

Czech Republic Real Estate Investment Volumes Q2 2026

The Czech commercial real estate investment market gained clear momentum in the second quarter of 2026. After a subdued start to the year, Q2 2026 recorded investment transactions totalling approximately €943 million. This represented a 39% year-on-year increase compared to Q2 2025 and brought total H1 2026 volume to roughly €1.3 billion. Activity remained firmly concentrated in Prague.

Office and residential assets (including forward purchases) dominated the quarter, together accounting for close to 90% of total volume. Offices led with approximately €467 million, around 50% of the total, followed by residential at approximately €371 million, or 39%. Notable transactions included the acquisition of the Port 7 office building by AFI, the sale of the Na Příkopě 14 office building to Generali, and the acquisition of the Písnice residential site — comprising 760 residential units — by Wood & Company.

Domestic investors remained the principal source of capital, accounting for 64% of total investment volume in Q2 2026 and reaffirming the continued strength of local capital.



Domestic
Foreign

Origin purchaser capital

39%

Y-on-Y Change Q2

2%

Y-on-Y Change R12M

Nr. of Transactions

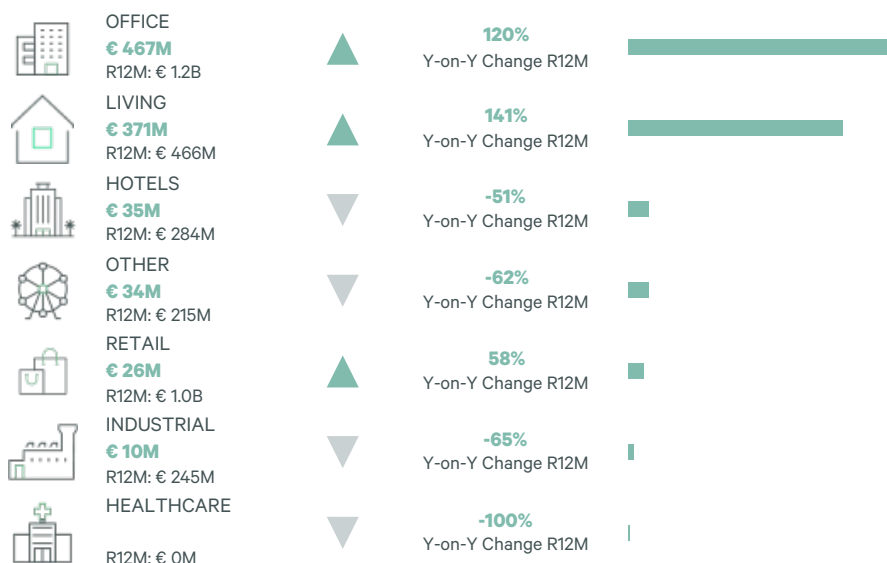
24

94 R12M

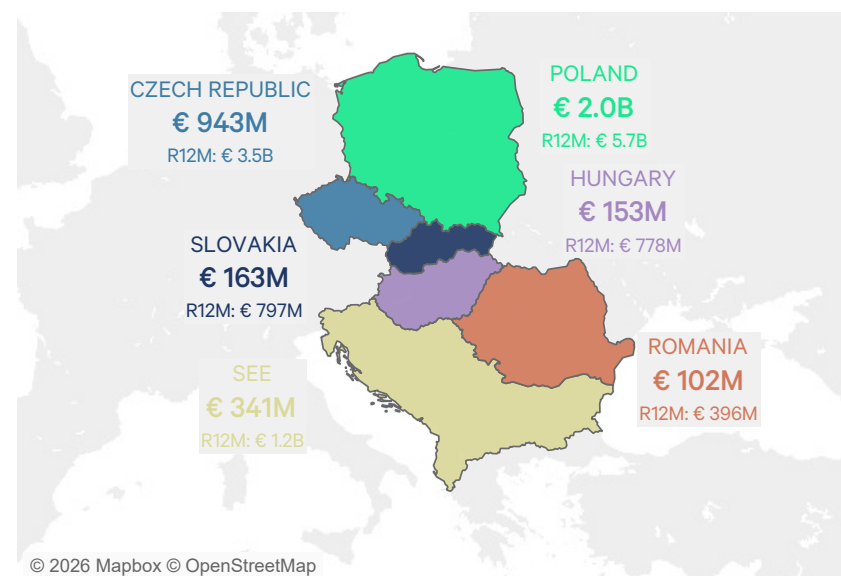
Y-on-Y: Year on Year

R12M: Rolling Twelve Months

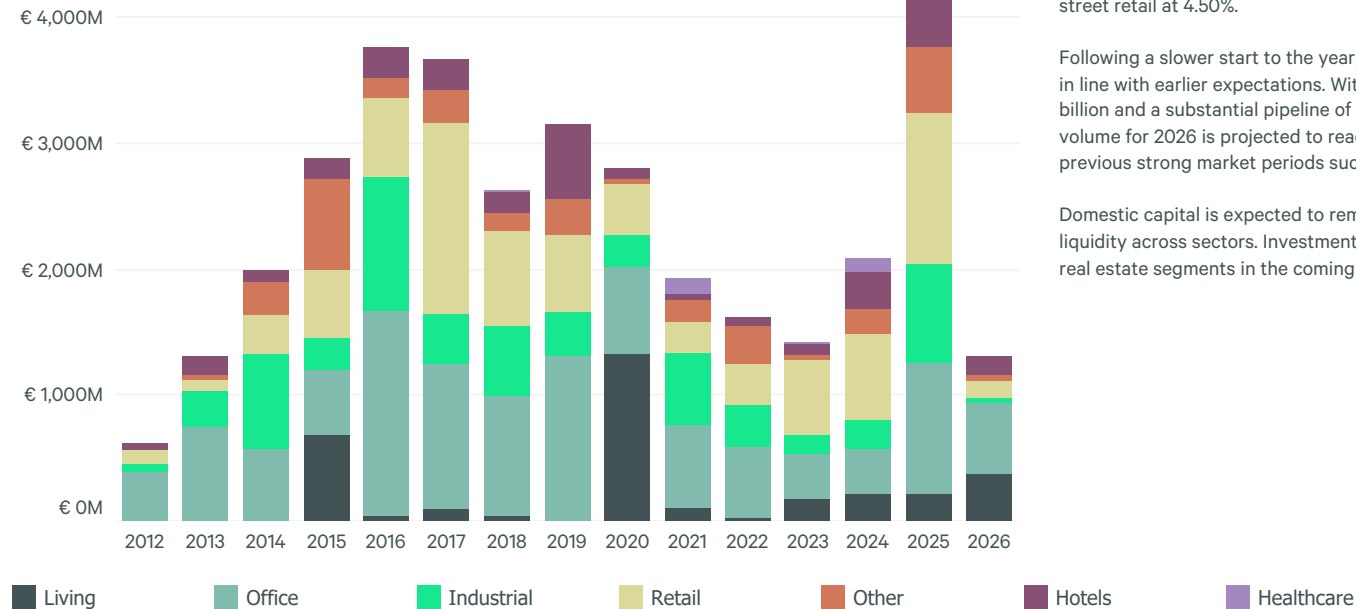
Investment Volumes by Sector (Czech Republic)



Investment Volumes in CEE Region



Investment Volumes Annual by Sector (Czech Republic)



Note: 2025 annual numbers till 6/30/2026

Contacts

Tomáš Krus

Associate Director, Investment Properties
+420 224 814 060
tomas.krus@cbre.com

Jana Řezáčová

Research
+420 777 960 676
jana.rezacova@cbre.com

Jakub Stanislav

Senior Director, Head of Investment Properties
+420 224 814 060
jakub.stanislav@cbre.com

Vítězslav Doležal

Director, Investment Properties
+420 224 814 060
vitezslav.dolezal@cbre.com

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Countries considered: CEE Region exists out of Czech Republic, Hungary, Poland, Romania, SEE (Serbia, Slovenia, Croatia, Bulgaria, Albania, Montenegro, Bosnia and Herzegovina, North Macedonia) and Slovakia.

Prime yields across all sectors remained stable q-o-q in Q2 2026, reflecting balanced market conditions and continued investor confidence. Prime office yields stand at 5.10%, shopping centres at 6.00%, retail parks at 6.10%, industrial assets at 5.15%, and high street retail at 4.50%.

Following a slower start to the year, investment activity strengthened from Q2 onwards, in line with earlier expectations. With H1 2026 volume already at approximately €1.3 billion and a substantial pipeline of transactions in advanced stages, total investment volume for 2026 is projected to reach around €3 billion, aligning with levels seen during previous strong market periods such as 2016 and 2017.

Domestic capital is expected to remain a key driver of activity, providing stability and liquidity across sectors. Investment activity is anticipated to remain strong across all real estate segments in the coming quarters.