

FIGURES | DENMARK OFFICE | Q4 2025

# Investor appetite is improving

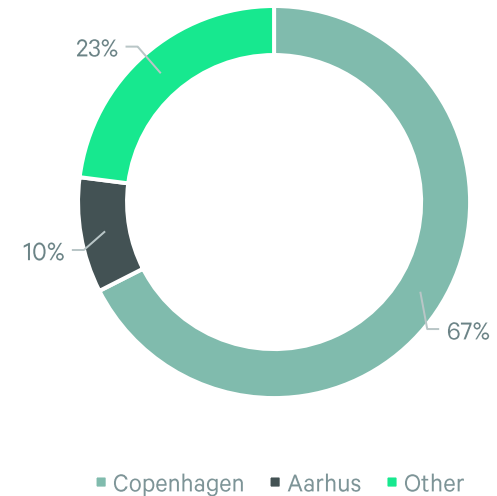
## OFFICE INVESTMENT MARKET KEY FIGURES 2025



Note: \*Cut-off at DKK 5 million; Arrows indicate change y-o-y, except for Prime yield (q-o-q);

- The Office sector constituted an estimated DKK 9.3 billion, which represents an increase of 23% compared to the performance recorded in 2024. Although activity is recovering from low levels, rather than booming, this trend suggests a healthy level of overall activity for the Danish office market in 2026.
- The Prime Office Yield remained stable in both key cities (4.30% as of Q4 2025) and major regional cities (6.50% as of Q4 2025), indicating a consistent trend. Similarly, secondary office yields in key Danish cities remained unchanged at 6.30% as of Q3 2024.
- Deals from the fourth quarter worth mentioning include Schroder’s divestment of a 33,000 sq m fully-leased office property located in Valby to Danish pension fund PensionDanmark. Other deals worth mentioning include Jeudan acquiring three office properties from Danish pension fund PFA.

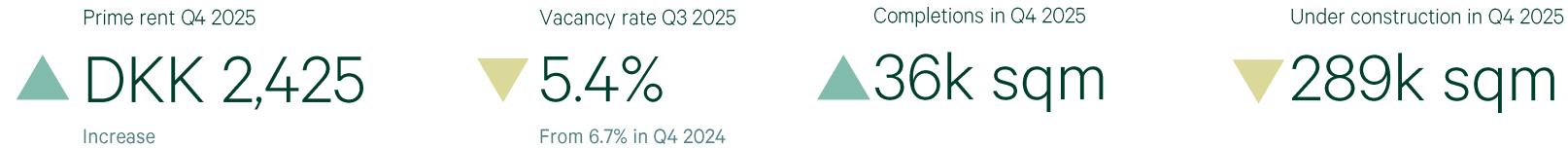
## OFFICE TRANSACTION VOLUME BY LOCATION



Source: CBRE Research, Erhvervsrådgiverne's Branchedata

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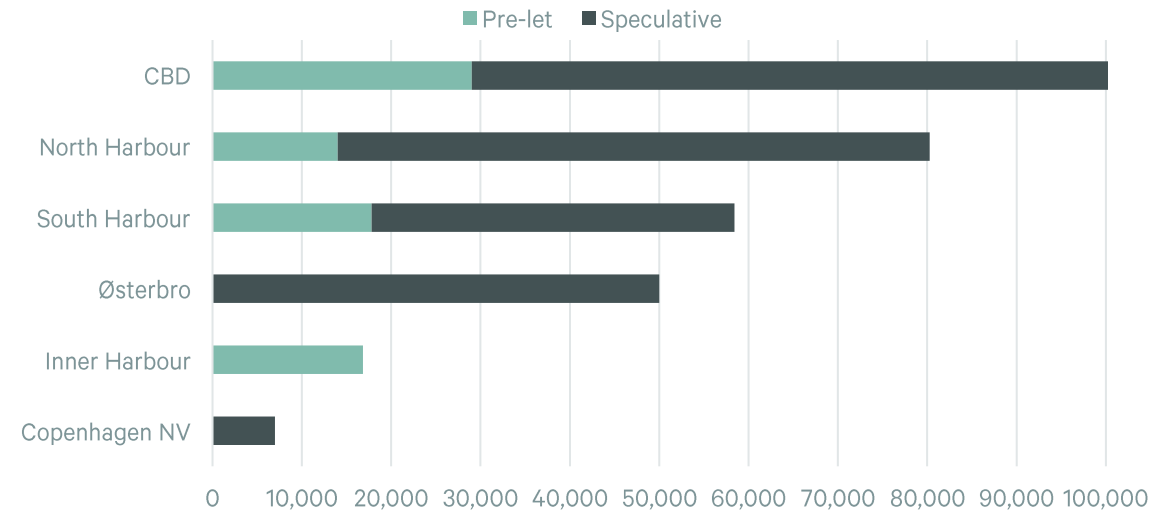
COPENHAGEN CITY OFFICE OCCUPIER MARKET KEY FIGURES



Note: Arrows indicate change q-o-q

- Many offices are already full-on peak days, with increasing attendance expected. In the Nordics, employer requirements have shifted from a majority-in-office model of three days per week to more frequent presence - often four days. Increasingly, companies are also specifying which days employees should be on-site, for example mandating Mondays and Fridays for team alignment.
- Fiercer competition for new space in the best locations is expected, as supply has reached low levels. As demand for premium office space is outpacing supply, this will drive headline rental growth in 2026.
- Financial impact and ESG considerations remain central. Occupiers and landlords are reviewing refurbishment costs and prioritising sustainable construction practices, aligning with long-term resilience goals.

COPENHAGEN CITY OFFICES U/C; SPECULATIVE AND PRE-LET (SQ M)



Source: CBRE Research

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