

WAREHOUSE INFRASTRUCTURE IN EURASIA: OPPORTUNITY OF THE DECADE

KEY FINDINGS

ANALYTICAL REPORT 25/12

EURASIAN REGION IS EXPERIENCING A "WAREHOUSE BOOM"

Growth in warehouse space

 **+15 million m²**
from 2021 to Q1 2025

Warehouse space per capita

 **0.23 m²**

Declared construction

 **20 million m²**

GROWTH FACTORS



Shortage of high-quality warehouses



Reorientation of trade flows



Industrialization of the region's economy



Expansion of retail trade



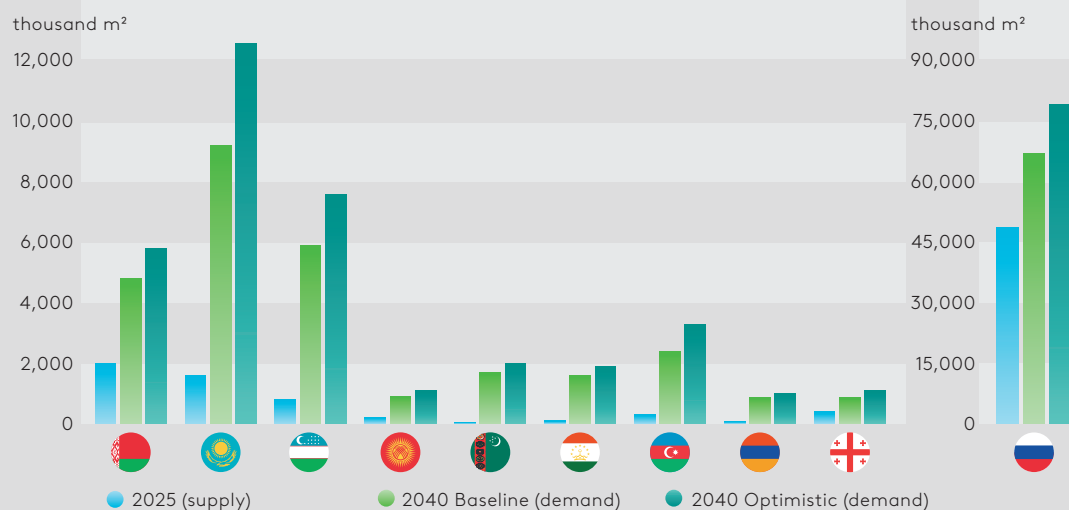
Rapid growth of e-commerce



Growth in containerization of cargo

WAREHOUSING SECTOR IS BECOMING ONE OF THE RELIABLE DRIVERS OF ECONOMIC GROWTH IN THE REGION

from **58** to
101–123
million m²
4–5%
CAGR



WAREHOUSE INFRASTRUCTURE — A SOLID FOUNDATION FOR COMPETITIVENESS AND INTERNATIONAL INTEGRATION OF THE REGION

Modernization and expansion of infrastructure

- ▶ Modern high-class A and B+ warehouses
- ▶ Agricultural and pharmaceutical logistics
- ▶ Multimodal logistics hubs and dry ports

Standardization and coordination

- ▶ Unification of regulations, technical standards, information services, and border procedures
- ▶ Industry coordination bodies (associations)
- ▶ Unified digital environment and data exchange, IoT, automation, and AI

Financial instruments and incentives for investors

- ▶ Public-private partnerships and guarantees, tax and credit incentives
- ▶ Pre-lease mechanisms and anchor tenants
- ▶ Collective financing and bond instruments, industry financial councils



Eurasian Development Bank