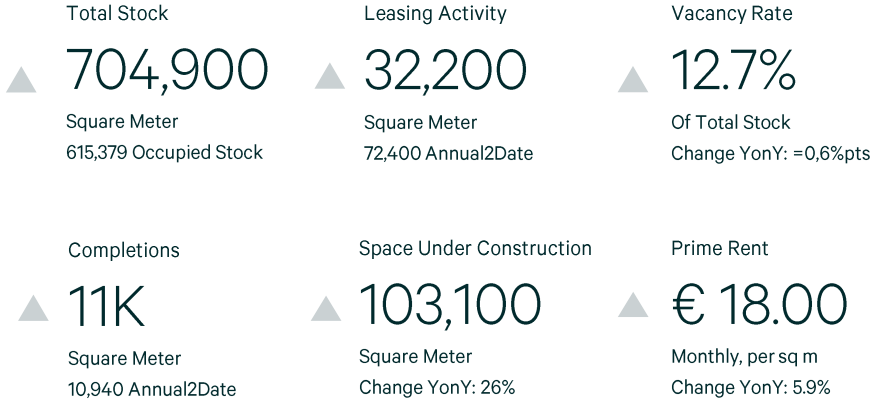


Brno Offices Market Figures

KEY PERFORMANCE INDICATORS (H1 2025)



The total modern office stock in Brno increased to 704,900 sq m. There was one office project completed in the first half of 2025, Titanium X (10,940 sq m). Four projects started construction in H1 2025; Dornych (27,600 sq m), two buildings in CTPark Brno - A 3.2 EF (8,700 sq m) and G2 (7,400 sq m).

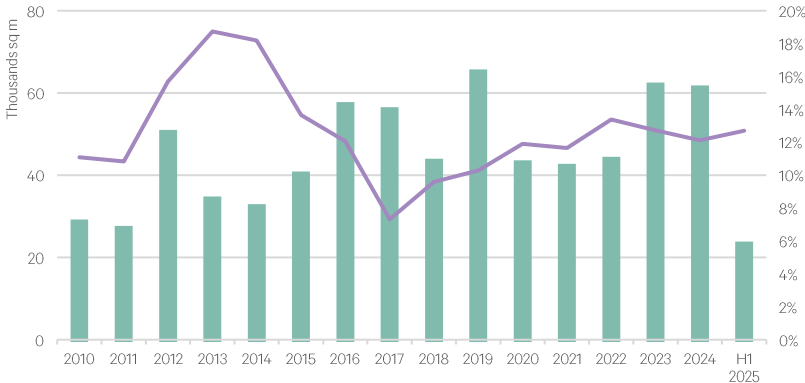
Only one project Cerit III (10,800 sqm) is scheduled to be completed by the end of 2025.

The vacancy rate increased to 12.7% representing an increase of 0.6 percentage points and corresponding to 89,500 sqm of vacant office space as of Q2 2025.

In H1 2025, total leasing activity (TLA) amounted to 32,200 sq m. Marking a 24% decrease compared to the same period of the previous year. The most active companies were from the Energy & Extractives Technology (35%), Technology (20%) and Construction & Development (11%) sectors. New leases accounted for 55% of TLA, while pre-leases made up 43%.

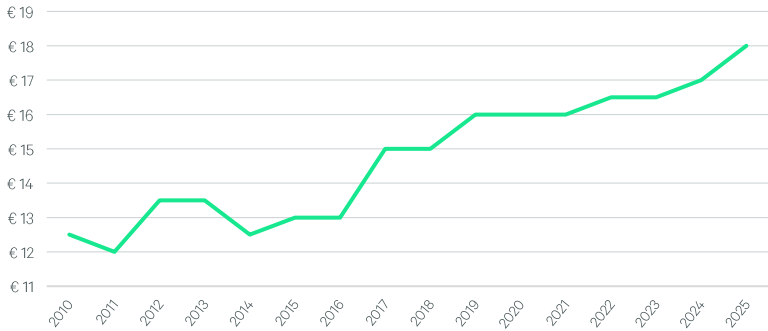
In H1 2025, take-up (excl. renegotiations) reached 31,400 sq m. This represented an increase of 14% compared to the same period last year, while reflecting a decrease of 10% compared to H2 2024.

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



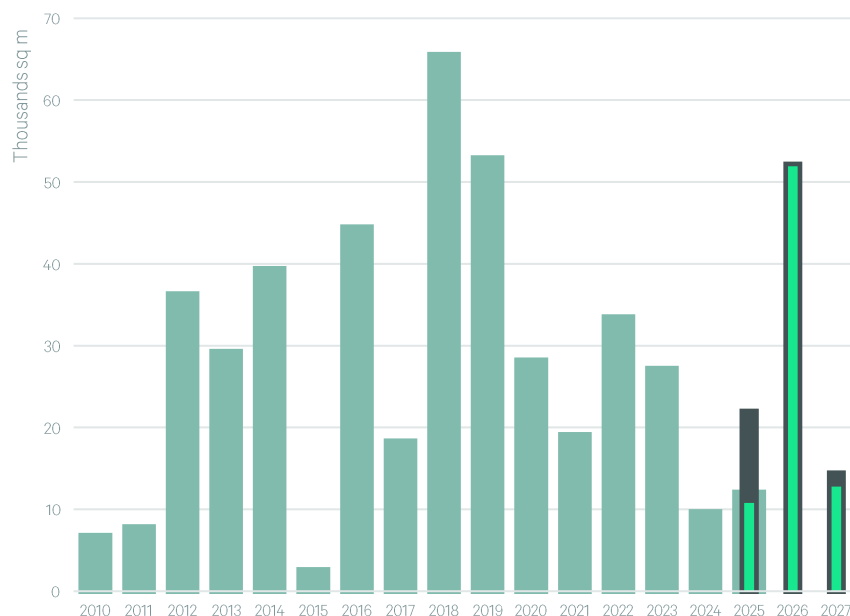
Source: CBRE Research, RRF, Q2 2025

PRIME RENT DEVELOPMENT (Euro/ sq m/ month)



Source: CBRE Research, RRF, Q2 2025

STOCK DEVELOPMENT (Completions | Forecast | Forecast UC)



Source: CBRE Research, RRF, Q2 2024

Prime rents on the Brno office market slightly increased and range between 17.00 - 18.00 EUR/sq m/month in Q2 2025.

As of Q2 2025, the total amount of space under construction was 103,120 sq m in ten buildings. Ponávka A4 (16,800 sqm), and Nová Zbrojovka D4 (10,500) being the largest. There are 6 projects, scheduled for delivery by the end of the 2026 with a combined total around 51,900 sq m and only Cerit III project scheduled for delivery by the end of the 2025.

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.

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H1 2025

REPORT FIGURES

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