

	CBD					DECENTRALISED	PERIPHERY	TOTAL	
	City Centre	North	South	Leopold	Louise				
STOCK & SUPPLY	Stock (million sq.m)	2.33	1.75	0.54	3.46	0,66	2,41	2,21	13,36
	<i>Change Q-on-Q</i>								
	Vacancy rate	3.70 % →	5,70 % ↗	2.80 % →	2.20 % →	6.70 % ↗	10.80 % ↗	16.80 % ↘	7.10 % →
DEMAND	Speculative Pipeline Q2-Q42024 (sq.m)	-	4,200	22,400	21,500	23,300	7,300	10,800	89,500
	<i>Change Q-on-Q</i>								
	Take-up Q1 (sq.m)	19,200 ↘	- ↘	- ↘	2,700 ↘	5,400 ↘	7,700 ↘	9,300 ↘	44,300 ↘
RENTAL VALUES	Private (sq.m)	10,000	-	-	2,700	4,400	7,700	9,000	33,800
	Public (sq.m)	9,200	-	-	-	1,000	-	300	10,500
	<i>Change Y-on-Y</i>								
INVEST	Take-up FY 2024(sq.m)	19,200 ↘	- ↘	- ↘	2,700 ↘	5,400 ↘	7,700 ↘	9,300 ↘	44,300 ↘
	<i>Change Q-on-Q</i>								
	Prime Headline Rent (per annum)	350 ↗	300 →	195 →	350 →	340 →	200 →	185 →	350 →
INVEST	Average rent (per annum)	224	210	165	230	210	155	135	191
	Average rent-free period by year of lease contract (per months)	1.5-2	2 - 2.5	1.5 -2	1.5 -2	2 - 3	2.5 - 3.5	1.5 - 3	1.5 - 3,5
	<i>Future Trend</i>								
INVEST	Prime yield (6/9 yr leases)	5.25 →	5.50% →	5.70% →	5.25% →	5.40% →	7.00% →	7.50% →	5.25 →
	Prime yield (> 9yr leases)	4.70 →	4,75% →	5,20 →	4.70% →	4.75% →	6.00 →	6.50% →	4.70% →

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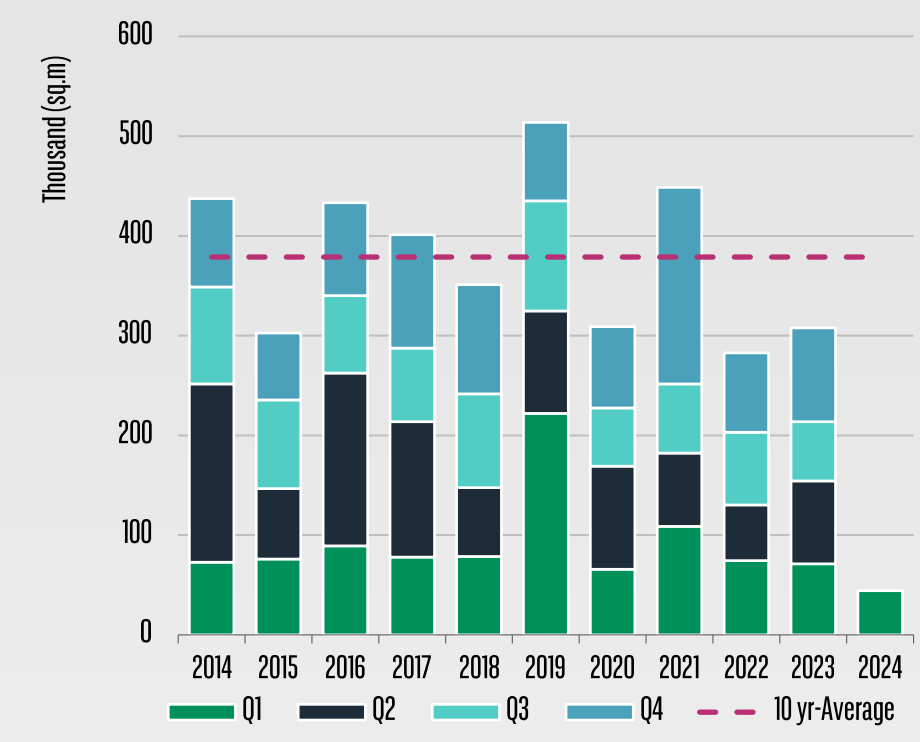


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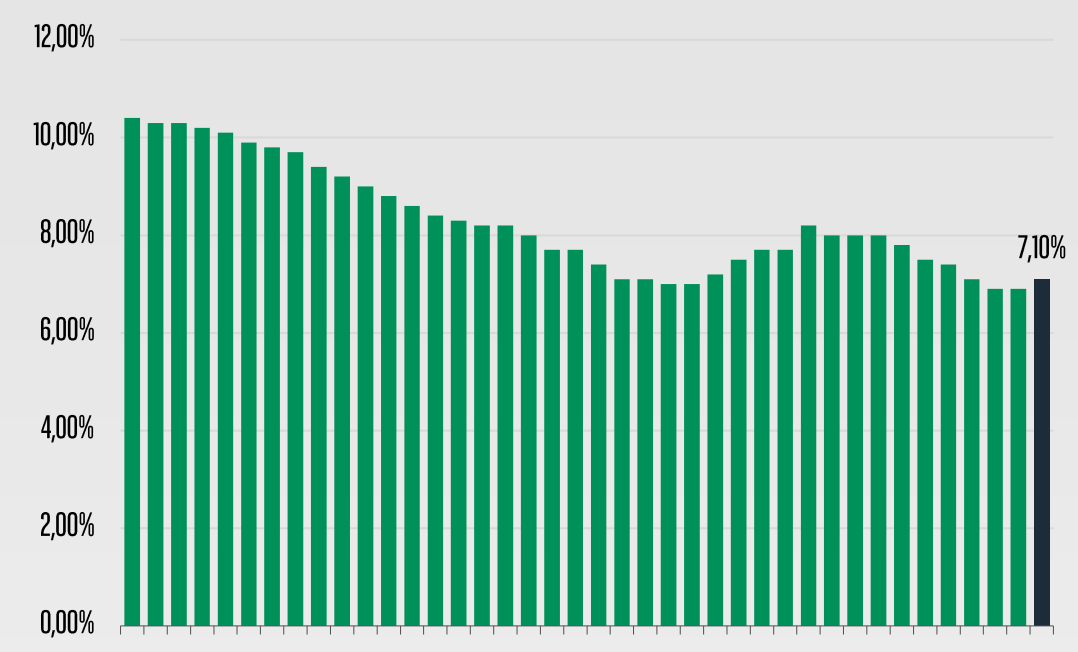
BNP Paribas Real Estate: Simplified joint stock company with capital of € 383 071 696 € - 692 012 180 RCS Nanterre.

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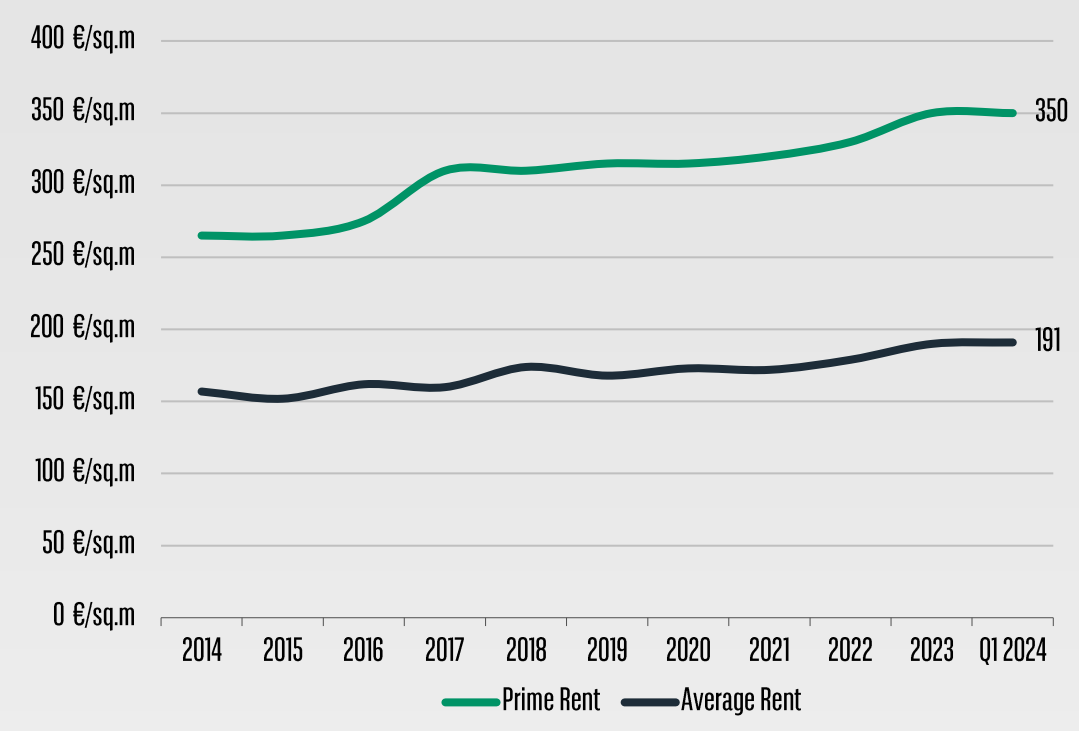
Take-up



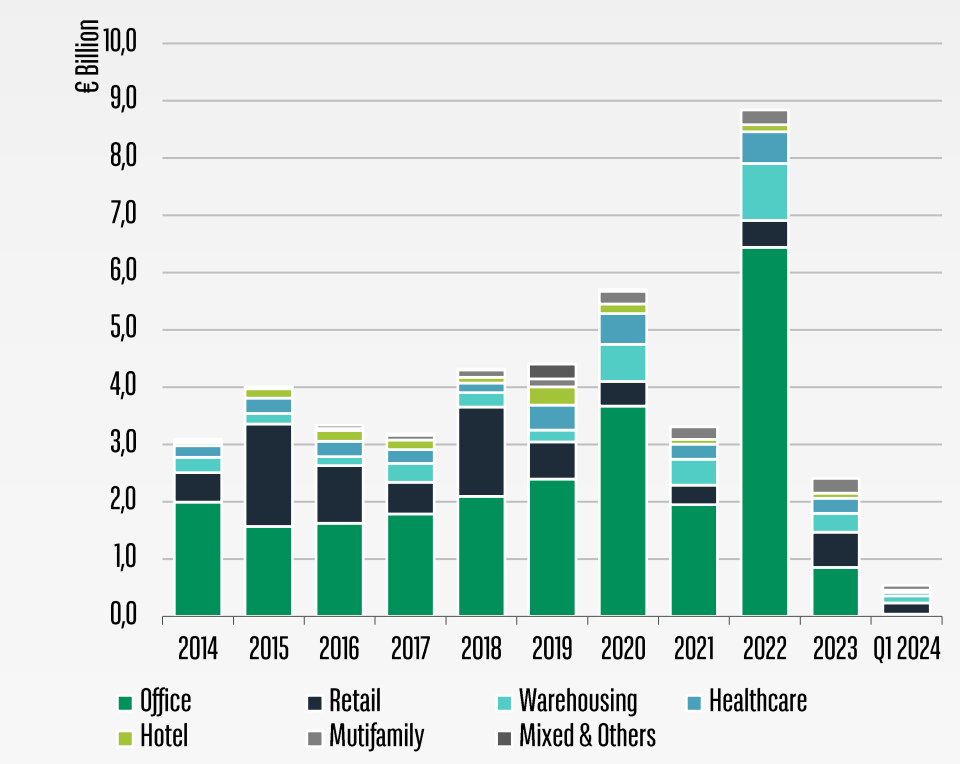
Vacancy rate



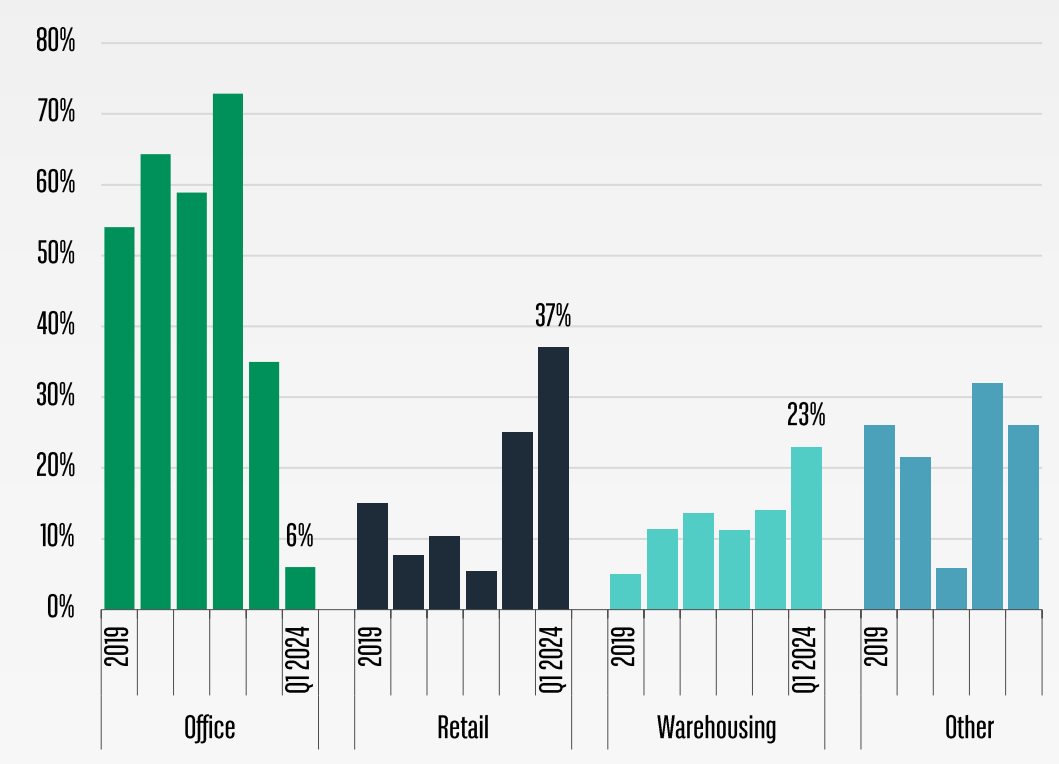
Rental values



Belgian Investment Volume



Investment Volume By Asset



Yields

