FIGURES | OFFICE | Q2 2026

Poland - TriCity

Key Performance Indicators

Prime Yield	Prime Rent	Average Rent
8,30%	€ 16,00	€ 15,00
Expected Investment Returns	Monthly, per sq m	Monthly, per sq m
Change YonY: 0 bps	**Change YonY: 1,6%**	**Change YonY: 0,8%**

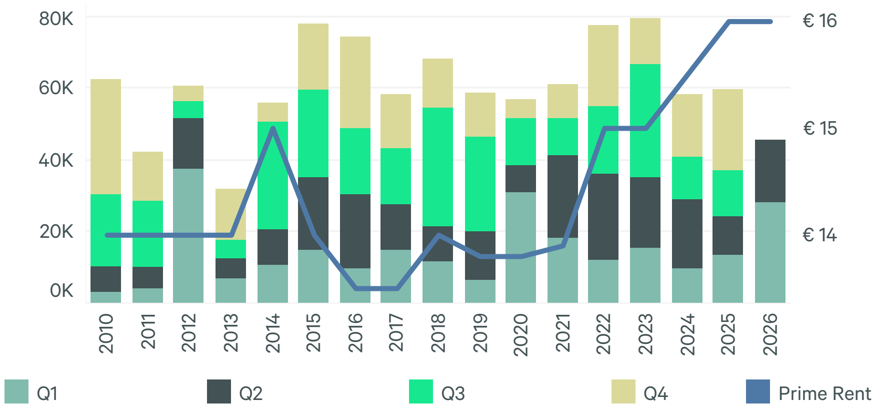
Office Investment Volume	Take Up	Vacancy Rate
€ 346M	17K	10,40%
In Poland during Q2 2026	Square Meter	Percentage of Stock vacant
€ 1.94B (Rolling 12 months)	**46K Year2Date**	**Change YonY: -226 bps**

Completions	Total Stock	(Forecast) Completions
-	1 077K	25K (2026)
Square Meter	Square Meter	Square Meter
13K Year2Date	**965K Occupied Stock**	**11 000 (2027) // 22 171 (2028)**

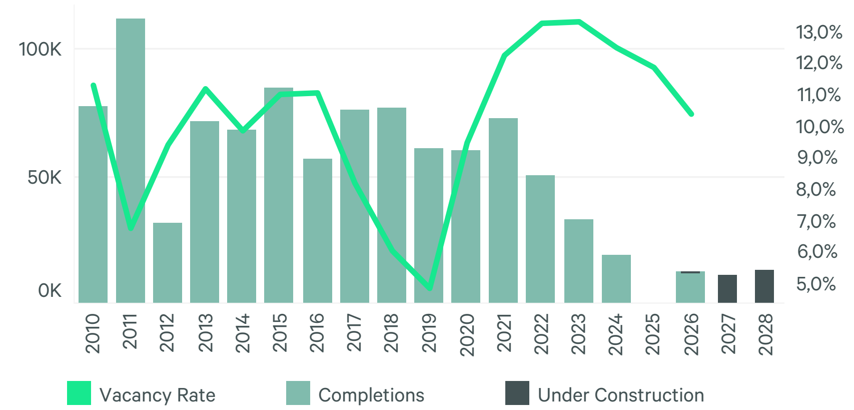
Tricity's modern office stock stood at approximately 1,077,000 sq m at the end of Q2 2026. No new office buildings were completed during the quarter, following the delivery of Punkt in Gdansk in Q1. Development activity remained relatively contained, with around 36,000 sq m under construction. The limited scale of the pipeline continues to reflect a disciplined approach to new supply and should help preserve the market's comparatively healthy balance.

The vacancy rate declined from 10.8% at the end of March to 10.4% in Q2, while the volume of available office space fell to approximately 112,000 sq m. This further improvement confirms Tricity's position as one of Poland's tightest regional office markets. With no new supply introduced during the quarter, ongoing tenant activity supported the absorption of existing availability. Occupier interest remains focused on modern, well-connected buildings.

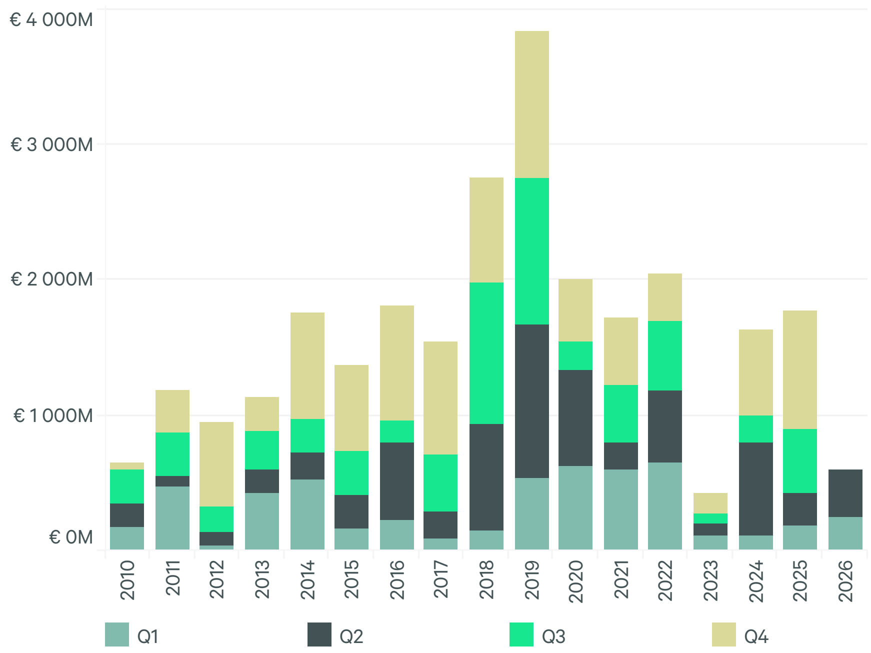
Market Trend (Take-Up | Prime Rent)



Development Activity (Completions | Vacancy Rate)



Poland Office Investment Volumes



Note: 2026 annual numbers till 30.06.2026

Leasing activity reached approximately 20,600 sq m in Q2, bringing first-half take-up to around 70,600 sq m. Although the quarterly volume was lower than the strong result recorded at the beginning of the year, the structure of demand remained encouraging. New leases accounted for 74% of take-up, while renewals represented 16% and expansions contributed 10%. This marks a clear shift from the more evenly balanced structure seen in Q1 and indicates that occupiers continued to make fresh location decisions despite a more moderate overall transaction volume.

IT products and services were the leading source of demand in Q2, generating approximately 50% of take-up. Manufacturing followed with 14%, while construction and development companies accounted for 10%.

Prime headline rents remained stable at up to EUR 16.00 per sq m/month at the end of Q2 2026. Pricing in the best-performing office schemes continues to be supported by limited availability of high-quality space and sustained occupier demand for modern, well-located buildings.

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