



RealtyCorp Analytics

Offices & Industrial

2nd Quarter 2026

(Data reference: Q1 2026)

Corporate Offices

Corporate Offices City of São Paulo



Escritórios > Visão Geral > Cidade: São Paulo > Perfil/Classe: Mult. > Trimestre: 1T26

17.570.117

Estoque Total (m²)

15.191.582

Ocupação (m²)

2.378.535

Vacância (m²)

13,54%

Taxa de Vacância

108.342

Absorção Líquida (m²)

227.645

Absorção Bruta (m²)

Absorção Líquida (m²) e Taxa de Vacância

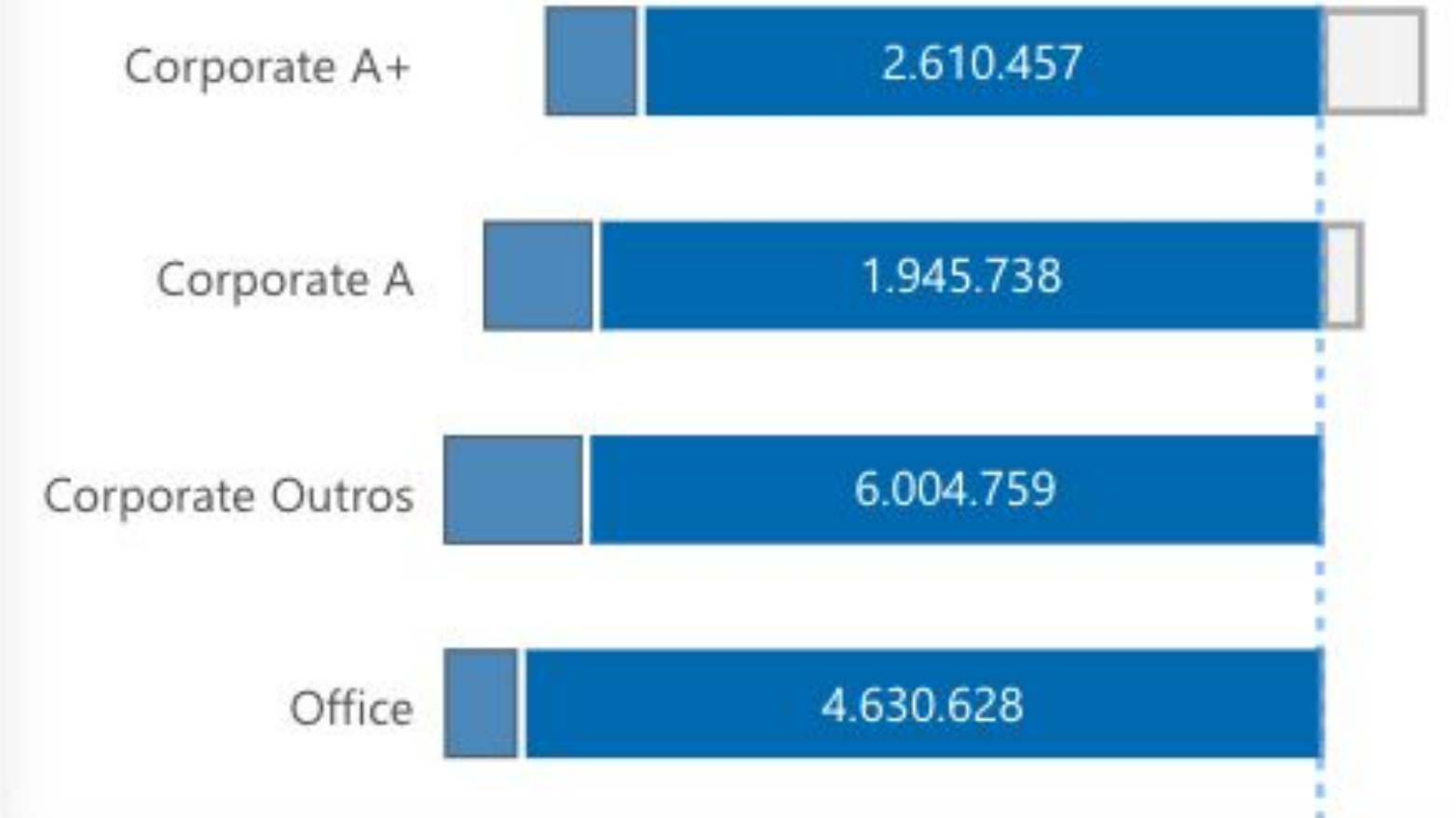
Histórico Completo



Destaque - Últimos 2 anos



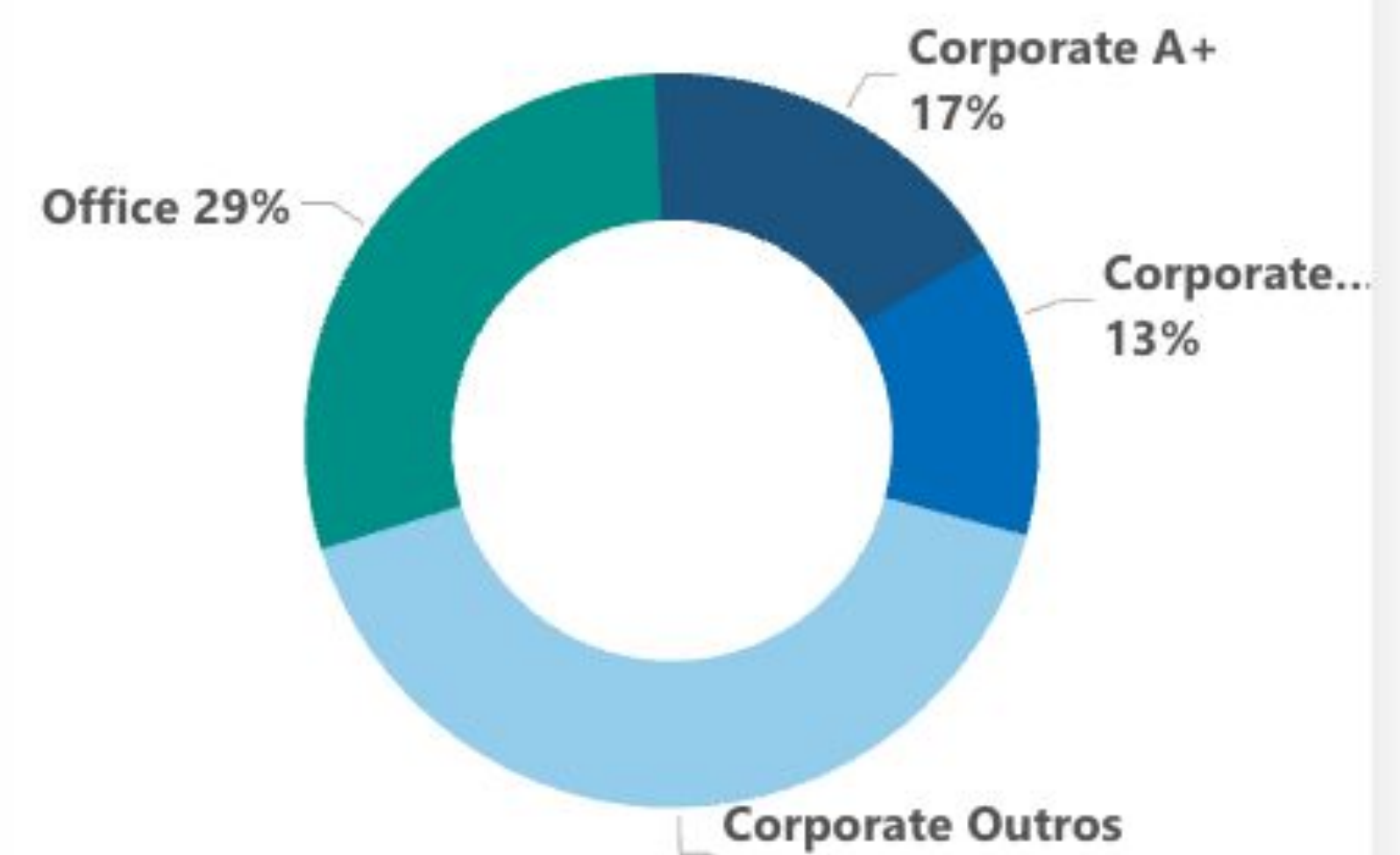
● Vacância ● Ocupação ○ Atividade Construtiva (m²)



Painel de Tendências Corporate

	A+			A			Outros		
	4T25	1T26	△	4T25	1T26	△	4T25	1T26	△
Taxa de Vacância	13,97%	12,87%	⬇️	15,13%	14,01%	⬇️	17,03%	16,72%	⬇️
Absorção Líquida (m ²)	76.036	32.864	⬇️	33.491	47.663	⬆️	24.630	25.468	⬆️
Novo Estoque (m ²)	20.609	0	⬇️	20.900	25.811	⬆️	8.868	4.809	⬇️
Atividade Construtiva (m ²)	409.315	409.315	—	143.887	118.076	⬇️	39.167	34.358	⬇️
Preço de Locação (m ² /mês - M.P.)	R\$ 127,15	R\$ 131,22	⬆️	R\$ 112,99	R\$ 116,59	⬆️	R\$ 56,95	R\$ 62,34	⬆️

Composição - Filtros



[DYNAMIC ANALYTICS DASHBOARD](#)
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FILTER: Offices > Overview > City: São Paulo > Profile/Class: Corporate + Office > Quarter: Q1/26

- The city of São Paulo closed the 1st quarter of 2026 with a total inventory of 17,568,619 m², combining the Corporate and Office universes. The market structure remains consolidated with the leadership of the Corporate Others class (B and C), which holds 41% of the inventory, followed by the Office segment (commercial suites) with 29%. The high-end segment (A+) represents 17% and Corporate A the remaining 13% of market share.
- The first quarter revealed heated demand, presenting a total net absorption of +108.519 m² and a gross movement of 227,083 m² in new leases. In the corporate breakdown, the Corporate A class was the main growth driver with +47.663 m² of net absorption, surpassing the Corporate A+ (+32,864 m²) and Corporate Others (+25,645 m²) classes.
- The vacancy rate for the total office universe (All classes) fell to 13.53%, compared to 14% in 4Q25, which represents a

- a vacant inventory of 2,377,201 m² in the capital. The drop in availability was transversal: Corporate A+ vacancy fell to 12.87%, Corporate A to 14.01%, and Corporate Others to 16.70%. This movement occurred in a healthy manner, even absorbing the new inventory delivered in the period, which totaled 25,811 m² in class A and 4,809 m² in the Others class.
- The price scenario reflects generalized appreciation across all corporate niches. The average asking prices for the Corporate A+ class rose to R\$130,45/m² while the Corporate A class advanced to R\$116,59/m² and the Corporate Others class to R\$62,32/m². The pipeline of construction activity remains robust, with 409.315 m² in development for class A+, totaling 561.748 m² across the entire Corporate market.

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[2] Statistical data for Alphaville is not counted together with the data for the city of São Paulo.

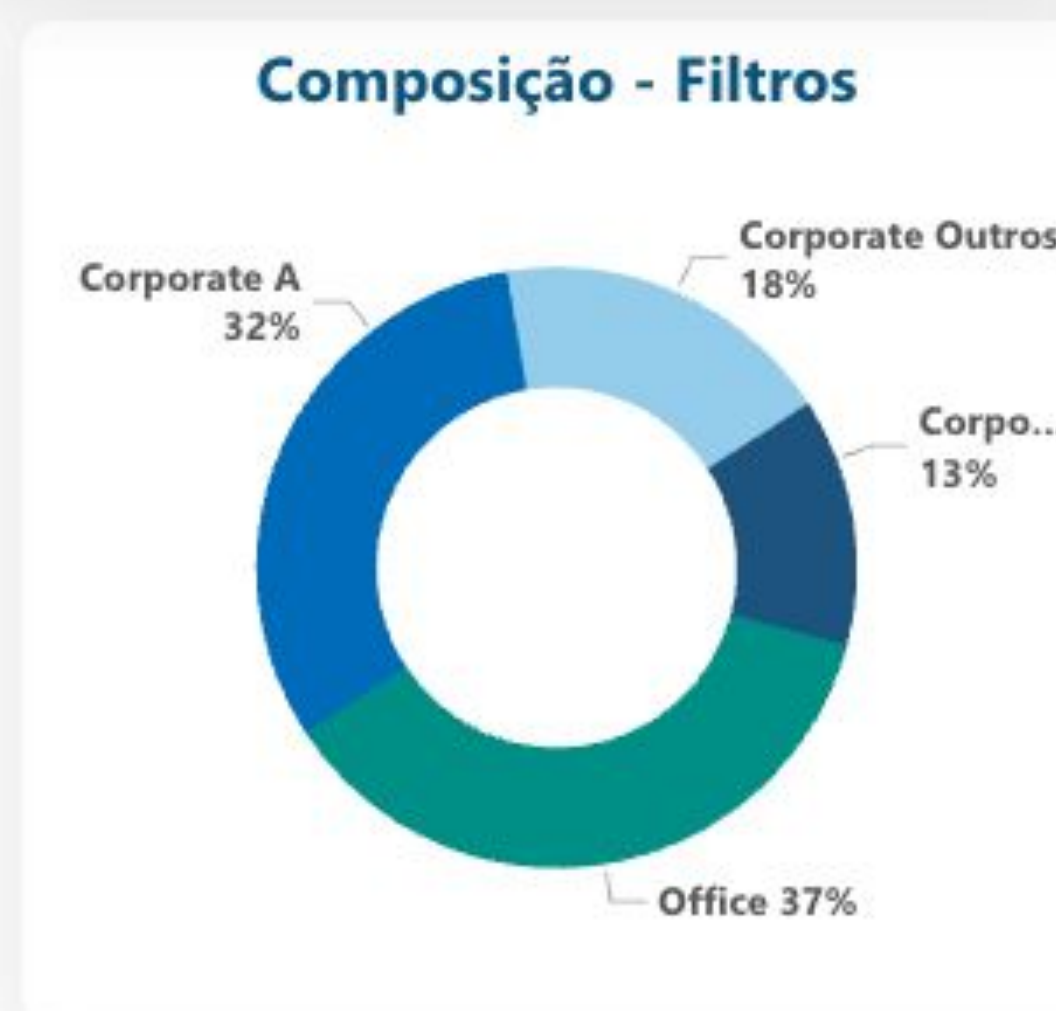
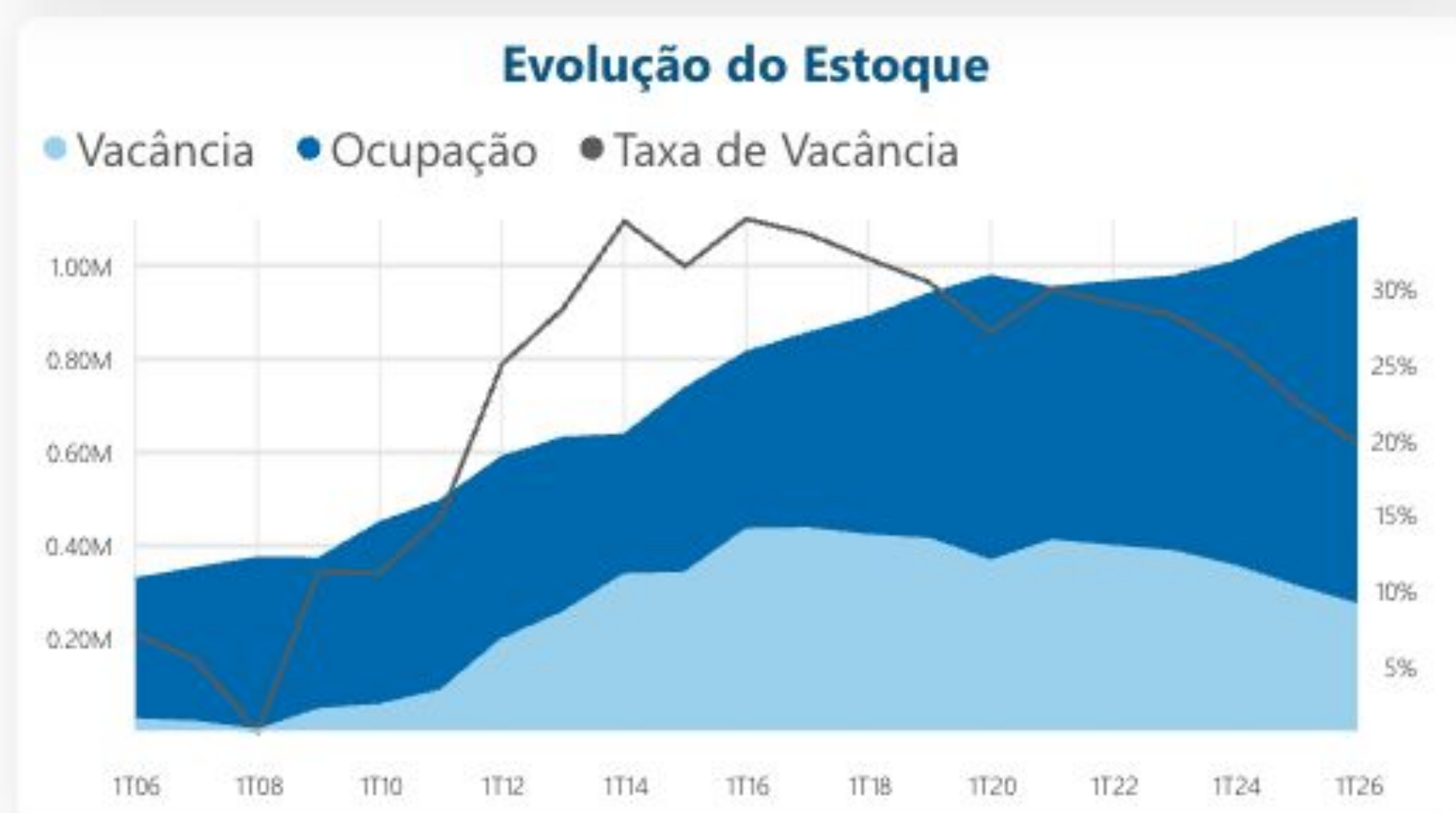
[3] The statistical data in this Analytics refers to the 1st quarter of 2026 and was consolidated on 03/31/2026.

[4] RealtyCorp has started to adopt the new regional division from Buildings, known as Buildings Regions 2.0. We believe this division is more consistent with the reality of the office regions in the cities of São Paulo and Rio de Janeiro.

Corporate Offices Alphaville | Barueri



Escritórios > Detalhes > Cidade: Barueri > Região: Alphaville > Perfil/Classe: Corporate + Office > Trimestre: 1T26



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

FILTER: Offices > Details > City: Barueri > Region: Alphaville > Profile/Class: Corporate + Office > Quarter: Q1/26

- The Alphaville market ended the 1st quarter of 2026 with a total inventory of 1.371.433 m² consolidating its position as one of the office hubs outside the central axis of the São Paulo capital. The profile of the entire market is predominantly led by the Office segment, which represents 37% of the region's universe, followed by the Corporate A class with 32%. High-end floor plates (A+) and the Others class complete the supply with 13% and 18%, respectively.
- Occupancy dynamism showed a favorable balance in the period, recording a general net absorption of \$+9.947 m², a result sustained by a gross absorption movement of 16.233 m² in new leases. This recovery scenario was boosted by supply stability, as there was no delivery of new inventory (0 m²) in the quarter. The absence of new deliveries is a determining factor for demand to absorb remaining availability, favoring the balance between supply and demand in the local market.
- The consolidated vacancy rate for the entire Alphaville market (Corporate + Office) closed the period at 19.80%, an index that still sits significantly above the 10% metric considered high by the real estate market. The physical volume of vacancy totals 271.561 m². In the class breakdown, the Office segment presents 91.072 m² vacant, while in the corporate universe, the highest concentration of available spaces is in class A, with a vacancy of 94.548 m², followed by the Others class (62.874 m²) and the high-end A+ (23.067 m²).
- In average asking prices, the Alphaville market demonstrated resilience, although the pressure from the high vacancy rate prevents aggressive hikes. The average lease asking price for the entire market closed at R\$51,88/m²/month this quarter, compared to the R\$52,06/m²/month recorded in 4Q25. This adjustment reinforces the region's strategy to remain competitive and attract companies seeking cost efficiency compared to prices practiced in the capital, where the vacancy rate is more restricted (13.54%)

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Corporate Offices City of Rio de Janeiro



Escritórios > Visão Geral > Cidade: Rio de Janeiro > Perfil/Classe: Mult. > Trimestre: 1T26

9.052.756 Estoque Total (m ²)	7.518.686 Ocupação (m ²)	1.534.071 Vacância (m ²)	16,95% Taxa de Vacância	27.346 Absorção Líquida (m ²)	80.685 Absorção Bruta (m ²)
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Absorção Líquida (m²) e Taxa de Vacância

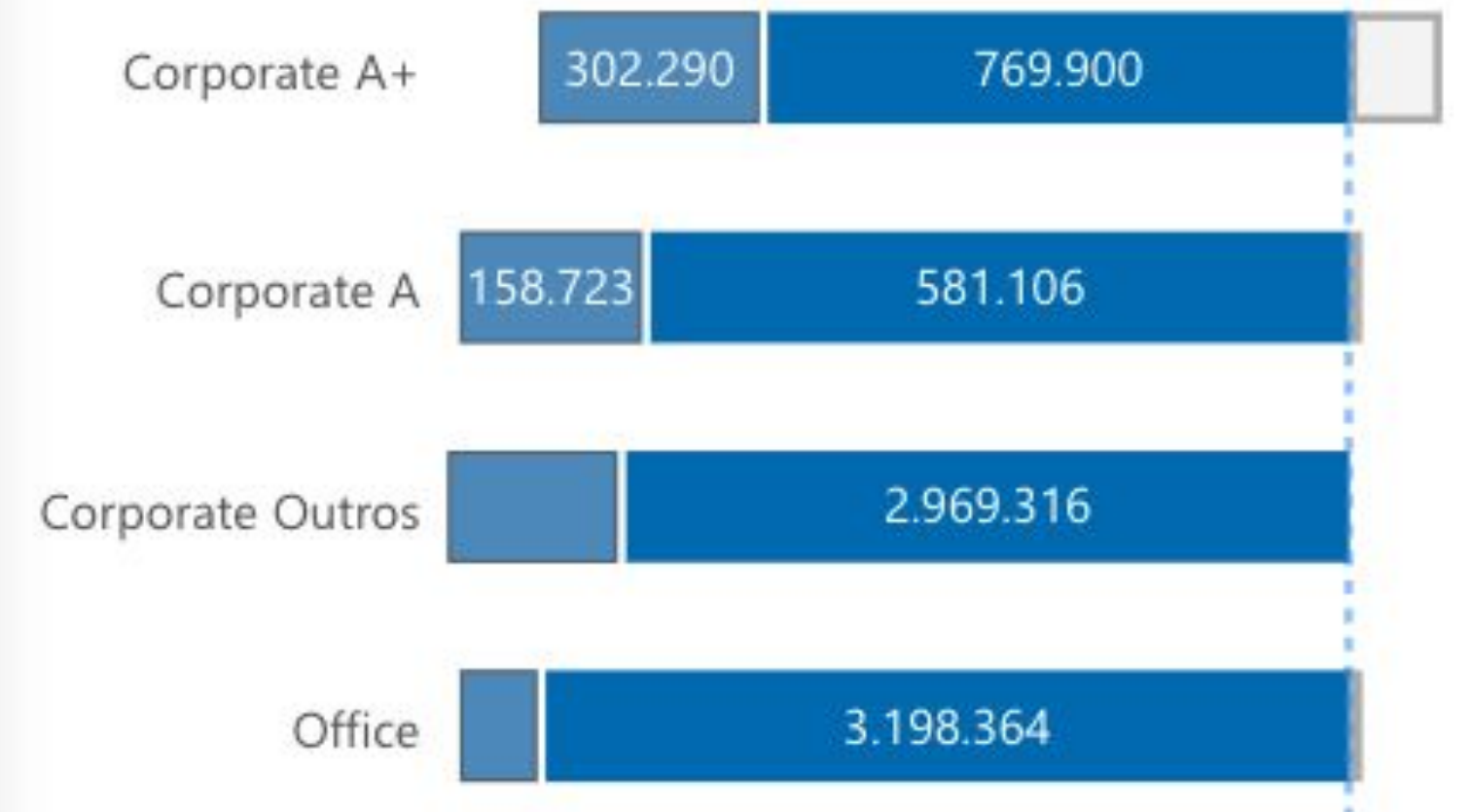
Histórico Completo



Destaque - Últimos 2 anos



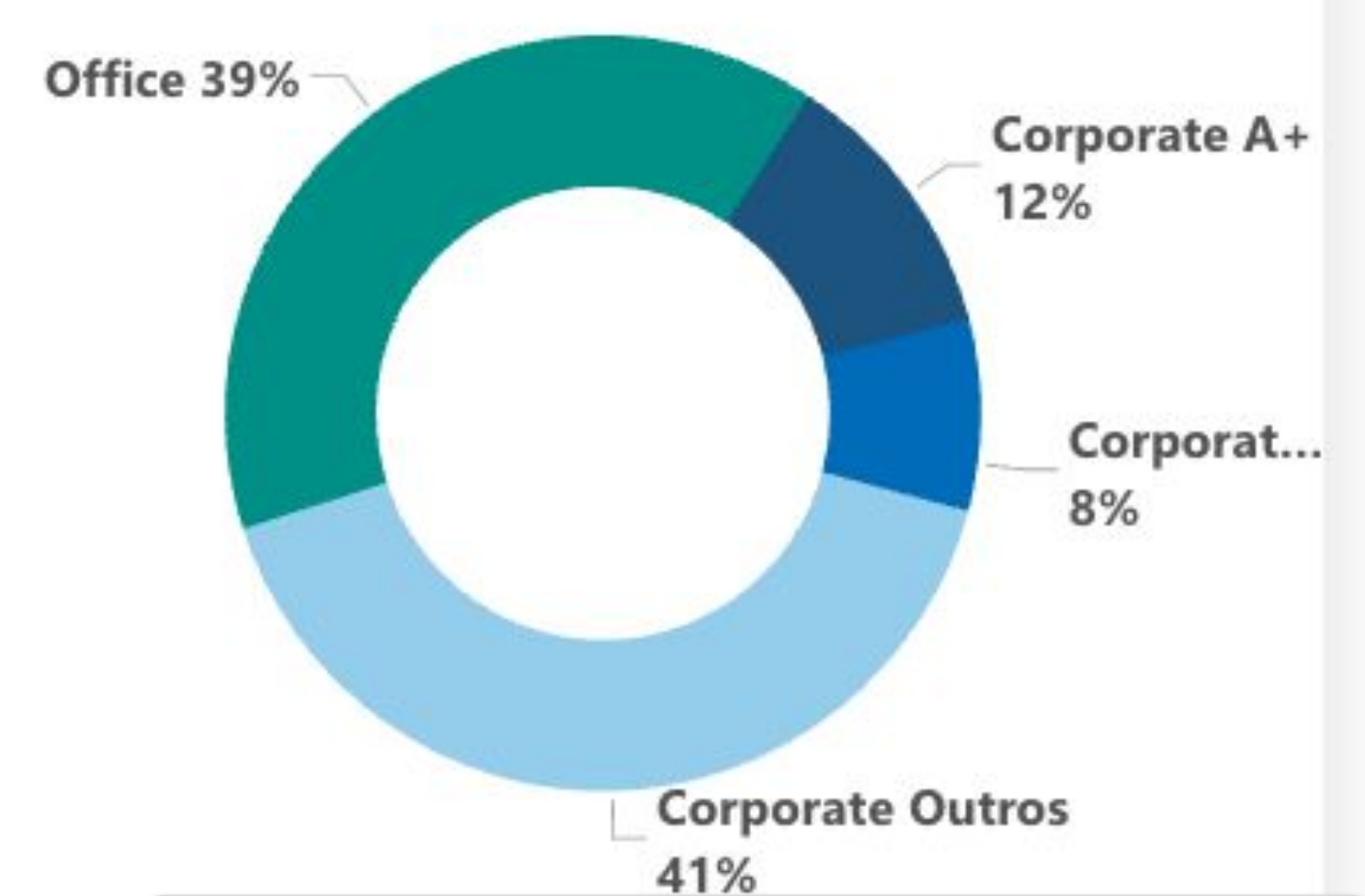
● Vacância ● Ocupação ○ Atividade Construtiva (m²)



Painel de Tendências Corporate

	A+			A			Outros		
	4T25	1T26	△	4T25	1T26	△	4T25	1T26	△
Taxa de Vacância	29,38%	28,19%	↘	23,25%	21,45%	↘	19,93%	19,77%	↘
Absorção Líquida (m ²)	3.052	12.752	↗	10.060	6.840	↘	12.488	6.658	↘
Novo Estoque (m ²)	0	0	—	0	0	—	0	0	—
Atividade Construtiva (m ²)	123.324	123.324	—	11.155	11.155	—	7.016	7.016	—
Preço de Locação (m ² /mês - M.P.)	R\$ 91,39	R\$ 92,15	↗	R\$ 58,00	R\$ 57,02	↘	R\$ 40,39	R\$ 42,53	↗

Composição - Filtros



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

FILTER: Offices > Overview > City: Rio de Janeiro > Profile/Class: Corporate + Office > Quarter: Q1/26

- The city of Rio de Janeiro started 1Q26 with a total inventory of 9.052.756 m². The market is led by the Corporate Others class (41%) and the Office segment (39%), with high-end completing the universe (A+ 12% and A 8%). Historically, office occupancy evolved from 4.238.113 m² in 1Q25 to 4.320.321 m² in 1Q26, confirming a consistent recovery.
- In the current quarter, demand remained heated with a total net absorption of +27.346 m² and gross absorption of 80.685 m². Performance was positive in all corporate classes: A+ led with +12.752 m² followed by classes A (+6.840 m²) and Others (+6.658 m²), evidencing that the search for quality in high-end remains the main driver of the Rio market.
- The total vacancy rate closed at 16,95%, totaling 1.534.071 m² available for lease. Although the index exceeds the 10% mark (considered high by the market), the corporate scenario improved, falling from 23,53% (1Q25) to 21,63% in 1Q26. In the class breakdown, Corporate A+ adjusted to 28.19%, Corporate A to 21,45% and Others to 19,77%, all on a downward trajectory and without deliveries of new inventory (0 m²) in the period.
- The average asking price in the corporate market rose to R\$ 61,74/m². In the detail of high-end classes, A+ reached R\$ 92,15/m², while class A recorded R\$ 57,02/m². The Others class advanced to R\$ 42,53/m². The pipeline of construction activity remains focused on high-end inventory renewal, with 123.324 m² in development for class A+.

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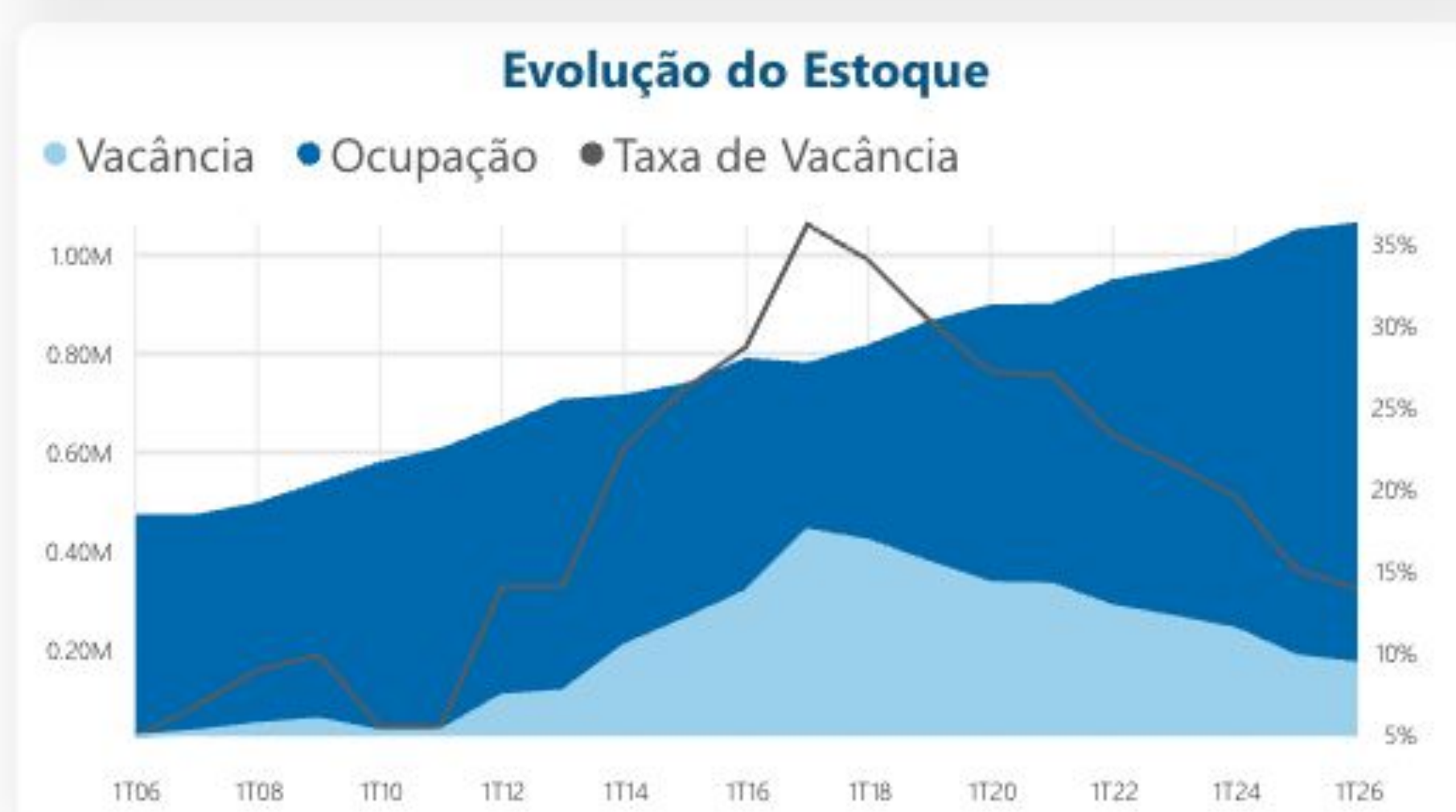
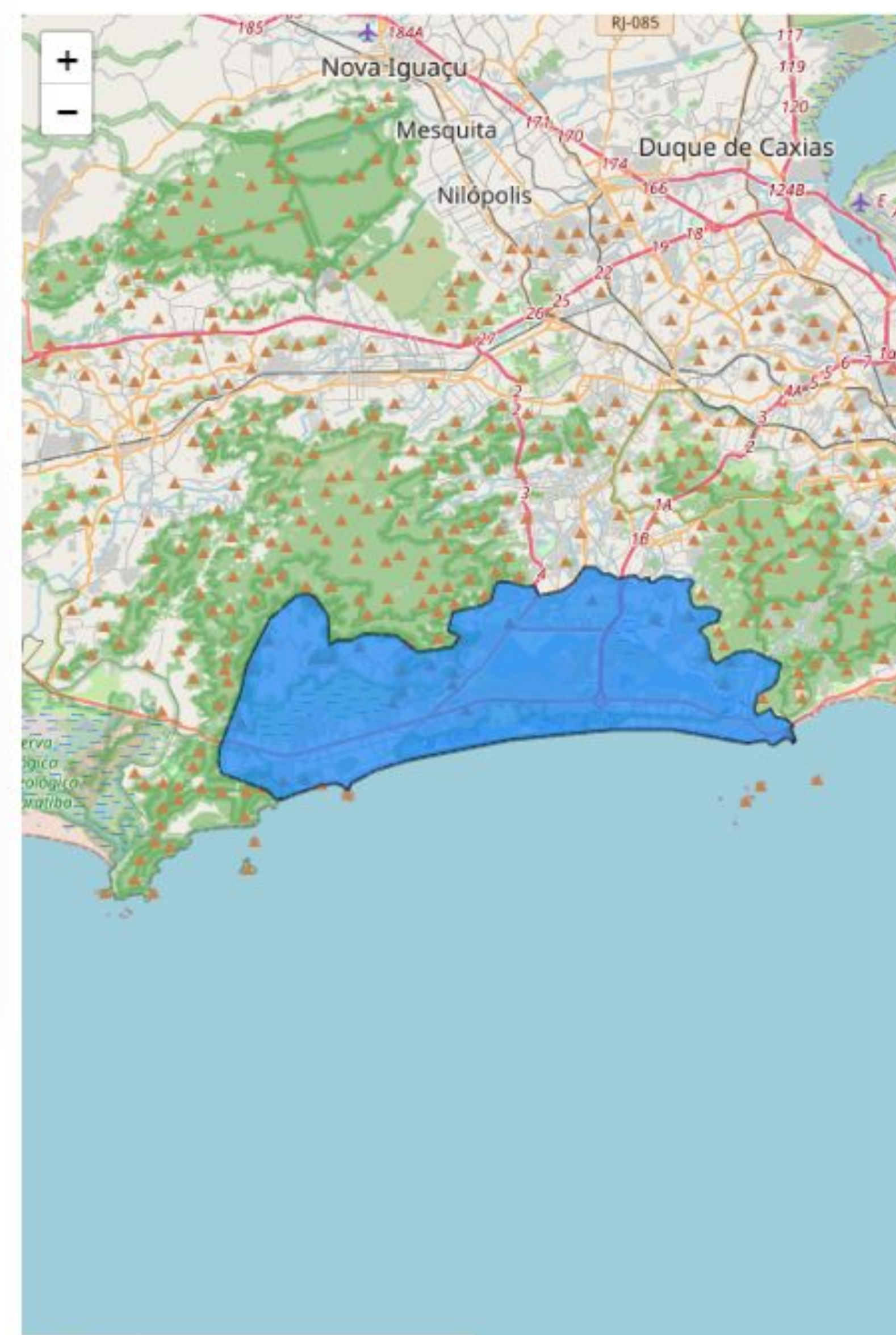
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Corporate Offices

Barra da Tijuca | Rio de Janeiro



Escritórios > Detalhes > Cidade: Rio de Janeiro > Região: Barra da Tijuca > Perfil/Classe: Corporate + Office > Trimestre: 1T26



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

FILTER: Offices > Details > City: Rio de Janeiro > Region: Barra da Tijuca > Profile/Class: Corporate + Office > Quarter: Q1/26

- The Barra da Tijuca region ended the 1st quarter of 2026 with a total inventory of 1.232.476 m² reaffirming its strategic importance in the Rio corporate scenario. The profile of the entire local market is dominated by the Office segment, which accounts for an expressive share of 65% of the region's universe. High-end floor plates are divided between class A (17%) and class A+ (9%), while the Corporate Others segment completes the remaining 9% of the total space supply in Barra
- Occupancy dynamism showed a favorable balance in the period, recording a net absorption of +4.934 m² a result sustained by a gross absorption movement of 7.516 m² in new leases. This scenario was boosted by supply stability, as there was no delivery of new inventory (0 m²) in the quarter. Such absence of new deliveries is a determining factor for demand to absorb remaining availability, gradually favoring the balance between supply and demand in the local market.
- The general vacancy rate ended the quarter at 13,85%, an index that still sits above the 10% metric considered high by the real estate market. The physical volume of vacancy totals 170.712 m², with the largest concentration in the Office segment, which totals 89.242 m² available. In the high-end breakdown, class A vacancy reaches 34.546 m², while class A+ presents 20.646 m² vacant. The history points to positive evolution, with the vacancy rate receding from peaks near 35% to current levels.
- In the field of values, Barra da Tijuca demonstrated resilience and slight nominal appreciation. The average lease asking price for the entire market rose to R\$ 49,50/m² this quarter, compared to R\$ 49,35 from the previous period. This upward trajectory signals the capacity for asset value retention, despite a vacancy volume that still confers room for favorable negotiations for occupants seeking high-end floor plates or commercial suites.

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Logistic Condominiums

Logistic Condominiums State of São Paulo



Logístico > Visão Geral > Região: Sudeste > Estado: SP > Classe: Mult. > Trimestre: 1T26

21.267.587

Estoque Total (m²)

19.905.626

Ocupação (m²)

1.361.961

Vacância (m²)

6,40%

Taxa de Vacância

371.609

Absorção Líquida (m²)

603.793

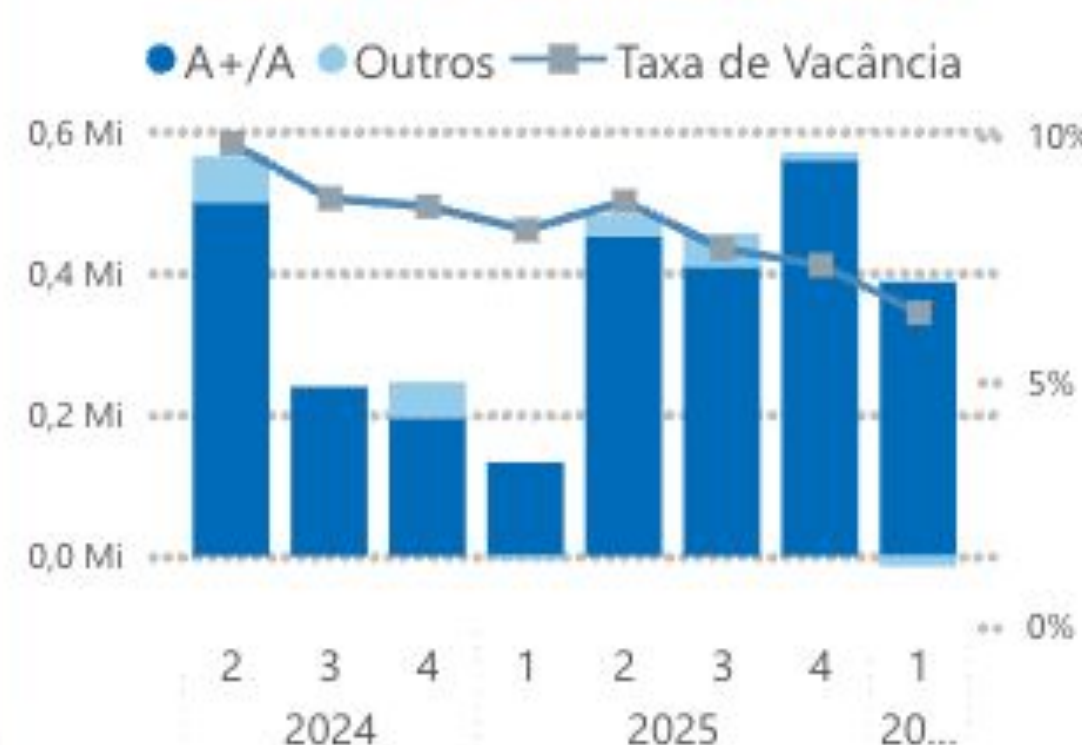
Absorção Bruta (m²)

Absorção Líquida (m²) e Taxa de Vacância

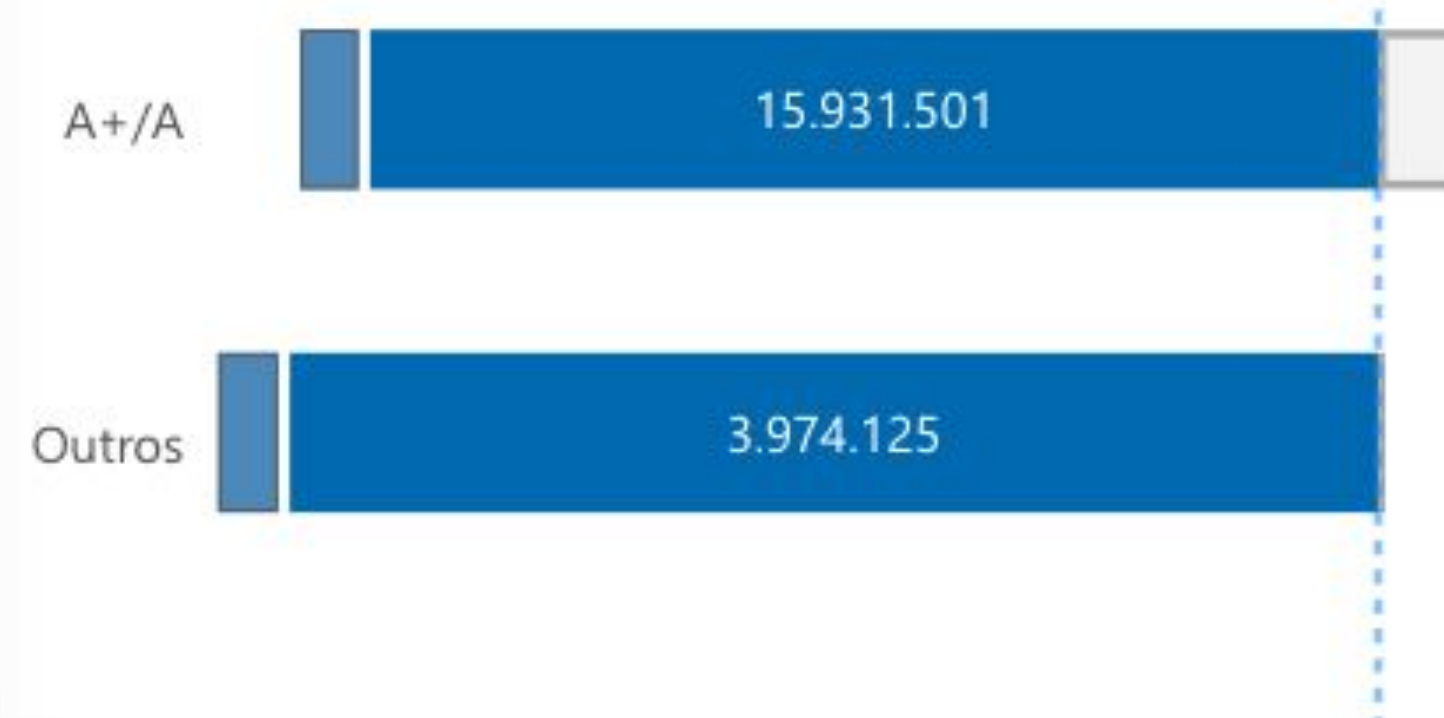
Histórico Completo



Destaque - Últimos 2 anos



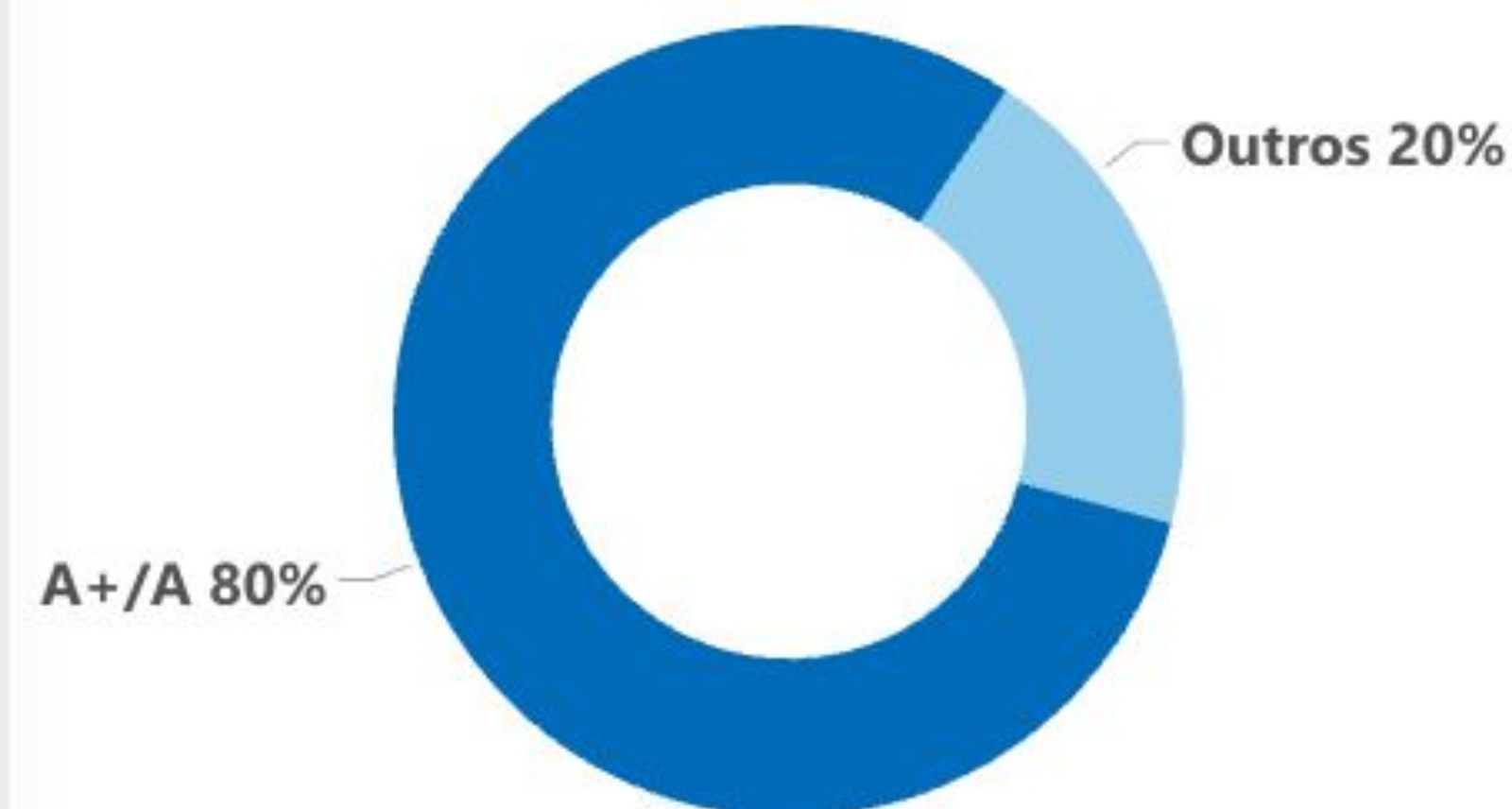
● Vacância ● Ocupação ○ Atividade Construtiva (m²)



Painel de Tendências

	A+ / A		△	Outros		△
	4T25	1T26		4T25	1T26	
Taxa de Vacância	7,77%	6,46%	↘	5,81%	6,17%	↗
Absorção Líquida (m ²)	558.406	386.862	↘	11.435	-15.253	↘
Novo Estoque (m ²)	544.160	177.521	↘	0	0	—
Atividade Construtiva (m ²)	1.278.008	1.416.536	↗	26.633	26.633	—
Preço de Locação (m ² /mês - M.P.)	R\$ 32,65	R\$ 34,31	↗	R\$ 23,66	R\$ 23,86	↗

Composição - Filtros



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

FILTER: Logistics > Overview > State: SP > Class: Mult. > Quarter: Q1/26

- The logistics market of the State of São Paulo ended 1Q26 with a total inventory of 21.267.587 m² consolidating its position as the epicenter of national logistics. The entire market is widely dominated by high-end assets (A+/A), which represent 80% of the São Paulo logistics universe, while the Others class accounts for the remaining 20%.
- The period's performance was marked by notable occupancy vigor, with positive net absorption of +366.732 m² and a gross movement of 598.228 m² in new leases. The great driver of this expansion was the high-end segment (A+/A), which recorded a net balance of +381.296 m², offsetting the contraction of -14.564 m² observed in the Others class, compared to +10.746 from the previous quarter, evidencing that the preference for efficiency and technical quality dictates the pace of growth
- The consolidated vacancy rate reached the healthy level of 6,40%, remaining comfortably below the 10% line that signals alert in the market. In physical volume, total vacancy sums 1.361.961 m². In the class breakdown, high-end saw its vacancy rate recede to 6,46%, a positive movement even with the delivery of 177.521 m² of new inventory in the quarter. The Others class had a slight fluctuation in vacancy rate, closing at 6,17%.
- Lease values accompanied the sector's heating, with the average asking price for high-end warehouses rising from R\$ 32,65 to R\$ 34,31/m². The Others class also recorded appreciation, closing at R\$ 23,86/m². With a construction activity of 1.399.536 m², the state market signals that the appetite for expansion and quality remains unshaken for the rest of the year.

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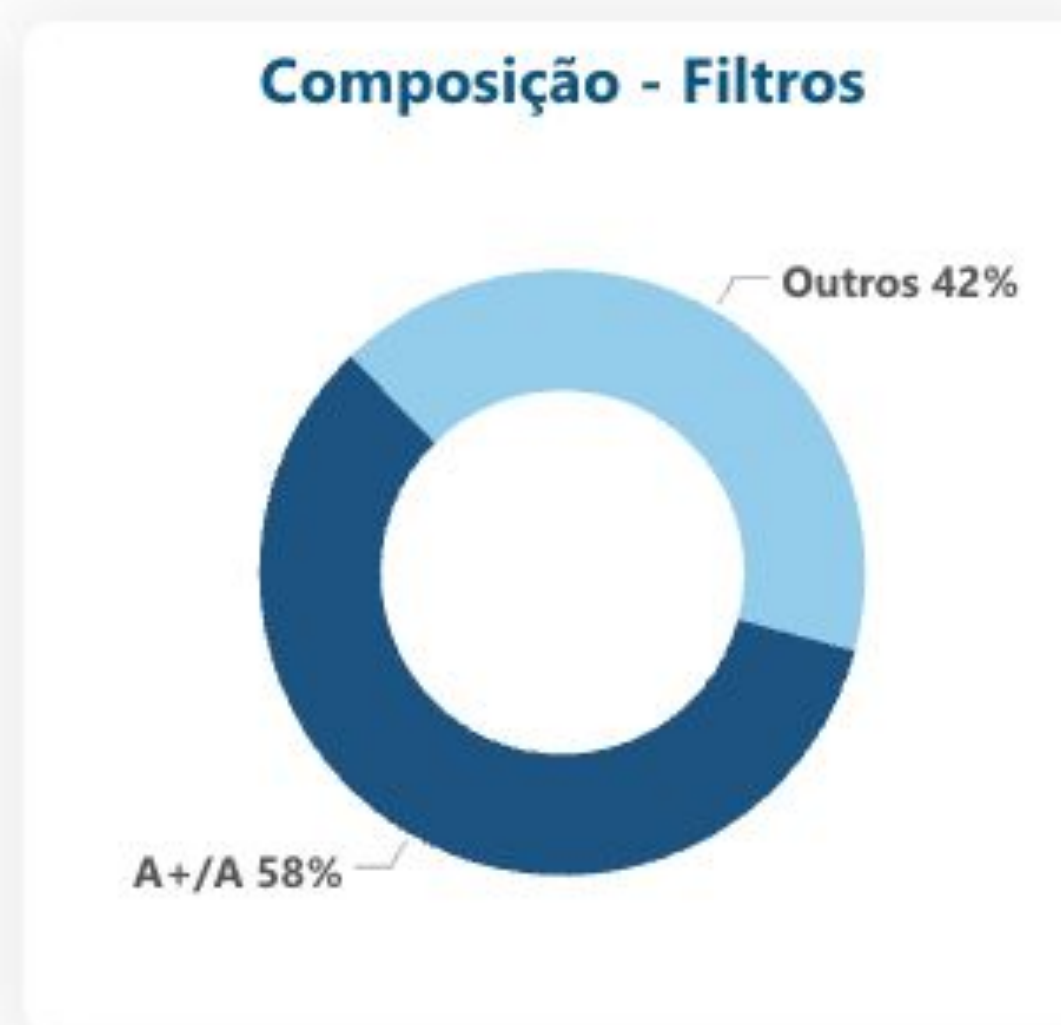
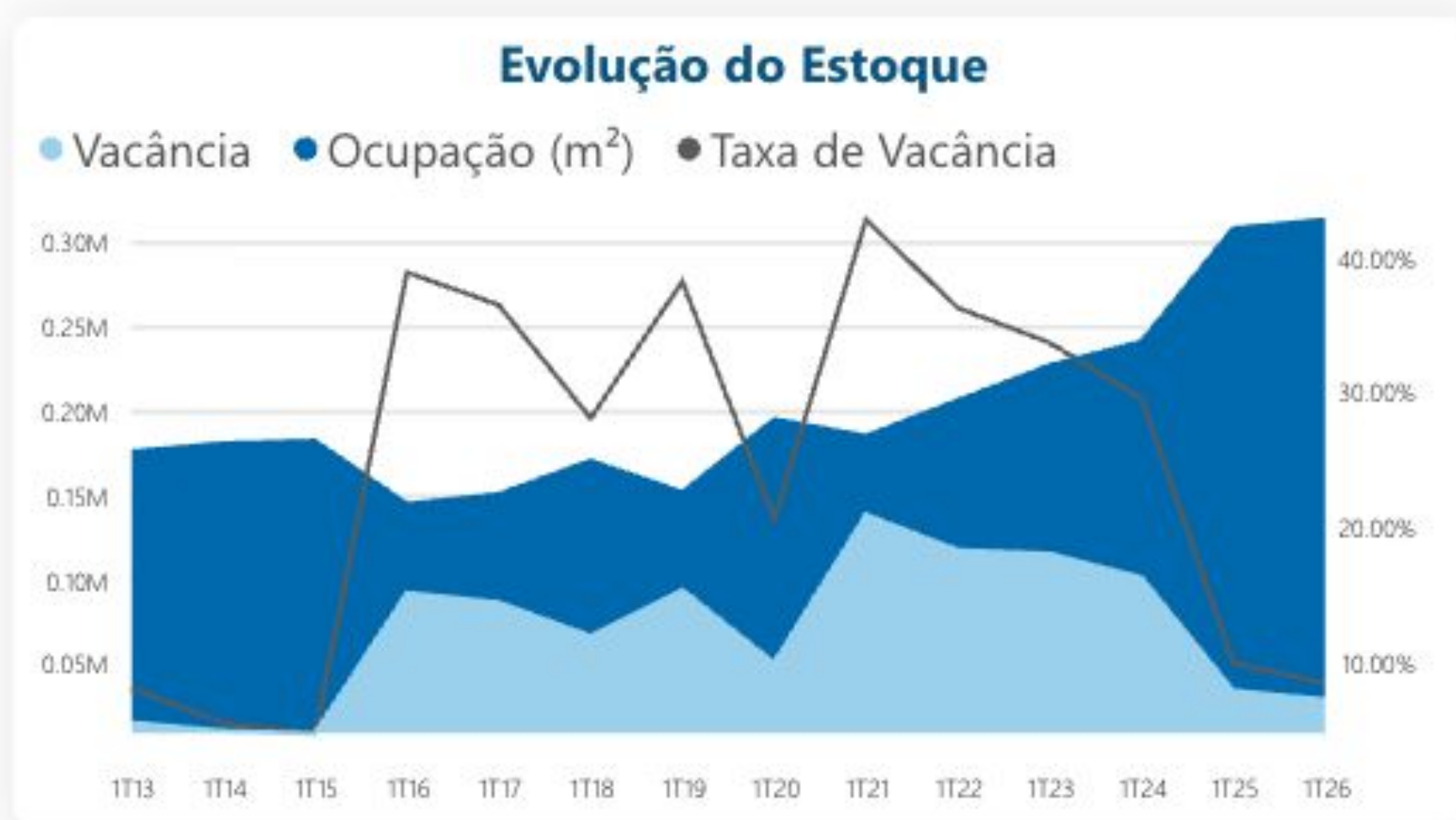
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Logistic Condominiums

Fernão Dias Corridor | São Paulo



Logístico > Detalhes > Região Brasil: Sudeste > Estado: SP > Eixo: Fernão Dias > Classe: A+/A,Outros > Trimestre: 1T26



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

FILTER: Logistics > Details > Corridor: Fernão Dias > Class: A+/A, Others > Quarter: Q1/26

- The Fernão Dias Corridor consolidated the closing of the 1st quarter of 2026 with a total inventory of 343.251 m² reaffirming its prominent position as a vital logistics corridor for regional and interstate distribution. The structure of the entire market in the region is characterized by a well-defined technical balance, where high-end assets (categories A+/A) represent 58% of the local universe, while the Others class accounts for the remaining 42% of available supply.
- Regarding market movement, the period demonstrated absolute operational stability, presenting gross absorption of 2.000 m² which ended up neutralized by equivalent returns, resulting in a negative net absorption of -2.000 m². It is worth noting that the absence of delivery of new inventory (0 m²) in the quarter functioned as an important protection factor for local indicators, avoiding additional pressure on availability in the logistics condominiums installed on this strategic route.
- The consolidated vacancy rate in the Fernão Dias Axis closed 1Q26 at 8,59%, remaining at a level of full occupancy health, significantly below the critical 10% mark that signals the balance of forces between owners and occupants. The physical volume of vacancy totals 29.500 m², with the massive concentration of this availability situated in high-end assets, which sum 28.370 m² vacant. Currently, the universe of effectively occupied spaces in the entire market of the region reaches the mark of 313.751 m².
- The main indicator of market heating was asset appreciation in the period. The average lease asking price for the entire market of the axis recorded an expressive jump, going from R\$ 44,43 in 4Q25 to an impressive R\$ 53,56/m² in 1Q26, considering all classes, evidencing strong demand pressure in a route with restricted qualified supply.

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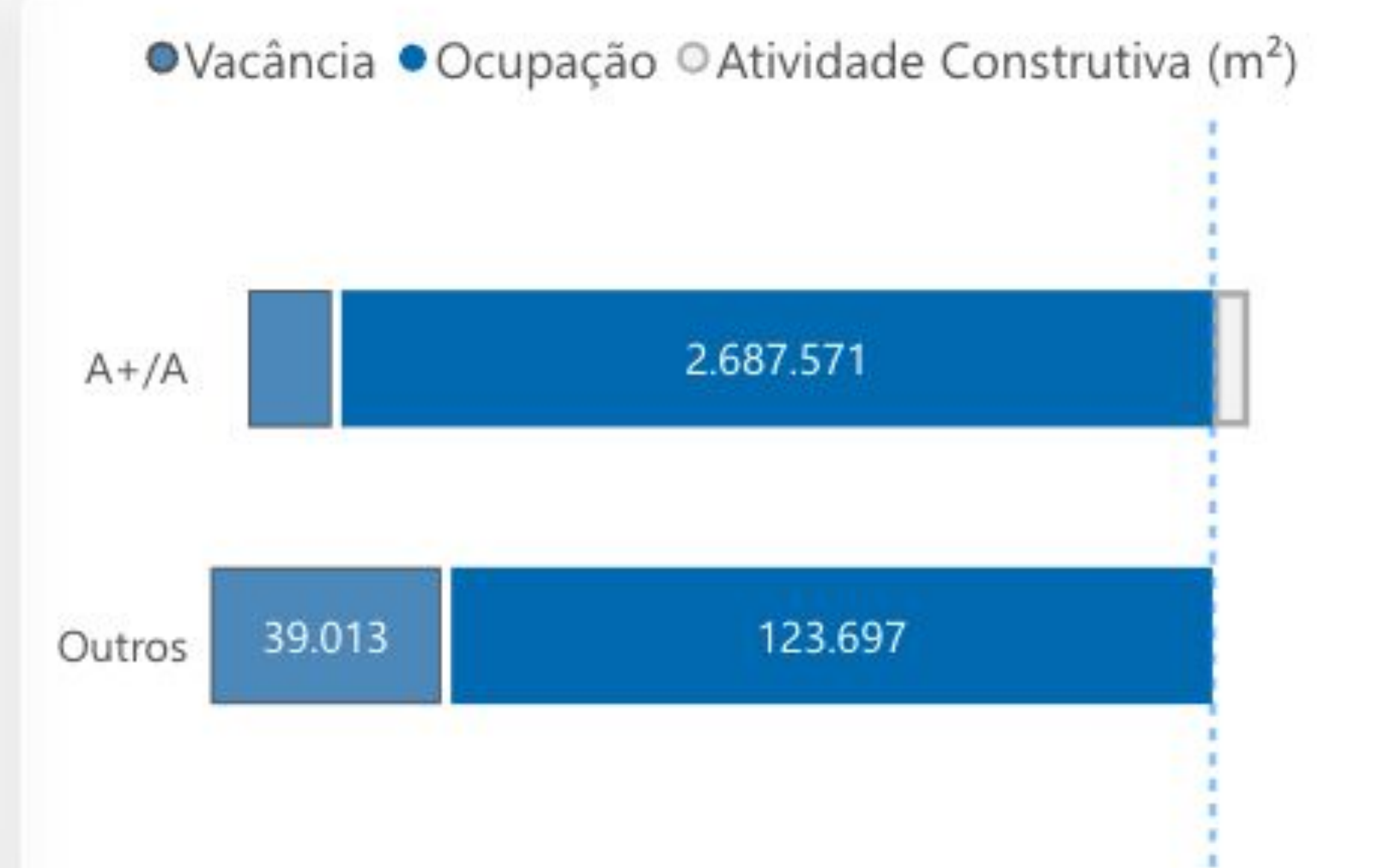
Logistic Condominiums State of Rio de Janeiro



Logístico > Visão Geral > Região: Sudeste > Estado: RJ > Classe: Mult. > Trimestre: 1T26

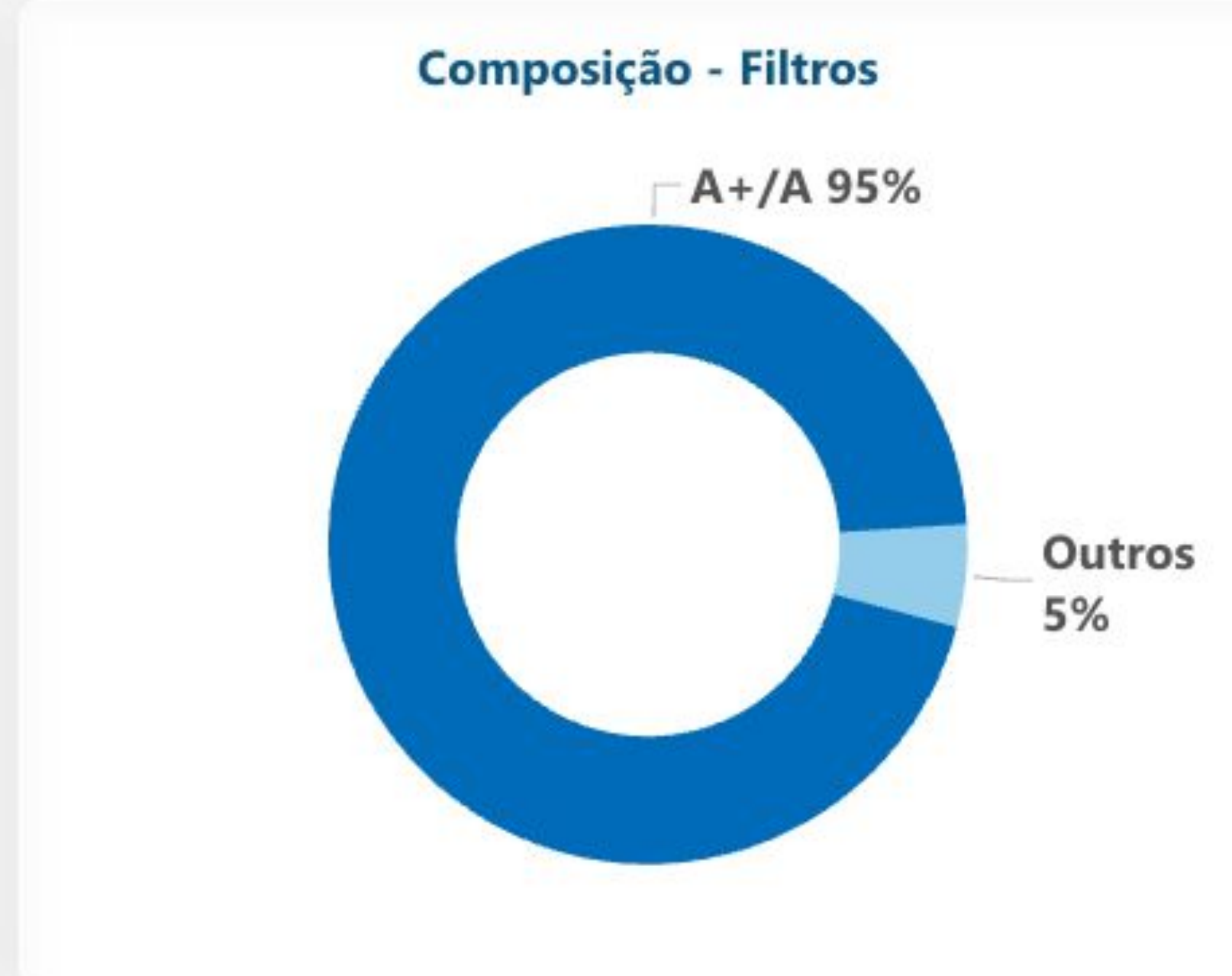


Absorção Líquida (m²) e Taxa de Vacância



Painel de Tendências

	A+ / A		△	Outros		△
	4T25	1T26		4T25	1T26	
Taxa de Vacância	11,14%	9,68%	↘	21,51%	23,98%	↗
Absorção Líquida (m ²)	5.571	61.018	↗	836	-4.013	↘
Novo Estoque (m ²)	11.735	19.863	↗	0	0	—
Atividade Construtiva (m ²)	134.367	114.504	↘	0	0	—
Preço de Locação (m ² /mês - M.P.)	R\$ 24,71	R\$ 28,01	↗	R\$ 30,00	R\$ 32,99	↗



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

FILTER: Logistics > Overview > State: RJ > Class: Mult. > Quarter: Q1/26

- The logistics market of the State of Rio de Janeiro ended 1Q26 with a total inventory of 3.138.285 m², maintaining a highly specialized profile. The entire market is dominated by high-end assets (A+/A), which represent 95% of the Fluminense universe, while the Others class holds only 5%. This extreme concentration reinforces that local infrastructure is geared almost exclusively toward high technical efficiency operations.
- Occupancy recorded a strong recovery in the first quarter of 2026. The entire market presented a net absorption of +57.006 m², sustained by a gross absorption of 85.463 m². The absolute protagonism was from high-end, with a net balance of +61.018 m², offsetting the contraction of -4.013 m² in the Others class. The movement indicates that occupants' appetite is focused on migrating to warehouses with better technical specification.
- The consolidated vacancy rate closed at 10,42%, a level still considered elevated as it sits above the 10% line. The physical volume of vacancy totals 327.017 m². However, the high-end vacancy rate receded to 9,68%, breaking the equilibrium barrier and entering a zone of greater control for owners, even with the delivery of 19.863 m² of new inventory. Meanwhile, the Others class saw its index rise to 23,98%.
- Lease values reacted to higher occupancy with generalized increases. The average asking price for high-end warehouses rose to R\$ 28,01/m², while the Others class reached R\$ 32,99/m². The pipeline of construction activity remains active with 114.504 m² in development, fully focused on the high-end segment, signaling confidence in the continued absorption of qualified spaces in Fluminense territory.

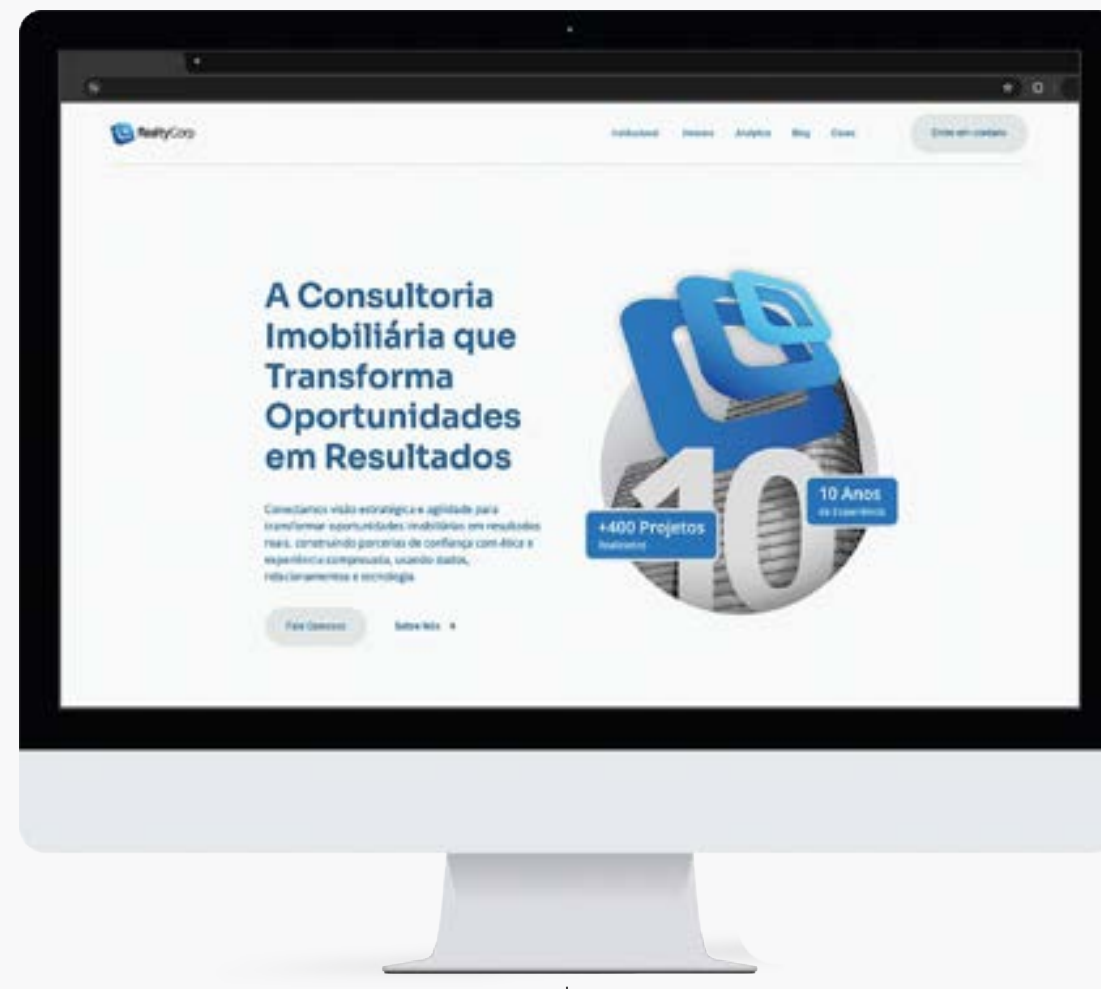
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[4] RealtyCorp has started to adopt the new regional division from Buildings, known as Buildings Regions 2.0. We believe this division is more consistent with the reality of the office regions in the cities of São Paulo and Rio de Janeiro.

Ecosystem RC



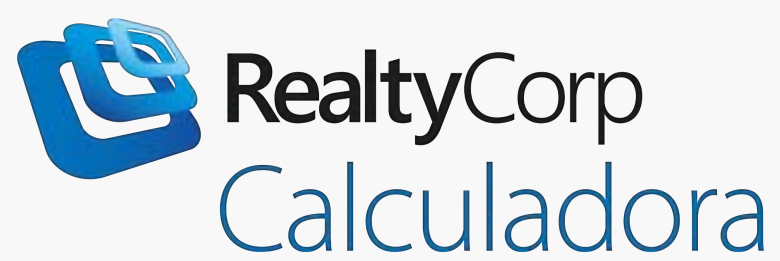
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