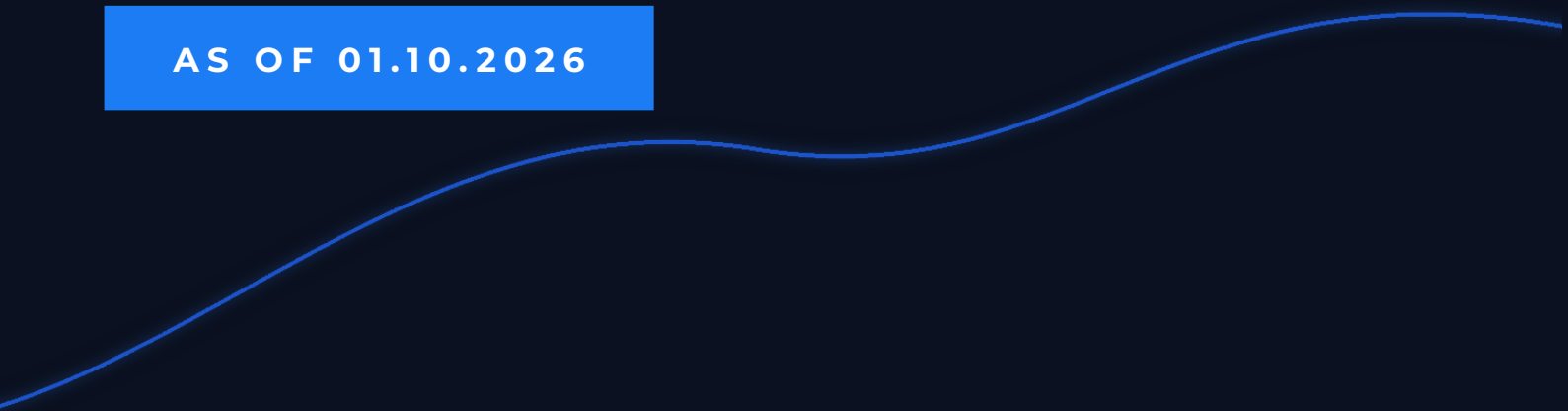


MARKET REPORT · OFFICES

KATOWICE OFFICE MARKET

Rents, vacancy, supply and subleases in Katowice's modern office stock from **the tenant's perspective.**



AS OF 01.10.2026

783k

M² OF STOCK

18.98%

VACANCY

€12.40

AVG. RENT / M² / MONTH

10k

M² UNDER CONSTRUCTION

01 · EXECUTIVE SUMMARY

148,000 M² AVAILABLE, RENTS UP 2.8% Y/Y

The vacancy rate stands at **18.98%**. The average asking rent is **€12.40/m²**, 2.8% higher than a year ago.

MODERN STOCK 782,540 m² 85 buildings · 36 class A / 49 class B	VACANCY RATE 18.98% 148,492 m² available	AVERAGE ASKING RENT €12.40/m² +2.8% year on year
UNDER CONSTRUCTION 10,200 m² 3 schemes in Śródmieście and Załęże	SUBLEASES 9,714 m² hidden supply · mainly the North district	SERVICE CHARGE PLN 20.99/m² median of quoted advances

1. AVAILABILITY: 148,000 M²

Alongside Łódź and Wrocław, Katowice offers high office availability, giving tenants plenty of options to find quality space at rents clearly lower than in regional cities such as Kraków or Poznań.

2. RENTS: €12.40/M², +2.8% Y/Y

The average asking rate is €0.34/m² higher than a year ago (€12.06/m²) and €0.25/m² lower than in Q2. Top asking rents are €14.50-16.00/m².

3. PLENTY OF CHOICE

Vacancy in the North district exceeds 15%, while in the City centre district one in four square metres is vacant.

4. SUPPLY: 10,200 M² UNDER CONSTRUCTION

Under construction are IASO Core Business Hub D and S (4,500 and 3,500 m², due in 2027) and Park Technologiczny Kleofas (2,200 m²). CH111 and Korfantego 193B were delivered in 2026.

WHAT DOES IT MEAN FOR TENANTS?

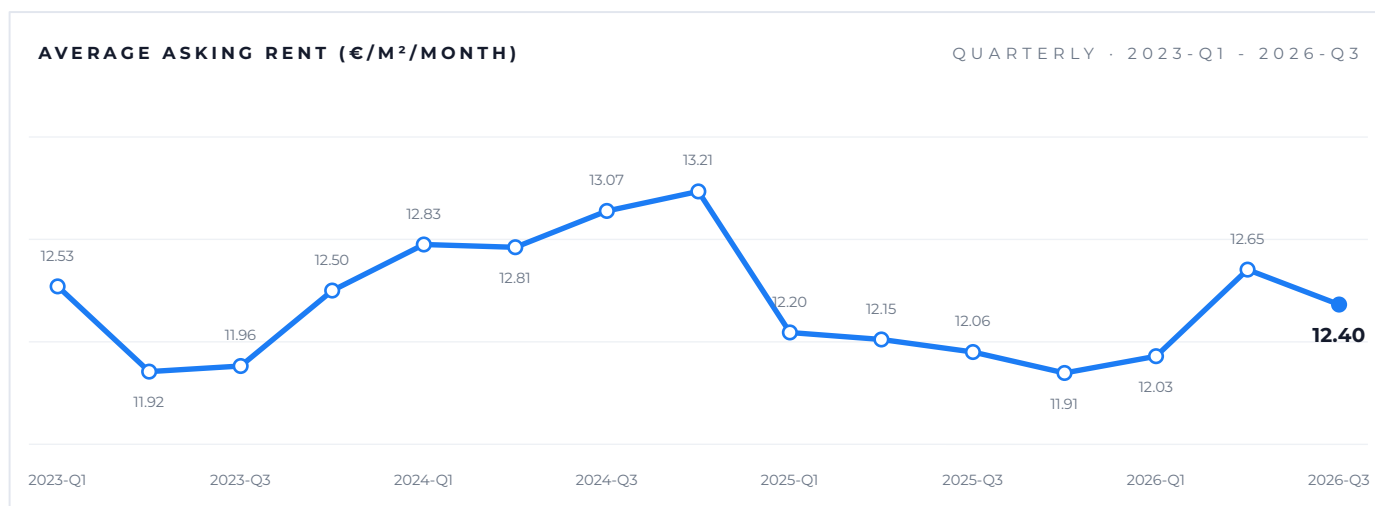
With vacancy close to **19%** and an average asking rent of €12.40/m², tenants in Katowice hold a strong negotiating position. Leases expiring in **2027-2028** are worth reopening 18-24 months in advance, using the wide choice of available space, above all in the City centre district, to secure an attractive incentive package.



02 · RENTS

€12.40 - RENTS UP 2.8% YEAR ON YEAR

The average asking rent in Q3 is €12.40/m². Year on year the rate is up €0.34/m² (+2.8%), and down €0.25/m² compared with Q2. It remains below the end-2024 level (€13.21/m²).



HIGHEST ASKING RENTS

BUILDING	€/M ²	VACANCY	AVAILABLE M ²
.KTW II	15.50	7.3%	2,931
CRAFT	15.00	36.3%	9,683
DL TOWER	15.00	19.3%	3,180
DL PIANO / DL CENTER POINT II	15.00	9.6%	1,138
Carbon Office	15.00	1.8%	153
Global Office Park - A1	14.95	4.8%	5,073
Global Office Park - A2	14.95	28.7%	7,073
.KTW I	14.95	8.3%	1,515
Młyńska 6	14.50	12.5%	325

ANALYST COMMENTARY

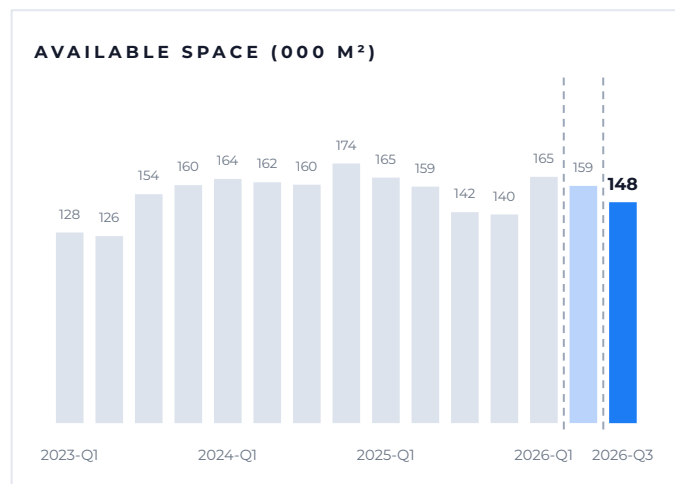
The average rate in the North district (€12.69/m²) is €0.61/m² higher than in the City centre district (€12.08/m²); in the West district it is €12.59/m². Differences between locations are small. The cost of leasing is driven mainly by building standard, and top asking rents reach €16.00/m². The median service charge is PLN 20.99/m²: PLN 21.00/m² in the North and West districts and PLN 19.80/m² in the City centre.

BROOKFIELD PARTNERS PERSPECTIVE

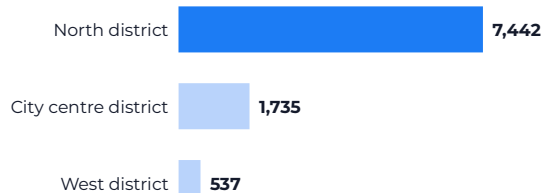
The asking rate is only the starting point. The real effective cost (NER), after rent-free periods, fit-out contributions and other incentives, is lower than the headline figures. The higher a building's vacancy, the more room for negotiation. In Katowice this applies above all to the City centre district, where one in four square metres is vacant.

03 · VACANCY AND AVAILABILITY

HIGH OFFICE AVAILABILITY, VACANCY AT 18.98%



SUBLEASES - HIDDEN SUPPLY (M²)



The 9,700 m² offered for sublease is concentrated mainly in the North district (77% of the volume), a signal of where tenants are reducing their footprint.

LARGEST CONCENTRATIONS OF VACANT SPACE

01	ECOCITY 1 and 2 City centre district · class A · €14.00/m ²	15,420 m ²
02	Katowice Business Point City centre district · class B · €13.50/m ²	11,707 m ²
03	CRAFT City centre district · class A · €15.00/m ²	9,683 m ²
04	A4 Business Park I North district · class A · €13.50/m ²	8,100 m ²
05	Global Office Park - A2 North district · class A · €14.95/m ²	7,073 m ²

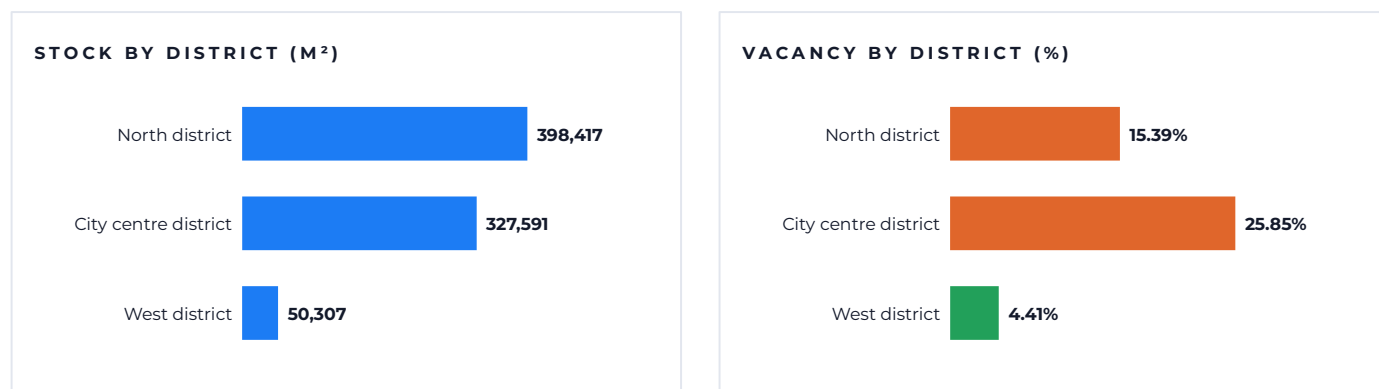
BROOKFIELD PARTNERS PERSPECTIVE

Real supply for a tenant = vacancy + subleases + space released within 12 months. Vacancy and subleases alone total c. 158,000 m², 6.5% more than official availability.

04 · DISTRICTS

CITY CENTRE AT 25.85%, WEST DISTRICT AT 4.41%

The North and City centre districts hold 93% of the city's stock. In the North district, Katowice's largest office area (398,000 m²), vacancy stands at 15.39%, and in the City centre district at 25.85%. In the West district vacancy has fallen to 4.41%, with an average rent of €12.59/m².



DISTRICT	BUILDINGS	STOCK (M ²)	VACANCY	VACANT (M ²)	SUBLEASE (M ²)	RENT (€/M ²)	SERV. CHARGE (PLN)
North district	44	398,417	15.39%	61,321	7,442	12.69	21.00
City centre district	32	327,591	25.85%	84,673	1,735	12.08	19.80
West district	8	50,307	4.41%	2,218	537	12.59	21.00

CLASS C · OUTSIDE THE MODERN OFFICE STOCK

Beyond the modern stock, Katowice has 109,300 m² of class C space. Low vacancy (5.98%) and the lowest rents in the city (€9.50/m²) make it an option for tenants whose priority is cost.

CLASS C - STOCK 109,251 m² 23 buildings · 12.30% of the city market	CLASS C VACANCY 5.98% long-term tenants, low turnover	CLASS C AVERAGE RENT €9.50/m² lowest rents in the city
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05 · SUPPLY AND OUTLOOK

10,200 M² UNDER CONSTRUCTION - THREE SCHEMES

Under construction are two buildings of the IASO Core Business Hub complex in Śródmieście, D (4,500 m²) and S (3,500 m²), both due in 2027, and Park Technologiczny Kleofas in Załęże (2,200 m²). Delivered in 2026 were CH111 in Dąb (2,500 m²) and Korfantego 193B in Wełnowiec (2,180 m²).

UNDER CONSTRUCTION

BUILDING	LOCATION	M ²	DELIVERY
IASO Core Business Hub D	Śródmieście · A	4,500	2027
IASO Core Business Hub S	Śródmieście · A	3,500	2027
Park Technologiczny Kleofas	Załęże · A	2,200	TBC

RECENTLY DELIVERED

BUILDING	LOCATION	M ²	YEAR
CH111	Dąb · A	2,500	2026
Korfantego 193B	Wełnowiec · B	2,180	2026
ECOCITY 1 and 2	Wełnowiec · A	15,420	2025

BROOKFIELD PARTNERS OUTLOOK · Q4 2026

With limited new supply (10,200 m² under construction) we expect further gradual absorption of vacant space, while in the City centre district, where availability exceeds 25%, the incentive package will remain the main currency of negotiation. For tenants with leases expiring by 2028 we recommend running **a renegotiation and a relocation scenario** in parallel. As an adviser acting exclusively for tenants we do not represent landlords. Our recommendations are free of any conflict of interest.

METHODOLOGY AND DISCLAIMER

Based on OfficeList Pulse data, Brookfield Partners' proprietary analytics platform monitoring 85 modern office buildings (class A and B) in Katowice; as of 01.10.2026. Rents: average asking rates for available space; service charges: median of quoted advances. Indicators refer to 782,500 m² in 85 buildings. This material is for information only and does not constitute an offer within the meaning of the law.

LET'S TALK ABOUT YOUR LEASE

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