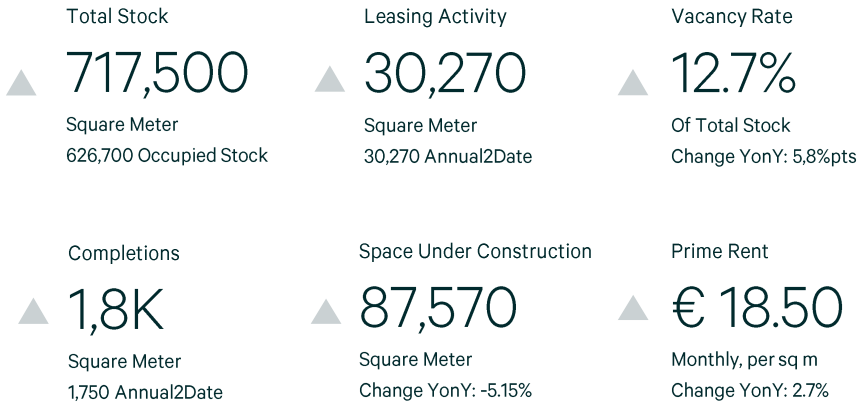


Brno Offices Market Figures

KEY PERFORMANCE INDICATORS (H1 2026)



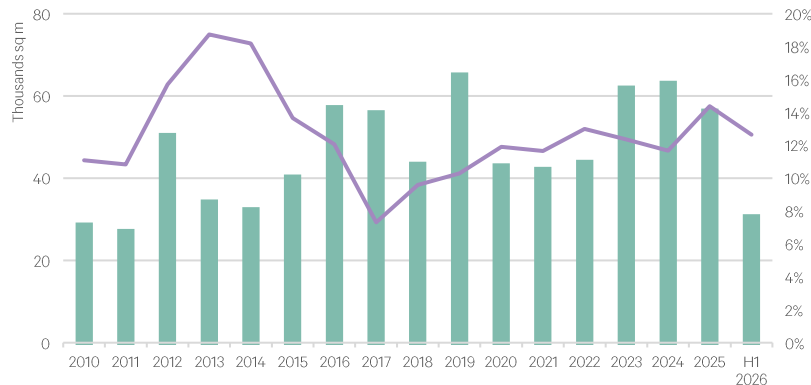
The total modern office stock in Brno reached 717,500 sq m. During the first half of 2026, only one office scheme was completed, Svatopetrská D (1,750 sq m). At the same time, construction commenced on one new project, Office Building BRIXX Brno (1,400 sq m), marking the only office development to enter the construction phase during H1 2026.

Availability in the Brno office market continued to improve, with the vacancy rate dropping to 12.7%. This represented a 1.7 percentage point decline and translated into approximately 90,750 sq m of vacant office space at the end of Q2 2026.

Occupier demand remained solid throughout H1 2026, with total leasing activity reaching 35,770 sq m, up 10.8% compared with the same period of the previous year. Manufacturing companies generated the largest share of demand (23%), followed by the Technology (18%) and Finance (15%) sectors. In terms of transaction structure, new leases accounted for 68% of total leasing activity, ahead of renegotiations (12%), pre-leases (11%) and expansions (6%), while short-term leases represented the remaining 3%.

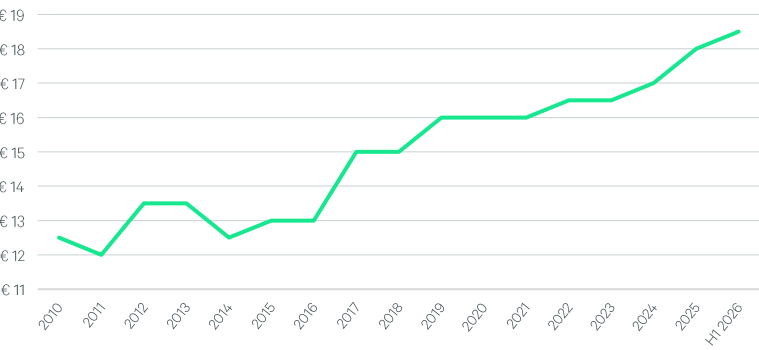
In H1 2026, take-up excluding renegotiations totalled 30,270 sq m. Compared with the first half of the previous year, this represented an increase of 23%, although activity remained 3.1% lower than the level recorded in H1 2025.

MARKET TREND (Total leasing activity sq m | Vacancy rate)



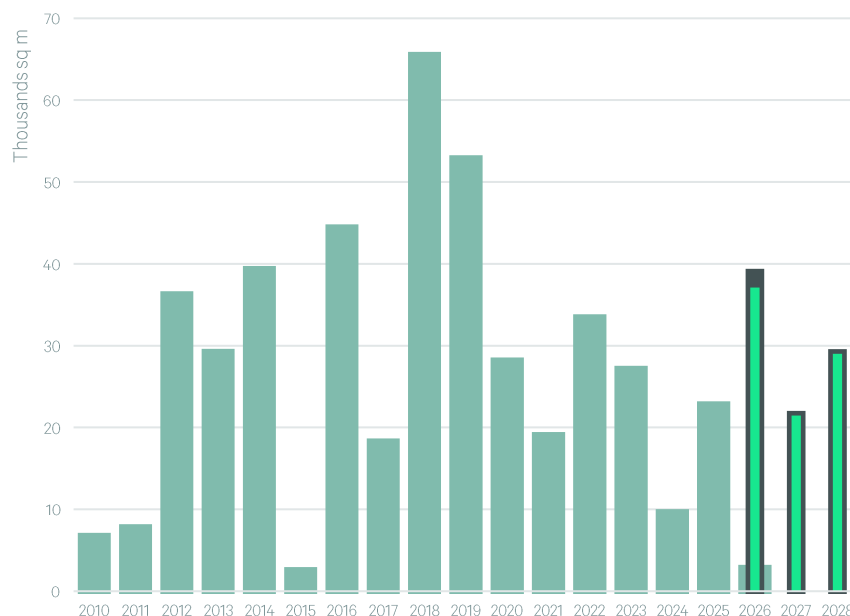
Source: CBRE Research, RRF, Q2 2026

PRIME RENT DEVELOPMENT (Euro/ sq m/ month)



Source: CBRE Research, RRF, Q2 2026

STOCK DEVELOPMENT (Completions | Forecast | Forecast UC)



Source: CBRE Research, RRF, Q2 2026

Prime rents on the Brno office market increase to range between 17.50 - 18.50 EUR/sq m/month in Q2 2026.

As the end of Q2 2026, the total amount of space under construction was 87,570 sq m in nine buildings. New project Dornych (27,600), Ponávka A4 (16,800 sqm), and Nová Zbrojovka D4 (10,500) being the largest. There are 4 projects, scheduled for delivery in the 2026 with a combined total around 37,100 sq m with an additional 21,500 sq m due for completion in the years 2027 and 29,00 sq m in 2028

Definitions.

Stock: Total completed office space (occupied and vacant), newly built since 1990 or refurbished, A and B class offices, owner occupied and for lease and public authorities' buildings. Buildings with leasable area lower than 1,000 sq m are excluded.

Completions: Completed newly built or refurbished buildings that obtained a use permit in the given period.

Total leasing activity: A gross figure representing the total floor space known to have been let or pre-let, sold or pre-sold to tenants or owner-occupiers over a specified period. It does not include space that is under offer. A property is taken up when the contract is signed. Total leasing activity includes renegotiations, lease extension and subleases, take-up excludes these.

Vacancy rate: Ratio of physically vacant space in completed buildings on the total stock.

Prime rent: Achieved rents that relate to new prime, high specification units in prime locations. However, there might be exceptional assets on the market, in which higher rent could be achieved.

CONTACTS

Jana Řezáčová
Researcher
 +420 221 711 056
jana.rezacova@cbre.com

Helena Hemrová
Head of Advisory & Transactions - Office
 +420 221 711 015
helena.hemrova@cbre.com

Simon Orr
Head of A&T – Office Occupier
 +420 221 711 079
simon.orr@cbre.com

© Copyright 2026. All rights reserved. This report has been prepared in good faith, based on CBRE's current anecdotal and evidence views of the commercial real estate market. Although CBRE believes its views reflect market conditions on the date of this presentation, they are subject to significant uncertainties and contingencies, many of which are beyond CBRE's control. In addition, many of CBRE's views are opinion and/or projection based on CBRE's subjective analyses of current market circumstances. Other firms may have different opinions, projections and analyses, and actual market conditions in the future may cause CBRE's current views to later be incorrect. CBRE has no obligation to update its views herein if its opinions, projections, analyses or market circumstances later change.

Nothing in this report should be construed as an indicator of the future performance of CBRE's securities or of the performance of any other company's securities. You should not purchase or sell securities—of CBRE or any other company—based on the views herein. CBRE disclaims all liability for securities purchased or sold based on information herein, and by viewing this report, you waive all claims against CBRE as well as against CBRE's affiliates, officers, directors, employees, agents, advisers and representatives arising out of the accuracy, completeness, adequacy or your use of the information herein.

H1 2026

REPORT FIGURES

Information contained herein, including projections, has been obtained from sources believed to be reliable. While we do not doubt its accuracy, we have not verified it and make no guarantee, warranty or representation about it. It is your responsibility to confirm independently its accuracy and completeness. This information is presented exclusively for use by CBRE Ltd. clients and professionals and all rights to the material are reserved and cannot be reproduced without prior written permission of CBRE Ltd.