RealtyCorp Analytics

Office & Industrial

3rd Quarter of 2026

(Data Reference: Q2 2026)

Corporate Offices

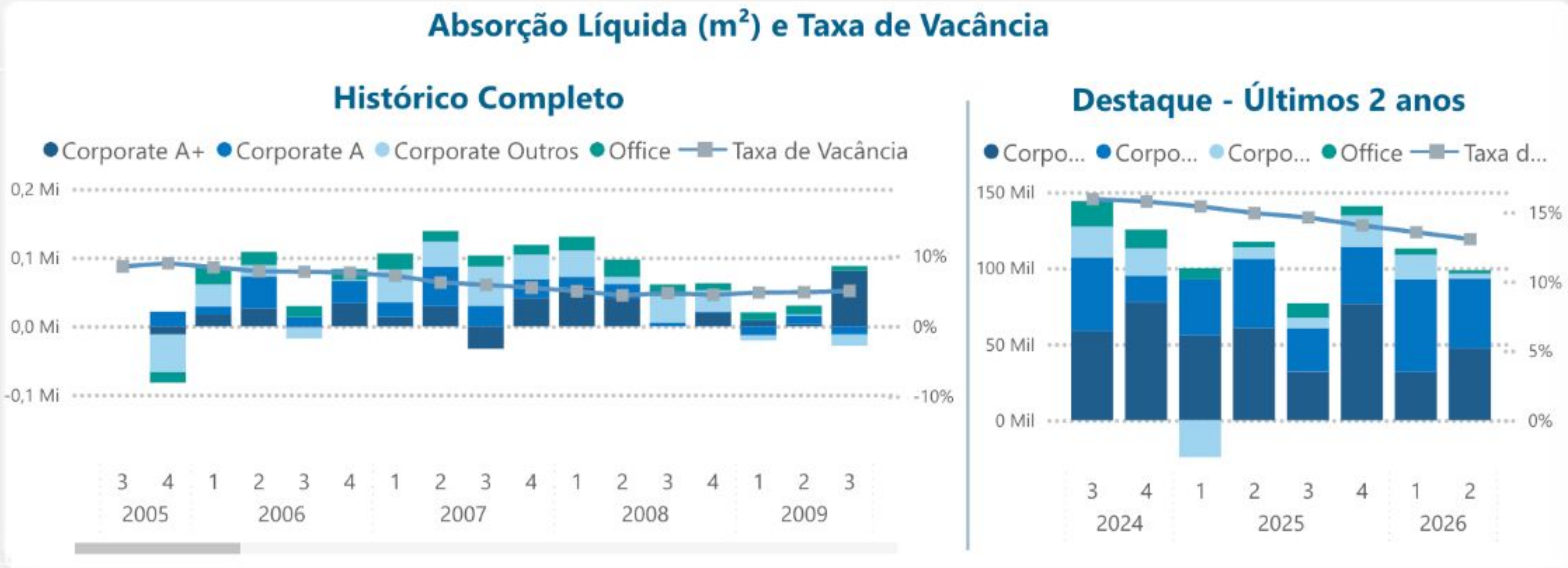
RealtyCorp Analytics

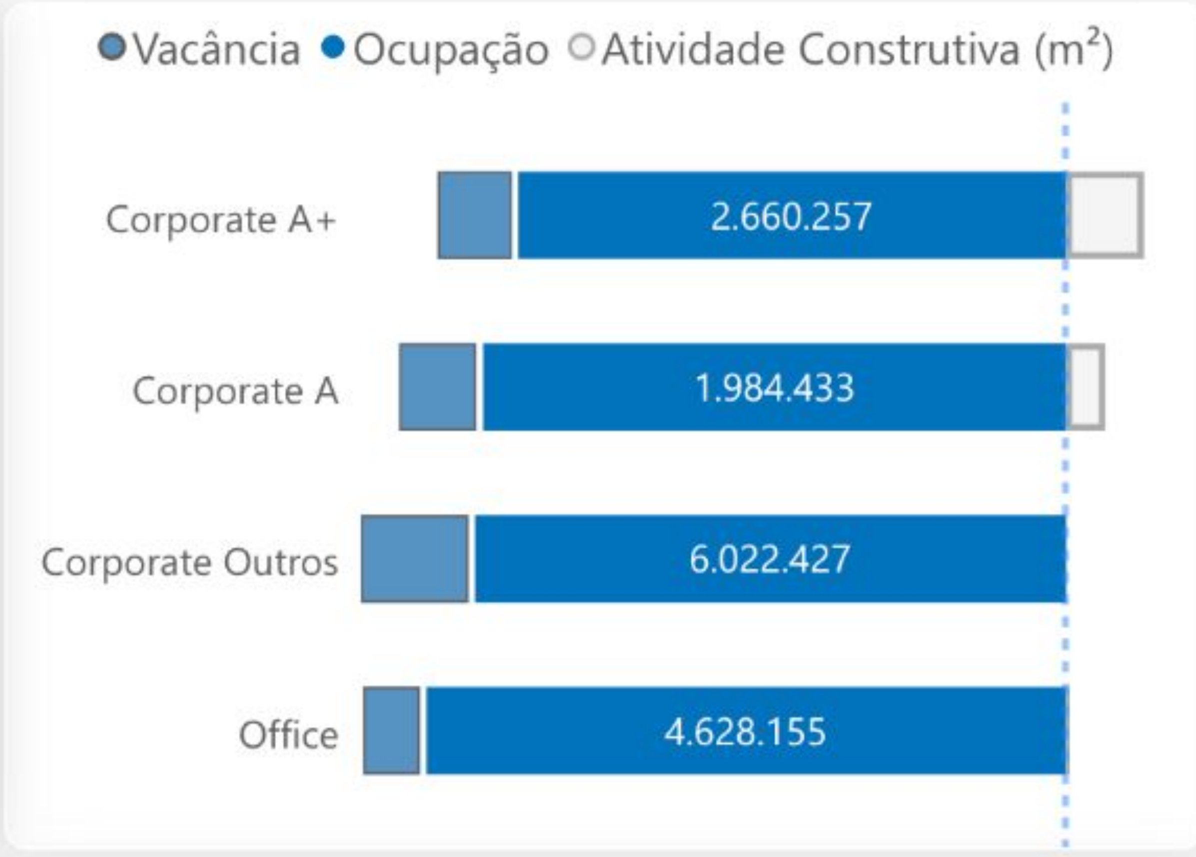
Corporate Offices Overview
City of São Paulo

Escritórios > Visão Geral > Cidade: São Paulo > Perfil/Classe: Mult. > Trimestre: 2T26

RealtyCorp Analytics

17.592.049	15.295.272	2.296.777	13,06%	98.626	244.077
Estoque Total (m²)	Ocupação (m²)	Vacância (m²)	Taxa de Vacância	Absorção Líquida (m²)	Absorção Bruta (m²)

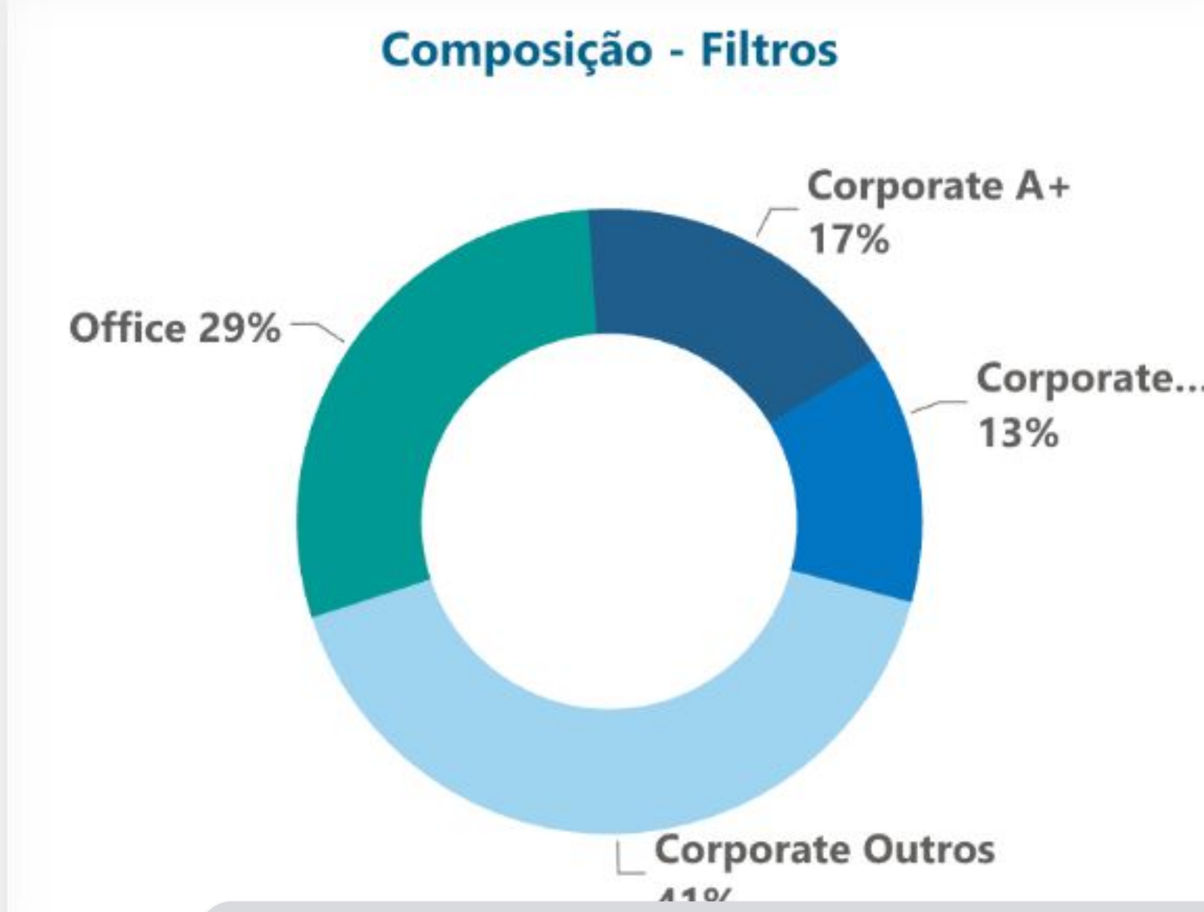




Painel de Tendências Corporate

	A+ 1T26	A+ 2T26	A+ △	A 1T26	A 2T26	A △	Outros 1T26	Outros 2T26	Outros △
Taxa de Vacância	12,85%	12,82%	↘	13,99%	12,58%	↘	16,92%	16,20%	↘
Absorção Líquida (m²)	31.650	47.336	↗	61.229	45.878	↘	15.985	3.165	↘
Novo Estoque (m²)	0	53.229	↗	30.815	16.035	↘	0	0	—
Atividade Construtiva (m²)	409.315	382.070	↘	139.453	136.198	↘	17.607	17.607	—
Preço de Locação (m²/mês - M.P.)	R$ 131,83	R$ 147,53	↗	R$ 124,11	R$ 119,22	↘	R$ 58,69	R$ 59,65	↗

Composição - Filtros



🔗 **DYNAMIC ANALYTICS DASHBOARD**
Access now by **clicking here**

FILTER: Offices > Overview > City: São Paulo > Profile/Class: Mult. > Quarter: Q2/26

- The city of São Paulo closed the 2nd quarter of 2026 with a total stock of 17,592,049 m², combining the Corporate and Office universes. The market structure remains consolidated with the leadership of the Corporate Others (B and C) class, which holds 41% of the inventory, followed by the Office segment (commercial suites) with 29%. The high-end segment (A+) represents 17% and the Corporate A class makes up the remaining 13% of the market share.
- The vacancy rate for the office universe (All classes) dropped to 13.06% in the quarter, a result of decreases across all corporate classes: Corporate A+ went from 12.85% to 12.82%, Corporate A fell from 13.99% to 12.58%, and Corporate Others retreated from 16.92% to 16.20%. The vacant stock totals 2,296,777 m² in the capital, successfully absorbing the new stock delivered in the period - 53,229 m² in the A+ class and 16,035 m² in the A class.
- The second quarter confirmed heated demand, with a total net absorption of +98,626 m² and a gross movement of 244,077 m² in new leases. In the corporate breakdown, the Corporate A+ class was the main growth driver, with +47,336 m² of net absorption, closely followed by Corporate A (+45,878 m²) and, with a more modest performance, by Corporate Others (+3,165 m²).
- The pricing scenario followed the appreciation observed in the previous quarter: Corporate A+ advanced to R$ 147.53/m², Corporate Others rose to R$ 59.65/m², while Corporate A retreated to R$ 119.22/m². The construction activity pipeline totals 382,070 m² under development in the A+ class, bringing the total to 535,875 m² across the entire Corporate market (A+, A, and Others).

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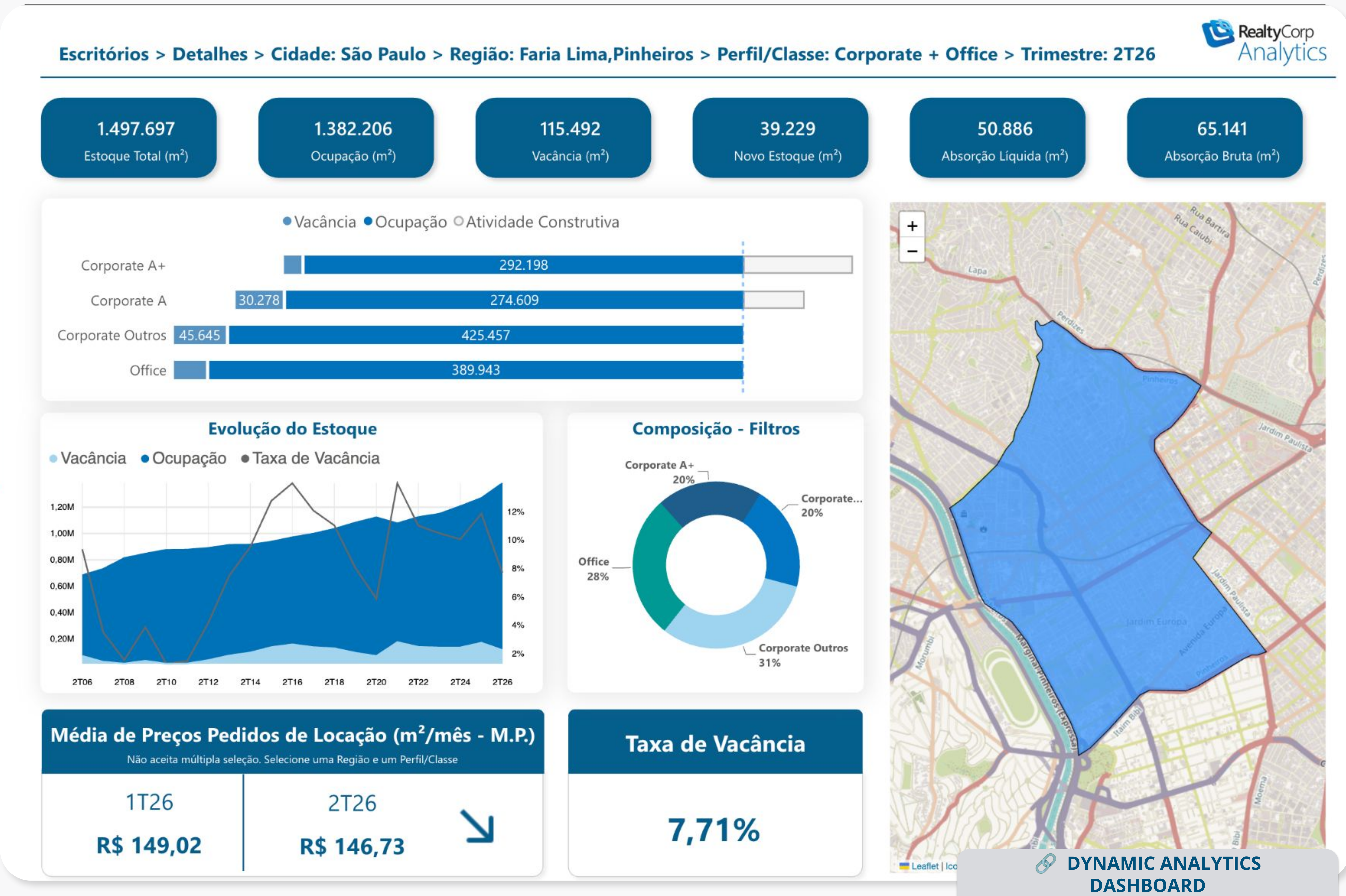
Corporate Offices Details
Faria Lima/Pinheiros | São Paulo



🔗 **DYNAMIC ANALYTICS DASHBOARD**
Access now by **clicking here**

FILTER: Offices > Details > City: São Paulo > Region: Faria Lima, Pinheiros > Profile/Class: Corporate + Office > Quarter: Q2/26

- The Faria Lima/Pinheiros submarket ended the 2nd quarter of 2026 with a total stock of 1,497,697 m², consolidating itself as one of the most relevant regions in the São Paulo corporate market, accounting for 8.5% of the entire office stock in the city of São Paulo. Unlike hubs outside the central axis, this region is already integrated into the São Paulo city data. The market profile is balanced between the Corporate A+ (20%) and Corporate A (20%) classes, with the Corporate Others class leading at 31% and the Office segment completing 28% of the supply.

- Occupancy dynamism showed a positive balance in the period, with an overall net absorption of +50,886 m², sustained by a gross absorption movement of 65,141 m² in new leases. This result was accompanied by the delivery of 39,229 m² of new stock in the quarter, which was absorbed in a healthy manner by the market.

- The consolidated vacancy rate for the region closed at 7.71%, a level comfortably below the 10% considered the healthy limit by the real estate market, and also below the average for the city of São Paulo (13.06%). The physical volume of vacancy totals 115,492 m², concentrated mainly in the Corporate Others (45,645 m²) and Corporate A (30,278 m²) classes; the A+ and Office classes, which are leaner in availability, together make up the remaining 39,569 m².

- In terms of average asking rental prices, the region registered a slight retraction: the value for the entire market went from R$ 149.02/m²/month in Q1/26 to R$ 146.73/m²/month in Q2/26, reflecting the low vacancy rate that is already operating close to equilibrium, limiting additional readjustment pressures in the short term.

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Corporate Offices
City of Rio de Janeiro

	A+ 1T26	A+ 2T26	A+ △	A 1T26	A 2T26	A △	Outros 1T26	Outros 2T26	Outros △
Taxa de Vacância	28,19%	26,48%	↘	21,90%	21,76%	↘	19,68%	19,24%	↘
Absorção Líquida (m²)	12.752	18.260	↗	1.194	2.460	↗	12.431	8.557	↘
Novo Estoque (m²)	0	0	—	0	0	—	0	0	—
Atividade Construtiva (m²)	123.324	123.324	—	14.571	14.571	—	6.658	6.658	—
Preço de Locação (m²/mês - M.P.)	R$ 92,96	R$ 92,85	↘	R$ 57,69	R$ 57,60	↘	R$ 42,08	R$ 42,54	↗

🔗 **DYNAMIC ANALYTICS DASHBOARD**
Access now by **clicking here**

FILTER: Overview > City: Rio de Janeiro > Profile/Class: Mult. > Quarter: Q2/26

- The city of Rio de Janeiro closed the 2nd quarter of 2026 with a total stock of 9,036,450 m². The market remains led by the Corporate Others class (41%) and the Office segment (39%), with the high-end completing the Corporate universe—Corporate A+ with 12% and Corporate A with 8% of the total share.

- In the quarter, demand remained positive, with a total net absorption of +29,549 m² and a gross absorption of 61,517 m² in new leases. Corporate performance was driven by the Corporate A+ class, which led with +18,260 m² of net absorption, followed by Corporate Others (+8,557 m²) and Corporate A (+2,460 m²)—all classes remain positive, evidencing the continuity of the Rio de Janeiro recovery.

- The total vacancy rate closed the quarter at 16.52%, equivalent to 1,492,493 m² available for lease. In the corporate universe, Corporate A+ retreated from 28.19% to 26.48%, Corporate A practically stabilized at 21.76% (compared to 21.90% in Q1/26), and Corporate Others yielded from 19.68% to 19.24%—a downward trajectory across all classes, with no new stock deliveries (0 m²) in the period.

- In terms of prices, behavior was mixed among the classes: Corporate A+ retreated slightly to R$ 92.85/m², while Corporate A also yielded, dropping to R$ 57.60/m². Conversely, the Corporate Others class appreciated, advancing to R$ 42.54/m². The construction activity pipeline remains stable, with 123,324 m² under development for the A+ class.

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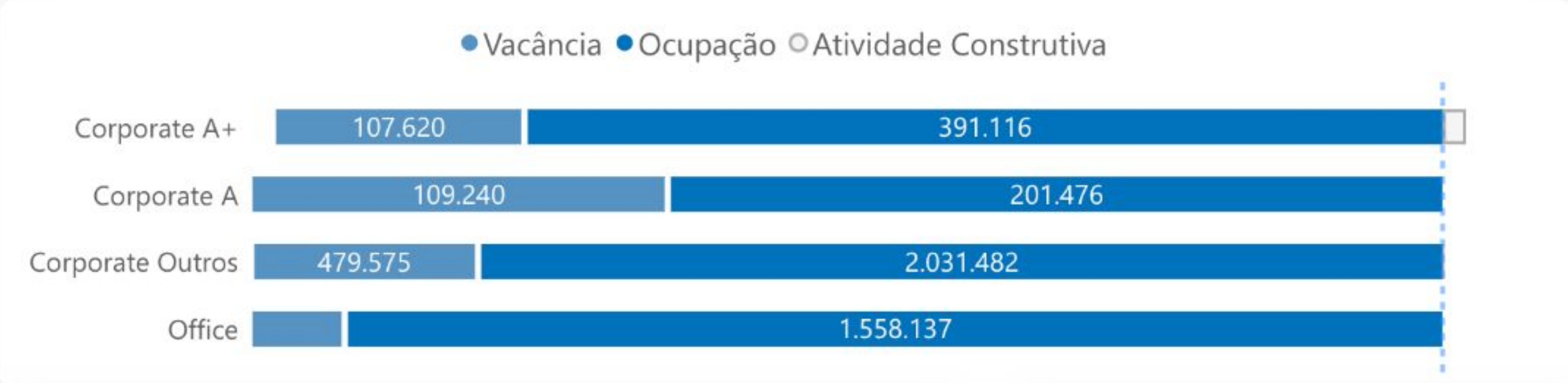
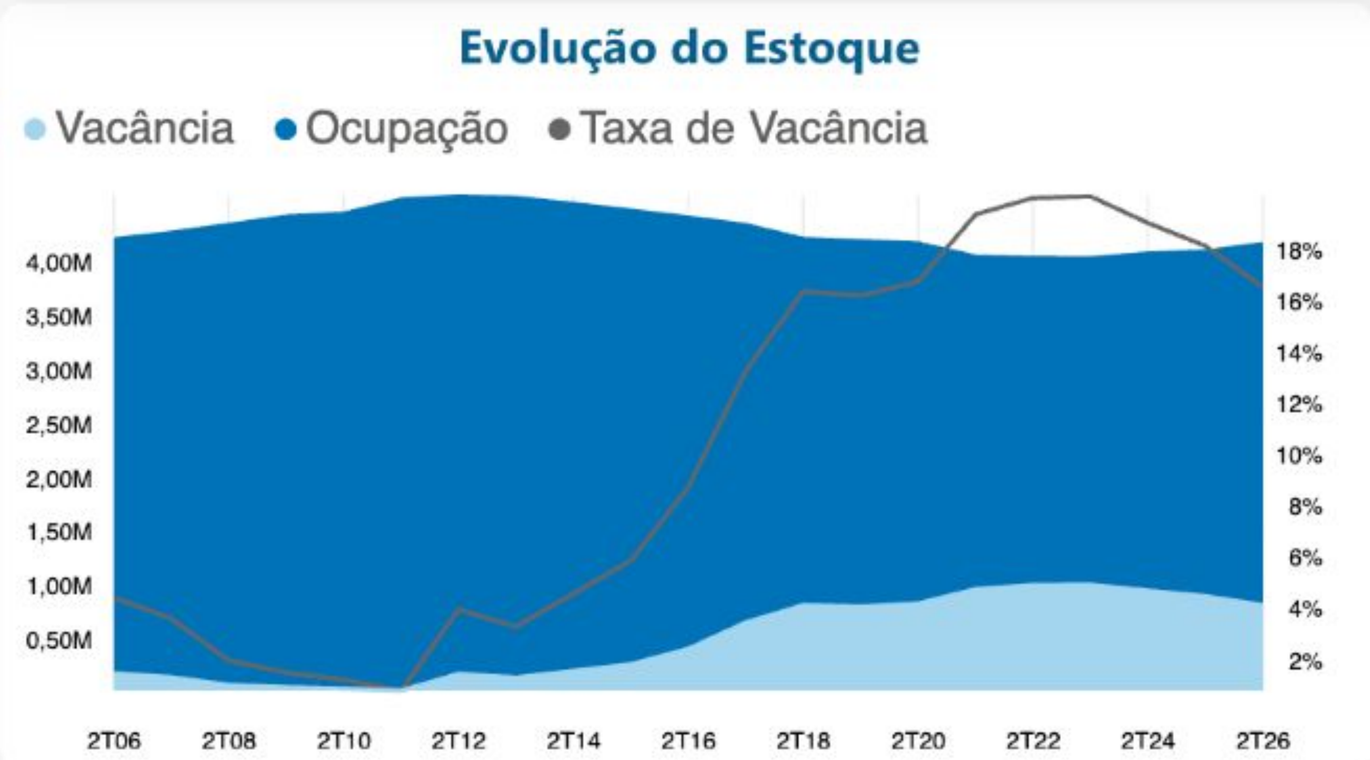
Corporate Offices
Centro | Rio de Janeiro

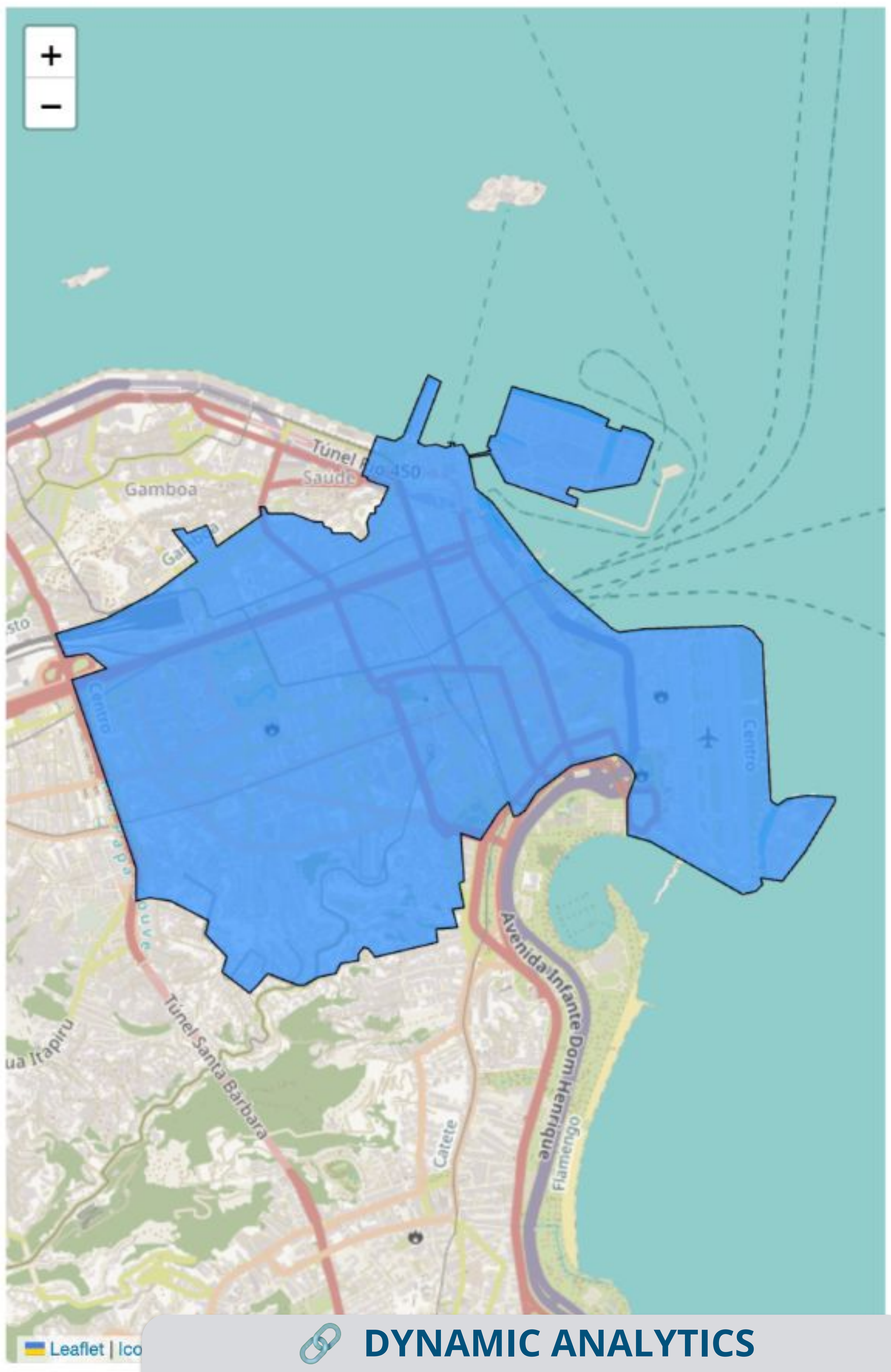
Escritórios > Detalhes > Cidade: Rio de Janeiro > Região: Centro RJ > Perfil/Classe: Corporate + Office > Trimestre: 2T26

RealtyCorp Analytics

5.014.425	4.182.211	832.215	0	18.870	39.166
Estoque Total (m²)	Ocupação (m²)	Vacância (m²)	Novo Estoque (m²)	Absorção Líquida (m²)	Absorção Bruta (m²)







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

Não aceita múltipla seleção. Selecione uma Região e um Perfil/Classe

1T26	2T26
R$ 49,02	R$ 46,95 ↘

Taxa de Vacância

16,60%

🔗 **DYNAMIC ANALYTICS DASHBOARD**
Access now by **clicking here**

FILTER: Details > City: Rio de Janeiro > Region: Centro RJ > Profile/Class: Corporate + Office > Quarter: Q2/26

- The Centro (Downtown) region of the city of Rio de Janeiro ended the 2nd quarter of 2026 with a total stock of 5,014,425 m², consolidating itself as the largest office submarket in the city of Rio de Janeiro, solely accounting for 55.5% of all Rio's corporate stock. The region's profile is largely dominated by the Corporate Others class, which accounts for 50% of the local stock, followed by the Office segment with 34%. High-end floor plates are divided between the A+ class (10%) and the A class (6%) of the total supply.

- Occupancy dynamism showed a positive balance in the period, with a net absorption of +18,870 m², sustained by a gross absorption movement of 39,166 m² in new leases. The scenario was favored by stable supply, since there was no delivery of new stock (0 m²) in the quarter, allowing demand to continue absorbing the remaining availability in the region.

- The general vacancy rate for Centro ended the quarter at 16.60%, practically in line with the average for the city of Rio de Janeiro (16.52%)—reinforcing that high vacancy is a structural challenge of the Rio market as a whole, and not a particularity of the central region. The physical volume of vacancy totals 832,215 m², with the highest concentration in the Corporate Others class (479,575 m²), followed by the Office segment (135,780 m²), Corporate A (109,240 m²), and Corporate A+ (107,620 m²)—a picture of availability spread across practically all classes.

- In terms of values, Centro registered a retraction in average asking rental prices, which fell from R$ 49.02/m²/month in Q1/26 to R$ 46.95/m²/month in Q2/26. The movement reflects the still elevated volume of vacancy in the region, which continues to offer negotiation margins for occupants seeking spaces in the historical and financial heart of the city.

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Logistic Condominiums

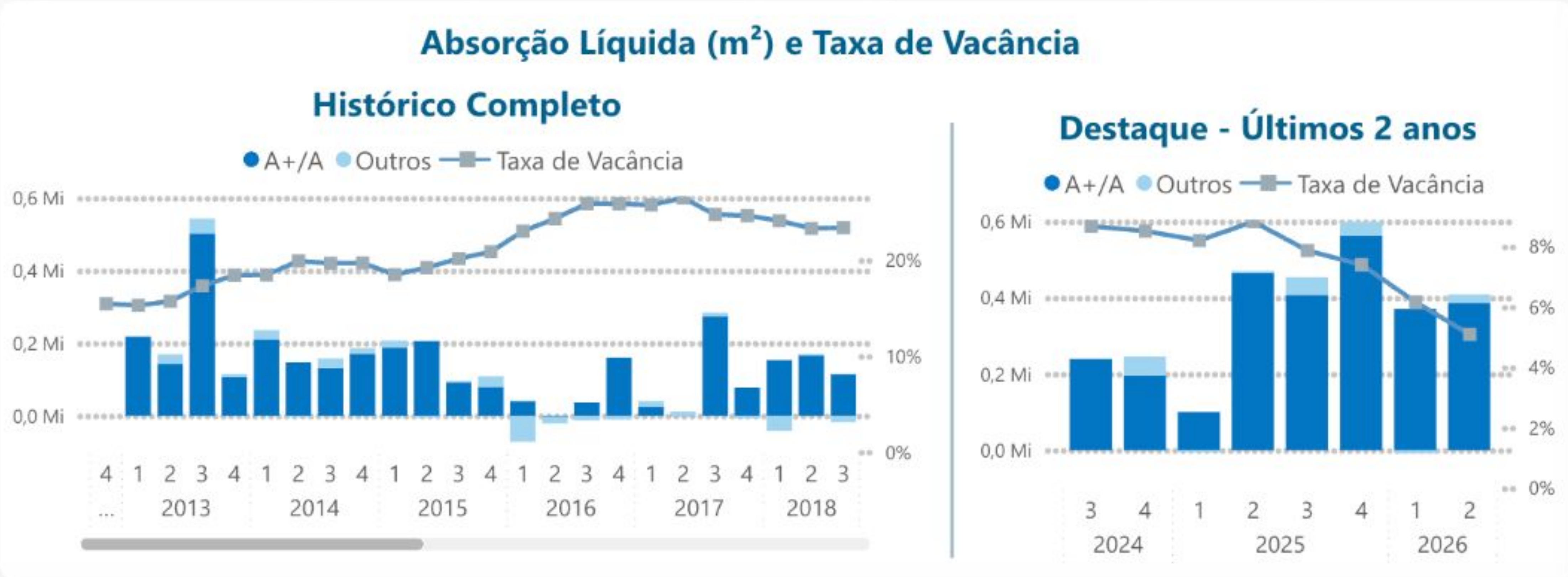
RealtyCorp Analytics

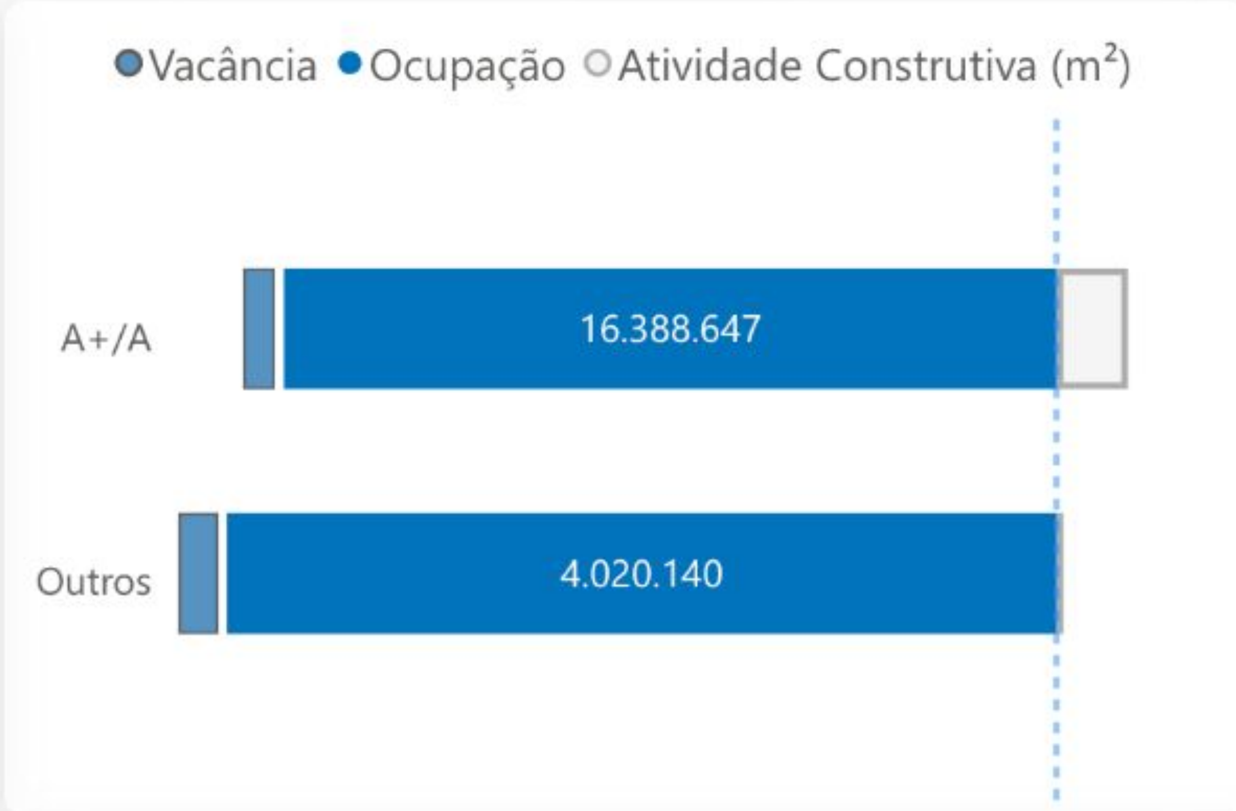
Logistic Condominiums
State of São Paulo

Logístico > Visão Geral > Região: Mult. > Estado: SP > Classe: Mult. > Trimestre: 2T26

RealtyCorp Analytics

21.504.550	20.408.787	1.095.763	5,10%	408.936	634.185
Estoque Total (m²)	Ocupação (m²)	Vacância (m²)	Taxa de Vacância	Absorção Líquida (m²)	Absorção Bruta (m²)

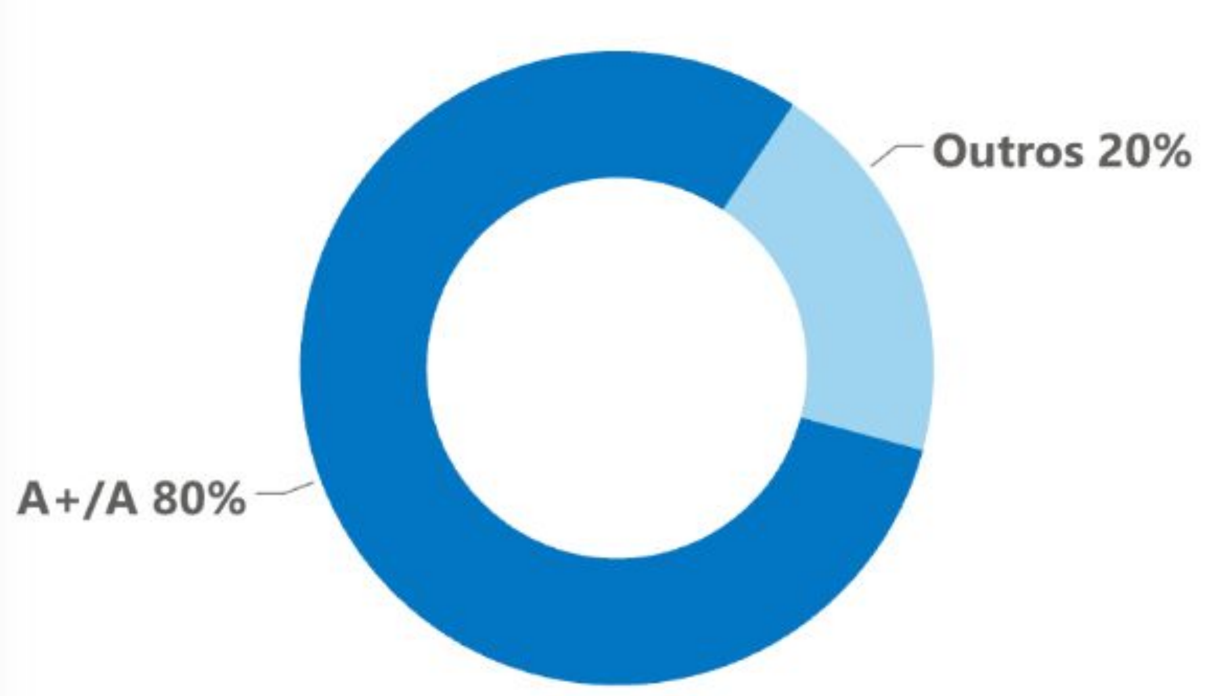




Painel de Tendências

	A+ / A 1T26	A+ / A 2T26	△	Outros 1T26	Outros 2T26	△
Taxa de Vacância	6,21%	4,99%	↘	5,97%	5,51%	↘
Absorção Líquida (m²)	371.086	386.281	↗	-7.969	22.655	↗
Novo Estoque (m²)	107.607	188.149	↗	0	3.000	↗
Atividade Construtiva (m²)	1.374.761	1.515.503	↗	35.776	32.776	↘
Preço de Locação (m²/mês - M.P.)	R$ 33,01	R$ 33,13	↗	R$ 24,11	R$ 24,65	↗

Composição - Filtros



🔗 **DYNAMIC ANALYTICS DASHBOARD**
Access now by **clicking here**

FILTER: Logistics > Overview > Region: Mult. > State: SP > Class: Mult. > Quarter: Q2/26

- The logistics market in the State of São Paulo ended Q2/26 with a total stock of 21,504,550 m², reaffirming its position as the epicenter of national logistics. The market is largely dominated by high-end assets (A+/A) that represent 80% of the São Paulo universe, while the Others class accounts for the remaining 20%.

- The period's performance was marked by vigorous occupancy, with a positive net absorption of +408,936 m² and a gross movement of 634,185 m² in new leases. The high-end segment (A+/A) remained the engine of expansion, with a net balance of +386,281 m², while the Others class also turned positive, registering +22,655 m²—a relevant recovery compared to the negative balance of -7,969 m² observed in Q1/26.

- The consolidated vacancy rate closed at 5.10%, a healthy level comfortably below the 10% line that signals a market alert. In physical volume, total vacancy sums 1,095,763 m². In the breakdown by classes, the high-end segment saw its vacancy rate retreat from 6.21% to 4.99%, even with the delivery of 188,149 m² of new stock in the quarter; the Others class also yielded, from 5.97% to 5.51%.

- Rental values continued their upward trajectory: the average asking price for high-end warehouses advanced from R$ 33.01 to R$ 33.13/m², while the Others class appreciated from R$ 24.11 to R$ 24.65/m². With construction activity at 1,548,279 m², the state's market indicates that the appetite for expansion and quality remains strong for the rest of the year.

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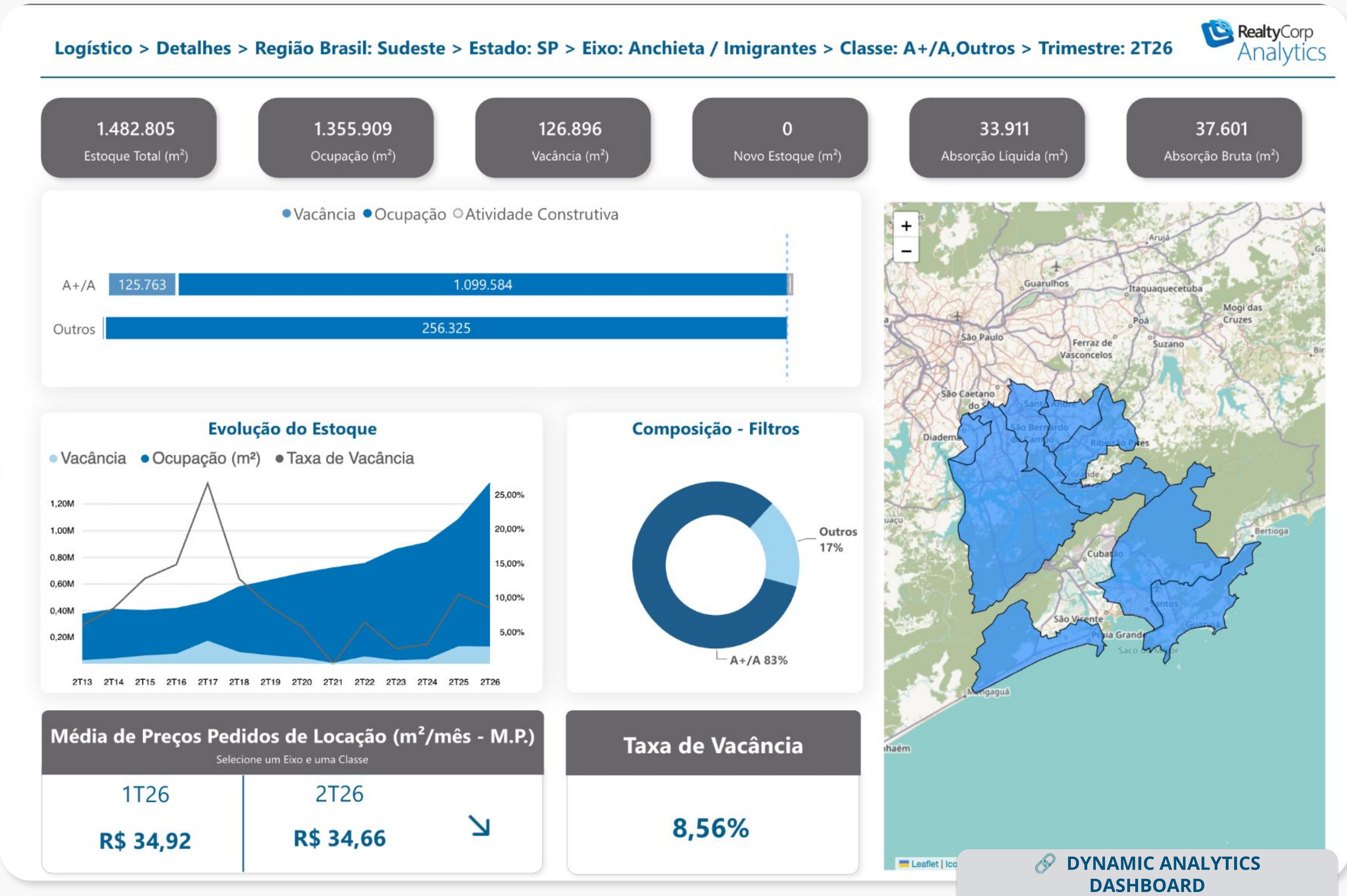
Logistic Condominiums
Anchieta/Imigrantes Corridor | São Paulo



🔗 **DYNAMIC ANALYTICS DASHBOARD**
Access now by **clicking here**

FILTER: Logistics > Details > Region Brazil: Southeast > State: SP > Corridor: Anchieta / Imigrantes > Class: A+/A, Others > Quarter: Q2/26

- The Anchieta/Imigrantes Corridor ended the 2nd quarter of 2026 with a total stock of 1,482,805 m², consolidating its position as a strategic logistics corridor for the ABC Paulista region and the Baixada Santista, accounting for 6.9% of all logistics stock in the State of São Paulo. The market is heavily concentrated in high-end assets (A+/A), which represent 83% of the local supply, while the Others class accounts for only 17%.

- Market movement in the quarter was significant, with a net absorption of +33,911 m² on top of a gross absorption of 37,601 m² in new leases. The lack of new stock delivery (0 m²) in the period acted as a protective factor for local indicators, directing all demand to the existing stock in the corridor.

- The consolidated vacancy rate ended the quarter at 8.56%—below the critical 10% mark, but still above the average for the State of São Paulo (5.10%), signaling that the corridor operates with a relatively larger supply slack than the overall São Paulo logistics market. The physical volume of vacancy totals 126,896 m², concentrated almost entirely in high-end assets (125,763 m²)—the Others class operates with a residual availability of only 1,133 m², reflecting practically full occupancy in this segment.

- Contrary to the rest of the state, the average asking rental price in the corridor fell from R$ 34.92/m² in Q1/26 to R$ 34.66/m² in Q2/26, considering all classes—a slight accommodation after the elevated levels of previous quarters.

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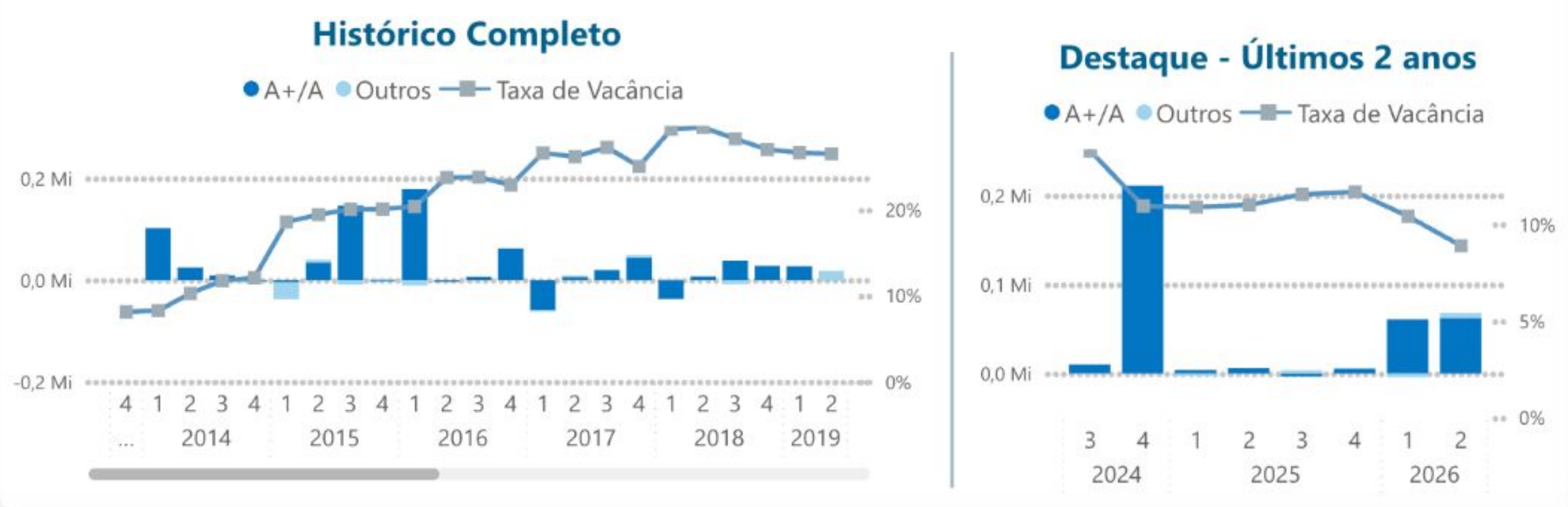
Logistic Condominiums
State of Rio de Janeiro

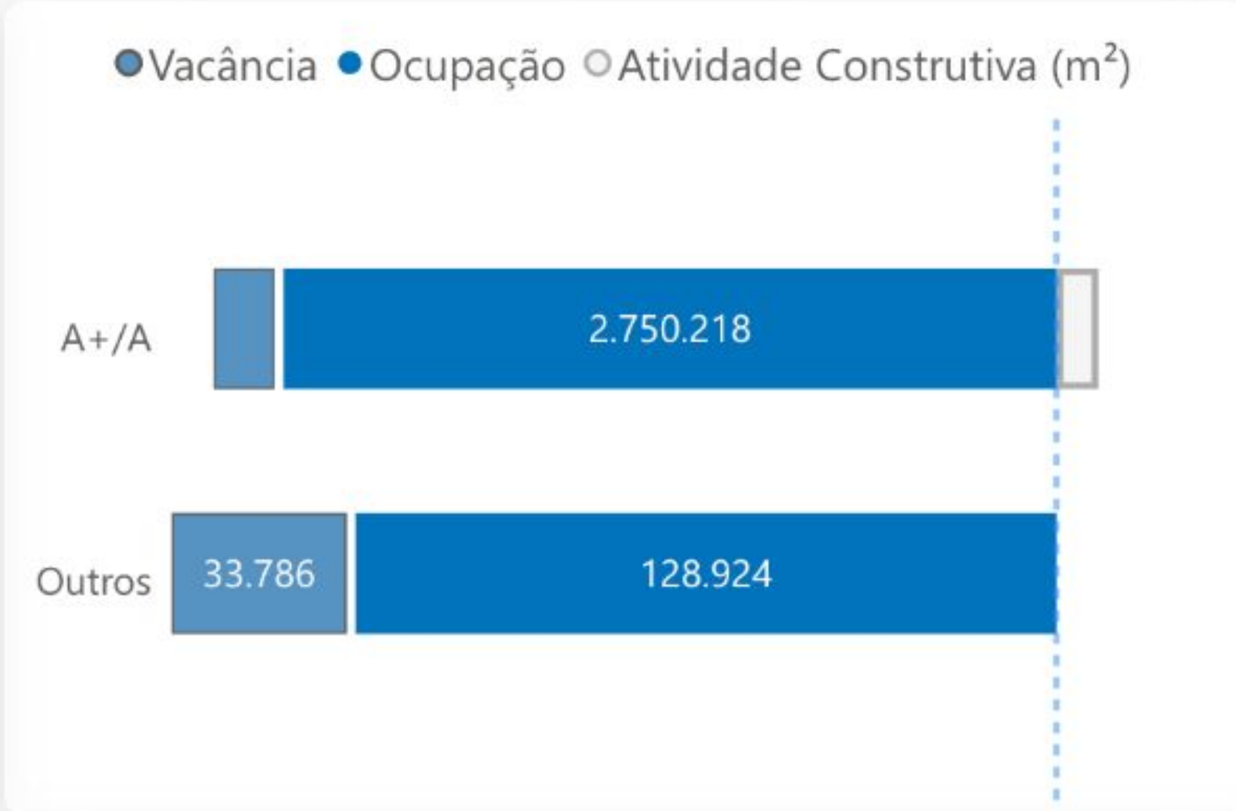
Logístico > Visão Geral > Região: Sudeste > Estado: RJ > Classe: Mult. > Trimestre: 2T26

RealtyCorp Analytics

3.160.311	2.879.142	281.169	8,90%	67.874	97.539
Estoque Total (m²)	Ocupação (m²)	Vacância (m²)	Taxa de Vacância	Absorção Líquida (m²)	Absorção Bruta (m²)

Absorção Líquida (m²) e Taxa de Vacância

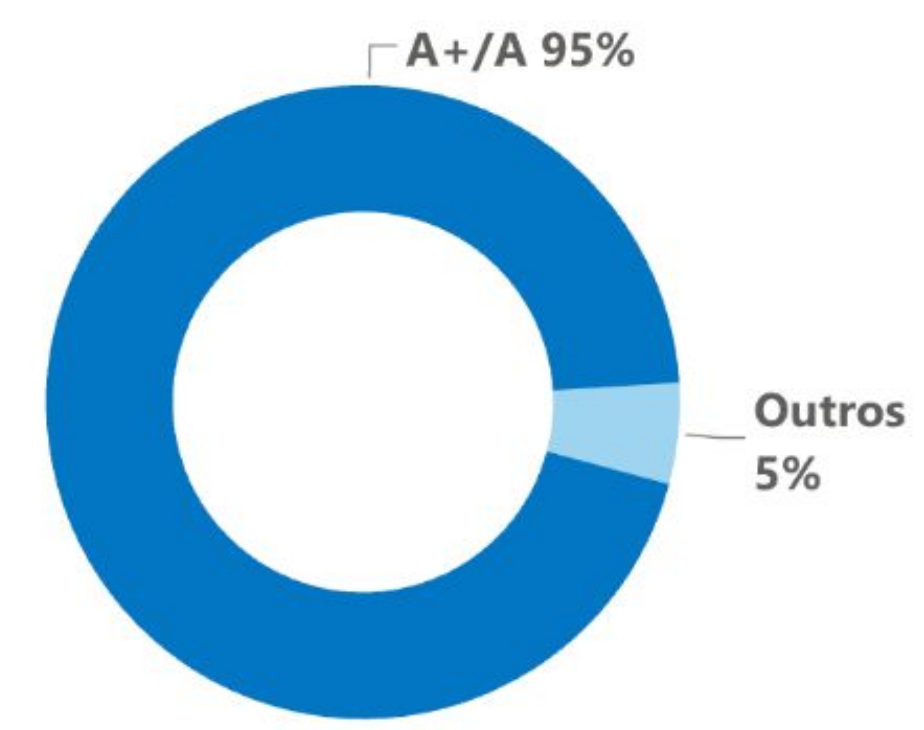




Painel de Tendências

	A+ / A 1T26	A+ / A 2T26	△	Outros 1T26	Outros 2T26	△
Taxa de Vacância	9,68%	8,25%	↘	23,98%	20,76%	↘
Absorção Líquida (m²)	61.018	62.647	↗	-4.013	5.227	↗
Novo Estoque (m²)	19.863	22.026	↗	0	0	—
Atividade Construtiva (m²)	114.504	149.142	↗	0	0	—
Preço de Locação (m²/mês - M.P.)	R$ 28,01	R$ 28,00	↘	R$ 32,99	R$ 38,00	↗

Composição - Filtros



🔗 DYNAMIC ANALYTICS DASHBOARD
Access now by **clicking here**

FILTER: Logistics > Overview > Region: Southeast > State: RJ > Class: Mult. > Quarter: Q2/26

- The logistics market in the State of Rio de Janeiro ended Q2/26 with a total stock of 3,160,311 m², maintaining a highly specialized profile. The market is dominated by high-end assets (A+/A) that represent 95% of the Rio de Janeiro universe, while the Others class holds only 5%—a concentration that reinforces the vocation of the local infrastructure for highly technical efficient operations.

- Occupancy continued on a positive trajectory in the quarter: the market presented a net absorption of +67,874 m², sustained by a gross absorption of 97,539 m². High-end properties remained the protagonist, registering a net balance of +62,647 m², while the Others class also turned positive, with +5,227 m²—a relevant recovery compared to the negative balance of -4,013 m² in the previous quarter.

- The consolidated vacancy rate retreated to 8.90%, totaling 281,169 m² available. High-end vacancy dropped from 9.68% to 8.25%, even with the delivery of 22,026 m² of new stock in the period. Meanwhile, the Others class, although still elevated, also retreated significantly, from 23.98% to 20.76%.

- Prices reacted differently between classes: the asking price for high-end warehouses remained stable at R$ 28.00/m², while the Others class experienced strong appreciation, jumping from R$ 32.99 to R$ 38.00/m². The construction activity pipeline remains active, with 149,142 m² under development, fully concentrated in the high-end segment.

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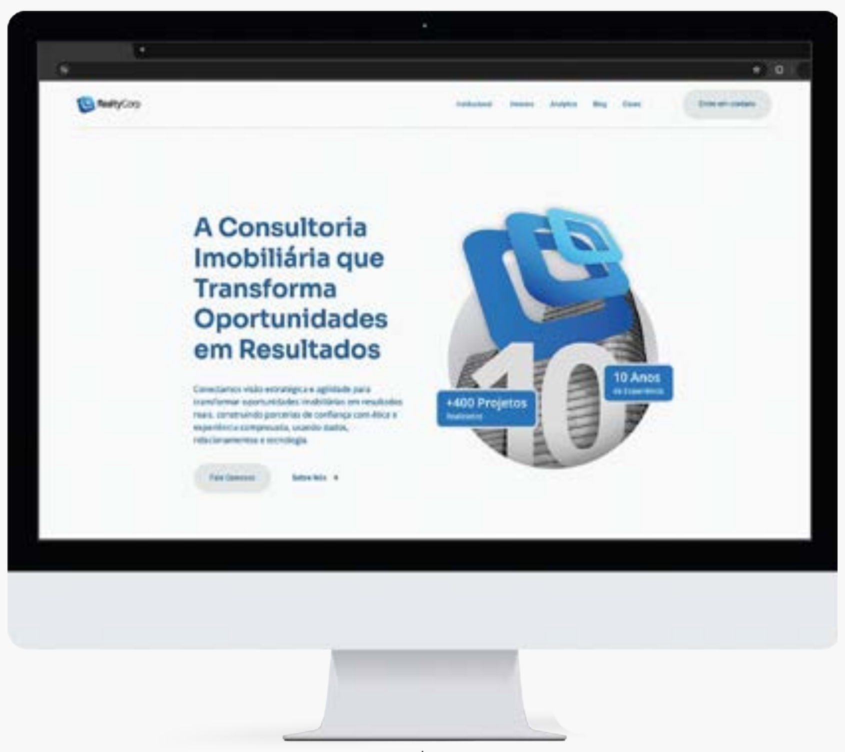
Ecossistema **RC**



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