

# Switzerland - Geneva

## Key Performance Indicators (Q1 2026)

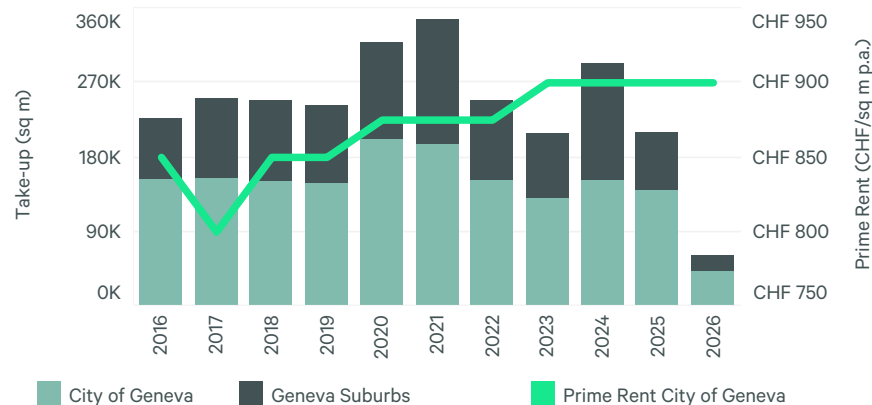
<b>Prime Yield City of Geneva</b> <b>2.70%</b> Expected Investment Returns Change YoY: -20 bps	<b>Prime Rent City of Geneva</b> <b>CHF 900</b> Yearly, per sq m Change YoY: 0.00%	<b>Take-up City of Geneva</b> <b>43K</b> Square Meters 43K Year2Date
<b>Prime Yield Geneva suburbs</b> <b>4.10%</b> Expected Investment Returns Change YoY: 0 bps	<b>Prime Rent Geneva suburbs</b> <b>CHF 550</b> Yearly, per sq m Change YoY: 0.00%	<b>Take-up Geneva suburbs</b> <b>19K</b> Square Meters 19K Year2Date
<b>Availability Rate City of Geneva</b> <b>3.8%</b> Percentage of Stock Available Change YoY: 4 bps	<b>Availability Rate Geneva suburbs</b> <b>7.1%</b> Percentage of Stock Available Change YoY: -176 bps	<b>Total Stock City of Geneva and Suburbs</b> <b>4.582M</b> Square Meters

The overall office availability rate in Geneva stands at 3.8%, reflecting continued stability across the market. The CBD remains the most sought-after area, primarily for 'Grade A' and large offices (>1,000 sq m), where demand consistently exceeds supply. Renovations of older buildings into 'Grade A' space or conversions to residential and hospitality use continue to tighten city-centre stock. In the periphery, the availability rate has fallen to 7.1%, i.e. its lowest level in nine years. This is driven by both a slowdown in new construction activity and the absorption of significant floor space through a handful of large transactions, notably in Geneva-Ouest and Vernier. The appeal of new peripheral buildings remains strong, as illustrated by more than 20,000 sq m taken up by Edmond de Rothschild and Banque Cantonale de Genève in recent quarters.

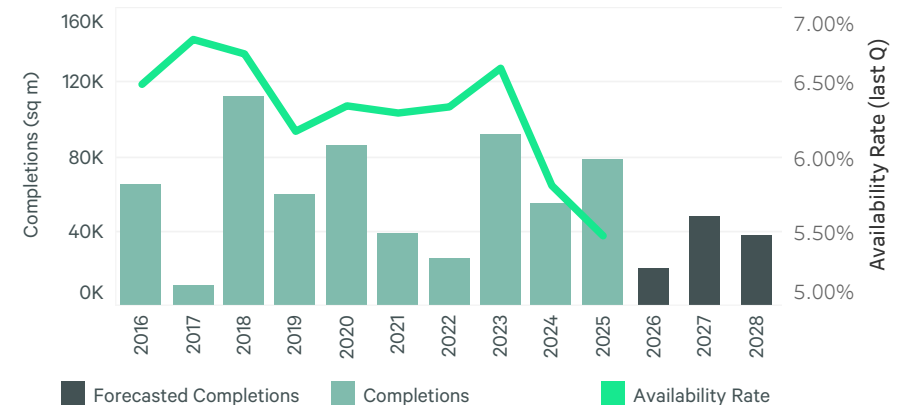
New construction is adjusting to absorption constraints, with the pipeline expected to contract materially over the next three years. Peripheral projects remain predominantly hybrid office-industrial buildings in FTI zones or mixed-use schemes within the PAV area. The Pont-Rouge micro-market continues to attract quality occupiers and sustain healthy leasing momentum.

In the International District, the availability rate stands at 4.6% with no significant new entrants recorded. However, ongoing cost-cutting by UN-related organisations and NGOs is expected to weigh on occupancy in the coming quarters. Across the market, rents remain broadly stable. Core CBD rents are unlikely to climb substantially; however, the tight supply in the city center should drive growth in fringe areas, where rents are expected to progress. Elsewhere, incentives and flexible lease terms are increasingly deployed to support commercialisation of vacant space.

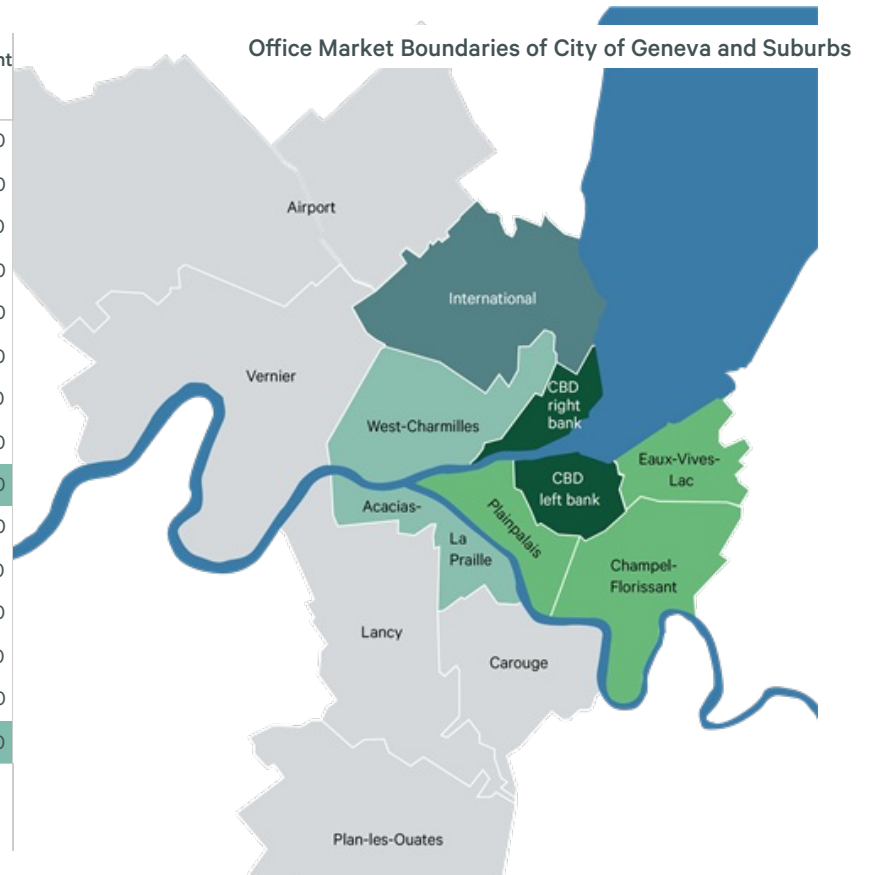
Market Trend (Take-up | Prime Rent)



Development Activity in City of Geneva and Suburbs (Completions | Availability Rate)



Submarket	Availability (sq m)	Availability Rate	Median Asking Rent (per sq m p.a.)	Prime Transaction Rent (per sq m p.a.)
CBD Left Bank	27,000	3.9%	CHF 690	CHF 900
CBD Right Bank	18,000	5.8%	CHF 465	CHF 700
Acacias-La Praille	6,000	2.6%	CHF 330	CHF 490
Champel-Florissant	7,000	3.6%	CHF 490	CHF 650
Eaux-Vives-Lac	5,000	3.2%	CHF 490	CHF 650
International	30,000	4.6%	CHF 390	CHF 600
Plainpalais	5,000	1.5%	CHF 460	CHF 680
West	8,000	3.5%	CHF 350	CHF 420
<b>City of Geneva</b>	<b>106,000</b>	<b>3.8%</b>	<b>CHF 480</b>	<b>CHF 900</b>
Airport	40,000	8.0%	CHF 330	CHF 450
Carouge	9,000	3.1%	CHF 340	CHF 410
Lancy	29,000	9.4%	CHF 390	CHF 550
Vernier	27,000	8.2%	CHF 320	CHF 480
Plan-les-Ouates	21,000	5.9%	CHF 295	CHF 370
<b>Geneva suburbs</b>	<b>126,000</b>	<b>7.1%</b>	<b>CHF 330</b>	<b>CHF 550</b>



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