

	CBD						DECENTRALISED	PERIPHERY	TOTAL	
	City Centre	North	South	Leopold	Louise					
STOCK & SUPPLY	Stock (million sq.m)	2.32	1.75	0.54	3.46	0,67	2,40	2,22	13,36	
	<i>Change Q-on-Q</i>									
	Vacancy rate	3.9 % ↘	6.0 % ↗	7.8 % →	2.3 % ↘	8.4 % ↘	11.8 % ↗	18.0 % ↘	7.90 % ↘	
DEMAND	Speculative Pipeline Q4 2024 (sq.m)	-	4,200	-	-	4,400	-	-	8,600	
	<i>Change Q-on-Q</i>									
	Take-up Q2 (sq.m)	15,500 ↘	1,800 ↗	1,1000 ↗	16,500 ↘	2,600 ↘	8,300 ↘	18,300 ↗	64,100 ↘	
RENTAL VALUES	Private (sq.m)	8,100	1,200	1,100	6,300	2,600	8,000	18,300	45,600	
	Public (sq.m)	7,400	600	-	10,200	-	300	-	18,400	
	<i>Change Y-on-Y</i>									
INVEST	Take-up FY 2024(sq.m)	71,100 ↗	3,200 ↘	1,100 ↗	60,400 ↗	10,700 ↘	41,600 ↗	40,100 ↘	229,100 ↗	
	<i>Change Q-on-Q</i>									
	Prime Headline Rent (per annum)	350 →	300 →	195 →	400 ↗	340 →	200 →	185 →	400 ↗	
FUTURE TREND	Average rent (per annum)	248	220	165	249	226	153	139	204	
	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% →	

KEEP UP-TO-DATE WITH
BNP PARIBAS REAL ESTATE'S NEWS,
WHEREVER YOU ARE



#BEYONDBUILDINGS

CONTACT DETAILS

Pascal Mikse
Head of Research Belux
pascal.mikse@bnpparibas.com

BNP Paribas Real Estate
Avenue Louise 235
1050 Brussels
+32 2 646 49 49
www.realestate.bnpparibas.be

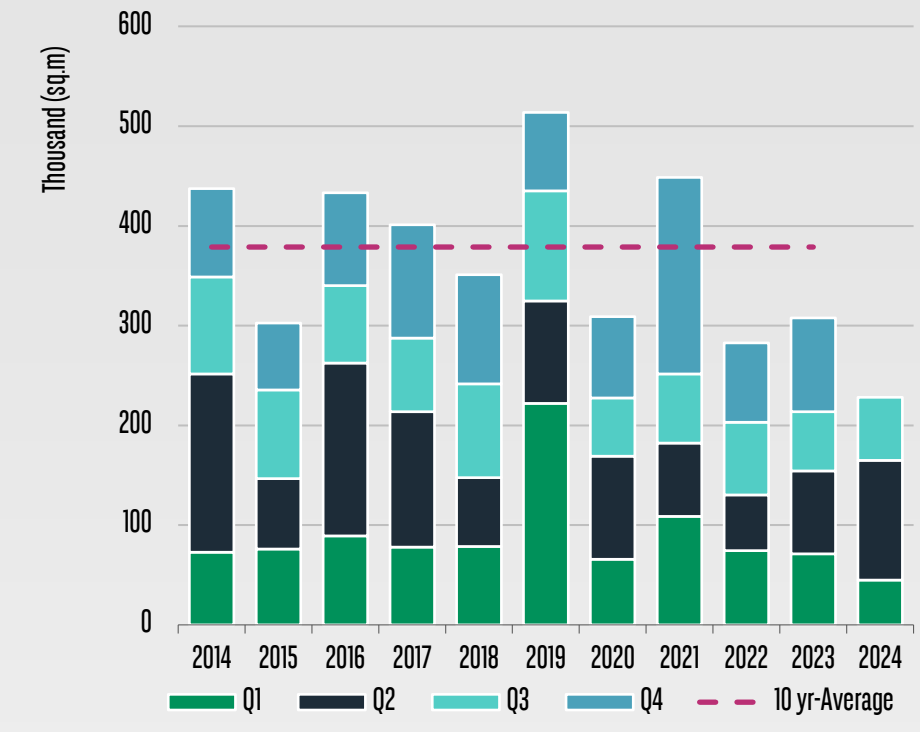


All rights reserved. Dashboard publication protected in its entirety by copyright. No part of this publication may be reproduced, translated, transmitted, or stored in a retrieval system in any form or by any means, without the prior permission in writing of BNP Paribas Real Estate.

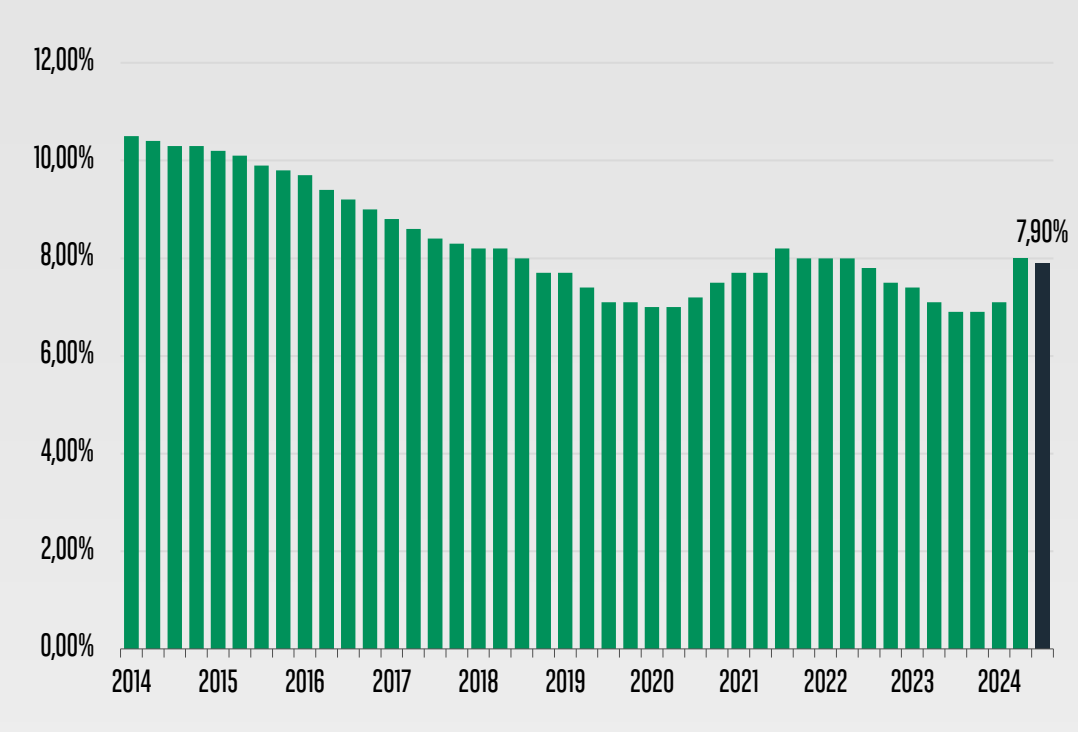
BNP Paribas Real Estate: Simplified joint stock company with capital of € 383 071 696 € - 692 012 180 RCS Nanterre .

Headquarters: 50 Cours de l'Île Seguin - CS 50280 - 92650 - Boulogne Billancourt Cedex. BNP Paribas Real Estate is part of the BNP Paribas Banking Group.

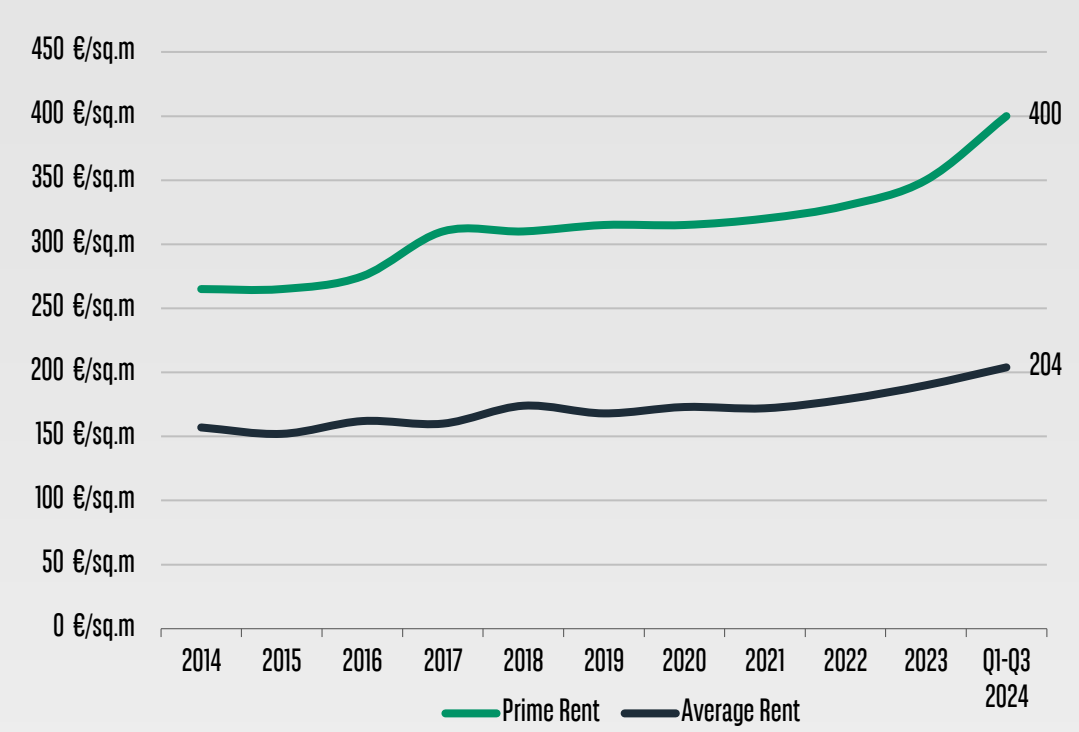
Take-up



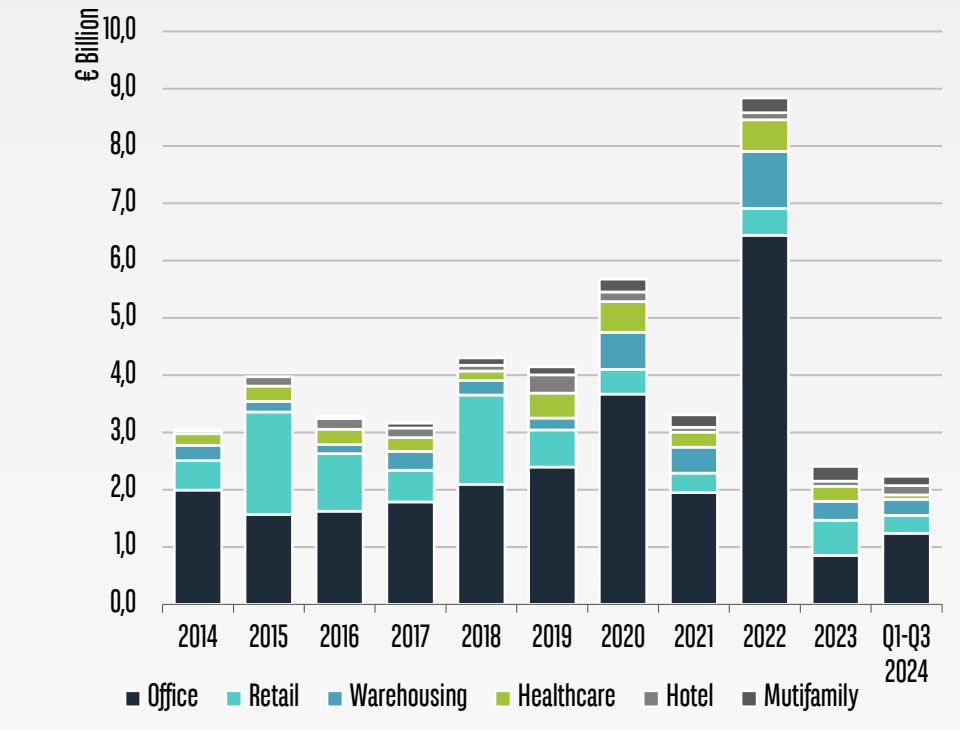
Vacancy rate



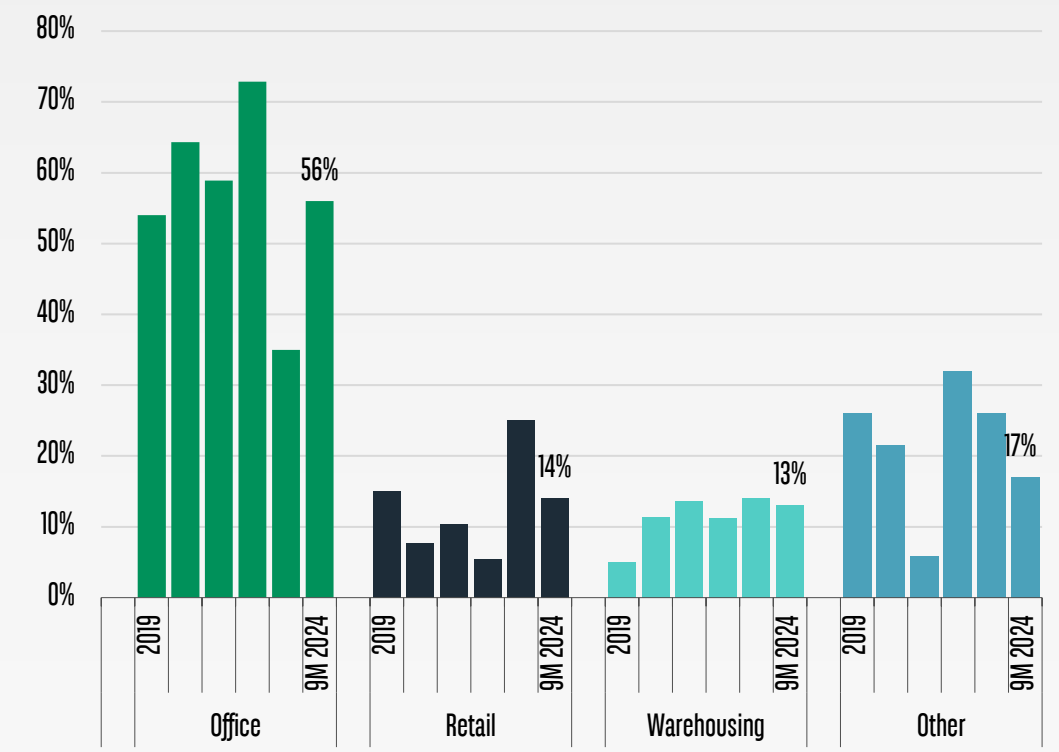
Rental values



Belgian Investment Volume



Investment Volume By Asset



Yields

