

	CBD					DECENTRALISED	PERIPHERY	TOTAL	
	City Centre	North	South	Leopold	Louise				
STOCK & SUPPLY	Stock (million sq.m)	2.32	1.75	0.54	3.47	0,66	2,40	2,22	13,36
	Change Q-on-Q								
	Vacancy rate	4.20 % ↗	5.90 % ↗	7.80 % ↗	2.40 % ↗	9.30 % ↗	11.60 % ↗	18.10 % ↗	8.00 % ↗
DEMAND	Speculative Pipeline H2 2024 (sq.m)	-	4,200	-	-	4,400	-	10,900	19,500
	Change Q-on-Q								
	Take-up Q2 (sq.m)	37,300 ↗	1,400 ↗	- →	41,200 ↗	2,700 ↘	25,100 ↗	12,500 ↗	120,200 ↗
RENTAL VALUES	Private (sq.m)	37,300	1,400	-	3,100	2,700	5,300	12,500	62,300
	Public (sq.m)	-	-	-	38,100	-	19,800	-	57,900
	Change Y-on-Y								
INVEST	Take-up FY 2024(sq.m)	56,500 ↗	1,400 ↘	- →	43,900 ↗	8,100 ↘	32,800 ↗	21,800 ↘	164,500 ↗
	Change Q-on-Q								
	Prime Headline Rent (per annum)	350 →	300 →	195 →	390 ↗	340 →	200 →	185 →	390 ↗
INVEST	Average rent (per annum)	243	220	165	237	217	170	137	200
	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
	Future Trend								
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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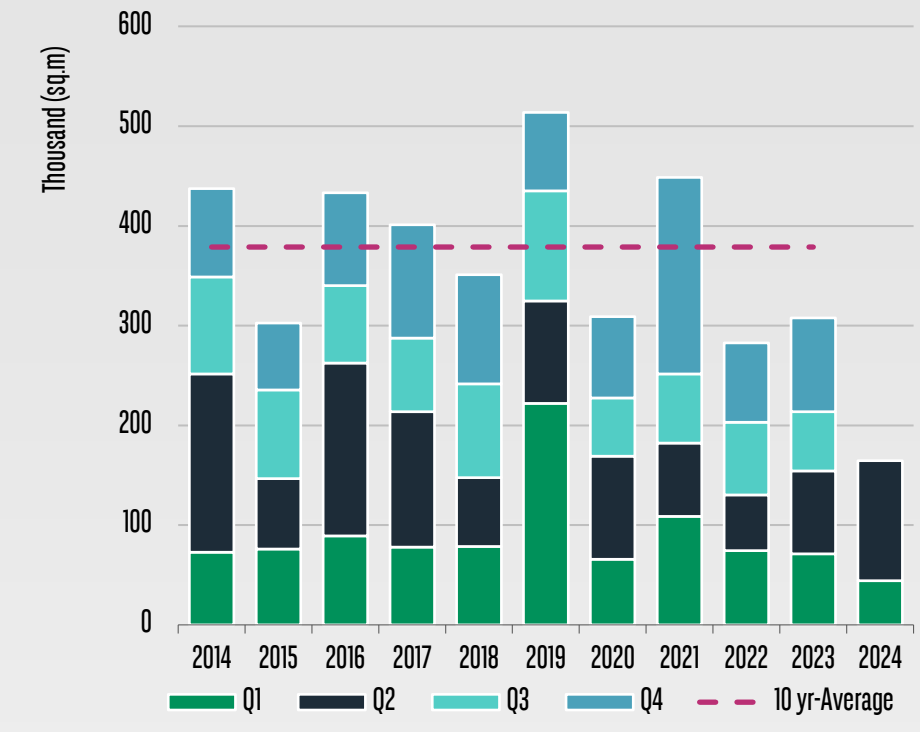


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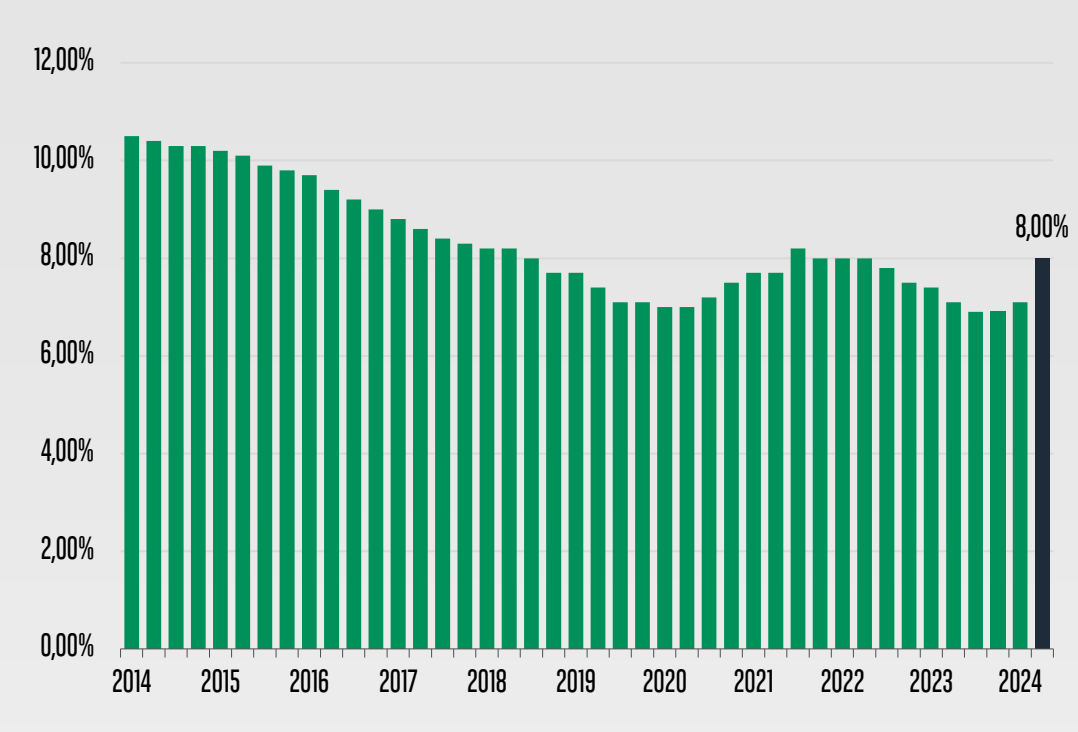
BNP Paribas Real Estate: Simplified joint stock company with capital of € 383 071 696 € - 692 012 180 RCS Nanterre .

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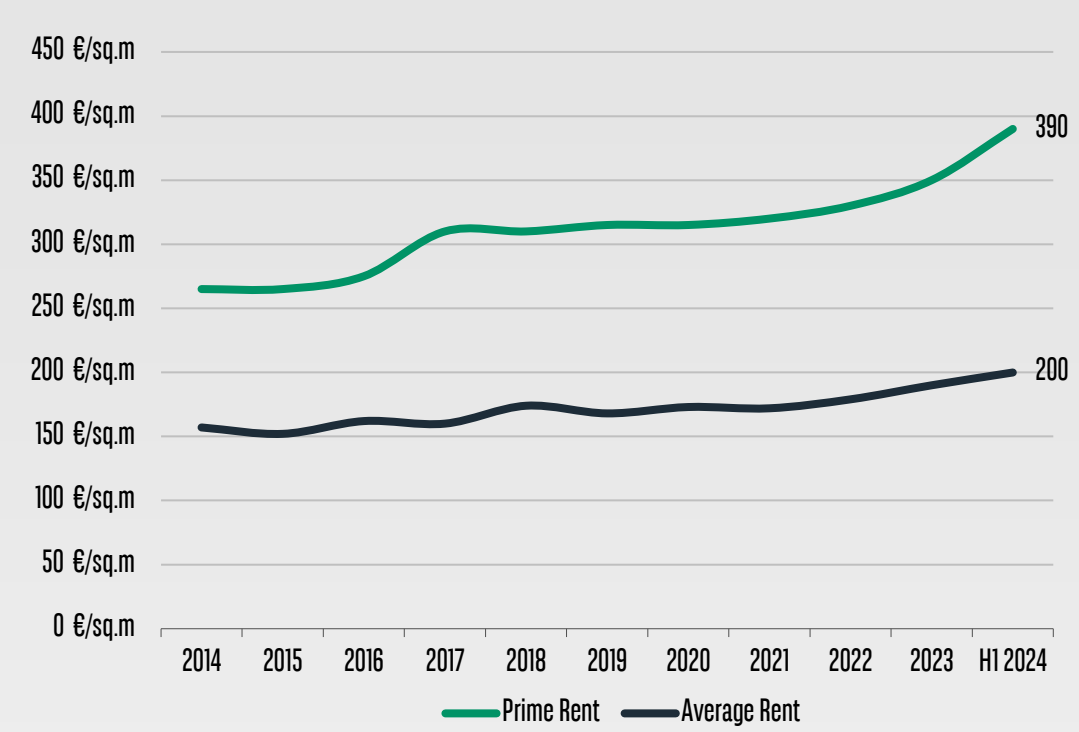
Take-up



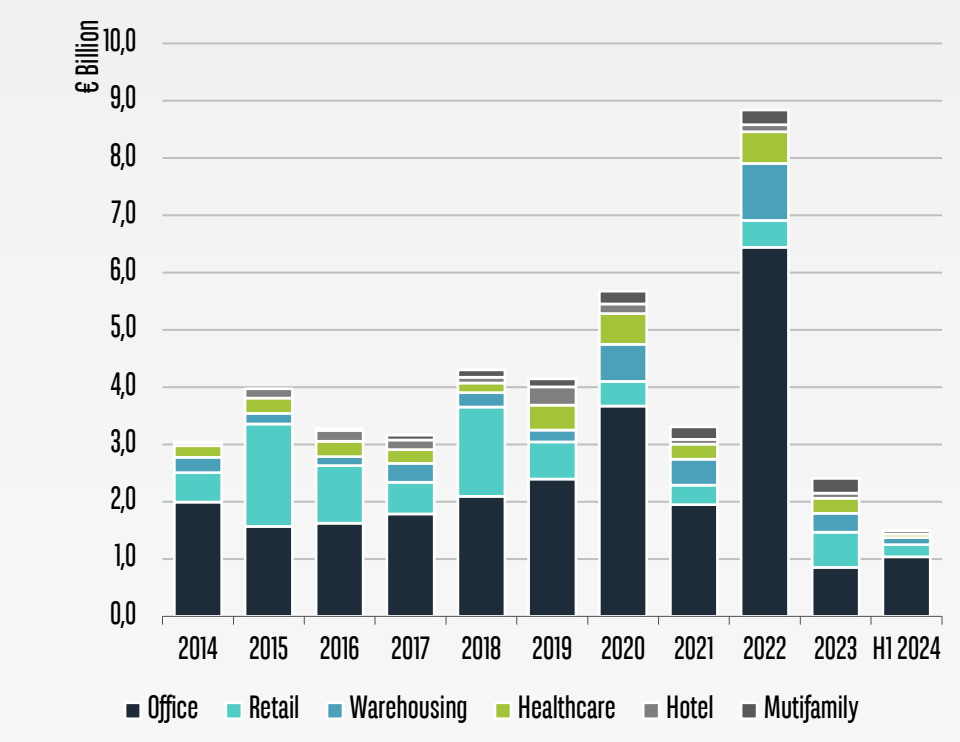
Vacancy rate



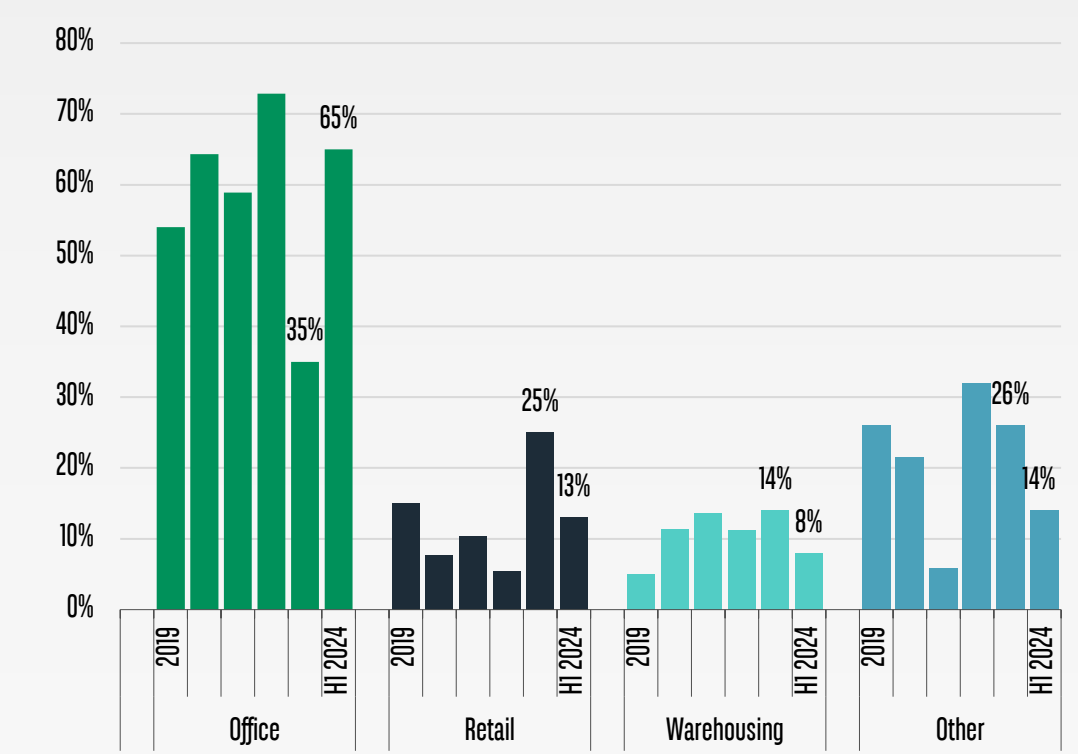
Rental values



Belgian Investment Volume



Investment Volume By Asset



Yields

