



# RealtyCorp Analytics

**Office & Industrial**

**1st Quarter 2025**

(Data Reference: Q4 2024)





# Corporate Offices

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RealtyCorp  
Analytics



# Corporate Office

## City of São Paulo



Escritórios > Visão Geral > Cidade: São Paulo > Perfil/Classe: Mult. > Trimestre: 4T24

17.413.150

Estoque Total (m²)

14.697.232

Ocupação (m²)

2.715.918

Vacância (m²)

15,60%

Taxa de Vacância

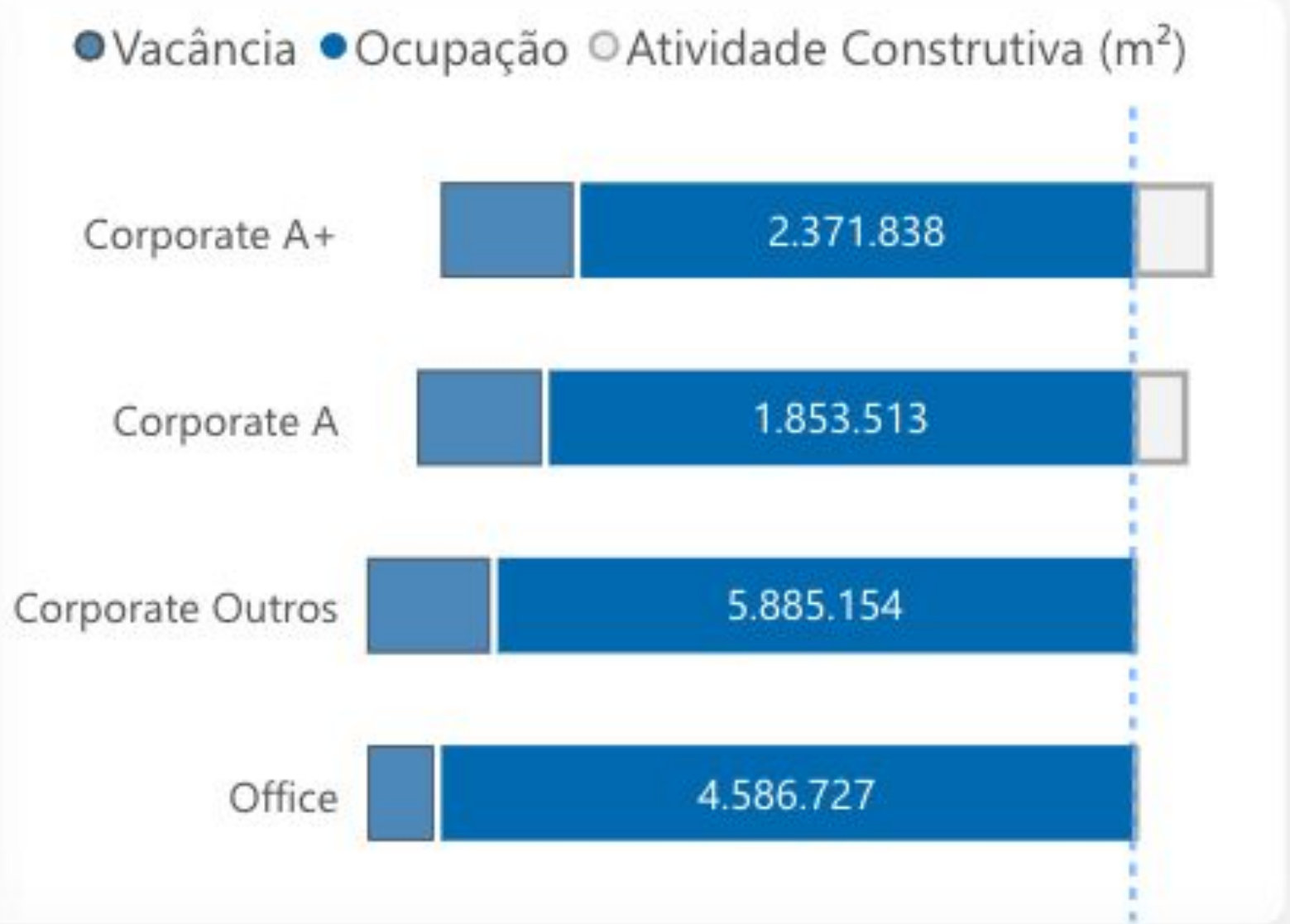
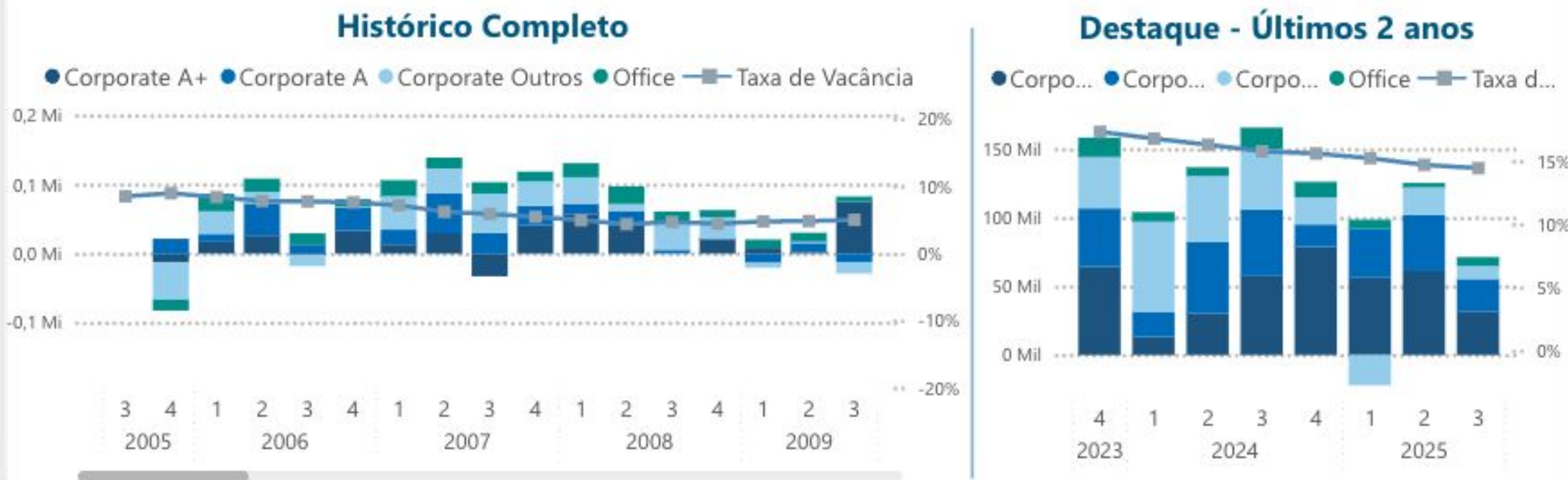
126.161

Absorção Líquida (m²)

316.431

Absorção Bruta (m²)

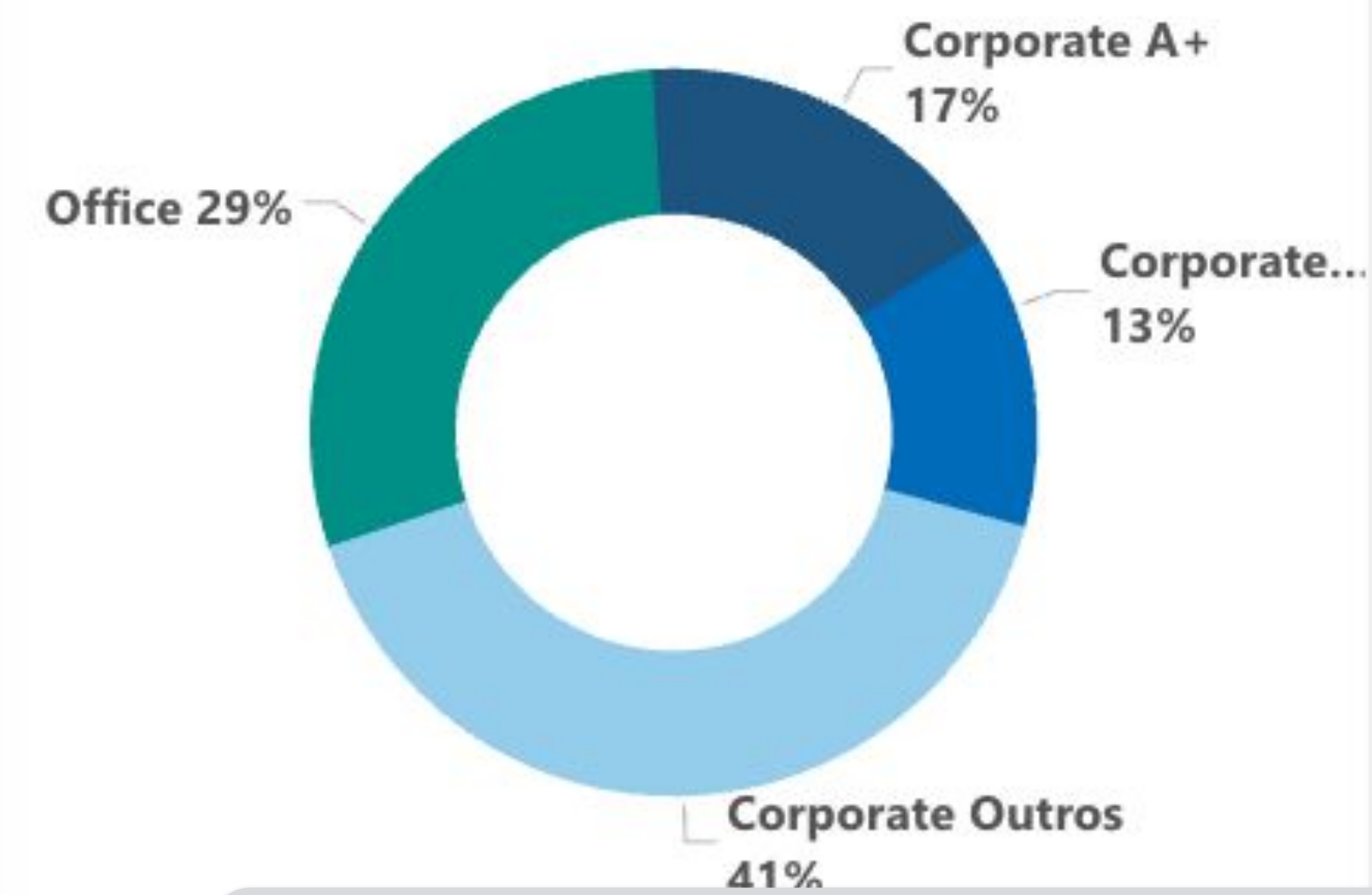
Absorção Líquida (m²) e Taxa de Vacância



Painel de Tendências Corporate

|                                  | A+         |            |   | A          |            |   | Outros    |           |   |
|----------------------------------|------------|------------|---|------------|------------|---|-----------|-----------|---|
|                                  | 3T24       | 4T24       | △ | 3T24       | 4T24       | △ | 3T24      | 4T24      | △ |
| Taxa de Vacância                 | 20,46%     | 20,13%     | ↘ | 18,22%     | 18,45%     | ↗ | 17,35%    | 17,07%    | ↘ |
| Absorção Líquida (m²)            | 57.473     | 78.841     | ↗ | 48.475     | 16.213     | ↘ | 43.915    | 19.740    | ↘ |
| Novo Estoque (m²)                | 52.745     | 86.906     | ↗ | 24.047     | 32.609     | ↗ | 16.728    | 13.243    | ↘ |
| Atividade Construtiva (m²)       | 433.401    | 346.496    | ↘ | 211.032    | 178.423    | ↘ | 70.193    | 56.950    | ↘ |
| Preço de Locação (m²/mês - M.P.) | R\$ 111,02 | R\$ 116,83 | ↗ | R\$ 104,08 | R\$ 110,02 | ↗ | R\$ 54,84 | R\$ 55,50 | ↗ |

Composição - Filtros



[DYNAMIC ANALYTICS DASHBOARD](#)  
Access now by [clicking here](#)

**FILTER:** Corporate Offices City of São Paulo Offices > Overview > City: São Paulo > Profile/Class: Mult. > Quarter: Q4/24

- The city of São Paulo finished the year 2024 with a total stock of 17,413,150 m² considering all classes (Corporate + Office). The market composition continues to be led by the Corporate Others class, representing 41% (7,096,550 m²) of the total, and by the Office segment (commercial suites) with 29% (5,074,236 m²). The high-end stock consolidates 30% of the market, divided between Corporate A+ (17% = 2,969,639 m²) and Corporate A (13% = 2,272,726 m²).
- The 4th quarter confirmed the sector's heating up. The total market (Corporate + Office) registered a positive net absorption of +126,161 m² and a gross absorption of 316,431 m². The absolute highlight was the Corporate A+ class, which led demand with a net absorption of +78,841 m². The other corporate classes also closed in the blue (positive): Corporate Others with +19,740 m² and Corporate A with +16,213 m².
- The vacancy rate for the total universe (Corporate + Office) retreated to 15.60%, totaling 2,715,918 m² of vacant spaces. This retreat occurred even with a significant volume of new stock delivered in the period: 86,906 m² were added in the Corporate A+ class, 32,609 m² in Corporate A, and 13,243 m² in Corporate Others. Strong absorption balanced the new deliveries, ending with vacancy rates of 20.13% for Corporate A+, 18.45% for Corporate A, and 17.07% for Corporate Others.
- The positive scenario drove asking rental values. The average for the Corporate A+ class reached R\$ 116.83/m², Corporate A rose to R\$ 110.02/m², and Corporate Others adjusted to R\$ 55.50/m². The construction pipeline remains robust in the Corporate A+ class, with 346,496 m² under development.

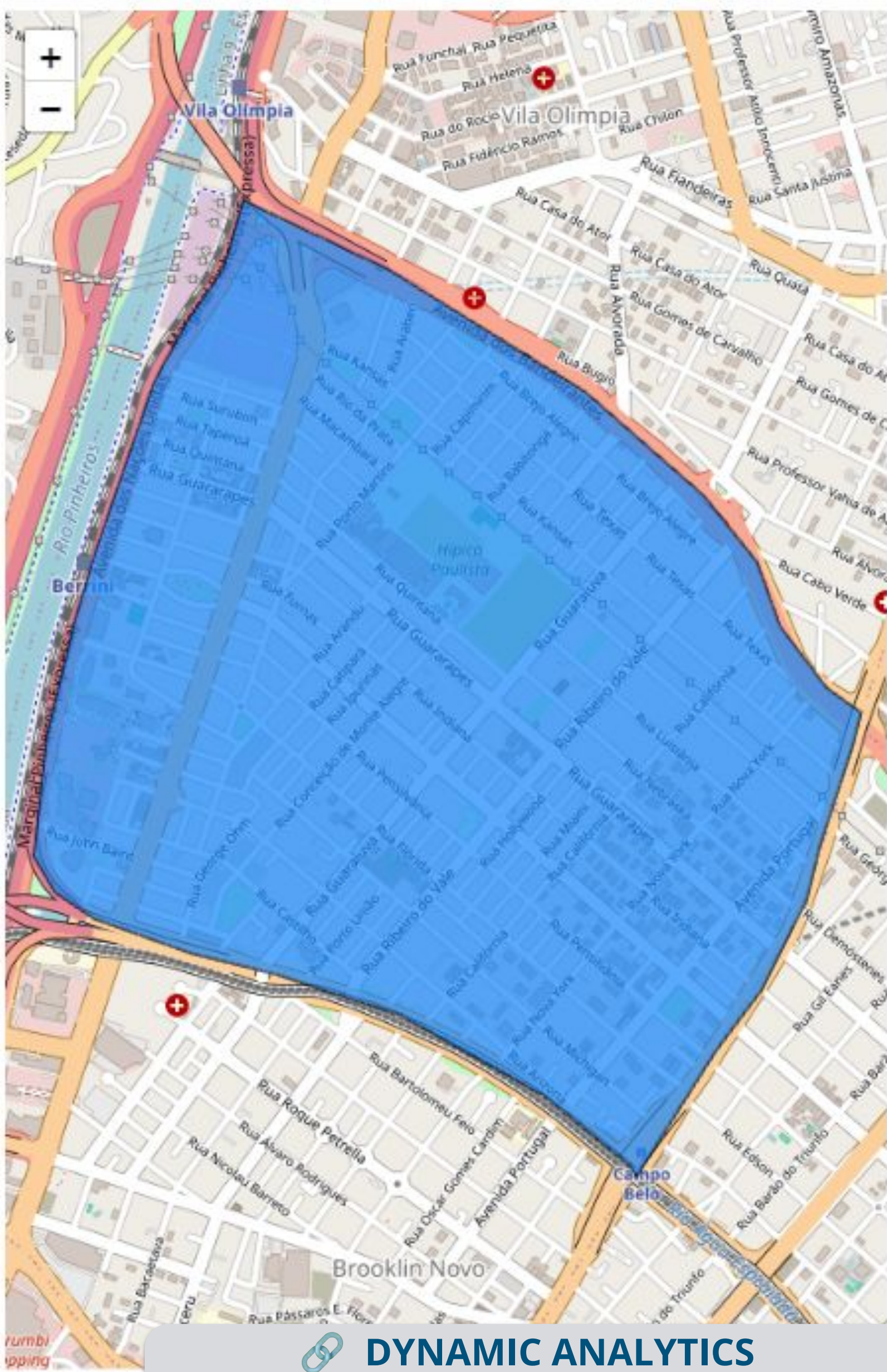
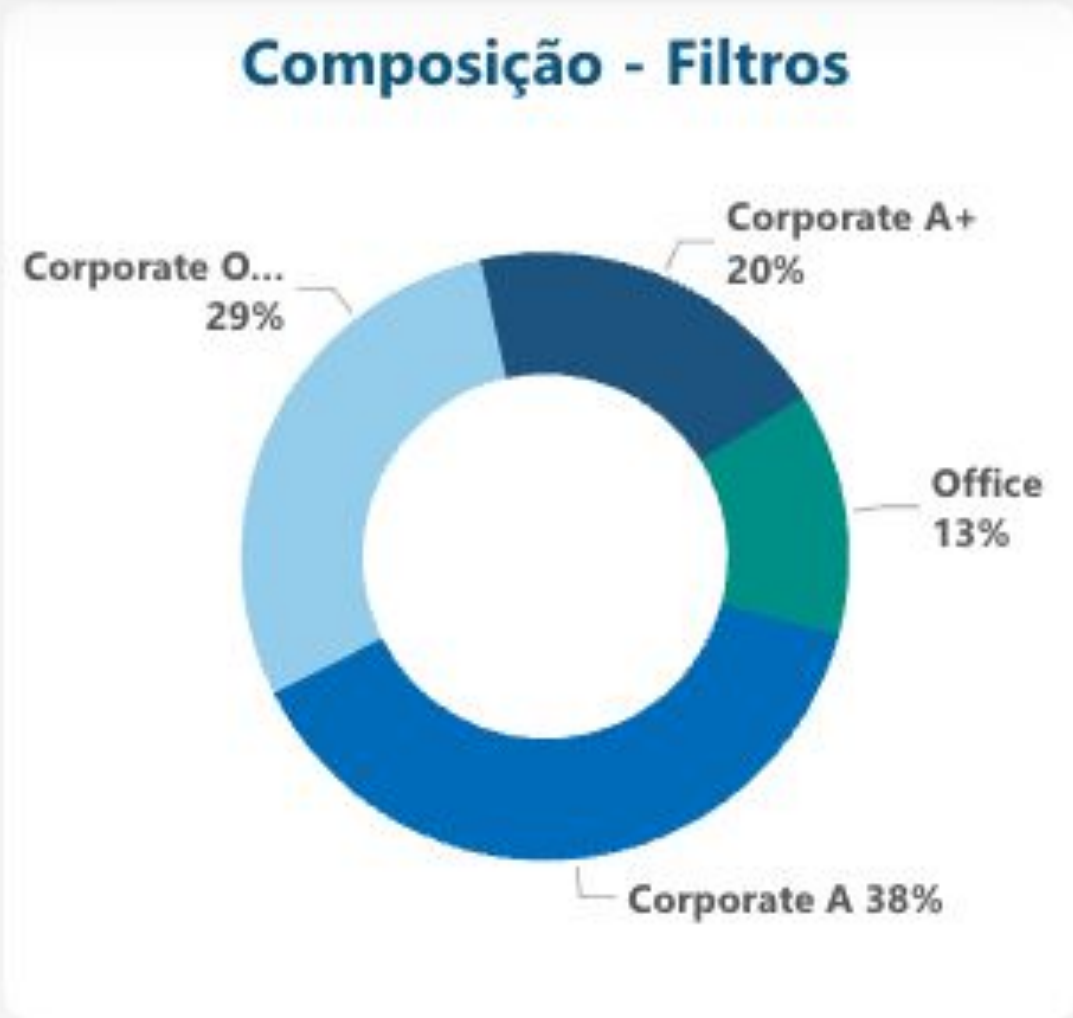
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[2] Statistical data for Alphaville are not accounted for together with the data for the city of São Paulo.  
[3] The statistical data in this Analytics refer to the 4th quarter of 2024 and were consolidated on 12/31/2024.  
[4] RealtyCorp has adopted the new division of regions from Buildings, known as Buildings Regions 2.0. We believe this division is more coherent with the reality of office regions in the cities of São Paulo and Rio de Janeiro.



# Corporate Office Berrini | São Paulo



Escritórios > Detalhes > Cidade: São Paulo > Região: Berrini > Perfil/Classe: Corporate + Office > Trimestre: 4T24



[DYNAMIC ANALYTICS DASHBOARD](#)  
Access now by [clicking here](#)

FILTER: São Paulo Offices > Details > City: São Paulo > Region: Berrini > Profile/Class: Corporate + Office > Quarter: Q4/24

- The Berrini region ended the 4th quarter of 2024 with a total stock of 993,496 m² considering all classes (Corporate + Office). The region's profile is predominantly high and medium standard corporate: the Corporate A class holds the largest share with 38% (381,501 m²), followed by Corporate Others with 29% (288,239 m²) and Corporate A+ with 20% (194,653 m²). The Office segment represents 13% (129,102 m²) of the total.
- The quarter registered positive occupancy activity. The total market (Corporate + Office) presented a net absorption of +16,714 m², resulting from leasing movement (gross absorption) of 27,020 m². There was no delivery of new stock (0 m²) for any class in the period, which helped in the reduction of organic availability.
- The vacancy rate for the total universe (Corporate + Office) closed the year at 16.71%, corresponding to 166,036 m² of vacant spaces. When analyzing absolute availability, the Corporate A class concentrates the largest vacant volume with 76,924 m², followed by Corporate Others with 66,776 m² and the Office segment with 17,021 m².
- The heating up of demand was reflected in rental values. The average asking prices for all classes (Corporate + Office) registered an expressive increase, rising from R\$ 62.40/m²/month in Q3/24 to R\$ 66.88/m²/month in Q4/24, consolidating the appreciation trend in the region.

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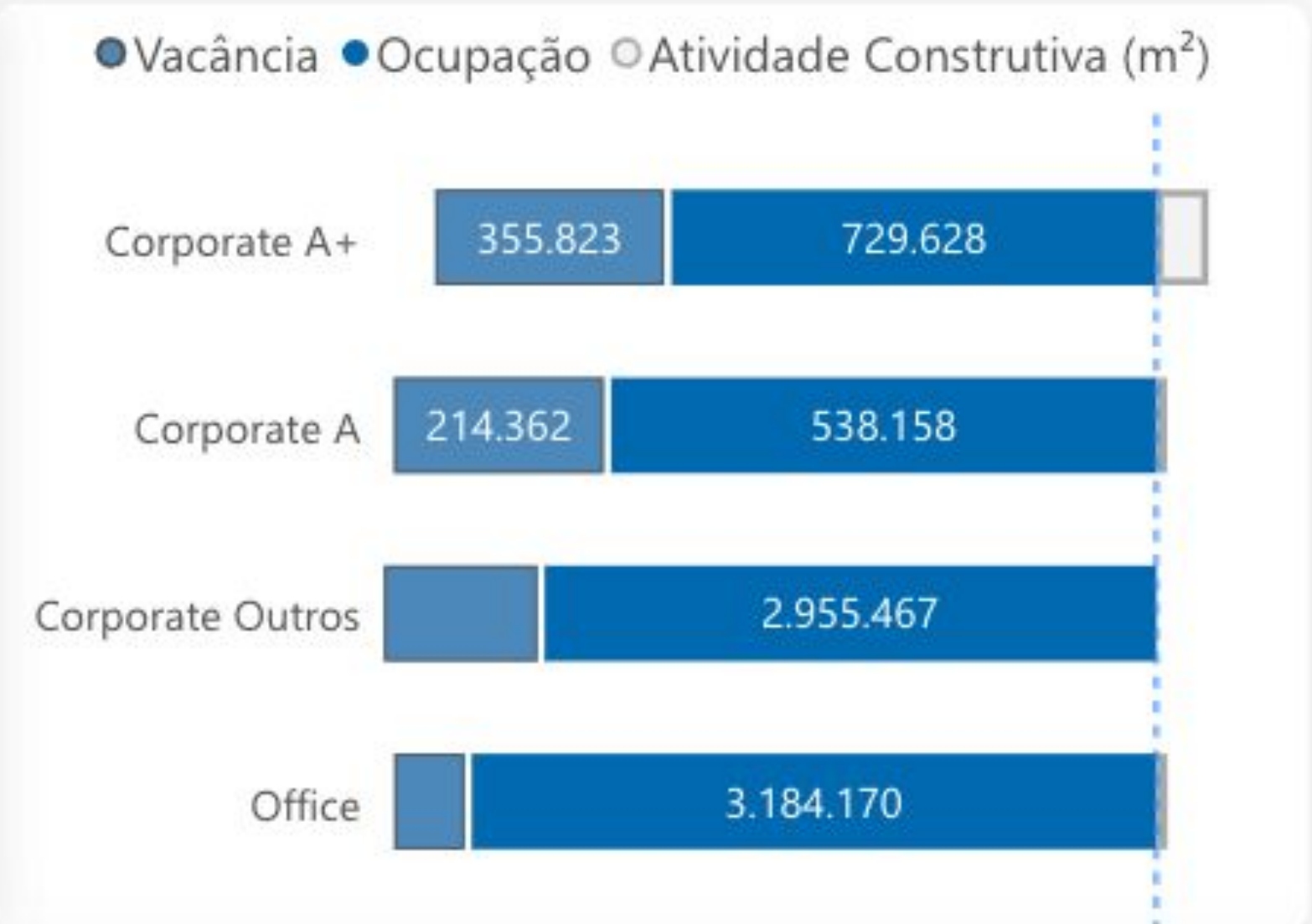
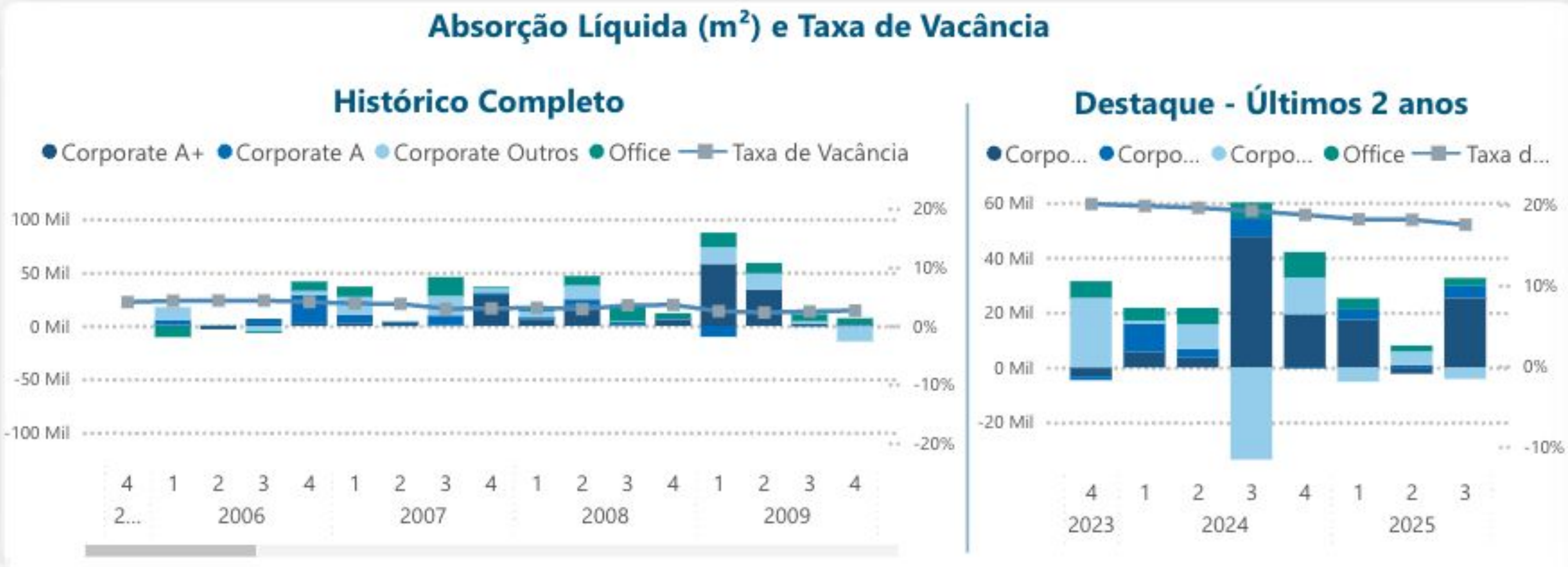
# Corporate Office

## City of Rio de Janeiro

Escritórios > Visão Geral > Cidade: Rio de Janeiro > Perfil/Classe: Mult. > Trimestre: 4T24

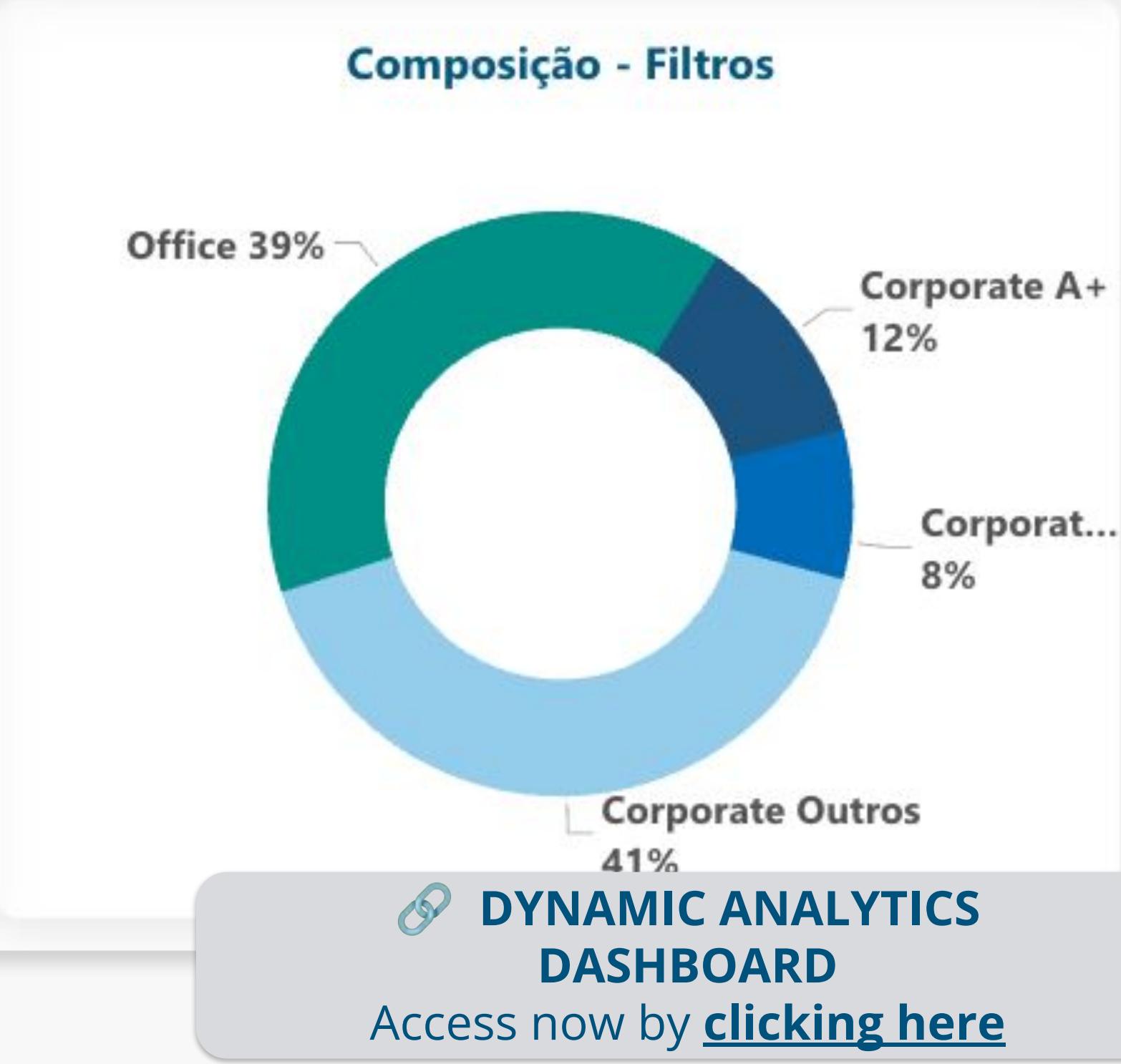


|                                 |                            |                            |                            |                                 |                               |
|---------------------------------|----------------------------|----------------------------|----------------------------|---------------------------------|-------------------------------|
| 9.113.235<br>Estoque Total (m²) | 7.407.423<br>Ocupação (m²) | 1.705.813<br>Vacância (m²) | 18,72%<br>Taxa de Vacância | 41.621<br>Absorção Líquida (m²) | 80.806<br>Absorção Bruta (m²) |
|---------------------------------|----------------------------|----------------------------|----------------------------|---------------------------------|-------------------------------|



**Painel de Tendências Corporate**

|                                  | A+        |           |   | A         |           |   | Outros    |           |   |
|----------------------------------|-----------|-----------|---|-----------|-----------|---|-----------|-----------|---|
|                                  | 3T24      | 4T24      | △ | 3T24      | 4T24      | △ | 3T24      | 4T24      | △ |
| Taxa de Vacância                 | 34,57%    | 32,78%    | ↘ | 28,43%    | 28,49%    | ↗ | 21,27%    | 20,79%    | ↘ |
| Absorção Líquida (m²)            | 47.708    | 19.410    | ↘ | 6.614     | -434      | ↘ | -33.540   | 13.305    | ↗ |
| Novo Estoque (m²)                | 0         | 0         | — | 0         | 0         | — | 0         | 0         | — |
| Atividade Construtiva (m²)       | 79.386    | 79.386    | — | 11.155    | 11.155    | — | 7.016     | 7.016     | — |
| Preço de Locação (m²/mês - M.P.) | R\$ 81,66 | R\$ 80,96 | ↘ | R\$ 55,21 | R\$ 54,80 | ↘ | R\$ 42,71 | R\$ 41,84 | ↘ |



**FILTER:** City of Rio de Janeiro Offices > Overview > City: Rio de Janeiro > Profile/Class: Mult. > Quarter: Q4/24

- The office market of Rio de Janeiro city ended the year 2024 with a total stock of 9,113,235 m² considering all classes (Corporate + Office). The market composition remains stable: the Corporate Others class (B and C) holds 41% (3,731,261 m²) of the total, followed by the Office segment (commercial suites) with 39% (3,544,003 m²). The high-end sums 20%, being 12% (1,085,451 m²) in Corporate A+ and 8% (752,520 m²) in Corporate A.
- The 4th quarter registered a positive performance in occupancy. The total market (Corporate + Office) presented a net absorption of +41,621 m², driven by a gross absorption of 80,806 m². In the breakdown by class, the highlight was Corporate A+, with positive net absorption of +19,410 m², and Corporate Others with +13,305 m². The Corporate A class registered slight returns, with a negative balance of -434 m².
- The vacancy rate for the total universe (Corporate + Office) retreated to 18.72%, totaling 1,705,813 m² of vacant spaces. Availability at the top of the pyramid showed improvement: the vacancy rate of the Corporate A+ class fell from 34.57% (Q3/24) to 32.78% (Q4/24). The Corporate Others class also reduced its vacancy rate to 20.79%, while Corporate A remained practically stable at 28.49%.
- There was no delivery of new stock (0 m²) for any class in this quarter, which favored the absorption of existing spaces. Asking rental values showed slight adjustments: the average asking price per square meter for the Corporate A+ class stood at R\$ 80.96/m², Corporate A at R\$ 54.80/m², and Corporate Others at R\$ 41.84/m². The construction pipeline remains concentrated in the Corporate A+ class, with 79,386 m² under construction.

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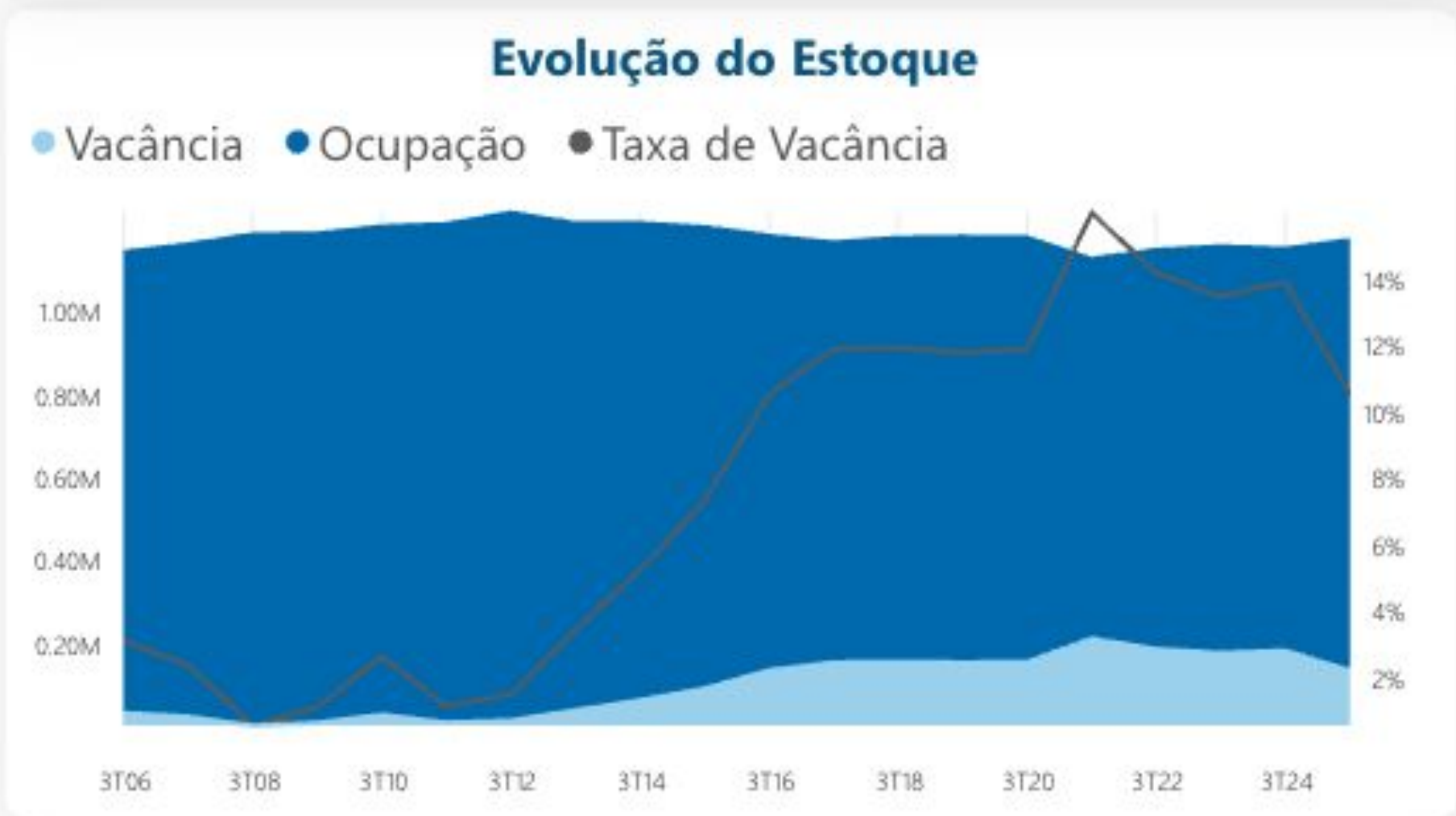


# Corporate Office

## Zona Sul | Rio de Janeiro



Escritórios > Detalhes > Cidade: Rio de Janeiro > Região: Zona Sul > Perfil/Classe: Corporate + Office > Trimestre: 4T24



[DYNAMIC ANALYTICS DASHBOARD](#)  
Access now by [clicking here](#)

FILTER: Offices > Details > City: Rio de Janeiro > Region: Zona Sul > Profile/Class: Corporate + Office > Quarter: Q4/24

- The Zona Sul region of Rio de Janeiro ended the 4th quarter of 2024 with a total stock of 1,333,682 m² considering all classes (Corporate + Office). The region's real estate profile is characterized by the predominance of intermediate spaces and commercial suites: the Corporate Others class represents 49% (648,976 m²) of the market and the Office segment, 40% (513,911 m²). The high-end is more exclusive, with the Corporate A class representing 8% (110,333 m²) and Corporate A+ about 3% (42,462 m²).
- The quarter registered a positive performance in space occupancy. The total market (Corporate + Office) presented a net absorption of +8,916 m², resulting from a gross absorption (new leases) of 21,740 m². The absence of new stock delivery (0 m²) for all classes in the period contributed to the organic adjustment between supply and demand.
- The vacancy rate for the total universe (Corporate + Office) closed the year at 12.94%, corresponding to 172,569 m² of vacant areas. When analyzing absolute availability, the highest concentration of vacancy is found in the Corporate Others class, with 139,870 m² available, followed by the Corporate A class with 14,677 m².
- Regarding financial values, a slight negative correction was observed. The average asking rental prices for all classes (Corporate + Office) went from R\$ 65.43/m²/month in Q3/24 to R\$ 64.71/m²/month in Q4/24, indicating stability with a downward bias in the region's pricing.

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# Logistic Condominiums

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# Logistic Condominiums

## State of São Paulo

Logístico > Visão Geral > Região: Sudeste > Estado: SP > Classe: Mult. > Trimestre: 4T24



19.449.183

Estoque Total (m²)

17.782.151

Ocupação (m²)

1.667.032

Vacância (m²)

8,57%

Taxa de Vacância

220.021

Absorção Líquida (m²)

520.333

Absorção Bruta (m²)

### Absorção Líquida (m²) e Taxa de Vacância

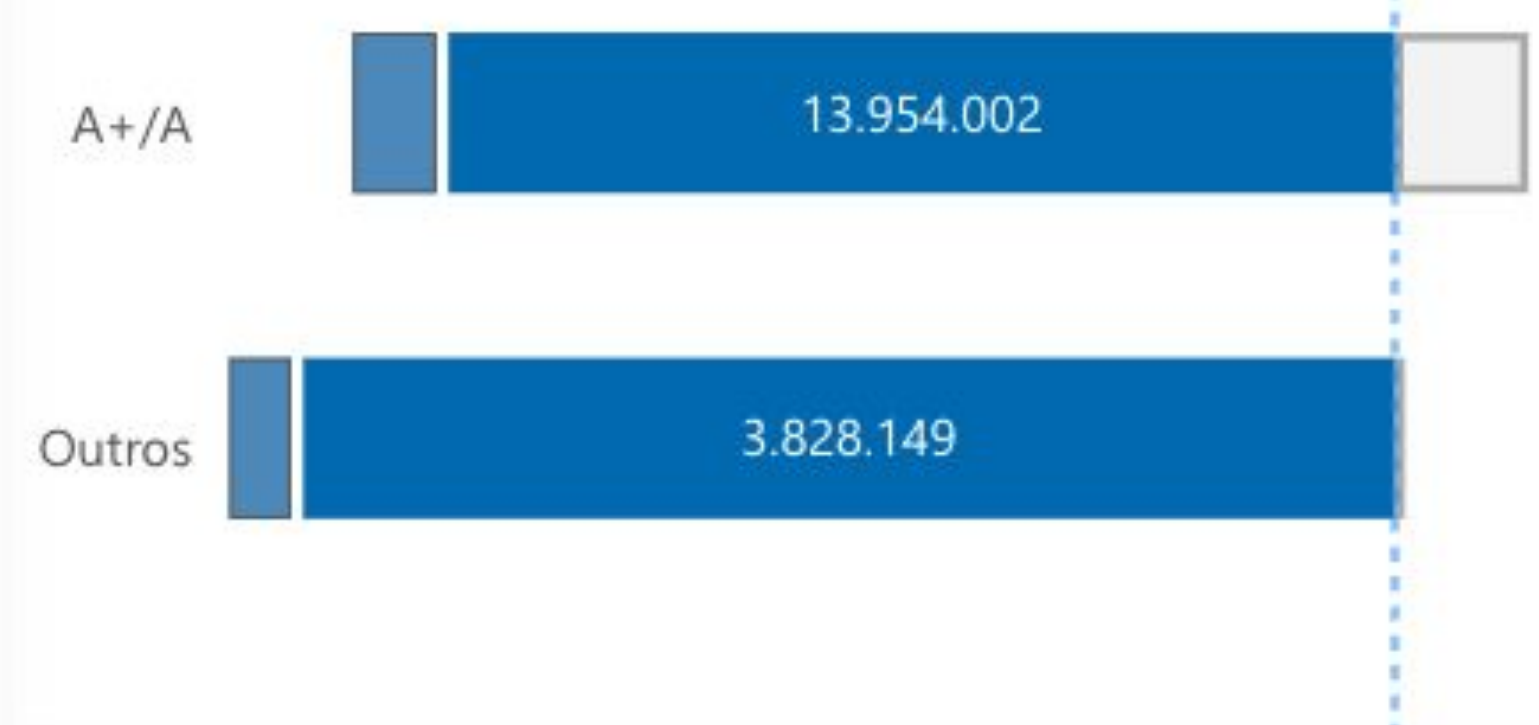
#### Histórico Completo



#### Destaque - Últimos 2 anos



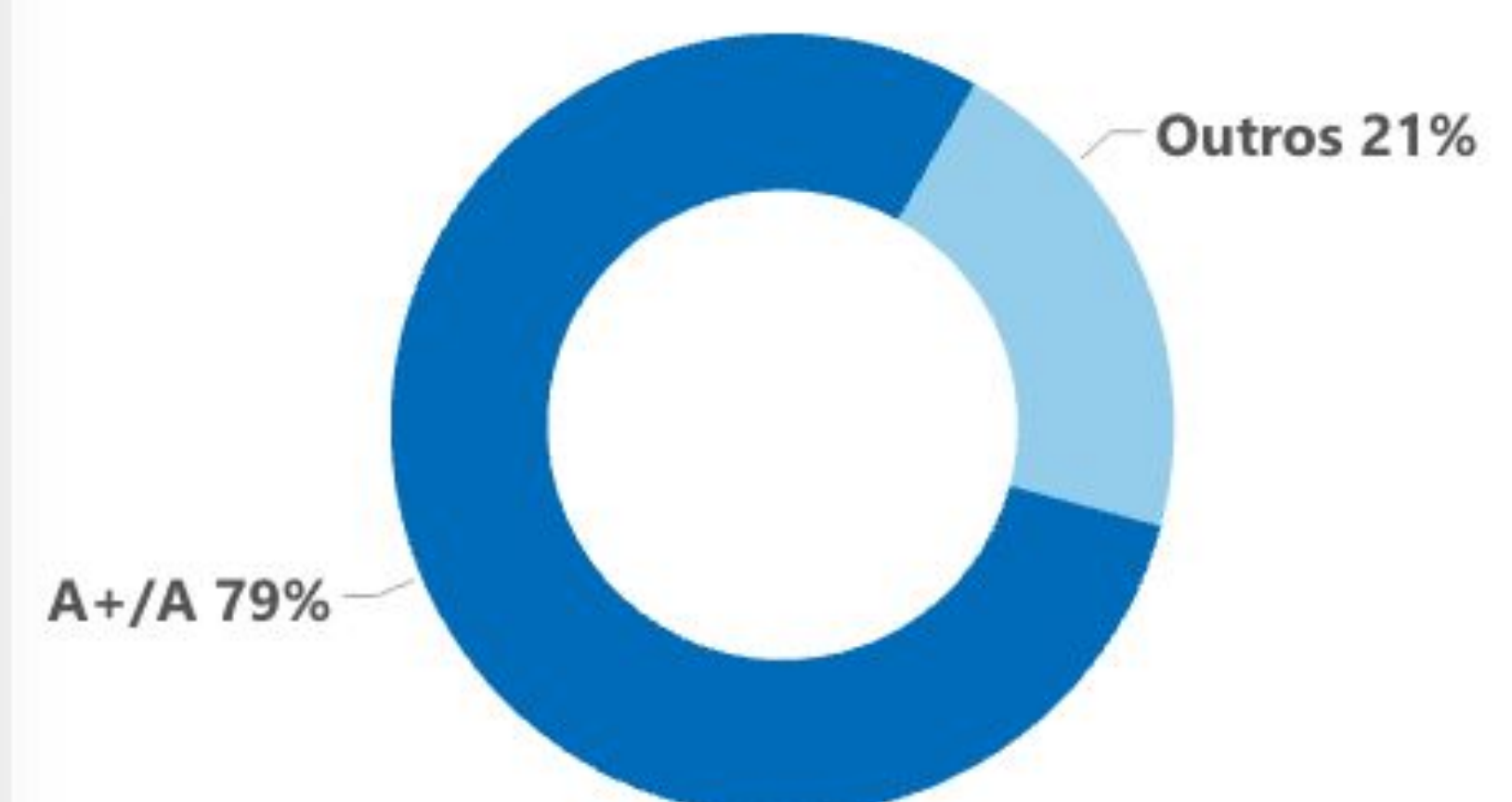
● Vacância ● Ocupação ○ Atividade Construtiva (m²)



### Painel de Tendências

|                                  | A+ / A    |           |   | Outros    |           |   |
|----------------------------------|-----------|-----------|---|-----------|-----------|---|
|                                  | 3T24      | 4T24      | △ | 3T24      | 4T24      | △ |
| Taxa de Vacância                 | 9,05%     | 9,17%     | ↗ | 6,78%     | 6,33%     | ↘ |
| Absorção Líquida (m²)            | 226.457   | 189.483   | ↘ | 2.089     | 30.538    | ↗ |
| Novo Estoque (m²)                | 23.404    | 242.539   | ↗ | 0         | 13.273    | ↗ |
| Atividade Construtiva (m²)       | 1.792.119 | 1.972.212 | ↗ | 49.049    | 35.776    | ↘ |
| Preço de Locação (m²/mês - M.P.) | R\$ 27,48 | R\$ 28,14 | ↗ | R\$ 22,31 | R\$ 22,78 | ↗ |

### Composição - Filtros



[DYNAMIC ANALYTICS DASHBOARD](#)

Access now by [clicking here](#)

**FILTER:** Logistics > Overview > Region: Southeast > State: SP > Class: Mult. > Quarter: Q4/24

- The logistics market of the State of São Paulo ended the year 2024 with a total stock of 19,449,183 m² considering all classes (A+/A and Others). The market structure remains dominated by high-end: the A+/A class represents 79% (15,362,208 m²) of the total market, while the Others class accounts for 21% (4,086,974 m²).
- The 4th quarter maintained the positive rhythm of expansion and occupancy. The total market (all classes) registered a net absorption of +220,021 m², resulting from a gross absorption of 520,333 m².
- The A+/A class was responsible for the largest share of this performance, with net absorption of +189,483 m², absorbing a large part of the expressive volume of 242,539 m² of new stock delivered in the period.
- The Others class also had a positive balance of +30,538 m², with the entry of 13,273 m² of new stock.
- The vacancy rate for the total market (all classes) stabilized at 8.57%, totaling 1,667,032 m² of vacant areas. A slight adjustment was observed in the A+/A class, where the vacancy rate fluctuated from 9.05% to 9.17%, a natural reflection of the high volume of new deliveries. In contrast, the Others class saw its availability fall from 6.78% to 6.33%.
- The heating up of the sector drove rental values. The average asking price in the A+/A class appreciated to R\$ 28.14/m²/month and in the Others class rose to R\$ 22.78/m²/month. The construction pipeline continues in strong expansion, with 1,972,212 m² of works in progress focused on the A+/A class.

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# Logistic Condominiums

## Régis Bittencourt Corridor | São Paulo

Logístico > Detalhes > Região Brasil: Sudeste > Estado: SP > Eixo: Régis Bittencourt > Classe: A+/A,Outros > Trimestre: 4T24



834.965

Estoque Total (m²)

649.797

Ocupação (m²)

185.168

Vacância (m²)

4.600

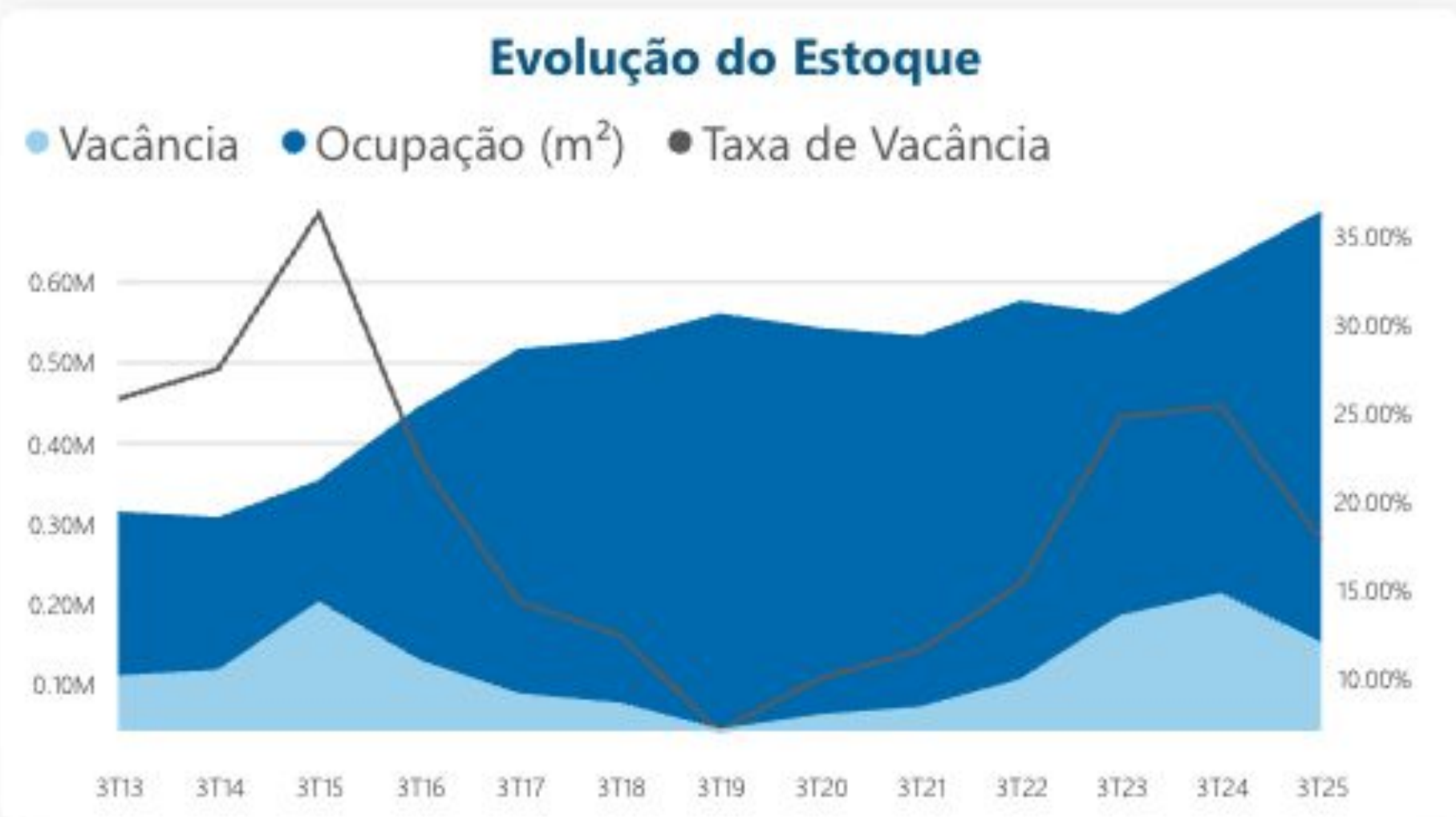
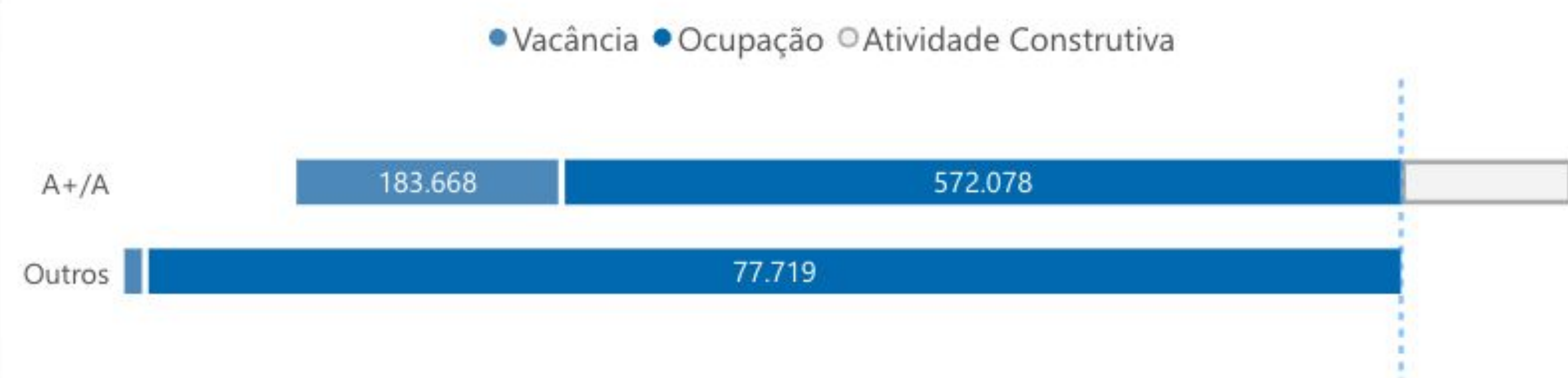
Novo Estoque (m²)

30.826

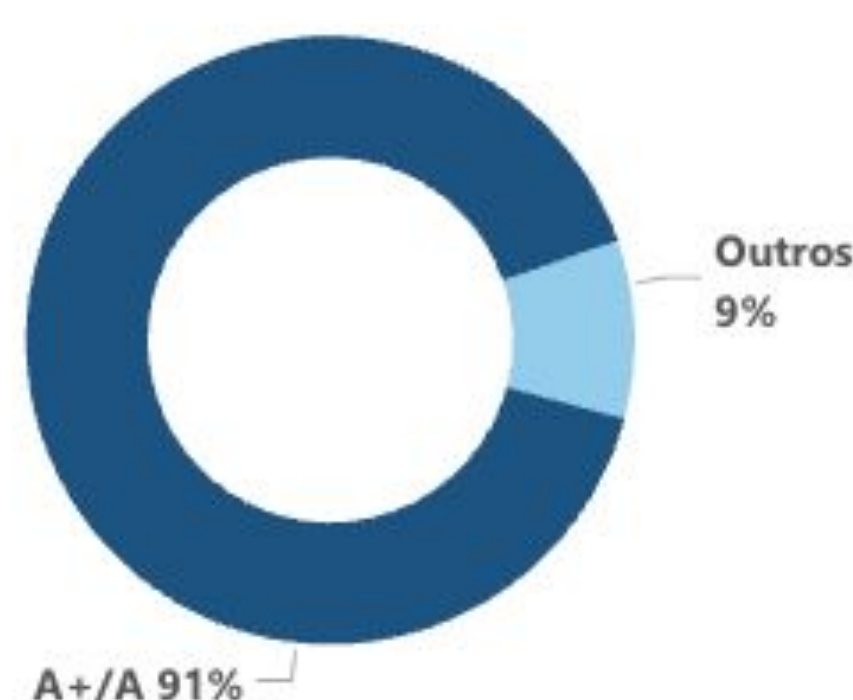
Absorção Líquida (m²)

64.517

Absorção Bruta (m²)



Composição - Filtros



Média de Preços Pedidos de Locação (m²/mês - M.P.)

Selecione um Eixo e uma Classe

3T24

R\$ 27,47

4T24

R\$ 27,45



Taxa de Vacância

22,18%



[DYNAMIC ANALYTICS DASHBOARD](#)

Access now by [clicking here](#)

**FILTER:** Logistics > Details > Region Brazil: Southeast > State: SP > Corridor: Régis Bittencourt > Class: A+/A, Others > Quarter: Q4/24

- The Régis Bittencourt Corridor ended the 4th quarter of 2024 with a total stock of 834,965 m² considering all classes (A+/A and Others). The region consolidates itself as a modern hub: the A+/A class (high-end) represents 91% (755,746 m²) of the total market, while the Others class accounts for only 9% (79,219 m²).
- The quarter registered a positive performance in occupancy. The total market (all classes) presented a net absorption of +30,826 m² supported by a gross absorption (new leases) of 64,517 m². This movement absorbed even the delivery of 4,600 m² of new stock in the period, contributing to the reduction of availability.
- The vacancy rate for the total market (all classes) closed the year at 22.18%, totaling 185,168 m² of vacant warehouses. When analyzing absolute availability, it is observed that the A+/A class concentrates almost the entirety of the vacancy, with 183,668 m² available, while the Others class presents high occupancy, with leased stock of 77,719 m².
- Rental values demonstrated stability. The average asking prices for all classes (A+/A and Others) oscillated minimally from R\$ 27.47/m²/month in Q3/24 to R\$ 27.45/m²/month in Q4/24, indicating an equilibrium in the region's pricing.

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# Logistic Condominiums

## State of Rio de Janeiro

Logístico > Visão Geral > Região: Sudeste > Estado: RJ > Classe: Mult. > Trimestre: 4T24



**FILTER:** Logistics > Overview > Region: Southeast > State: RJ > Class: Mult. > Quarter: Q4/24

- The logistics market of Rio de Janeiro ended the year 2024 with a total stock of 3,062,630 m² considering all classes (A+/A and Others). The predominance of high-end is absolute: the A+/A class represents 95% (2,900,125 m²) of the total market, leaving only 5% (162,505 m²) for the Others class.
- The quarter was marked by exceptional occupancy activity. The total market (all classes) registered an expressive net absorption of +211,250 m² and a gross absorption of 248,862 m². This performance was entirely driven by the A+/A class, which registered net absorption of +211,250 m², easily absorbing the delivery of 143,792 m² of new stock in the period. The Others class registered no net movement (0 m²).
- Strong demand caused a relevant drop in availability. The vacancy rate for the total market (all classes) retreated to 11.00%, totaling 336,808 m² vacant. In the breakdown by class, the A+/A class vacancy rate fell from 13.32% (Q3/24) to 10.33% (Q4/24), demonstrating the market's voracity for modern assets. The Others class maintained its rate stable at 22.88%.
- Regarding values, there was stability. The average asking price in the A+/A class adjusted slightly to R\$ 22.17/m²/month, while the Others class remained at R\$ 30.00/m²/month. The construction pipeline remains active with 135,911 m² under construction in the A+/A class.

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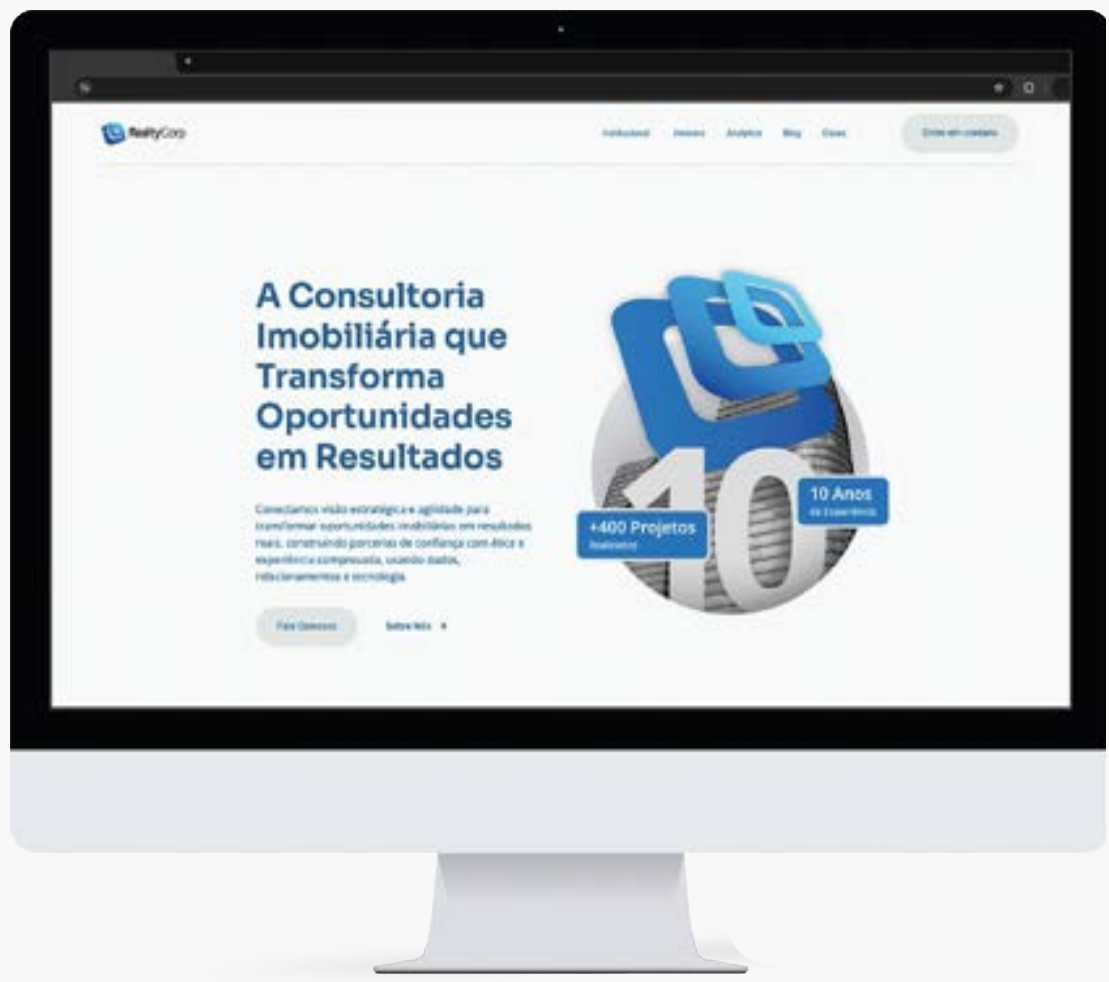
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# RC Ecosystem



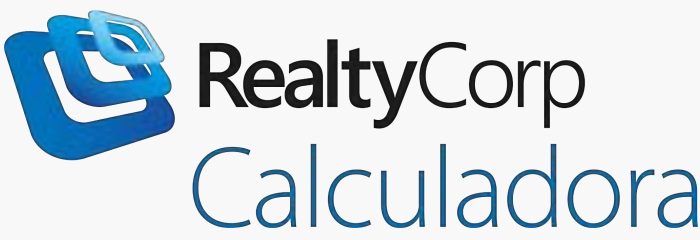
Your exclusive property with RealtyCorp: Quality and guaranteed confidence.

**+ 150 Contracted Properties**



Innovative solutions for complex real estate challenges.

**+ 220 Published Cases**



Calculate and compare the rent for your office.



Strategic insights and analyses on the real estate market.

**+ 185 Published Articles**



Interactive and intuitive dashboard: Explore RealtyCorp Analytics.

**+ Dynamic & Interactive**



# RealtyCorp



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