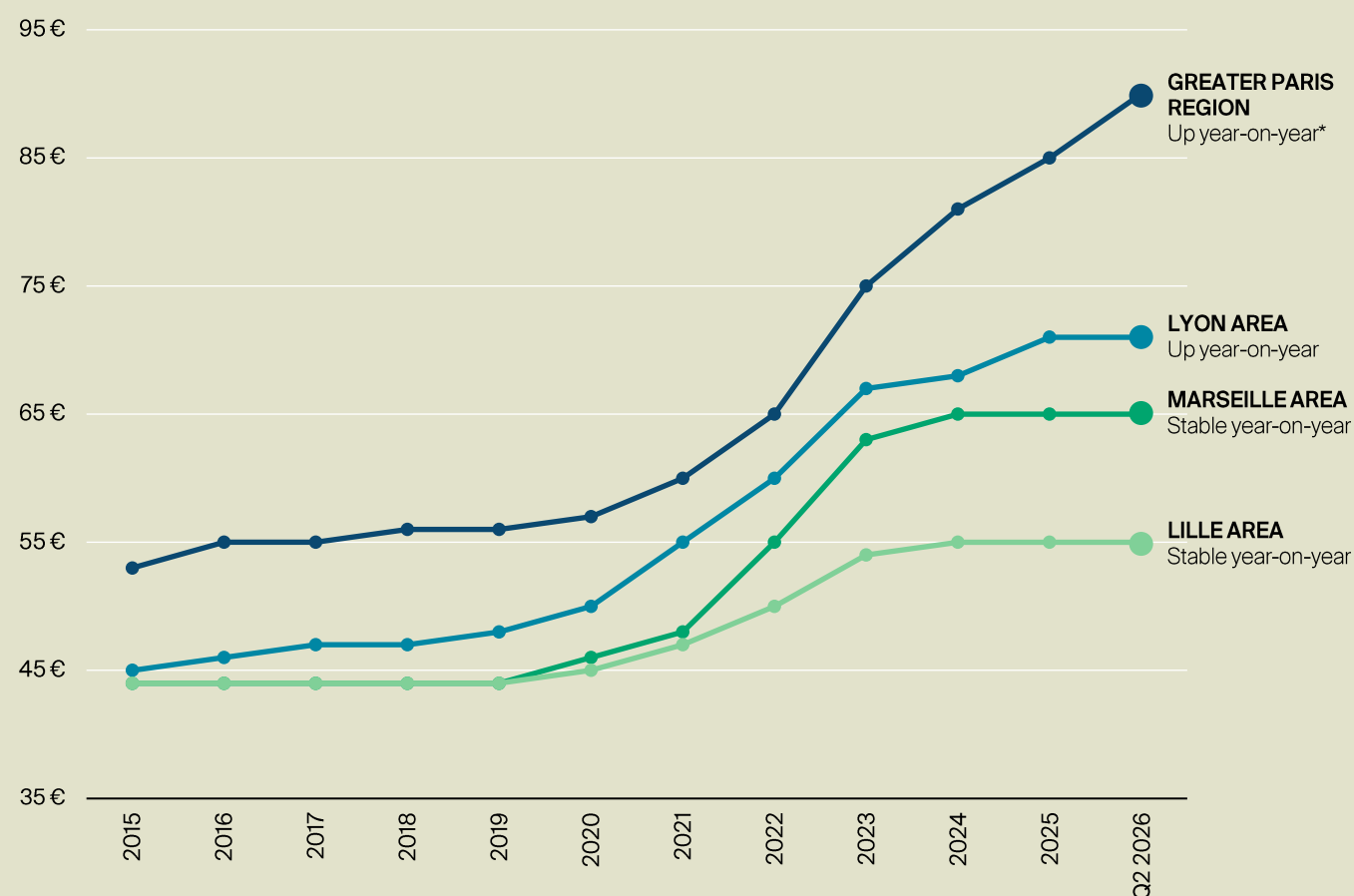
six months, with subdued occupier activity limiting any further rental growth despite the scarcity of prime stock. Elsewhere, prime rents have remained broadly unchanged compared with last year, standing at €65/sq. m/year in Marseille and €55/sq. m/year in the Lille region.

Transactional rents in secondary logistics markets are now around €60/sq. m/year along the Atlantic corridor, from Nantes

to Bordeaux, and in Toulouse. Rennes, Le Havre and Orléans are positioned at roughly €55/sq. m/year.

Prime rental values within the main logistics corridor

In €/sq. m/year for Class A assets, at the end of the period



* Compared to prime rents recorded in Q2 2025 - Source: Knight Frank

The occupier market in the Greater Paris Region

Following an exceptionally weak first quarter, with less than 67,000 sq. m transacted, the Paris logistics market recovered strongly in Q2 2026, recording close to 255,000 sq. m of take-up. Total H1 take-up therefore reached almost 322,000 sq. m, slightly below the 371,000 sq. m recorded a year earlier.

The recovery was visible across all size segments, particularly for units exceeding 10,000 sq. m, supported by logistics operators expanding their Greater Paris networks.

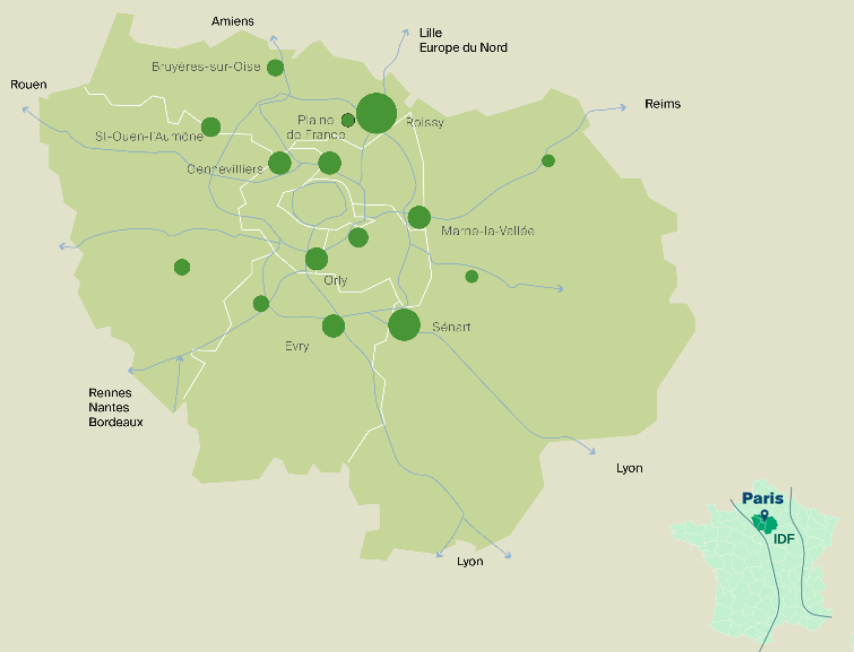
This rebound has come at a welcome time, given that available logistics space exceeded 1.2 million sq. m at mid-year. Vacancy has therefore risen above 8%, compared with a national average of 7.5%. This reflects a mismatch between supply and occupier requirements in terms of product quality, while speculative development activity remains limited.

PRIME RENT

 **€90** /sq. m/yr

Against this backdrop of improving occupier demand, prime rents have increased to approximately €90/sq. m/year for logistics facilities under development in locations benefiting from excellent motorway connectivity and proximity to major consumer catchment areas. For the limited number of new-build assets available in the inner suburbs, rents range between €100 and €150/sq. m/year

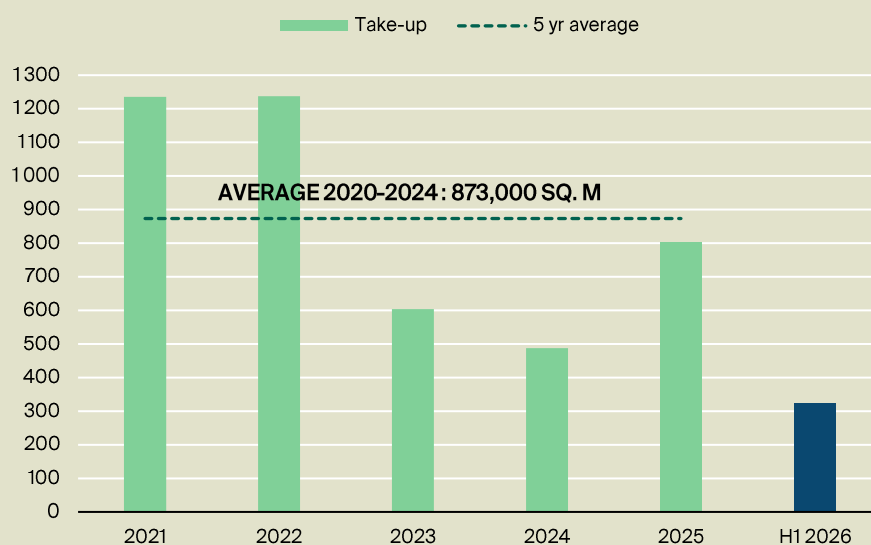
Location of major logistics areas in Île-de-France



Source: Knight Frank

Warehouse take-up in the Greater Paris Region

In thousands of sq. m



Sources: Immostat, Knight Frank

The occupier market in the Lyon region

Following an already subdued first quarter, with just 25,000 sq. m transacted, the Lyon logistics market continued to slow during Q2. Only one transaction exceeding 8,000 sq. m, involving a transport operator in existing premises in Corbas, was recorded during the quarter. As a result, total H1 take-up reached just 33,000 sq. m.

The market therefore remains well below its historic performance levels, which averaged around 296,000 sq. m per annum between 2021 and 2025. The lack of large-scale occupier moves, and owner-occupier transactions has deprived the market of its traditional growth drivers.

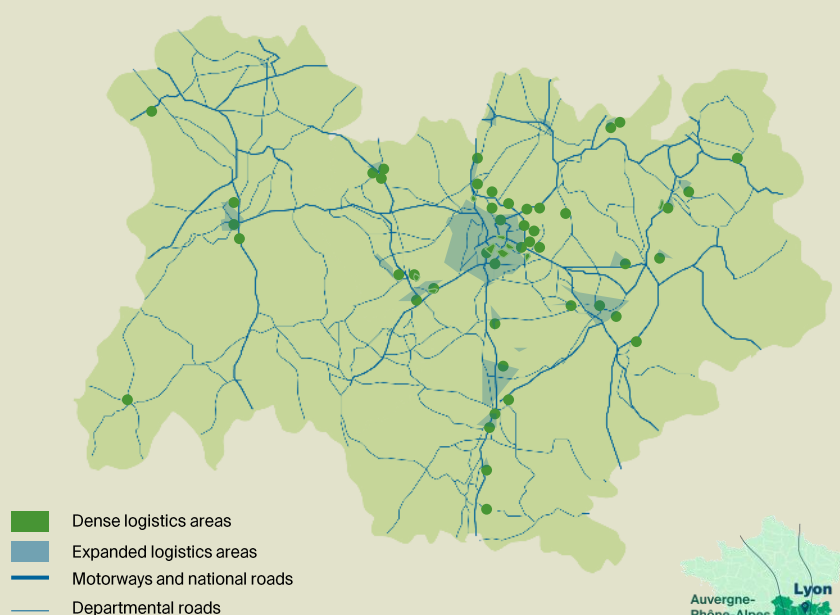
The slowdown has led to a rapid increase in immediately available space. The vacant stock has risen from 430,000 sq. m in mid-2025 to nearly 530,000 sq. m today. Most of this availability is concentrated in the south-eastern part of the metropolitan area, notably Saint-Priest, Corbas and Saint-Quentin-Fallavier.

PRIME RENT

 €71 /sq. m/yr

In this subdued occupier market, prime rents have remained unchanged quarter-on-quarter at around €71/sq. m/year. Developers and investors nevertheless remain confident, with several schemes currently being marketed on the basis of rents between €75 and €85/sq. m/year and up to €90/sq. m/year for logistics facilities located close to Lyon. Second-hand warehouse space has been let at rents ranging from €57 to €67/sq. m/year depending on location.

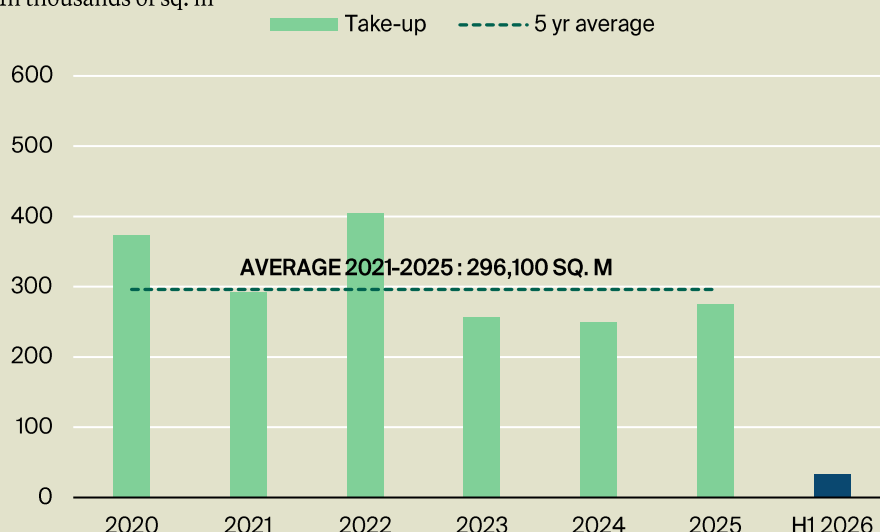
Location of major logistics areas in the Lyon region



Source: Knight Frank

Warehouse take-up in the Lyon region

In thousands of sq. m



Sources: CECIM, Knight Frank

The occupier market in the Marseille region

The exceptionally strong logistics market performance recorded in Marseille during 2025, with more than 262,000 sq. m transacted, has given way to a very different market environment in 2026. Only around 29,000 sq. m were let during Q1 and a further 8,000 sq. m in Q2. Total H1 take-up therefore reached less than 38,000 sq. m, compared with 115,000 sq. m during the same period a year earlier. The result points towards a 2026 outcome well below the five-year average of 246,000 sq. m.

Supply is gradually rebuilding across the market, with almost 300,000 sq. m of immediately available logistics space, representing a vacancy rate close to 6%. Most available stock is concentrated around the Étang de Berre, Miramas, Port-Saint-Louis-du-Rhône and Saint-Martin-de-Crau.

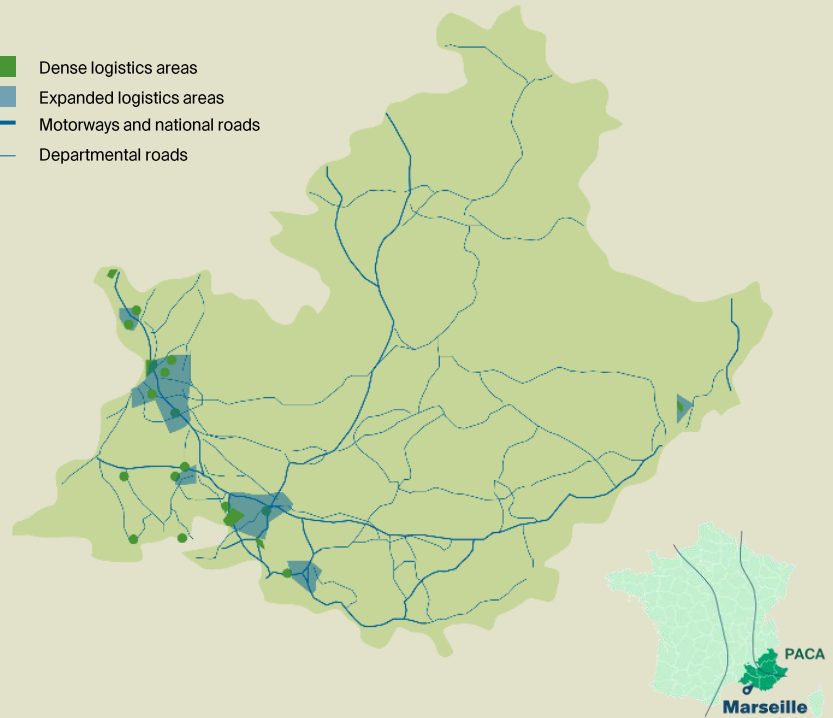
PRIME RENT

 €65 /sq. m/yr

Prime rents remained unchanged during H1 2026, standing at €65/sq. m/year for Grade A warehouses. Rents range between €50 and €60/sq. m/year at Distriport and between €70 and €85/sq. m/year around the Étang de Berre area. Some schemes in Salon-de-Provence are being marketed at €85/sq. m/year, while available space within the Parc Logistique des Aiguilles in Ensues-la-Redonne is being offered at €75/sq. m/year.

Location of major logistics areas in the PACA region

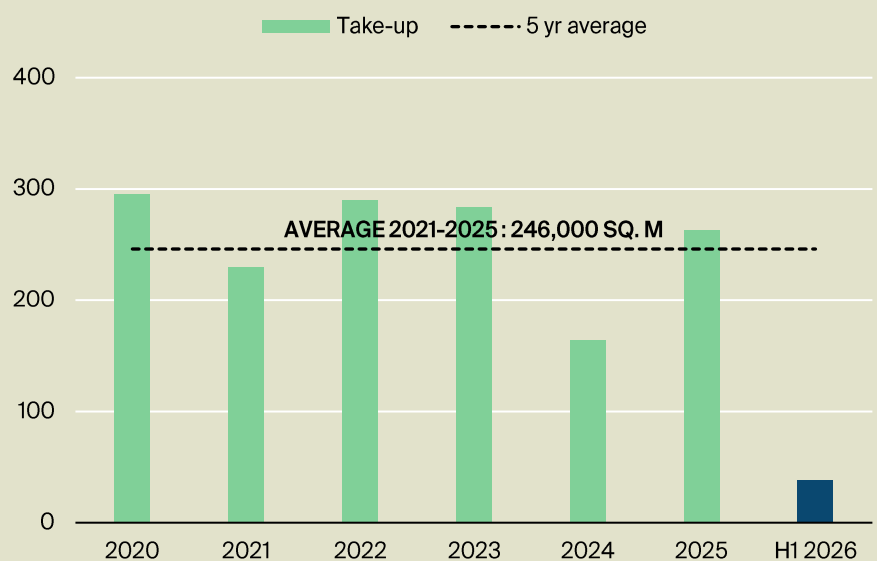
- Dense logistics areas
- Expanded logistics areas
- Motorways and national roads
- Departmental roads



Source: Knight Frank

Warehouse take-up in the Marseille region

In thousands of sq. m



Source: Knight Frank

The occupier market in the Hauts-de-France region

Contrary to the slowdown observed in Lyon and Marseille, the Hauts-de-France logistics market remained relatively active during Q2. While the major transactions that supported the market in 2025 have not been repeated, demand continues to come from clothing retailers, including CELIO, which signed for 11,600 sq. m in Amblainville during the quarter, as well as international logistics providers, transport operators and parcel delivery companies such as CHRONOPOST.

The market remains characterized by an abundant supply of immediately available space exceeding 1.1 million sq. m, resulting in a vacancy rate approaching 9%. Most availability is located around Dunkirk Port, southern Lille, Douai and Cambrai.

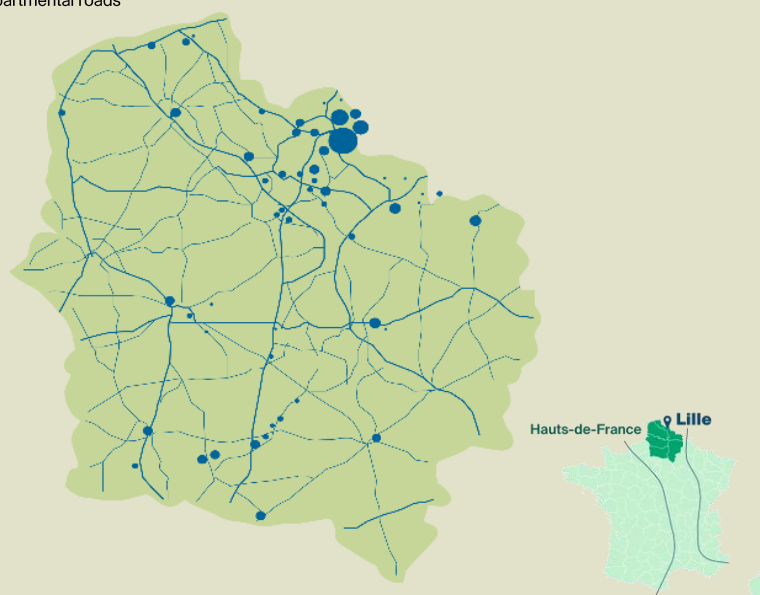
PRIME RENT

 **€55** /sq. m/yr

Prime rents remained unchanged during both 2025 and H1 2026, standing at €55/sq. m/year for Grade A warehouses in the Lille region. This represents an increase of 25% over the last five years. Asking rents for existing warehouses generally range between €45 and €60/sq. m/year depending on location, while a limited amount of new-build stock is offered at between €70 and €85/sq. m/year, notably in Dunkirk. A new urban logistics hub scheduled for delivery in 2027 is currently being marketed at €110/sq. m/year.

Location of major logistics areas in the Hauts-de-France region

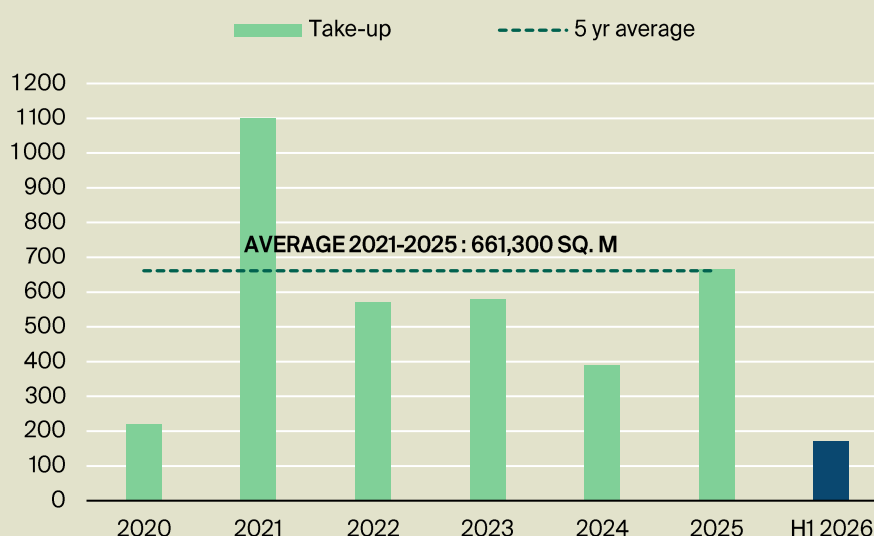
-  Dense logistics areas
-  Motorways and national roads
-  Departmental roads



Source: Knight Frank

Warehouse take-up in the Hauts-de-France region

In thousands of sq. m



Source : Knight Frank

The occupier market in the secondary hubs

As anticipated, Q2 2026 saw the return of very large logistics transactions outside the traditional logistics corridor. The geographical distribution of activity was particularly noteworthy, with the Grand Est region overtaking Centre-Val de Loire. Amazon's commitment to 189,000 sq. m of new logistics space in Ensisheim, north of Mulhouse, and a further 72,000 sq. m in Derval, between Rennes and Nantes, made a major contribution to H1 take-up, which reached approximately 885,000 sq. m. This represents an improvement on the 746,000 sq. m recorded a year earlier.

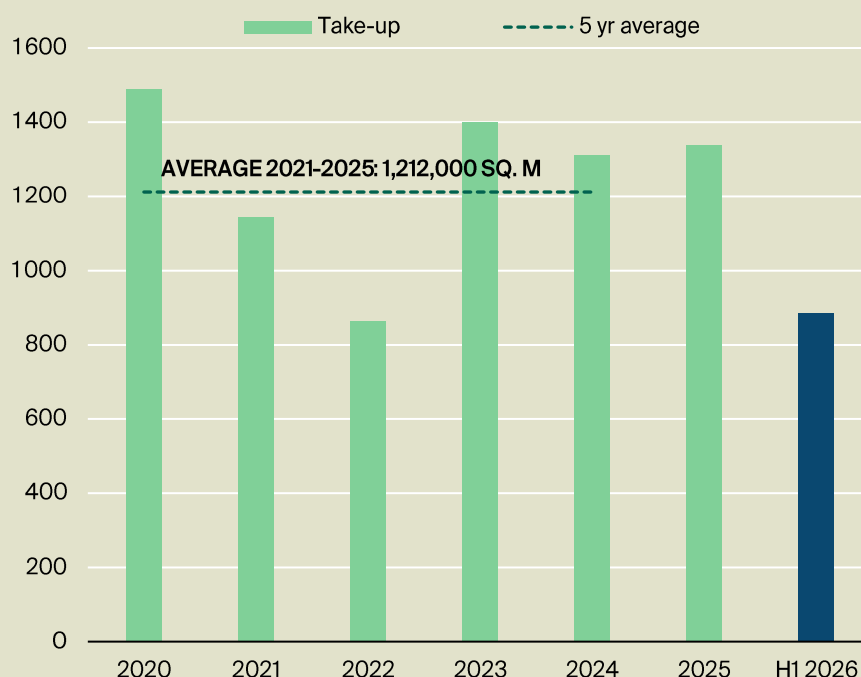
Secondary logistics markets have therefore accounted for almost two-thirds of national take-up since the start of the year, a record share that is substantially higher than the five-year average of 38%. Beyond these large-scale developments, local demand remains active for units below 20,000 sq. m, primarily from logistics providers and transport operators.

Immediately available supply has reached 1.6 million sq. m across these markets, corresponding to an average vacancy rate of 6.0%, compared with 8.5% across the core logistics corridor. Market conditions vary by region, with oversupply and vacancy rates between 9% and 12% in the East and Bourgogne regions, while availability remains more contained elsewhere, ranging from 2% to 6% along the Atlantic corridor and in South-West France.

Against this backdrop, prime rental values now stand as follows: between €53 and €55/sq. m/year for the Centre-Val de Loire markets (Chartres and Orléans), €55/sq. m/year in Rennes and Le Havre, €59/sq. m/year in the East (Strasbourg), and around €60/sq. m/year along an Atlantic Arc linking Nantes and Bordeaux, as well as around Toulouse. New developments offered in the Centre-Val de Loire region can reach €60, or even €70/sq. m/year in asking terms.

Warehouse take-up outside the main corridor

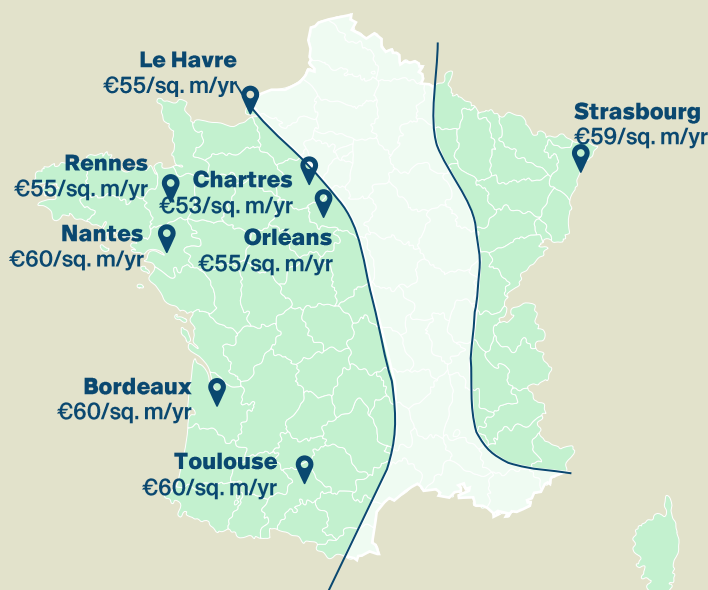
In thousands of sq. m



Source : Knight Frank

Prime rental values – Q2 2026

Outside the main corridor, in €/sq. m/year for Class A assets



Source: Knight Frank

The Investment Market

H1 2026 RECORDS THE LOWEST LEVEL OF LOGISTICS INVESTMENT OF THE LAST DECADE

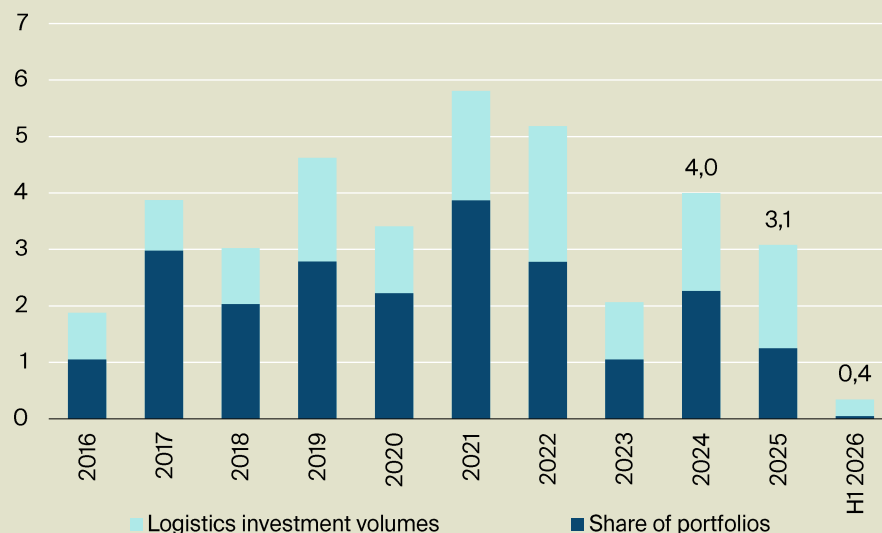
The slowdown in the logistics investment market continued during H1 2026, with just €391 million invested across France, representing a 70% year-on-year decline and a 74% decrease compared with the five-year average. This is also the lowest volume recorded over the past ten years.

Large logistics portfolio transactions, typically exceeding €200 million and historically accounting for a significant share of annual investment volumes (29% on average between 2015 and 2024), have been absent from the market since the beginning of 2025. Among the 23 transactions completed during H1 2026, all involved assets valued at less than €50 million.

The market's weak performance reflects the ongoing difficulty in agreeing asset values, against a backdrop of still restrictive financing conditions. Investor preference for smaller lot sizes in a market characterized by limited liquidity has made the execution of large portfolio transactions significantly more challenging.

Investment volumes in logistics warehouses in France

In billions of euros



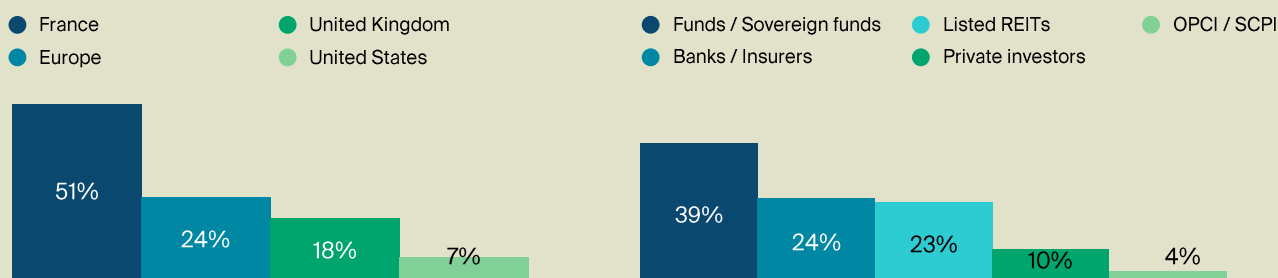
Source: Knight Frank

SHARP DECLINE IN FOREIGN INVESTMENT FUND ACTIVITY

The subdued level of activity during H1 has translated into a noticeable reduction in the share of overseas investors acquiring logistics assets. The absence of major portfolio transactions, traditionally favoured by international capital in France, resulted in foreign investors accounting for just 49% of acquisitions in H1 2026, compared with 80% and 85% respectively in 2024 and 2025. Among international investors, European buyers were the most active, accounting for 42% of market activity, including 18% for UK investors. British capital was notably involved in the acquisition of the Biocoop logistics platform near Avignon for €47 million through M&G Real Estate. French investors, meanwhile, represented 51% of acquisitions and completed the largest transaction of the semester: Groupama Gan REIM's acquisition of a portfolio of seven parcel delivery assets for €48.5 million. The breakdown by purchaser type also shows a continued decline in the proportion of investment funds, which accounted for 39% of acquisitions in H1 2026, compared with 77% in 2025 and 72% in 2024.

Investment volumes in logistics warehouses by purchaser nationality and type

In France, Q2 2026, as % of total volume



The Investment Market

PRIME YIELDS MOVE OUT FURTHER IN Q2

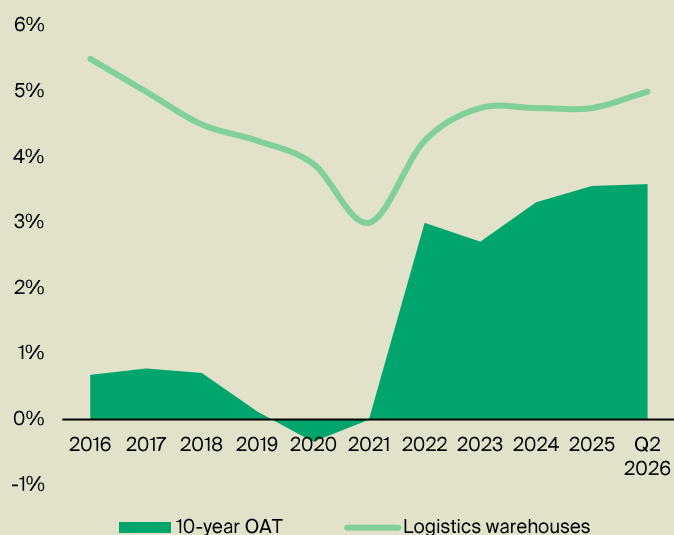
In a market characterised by a limited number of transactions, where pricing expectations between buyers and sellers remain misaligned, another adjustment in logistics yields has taken place.

Following an initial outward movement of 15 basis points during Q1, the French prime logistics yield expanded by a further 10 basis points in Q2, reaching 5.00% at the end of June 2026. This repricing has restored a more attractive risk premium relative to government bonds, particularly since the outbreak of the conflict involving Iran.

By mid-2026, the yield on the French 10-year government bond (OAT) had reached 3.59%. Given the continued uncertainty surrounding the conflict, this benchmark risk-free rate is expected to remain elevated in the coming months, potentially placing further upward pressure on real estate yields

Prime yield rates for logistics warehouses in France

In %



Source : Knight Frank

Major investment transactions in logistics warehouses over the past 12 months

ASSET	CITY	VENDOR	BUYER	PRICE
French assets of Mileway portfolio	National	BLACKSTONE	M7 REAL ESTATE	
Logiprime portfolio (5 Warehouse)	Régions	OFI INVEST	INTERVEST	
2 assets of Montclair portfolio	Régions	ARES MANAGEMENT	FIDELITY INTERNATIONAL	
Warenet portfolio	Régions	ALDERAN (PGIM)	M7 REAL ESTATE	
Seafrigo platform	Le Havre (76)	AG REAL ESTATE	WDP	
ZAC de la Grange Blanche 2	Courthezon (84)	PATRIZIA	P3 LOGISTIC PARKS	

50-100M€ 100-200M€

France, a strategic market

≈ 90 Mil. sq. m Existing stock of warehouses above 5,000 sq. m	17 Mil. sq. m Located in the Greater Paris Region	10 % of GDP France's 5th-largest employer	21 % global CO₂ emissions (transportation)
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ENERGY IS ONE OF THE LOCATION CRITERIA

For a long time, the decision to locate a warehouse was based on three main criteria: the availability of land, the quality of highway access, and the local labor market. Today, a fourth criterion has become essential: access to electricity, made necessary by the decarbonization of transportation and logistics operations.

The (Y)OUR SPACE report notes that every real estate decision now begins with two new questions: the amount of electrical power available at the site and the cost of securing that power over the long term.

In France, this constraint compounds another, already well-known one: the scarcity of land, which is exacerbated by the “Zero Net Land Take” objective. This has altered the hierarchy of potential locations. A site previously considered secondary can become attractive if it has a sufficient power supply.

THE LEASING CONTRACT: SOON TO BE AN ENERGY CONTRACT

Energy now plays a central role in building operations and is no longer limited to being a mere expense. It has become a topic of negotiation between landlords and tenants, whether regarding power guarantees, building performance, or the allocation of investments.

(Y)OUR SPACE, a Knight Frank report is observing this trend across Europe, and it is already taking shape in France. AFILOG, which brings together stakeholders in the logistics real estate sector, has signed a charter of commitments with the government that calls for the installation of solar panels on half of all warehouse roofs, as well as carbon neutrality for all new projects by 2040.

Owners and tenants have also agreed to share the benefits of the energy investments mandated by the commercial building decree. Leases are thus evolving toward a shared commitment to energy efficiency.

FROM CARBON RESTRICTIONS TO ASSET VALUE

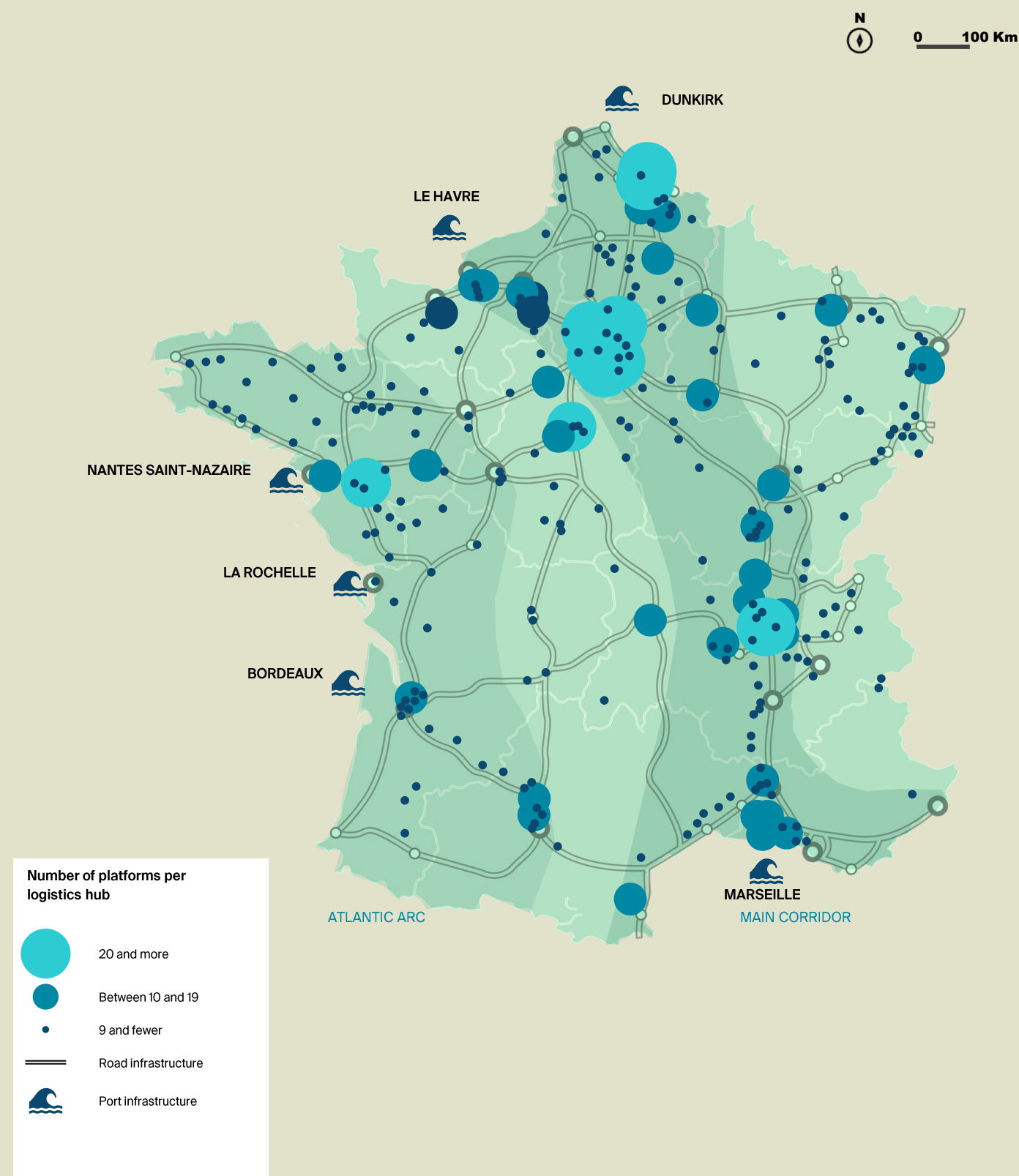
Transportation accounts for 21% of global CO₂ emissions. For the logistics sector, decarbonization is therefore both a regulatory requirement and a significant cost item. The real estate departments of major corporations, united under the ADI, also highlight the scale of investment required to bring buildings into compliance with the Tertiary Sector Decree before its first deadline, set for 2030.

But this constraint also presents an opportunity. The (Y)OUR SPACE report published by Knight Frank notes that value is now shifting toward the most energy-efficient buildings, provided that this efficiency is measured and demonstrated. From this perspective, on-site energy production—primarily through rooftop solar—is becoming the most credible path to decarbonization. It is directly linked to the building and thus helps enhance its value.



Distribution of the major logistics hubs in France

In number of platforms per logistics area



Sources: SOeS, Creram, IAU IdF

WAREHOUSE CLASSIFICATIONS AND TYPOLOGIES

According to the “TLOG” grid (formerly “CELOG”) defined by the AFILOG association, five classes of warehouse are distinguished in France. Class A and B warehouses, which account for a very large share of assets, correspond to efficient buildings meeting high standards (13 mandatory criteria for category A warehouses and 10 for category B). Class A is thus the category most sought after by logistics operators owing to its high clear height (over 9.3 metres), a comfortable manoeuvring area of at least 35 metres, a loading dock per 1,000 sq. m, or a floor load capacity of more than 5 tonnes/sq. m, for example.

Other classes exist: Class C assets, i.e. those not meeting Grade A or B standards, cold-storage facilities, and parcel hubs (mainly medium-sized buildings).



THE EMERGING ENERGY INFRASTRUCTURES OF WAREHOUSES



The Omega warehouse in Dourges (Pas-de-Calais), leased to PepsiCo, features 136,000 sq. m of rooftop space, hosting Europe’s largest single-site solar power plant, with a capacity of 18 MWp and approximately 38,000 solar panels.



At its 118,000 sq. m logistics facility, ESR Group has developed a fully integrated energy hub. The site combines 61,000 sq. m of rooftop solar panels, 8,000 sq. m of photovoltaic parking canopies, EV charging infrastructure and two battery storage units. In total, the installation generates close to 13 GWh of renewable electricity annually, enough to meet the energy needs of approximately 3,500 households.



BREEAM and LEED are internationally recognised environmental certifications that evaluate the sustainability performance of buildings across a range of criteria, including energy efficiency, environmental impact, construction materials, and occupant wellbeing.

PHOTOVOLTAIC ROOFING

Large warehouse roofs are increasingly being transformed into electricity-generation surfaces, with power consumed directly on-site. France’s Climate Law already requires 30% coverage on new or refurbished buildings, while the AFILOG charter targets 50%. The logistics sector alone plans to deploy 5 million sq. m of solar panels over the next five years, representing 1.2 GWp of installed capacity.

ON-SITE ELECTRIC VEHICLE CHARGING

Charging infrastructure for heavy goods vehicles and light commercial fleets enables vehicles to recharge on-site during loading and unloading operations. Although still at an early stage, with electric trucks accounting for just 2% of the total fleet, deployment is accelerating. Since 2025, any car park with more than 20 spaces has been required to include at least one charging point, while dedicated charging corridors are now being rolled out along major transport routes.

ENERGY STORAGE AND SELF-CONSUMPTION

Generating solar power is only part of the equation; the energy must also be used at the right time. Installing battery storage systems allows electricity produced during the day to be stored and released when the warehouse needs it most. As feed-in tariffs have declined, self-consuming on-site electricity generation has become more profitable than selling it back to the grid, with payback periods typically ranging from eight to twelve years. AFILOG is also advocating for more flexible regulations that would allow warehouses to share excess electricity production with neighbouring facilities.

CERTIFIED ENERGY PERFORMANCE

Compliance with the French Tertiary Buildings Decree and environmental certifications such as BREEAM and LEED provide evidence of measured, rather than merely claimed, performance. Long associated with office buildings, these certifications are increasingly becoming a standard expectation among both investors and occupiers in the logistics sector.

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