FIGURES | OFFICE | Q2 2026

Poland - Poznan

Key Performance Indicators

Prime Yield
8,00%
Expected Investment Returns
Change YonY: 0 bps

Prime Rent
€ 17,00
Monthly, per sq m
Change YonY: 0,0%

Average Rent
€ 15,88
Monthly, per sq m
Change YonY: 0,0%

Office Investment Volume
€ -
In Poznan during Q2 2026
(Rolling 12 months)

Take Up
28K
Square Meter
33K Year2Date

Vacancy Rate
11,50%
Percentage of Stock vacant
Change YonY: -332 bps

Completions
5K
Square Meter
8K Year2Date

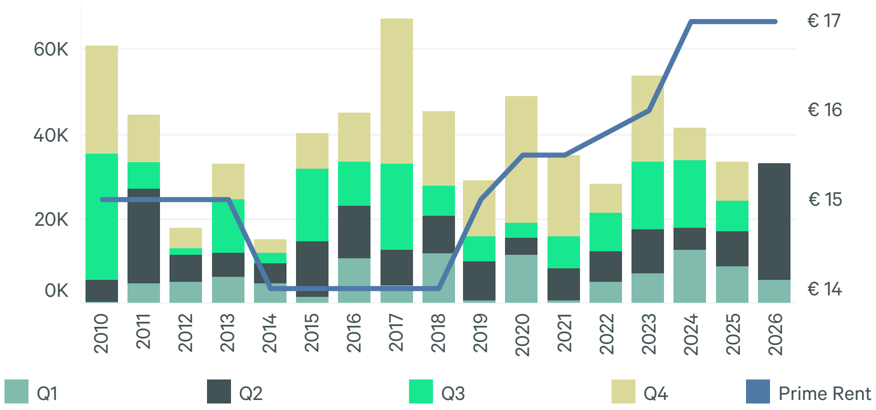
Total Stock
678K
Square Meter
600K Occupied Stock

(Forecast) Completions
18K (2026)
Square Meter
22 800 (2027) // 37 845 (2028)

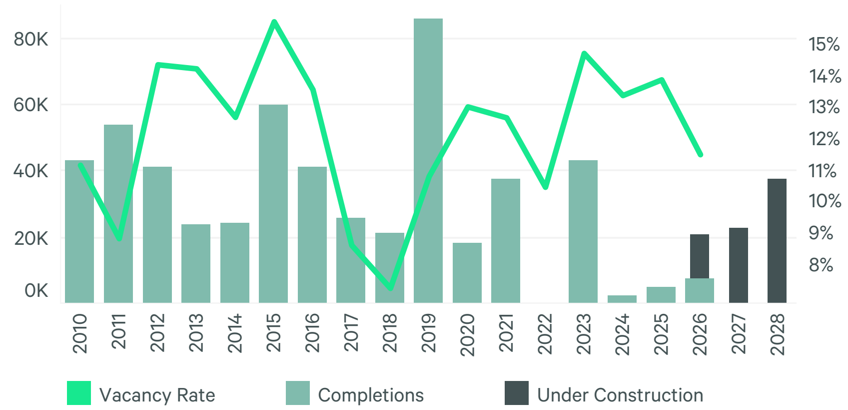
Poznan's total modern office stock increased to approximately 678,200 sq m at the end of Q2 2026 following the completion of the 5,000 sq m Selgros headquarters, an owner-occupied building. Development activity remained visible, with approximately 66,000 sq m of office space progressing through the pipeline. AND2 continues to be the largest scheme underway and is expected to materially strengthen the city's modern office offer once completed.

The vacancy rate declined considerably during the quarter, falling from 13.8% at the end of March to 11.5% in Q2. This corresponded to approximately 78,000 sq m of available office space, compared with 93,200 sq m three months earlier. The reduction reflects stronger occupier activity and the absorption of existing availability. Poznan therefore maintained its position as one of the tighter regional office markets in Poland.

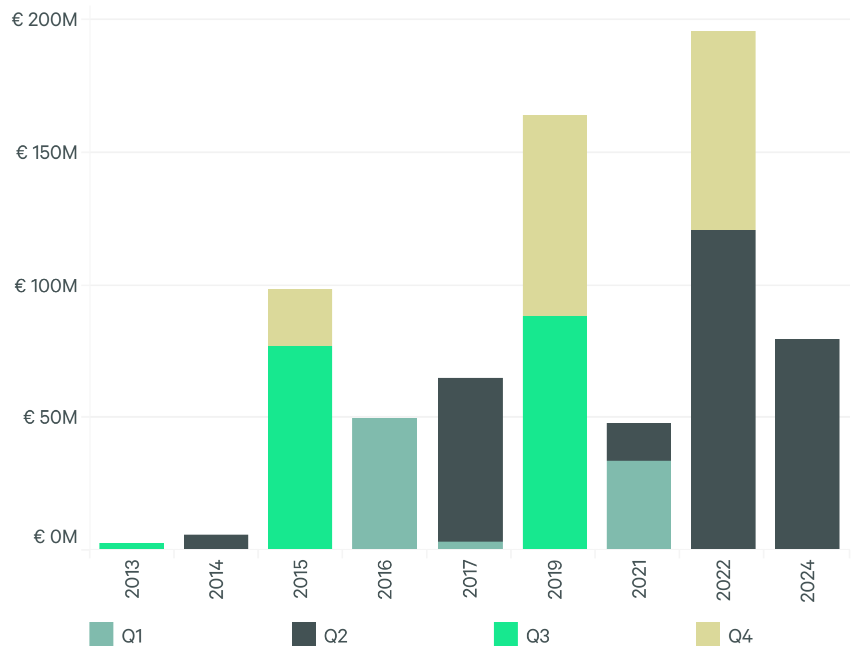
Market Trend (Take-Up | Prime Rent)



Development Activity (Completions | Vacancy Rate)



Poznan Office Investment Volumes



Note: 2026 annual numbers till 30.06.2026

Leasing activity accelerated sharply, reaching approximately 42,800 sq m in Q2 and bringing first-half take-up to around 48,500 sq m. Excluding the owner-occupied Selgros headquarters, renewals accounted for 40% of quarterly demand, new leases for 36%, and expansions for 24%. The relatively balanced transaction structure indicates that activity was supported by both existing occupiers extending or enlarging their commitments and companies selecting new locations. The quarter's largest transaction was Enea's expansion and consolidation across several buildings in Business Garden Poznan, covering approximately 11,500 sq m in total. Other notable deals included OLX's approximately 4,900 sq m renewal in Maraton A and Eurocash's new lease of around 3,300 sq m in Giant Office.

Prime headline rents remained stable at EUR 17.00 per sq m/month, while rents in secondary properties continued to stand at approximately EUR 14.75 per sq m/month. The decline in vacancy has supported landlords' ability to maintain headline pricing in the best-performing buildings. At the same time, incentives and flexible commercial terms remain important in older or less competitive schemes, particularly as landlords prepare for the future addition of new space to the market.

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