Poland - Katowice

Key Performance Indicators

Prime Yield
8,70%
Expected Investment Returns
Change YonY: 145 bps

Prime Rent
€ 14,50
Monthly, per sq m
Change YonY: 0,0%

Average Rent
€ 13,60
Monthly, per sq m
Change YonY: -2,9%

Office Investment Volume
€ 9M
In Katowice during Q2 2026
€ 29M (Rolling 12 months)

Take Up
8K
Square Meter
17K Year2Date

Vacancy Rate
22,21%
Percentage of Stock vacant
Change YonY: -52 bps

Completions
3K
Square Meter
3K Year2Date

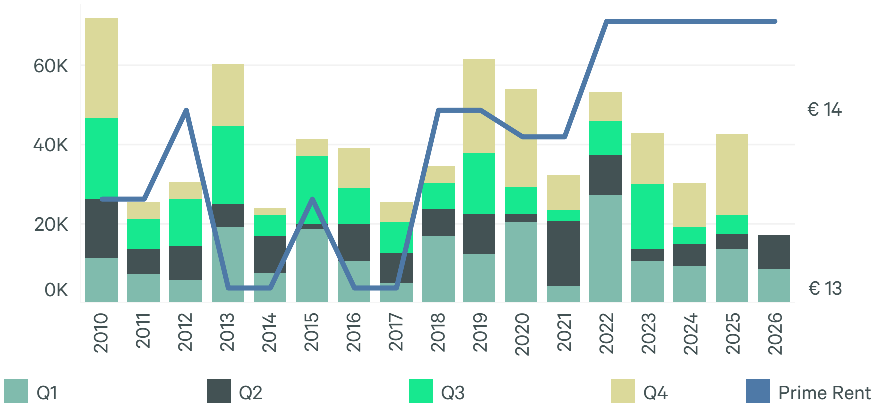
Total Stock
728K
Square Meter
566K Occupied Stock

(Forecast) Completions
3K (2026)
Square Meter
3 316 (2027) // 8 300 (2028)

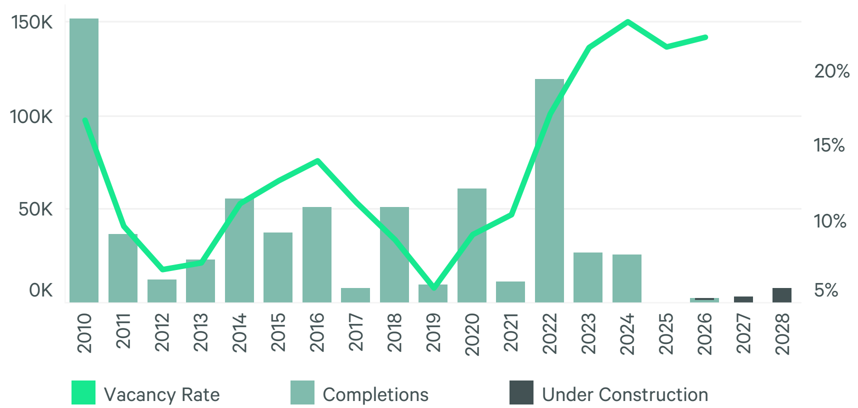
Katowice's modern office stock stood at approximately 728,100 sq m at the end of Q2 2026. The quarter saw the completion of Chorzowska 111, which added around 2,700 sq m to the market. At the same time, adjustments to the monitored office base, related to buildings intended for conversion to other uses, resulted in a net quarter-on-quarter reduction in total stock. Development activity remained limited, with only a small volume of office space progressing through the pipeline, as developers continued to take a cautious approach to new projects.

The vacancy rate remained broadly stable at 22.2%, compared with 22.1% at the end of March. The volume of available office space declined slightly to approximately 161,700 sq m. Despite the marginal improvement, Katowice continued to record one of the highest vacancy levels among Poland's regional office markets. The combination of limited new development and gradual adjustments to the existing office base should help restrict further increases in availability, although the absorption of vacant space is likely to remain gradual.

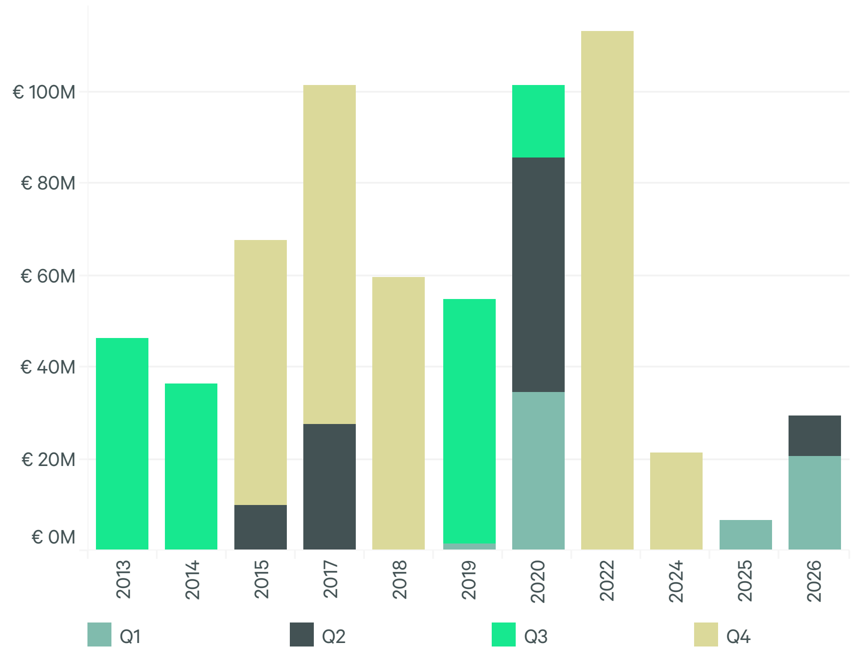
Market Trend (Take-Up | Prime Rent)



Development Activity (Completions | Vacancy Rate)



Katowice Office Investment Volumes



Note: 2026 annual numbers till 30.06.2026

Leasing activity strengthened significantly in Q2, reaching approximately 25,100 sq m and bringing first-half take-up to around 35,400 sq m. Renewals dominated the quarterly result, accounting for 67% of demand, while new leases represented 30% and expansions contributed 3%. The largest transactions included Keywords Studios' 6,600 sq m renewal in Global Office Park A1, Honeywell's renewal of approximately 5,000 sq m in Face2Face A and HireRight Poland's 3,200 sq m renewal in Silesia Star A. IT products and services formed the largest source of demand in Q2, generating 29% of take-up, followed by manufacturing with 24% and business services with 13%.

Prime headline rents remained unchanged at EUR 14.50 per sq m/month at the end of Q2 2026. Headline rents in secondary locations continued to stand at around EUR 13.50 per sq m/month, reflecting persistent competition for occupiers in older and less well-positioned buildings. With vacancy remaining elevated, landlords continue to use rent-free periods, fit-out contributions and other incentives to improve the competitiveness of their offers while seeking to maintain headline rental levels.

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