

Q1 2026

St. Louis Industrial Market Report



VACANCY
5.5% ↑

RENTAL RATES
\$6.26 PSF ↑

ABSORPTION
(1,160,388) SF ↓

CONSTRUCTION

83,277 SF
DELIVERED IN 2026
4,344,897 SF
UNDER CONSTRUCTION

Recent Lease Transactions

Tenant Name / Building	Square Feet	Submarket
U.S. AutoForce / 422 Hazelwood Logistics Ctr Dr	270,980	Airport
Express Chemical* / 1200 W 4th St	86,400	Illinois
T & W Tire* / 13875-99 Corporate Woods	79,598	Earth City
Hollywood River Studios / 1521 3rd St	55,350	Illinois

*Renewal

Recent Sale Transactions



4800 Baumgartner Rd
39,380 SF
\$5,000,000 (\$126.97 PSF)
South County

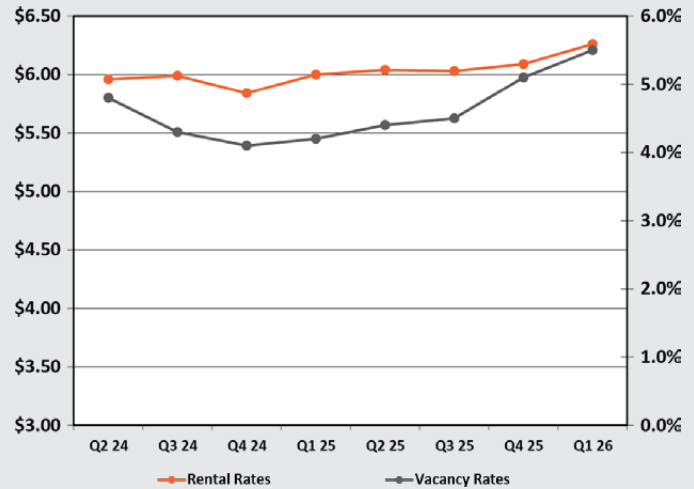


1581-1599 Fenpark Dr
36,000 SF
\$3,900,000 (\$108.19 PSF)
Fenton

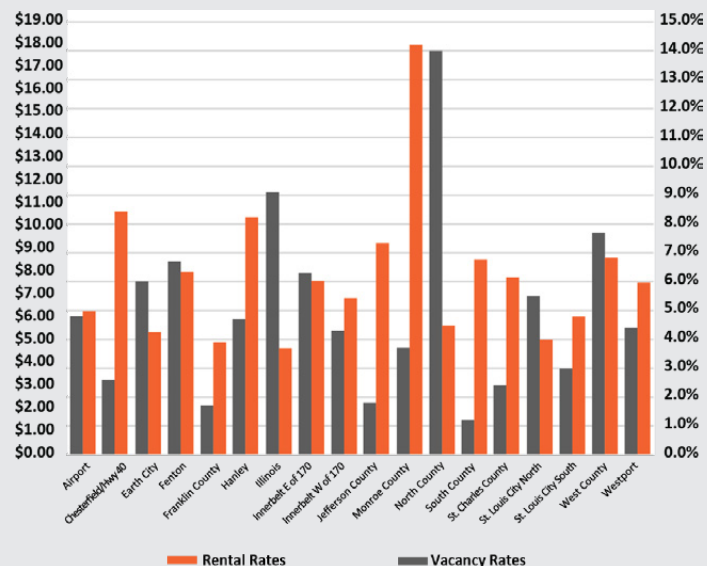
Noteworthy Under Construction

- Brownleigh Boeing Expansion • 1,100,000 SF • Airport • Q3 2026
- 1601 Tradeport Pkwy • 933,656 SF • Illinois • Q2 2026
- 141 Logistics Ctr • 544,672 SF • Westport • Q4 2026
- 5250 Banshee Rd • 500,000 SF • Airport • Q4 2026
- Maryland Heights Commerce Ctr • 369,534 SF • Earth City • Q2 2026

Overall Industrial Rental Rates & Vacancy Rates



Overall Industrial Rental Rates & Vacancy Rates by Submarket



Total Industrial Market Statistics

Submarket	Existing Inventory		Vacancy			Net Absorption	YTD Deliveries	Under Construction SF	Quoted Rates
	# Buildings	Total GLA	Direct SF	Total SF	Vacancy %				
Airport	259	21,234,832	923,136	1,018,816	4.8%	(391,082)	83,277	1,600,000	\$6.30
Chesterfield/Highway 40	175	6,517,893	169,315	169,315	2.6%	(5,673)	0	12,750	\$10.67
Earth City	321	24,823,381	1,473,057	1,494,909	6.0%	151,017	0	369,534	\$5.38
Fenton	239	10,838,170	580,161	723,452	6.7%	(35,116)	0	0	\$8.03
Franklin County	345	13,859,777	228,995	228,995	1.7%	(11,500)	0	0	\$4.94
Hanley	266	5,981,867	268,392	281,513	4.7%	(43,049)	0	0	\$10.43
Illinois	1,031	59,201,254	4,914,761	5,404,047	9.1%	(1,117,794)	0	1,110,156	\$4.68
Innerbelt E of 170	228	10,234,981	647,460	647,460	6.3%	(26,675)	0	0	\$7.63
Innerbelt W of 170	392	12,655,916	532,638	538,038	4.3%	(31,140)	0	0	\$6.88
Jefferson County	362	7,417,047	228,251	240,216	3.2%	4,670	0	165,229	\$9.29
Monroe County	45	5,000,066	186,550	186,550	3.7%	(186,550)	0	0	\$18.00
North County	191	15,022,746	1,742,243	2,108,525	14.0%	(231,022)	0	123,800	\$5.68
South County	309	9,619,182	107,768	112,179	1.2%	7,575	0	45,000	\$8.57
St. Charles County	951	37,923,487	893,624	905,604	2.4%	317,578	0	178,000	\$7.78
St. Louis City North	840	38,619,773	2,124,212	2,124,212	5.5%	225,687	0	8,500	\$5.05
St. Louis City South	994	34,123,929	1,038,111	1,038,111	3.0%	382,468	0	0	\$6.06
West County	172	5,009,256	384,531	384,531	7.7%	(204,879)	0	27,856	\$8.65
Westport	422	16,685,039	631,967	731,770	4.4%	35,097	0	704,072	\$7.55
TOTAL	7,542	334,768,596	17,075,172	18,338,243	5.5%	(1,160,388)	83,277	4,344,897	\$6.26

*Disclaimer: All information is collected from CoStar at the end of 1st Quarter, information is subject to change. Updated numbers for past quarters reflect CoStar's ongoing research for the most accurate market information.

Featured Property



9215 Riverview Dr - Suite 125

St. Louis, MO 63137

- 37,580 SF Industrial Warehouse for Lease
- 2.5 Acres +/- Paved, Fenced, Outdoor Storage
- 1,400 SF Office Space
- 6 Loading Docks with Levelers & Under Roof
- 1 Drive-In Door (12'x14'); 12'-17' Clear Ceiling Height (27'6" at Roof Peak)
- Lease Rate: \$4.50 PSF, NNN

For More Information, Contact:

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