Brno Offices Market Figures

KEY PERFORMANCE INDICATORS (H1 2026)

Total Stock
717,500
Square Meter
626,700 Occupied Stock

Leasing Activity
30,270
Square Meter
30,270 Annual2Date

Vacancy Rate
12.7%
Of Total Stock
Change YonY: 5,8%pts

Completions
1,8K
Square Meter
1,750 Annual2Date

Space Under Construction
87,570
Square Meter
Change YonY: -5.15%

Prime Rent
€ 18.50
Monthly, per sq m
Change YonY: 2.7%

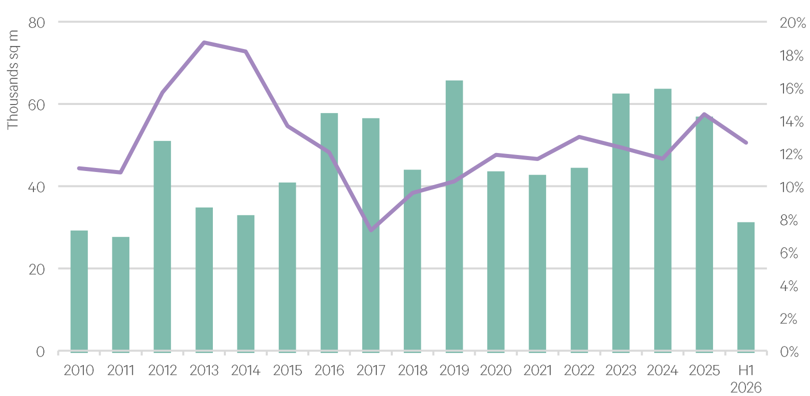
The total modern office stock in Brno reached 717,500 sq m. During the first half of 2026, only one office scheme was completed, Svatopetrská D (1,750 sq m). At the same time, construction commenced on one new project, Office Building BRIXX Brno (1,400 sq m), marking the only office development to enter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

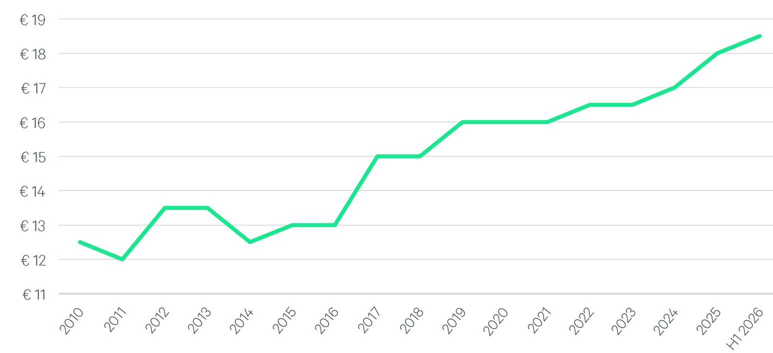
In H1 2026, take-up excluding renegotiations totalled 30,270 sq m. Compared with the first half of the previous year, this represented an increase of 23%, although activity remained 3.1% lower than the level recorded in H1 2025.

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



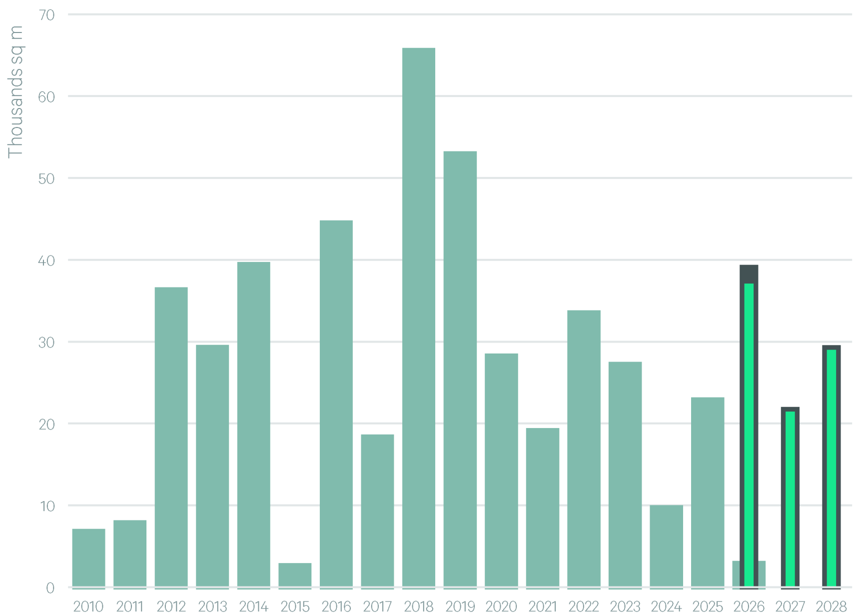
Source: CBRE Research, RRF, Q2 2026

PRIME RENT DEVELOPMENT (Euro/ sq m/ month)



Source: CBRE Research, RRF, Q2 2026

STOCK DEVELOPMENT (Completions I Forecast I 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 by exceptional assets on the market, in which higher rent could be achieved.

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H1 2026

REPORT FIGURES