

FIGURES | DENMARK OFFICE | Q1 2026

Investment activity is up, although from a low level

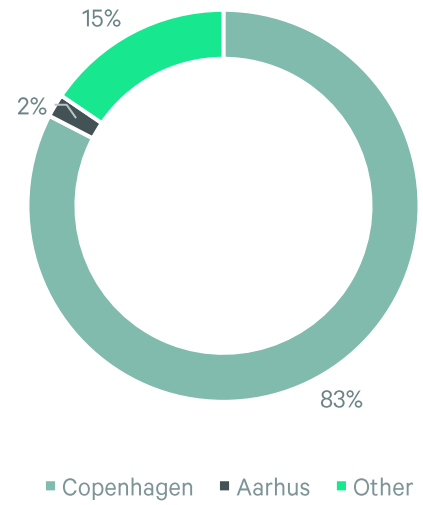
OFFICE INVESTMENT MARKET KEY FIGURES Q1 2026



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 1.7bn, representing a little more than 18% of the total investment volume in Denmark for the first quarter of 2026. Activity is up from a very low level, though not booming, and dominated by Nordic investors.
- The Prime Office Yield declined slightly (4.25% as of Q1 2026) and major regional cities remained stable (6.50% as of Q1 2026), indicating a consistent trend. Similarly, secondary office yields in key Danish cities remained unchanged at 6.30% as of Q1 2026.
- Deals from the first quarter worth mentioning include Wihlborgs acquisition of Caroline Hus in the Carlsberg City District and Urban Partners sale of the Market in Valby to Swizz Life Asset Management. Other deals worth mentioning include Jeudan’s acquisition of three centrally located office properties. Seller was Dansk Ejendomsfond.

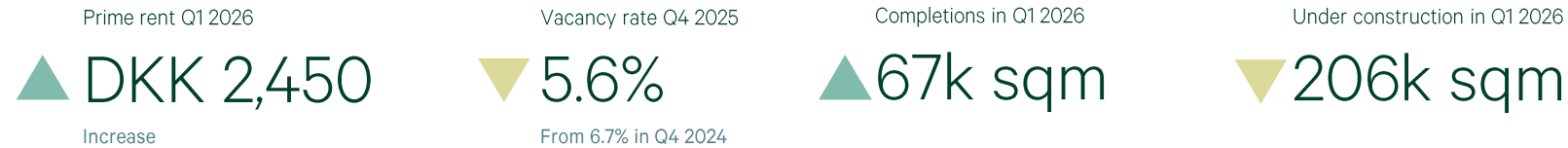
OFFICE TRANSACTION VOLUME BY LOCATION



Source: CBRE Research, Erhvervsrådgiverne's Branchedata

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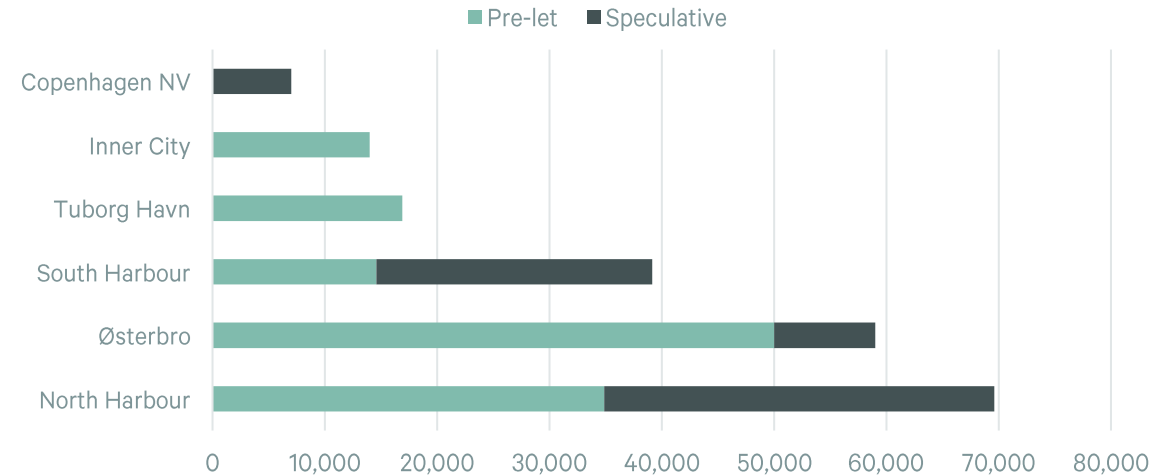
COPENHAGEN CITY OFFICE OCCUPIER MARKET KEY FIGURES



Note: Arrows indicate change q-o-q

- Companies are increasingly prioritising prime locations and high-quality buildings that offer flexibility, strong ESG performance, and an attractive working environment capable of supporting collaboration and attracting top talent.
- Take-up activity in the Copenhagen office market has slowed down. Brokers are experiencing lower demand, and companies are acting more cautiously, focusing on flexibility and cost control, while many are adopting a clear “wait-and-see” approach amid macroeconomic uncertainty.
- While unemployment is expected to remain stable in Denmark in 2026, the accelerating adoption of AI presents a potential structural shift. More companies are actively exploring AI, and beyond labour market impact, it could reshape demand patterns in 2026 and beyond.

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



Source: CBRE Research

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