RealtyCorp

# Analytics

## Offices & Industrial

4th Quarter 2026

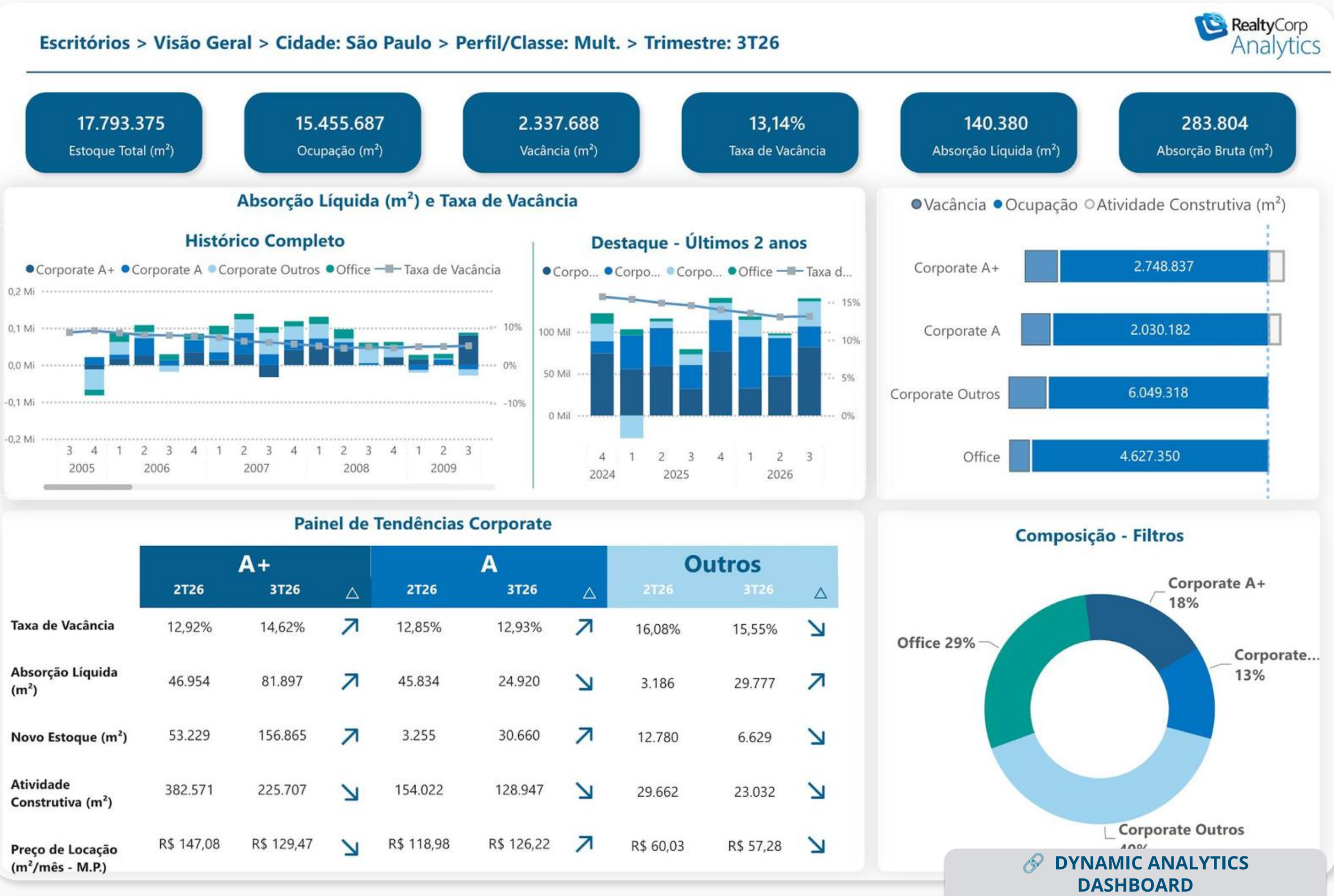
(Data reference: Q3 2026)

© **2026** | CRECI: **25548 J**

# Corporate Offices

RealtyCorp Analytics

# Corporate Offices
## City of São Paulo




### Painel de Tendências Corporate

| | A+ | | | A | | | Outros | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2T26 | 3T26 | △ | 2T26 | 3T26 | △ | 2T26 | 3T26 | △ |
| **Taxa de Vacância** | 12,92% | 14,62% | ↗ | 12,85% | 12,93% | ↗ | 16,08% | 15,55% | ↘ |
| **Absorção Líquida (m²)** | 46.954 | 81.897 | ↗ | 45.834 | 24.920 | ↘ | 3.186 | 29.777 | ↗ |
| **Novo Estoque (m²)** | 53.229 | 156.865 | ↗ | 3.255 | 30.660 | ↗ | 12.780 | 6.629 | ↘ |
| **Atividade Construtiva (m²)** | 382.571 | 225.707 | ↘ | 154.022 | 128.947 | ↘ | 29.662 | 23.032 | ↘ |
| **Preço de Locação (m²/mês - M.P.)** | R$ 147,08 | R$ 129,47 | ↘ | R$ 118,98 | R$ 126,22 | ↗ | R$ 60,03 | R$ 57,28 | ↘ |




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

**FILTER:** Offices > Overview > City: São Paulo > Profile/Class: Corporate + Office > Quarter: Q3/26

- The city of São Paulo closed the 3rd quarter of 2026 with a total inventory of 17,793,375 m², combining the Corporate and Office universes. The market structure remains consolidated under the leadership of the Corporate Others class (B and C), which holds 40% of the inventory, followed by the Office segment (commercial suites) with 29%. The high-end segment (A+) represents 18% and the Corporate A class the remaining 13% of market share.

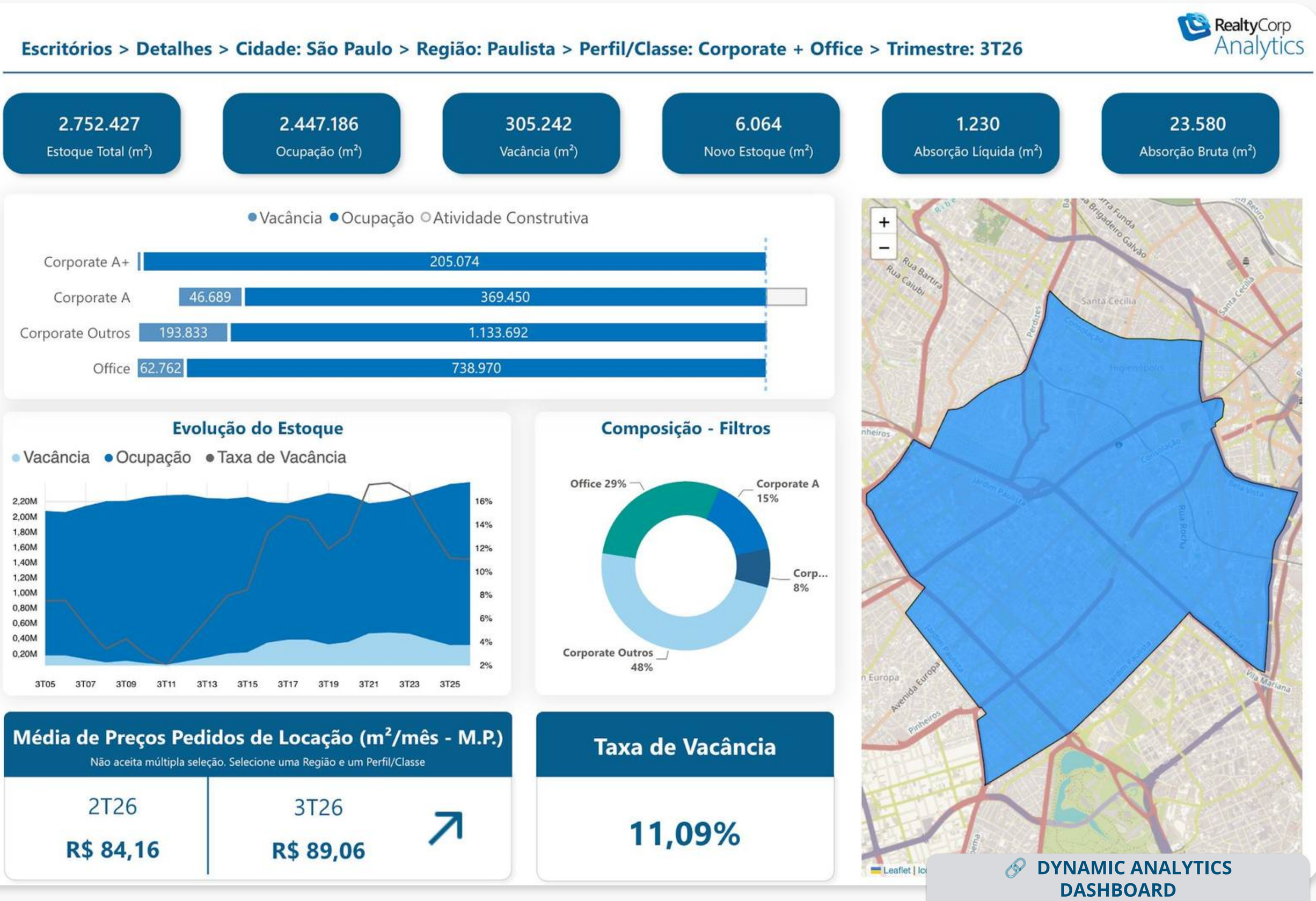
- The third quarter kept demand heated, with total net absorption of +140,380 m² and gross absorption of 283,804 m² in new leases. In the corporate breakdown, the Corporate A+ class was the main growth driver, with +81,897 m² of net absorption, followed by Corporate Others (+29,777 m²) and Corporate A (+24,920 m²).

- The vacancy rate for the office universe (All classes) stood at 13.14% in the quarter, a slight increase from 13.06% in 2Q26, driven by the delivery of 156,865 m² of new inventory in the Corporate A+ class, which raised its vacancy from 12.92% to 14.62%. The Corporate A class remained virtually stable (from 12.85% to 12.93%), while Corporate Others fell from 16.08% to 15.55%. Vacant inventory totals 2,337,688 m² in the capital, also considering deliveries of 30,660 m² in the Corporate A class and 6,629 m² in Corporate Others.

- Prices were mixed in a quarter of strong new inventory deliveries: the Corporate A+ class eased to R$ 129.47/m² and Corporate Others to R$ 57.28/m², while Corporate A rose to R$ 126.22/m². The construction pipeline totals 225,707 m² under development in the Corporate A+ class, adding up to 377,686 m² across the entire Corporate market (classes A+, A and Others).

[1] RealtyCorp's classification methodology for office buildings is based on the Buildings classification, as follows: *Office*: Buildings with units smaller than 100 m²; *Corporate*: Buildings with units greater than or equal to 100 m²; A+: Buildings equivalent to AAA and AA in the Buildings Classification; A: Buildings equivalent to A in the Buildings Classification; Others: Buildings equivalent to BB, B and C in the Buildings Classification;
[2] Statistical data for Alphaville are not included in the data for the city of São Paulo;
[3] The statistical data in this Analytics refer to the 3rd quarter of 2026 and were consolidated on 09/30/2026.
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# Corporate Offices
## Paulista | São Paulo




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

**FILTER:** Details > City: São Paulo > Region: Paulista > Profile/Class: Corporate + Office > Quarter: Q3/26

- The Paulista region, one of the most iconic financial centers in the country, ended the 3rd quarter of 2026 with a total inventory of 2,752,427 m² — accounting for 15.5% of all office inventory in the city of São Paulo. Unlike hubs outside the central axis, this region is already included in the city of São Paulo data. The market profile is led by the Corporate Others class, with 48% of the inventory, followed by the Office segment with 29%. High-end space accounts for 23% of supply, split between the Corporate A (15%) and Corporate A+ (8%) classes.

- Occupancy maintained a positive balance in the period, with overall net absorption of +1,230 m², supported by gross absorption of 23,580 m² in new leases. The region received 6,064 m² of new inventory in the Corporate A class during the quarter and has 32,211 m² under construction, of which 29,256 m² are Corporate A.

- The region's consolidated vacancy rate closed at 11.09%, a slight increase from 10.93% in 2Q26, but still below the city of São Paulo average (13.14%). Vacant space totals 305,242 m², concentrated mainly in the Corporate Others class (193,833 m²), followed by the Office segment (62,762 m²) and Corporate A (46,689 m²); Corporate A+ has residual availability of only 1,958 m², practically at full occupancy.

- Average asking rents in the region appreciated: the value for the entire market rose from R$ 84.16/m²/month in 2Q26 to R$ 89.06/m²/month in 3Q26, an increase of 5.8%, reflecting demand for space at one of the city's most traditional corporate addresses.

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# Corporate Offices
## City of Rio de Janeiro




### Painel de Tendências Corporate

| | A+ 2T26 | A+ 3T26 | △ | A 2T26 | A 3T26 | △ | Outros 2T26 | Outros 3T26 | △ |
|---|---|---|---|---|---|---|---|---|---|
| **Taxa de Vacância** | 26,69% | 25,50% | ↘ | 21,52% | 23,11% | ↗ | 19,22% | 18,87% | ↘ |
| **Absorção Líquida (m²)** | 18.474 | 12.780 | ↘ | 1.918 | 2.581 | ↗ | 9.772 | 9.714 | ↘ |
| **Novo Estoque (m²)** | 0 | 0 | — | 0 | 18.741 | ↗ | 0 | 3.058 | ↗ |
| **Atividade Construtiva (m²)** | 123.324 | 123.324 | — | 29.896 | 11.155 | ↘ | 6.658 | 3.600 | ↘ |
| **Preço de Locação (m²/mês - M.P.)** | R$ 92,70 | R$ 92,24 | ↘ | R$ 57,31 | R$ 67,83 | ↗ | R$ 40,92 | R$ 42,26 | ↗ |




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

**FILTER:** Overview > City: Rio de Janeiro > Profile/Class: Corporate + Office > Quarter: Q3/26

- The city of Rio de Janeiro closed the 3rd quarter of 2026 with a total inventory of 9,026,709 m². The market remains led by the Corporate Others class (41%) and the Office segment (39%), with high-end space completing the universe — Corporate A+ with 12% and Corporate A with 8% of the total.

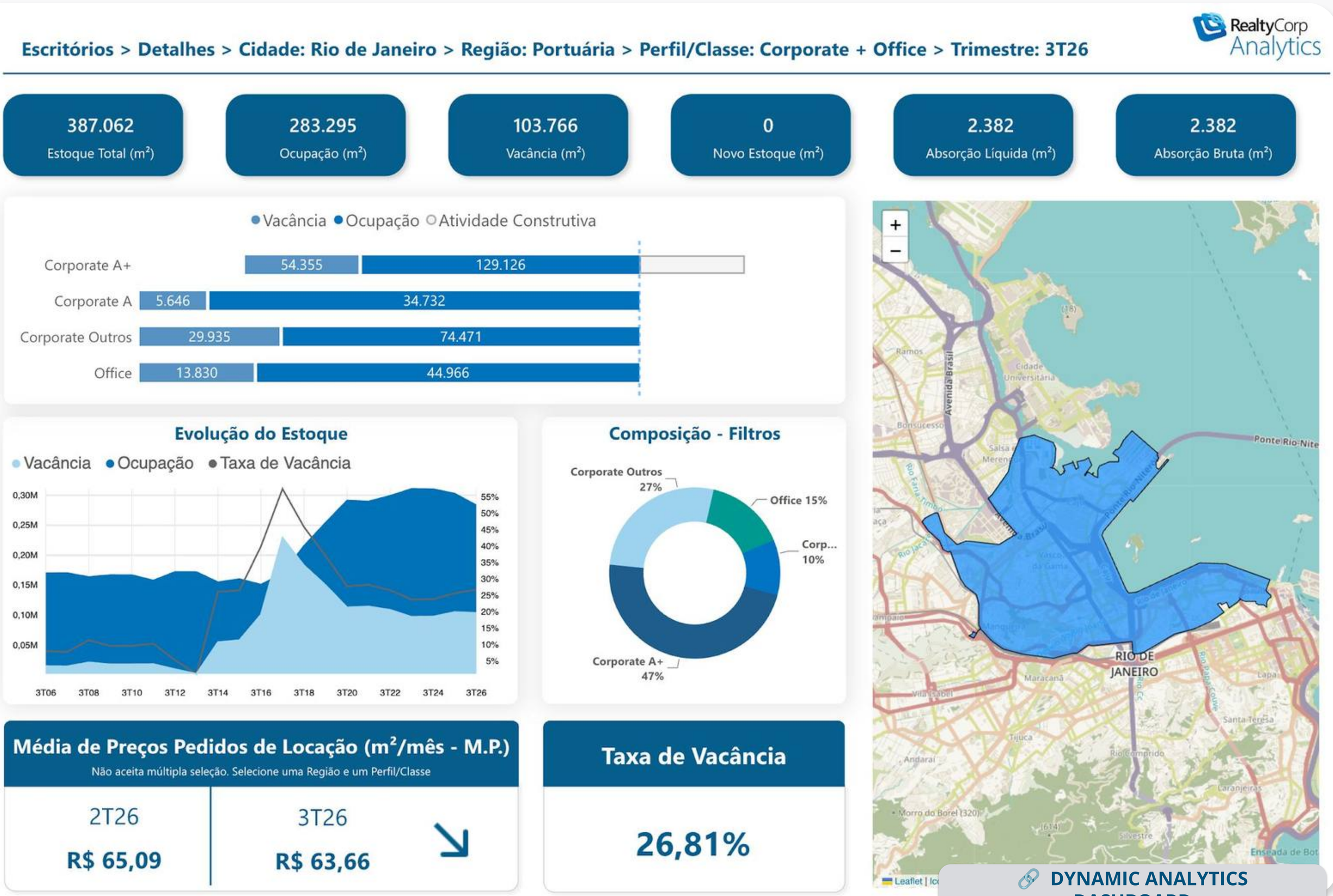
- In the quarter, demand remained positive, with total net absorption of +24,244 m² and gross absorption of 61,994 m² in new leases. Corporate performance was driven by the Corporate A+ class, which led with +12,780 m² of net absorption, followed by Corporate Others (+9,714 m²) and Corporate A (+2,581 m²) — all corporate classes remain positive, evidencing the continued recovery of the Rio market.

- The total vacancy rate closed the quarter at 16.36% (compared to 16.49% in 2Q26), equivalent to 1,476,427 m² available for lease. In the corporate universe, the Corporate A+ class fell from 26.69% to 25.50% and Corporate Others eased from 19.22% to 18.87%. In contrast, the Corporate A class rose from 21.52% to 23.11%, pressured by the delivery of 18,741 m² of new inventory in the period; Corporate Others also received 3,058 m².

- Prices were mixed across classes: Corporate A+ remained virtually stable at R$ 92.24/m², while Corporate A recorded strong appreciation, rising from R$ 57.31 to R$ 67.83/m². The Corporate Others class also appreciated, to R$ 42.26/m². The construction pipeline remains stable, with 123,324 m² under development in the Corporate A+ class.

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# Corporate Offices
## Portuária | Rio de Janeiro




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

**FILTER:** Details > City: Rio de Janeiro > Region: Portuária > Profile/Class: Corporate + Office > Quarter: Q3/26

- The Portuária region of the city of Rio de Janeiro ended the 3rd quarter of 2026 with a total inventory of 387,062 m² — accounting for 4.3% of Rio's entire corporate inventory. The region stands out for its modern, high-end profile: the Corporate A+ class holds the largest share of the inventory, with 47%, followed by Corporate Others with 27%. The Office segment represents 15% and the Corporate A class 10% of total supply.

- Occupancy showed a positive balance in the period, with net absorption of +2,382 m², identical to gross absorption, which indicates an expansion of occupied area with no move-outs in the quarter, concentrated in the Corporate A+ class. There was no delivery of new inventory (0 m²); on the other hand, the Corporate Others class inventory decreased by 14,400 m² compared to 2Q26.

- The overall vacancy rate in Portuária ended the quarter at 26.81% (compared to 26.44% in 2Q26), above the city of Rio de Janeiro average (16.36%). The slight increase reflects the reduction in total inventory, as vacant space fell from 106,148 m² to 103,766 m². Availability is concentrated in the Corporate A+ class (54,355 m²), followed by Corporate Others (29,935 m²), the Office segment (13,830 m²) and Corporate A (5,646 m²).

- In terms of values, Portuária recorded a slight decrease in average asking rents, which fell from R$ 65.09/m²/month in 2Q26 to R$ 63.66/m²/month in 3Q26. The pipeline remains active, with 49,089 m² under construction, entirely in the Corporate A+ class, reinforcing the region's role as a high-end corporate hub.

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# Logistic Condominiums

RealtyCorp Analytics

# Logistic Condominiums
## State of São Paulo

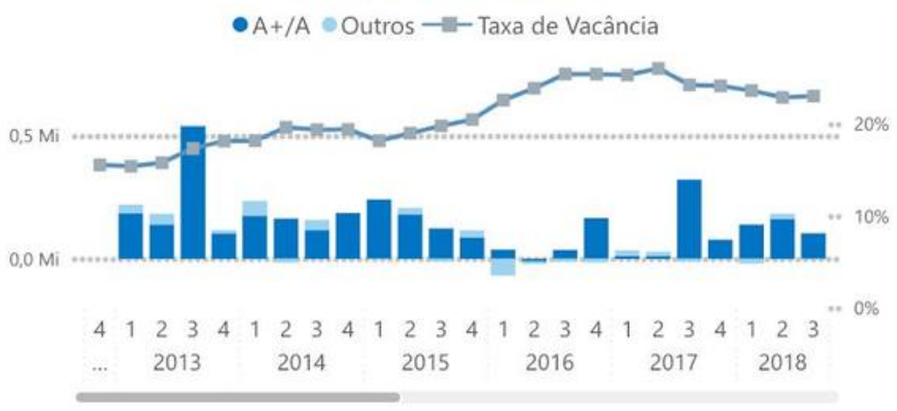
**Logístico > Visão Geral > Região: Mult. > Estado: SP > Classe: Mult. > Trimestre: 3T26**

RealtyCorp Analytics

| 22.675.686 | 21.662.779 | 1.012.907 | 4,47% | 639.984 | 877.025 |
|---|---|---|---|---|---|
| Estoque Total (m²) | Ocupação (m²) | Vacância (m²) | Taxa de Vacância | Absorção Líquida (m²) | Absorção Bruta (m²) |

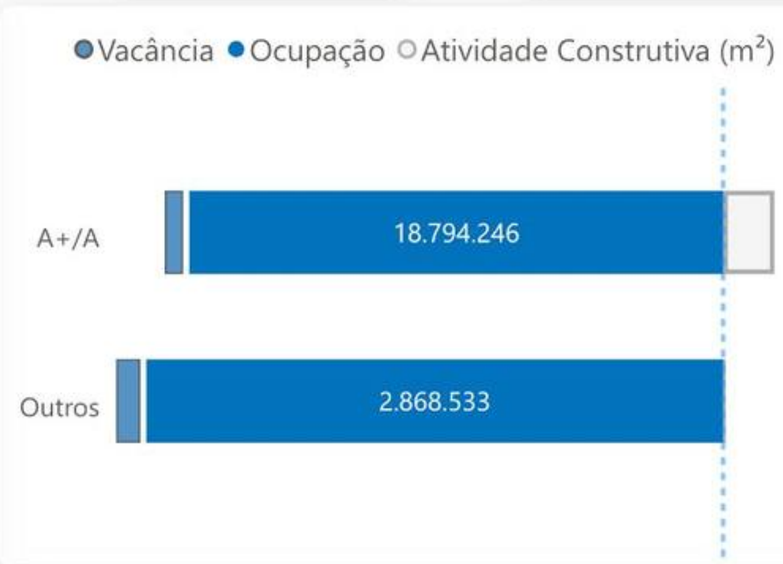
**Absorção Líquida (m²) e Taxa de Vacância**

**Histórico Completo**




**Destaque - Últimos 2 anos**

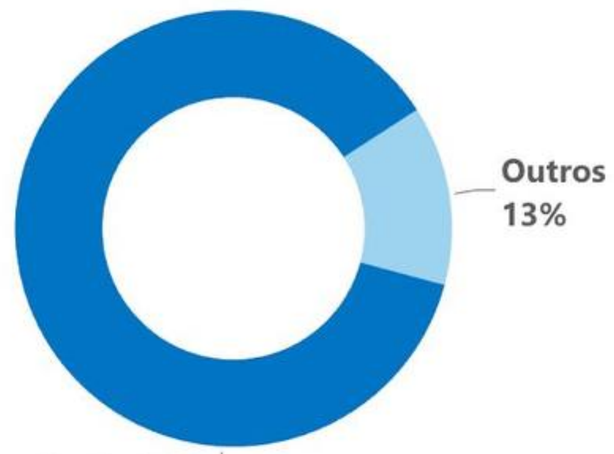



**Painel de Tendências**

| | A+ / A | | | Outros | | |
|---|---|---|---|---|---|---|
| | 2T26 | 3T26 | △ | 2T26 | 3T26 | △ |
| **Taxa de Vacância** | 5,14% | 4,39% | ↘ | 5,81% | 5,00% | ↘ |
| **Absorção Líquida (m²)** | 450.695 | 615.572 | ↗ | 19.071 | 24.412 | ↗ |
| **Novo Estoque (m²)** | 200.093 | 493.276 | ↗ | 5.236 | 0 | ↘ |
| **Atividade Construtiva (m²)** | 2.045.845 | 1.802.350 | ↘ | 12.776 | 12.776 | — |
| **Preço de Locação (m²/mês - M.P.)** | R$ 32,14 | R$ 44,65 | ↗ | R$ 25,73 | R$ 24,58 | ↘ |

**Composição - Filtros**




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

**FILTER:** Logistics > Overview > State: SP > Class: All > Quarter: Q3/26

- The logistics market of the State of São Paulo ended 3Q26 with a total inventory of 22,675,686 m², reaffirming its position as the epicenter of national logistics. The market is largely dominated by A+/A class (high-end) assets, which represent 87% of the São Paulo universe, while the Others class accounts for the remaining 13%.

- The period's performance was marked by strong occupancy, with positive net absorption of +639,984 m² and gross absorption of 877,025 m² in new leases. The A+/A class (high-end) remained the driver of expansion, with a net balance of +615,572 m², while the Others class also stayed positive, recording +24,412 m² — above the +19,071 m² observed in 2Q26.

- The consolidated vacancy rate fell from 5.23% to 4.47%, a healthy level comfortably below the 10% line that signals alert in the market. In physical terms, total vacancy amounts to 1,012,907 m². By class, high-end (A+/A) vacancy fell from 5.14% to 4.39%, even with the delivery of 493,276 m² of new inventory in the quarter; the Others class also eased, from 5.81% to 5.00%.

- Rents behaved differently across classes: the average asking price for high-end warehouses (A+/A) rose from R$ 32.14 to R$ 44.65/m², while the Others class fell from R$ 25.73 to R$ 24.58/m². With 1,815,126 m² under construction, the state market signals that the appetite for expansion and quality remains strong for the rest of the year.

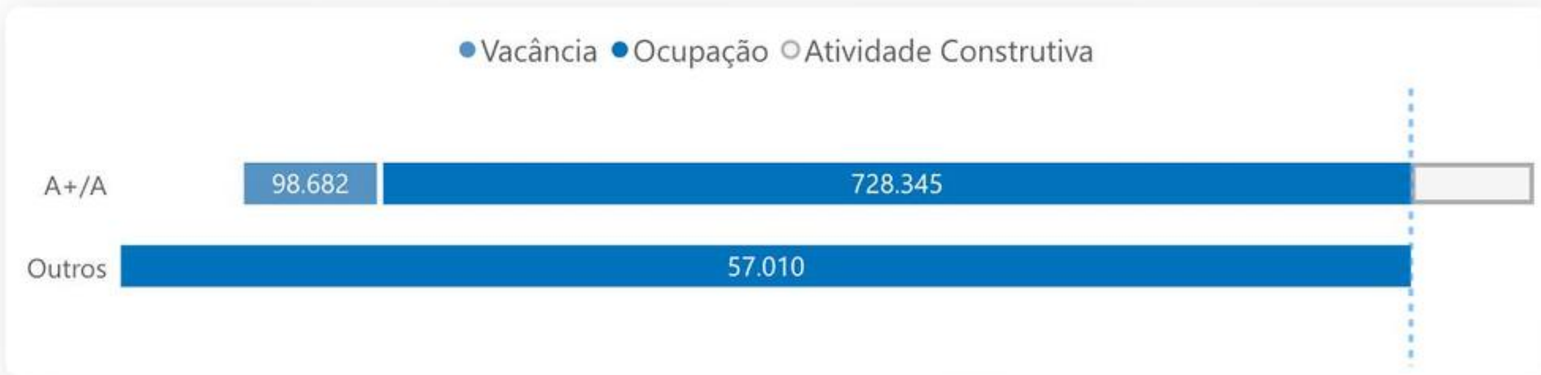
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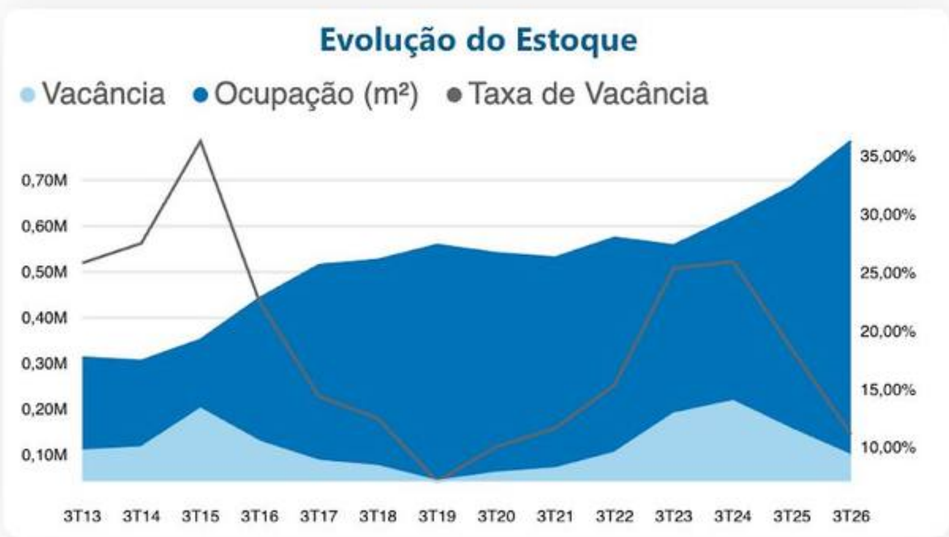
# Logistic Condominiums
## Régis Bittencourt | São Paulo

**Logístico > Detalhes > Região Brasil: Sudeste > Estado: SP > Eixo: Régis Bittencourt > Classe: A+/A,Outros > Trimestre: 3T26**

RealtyCorp Analytics

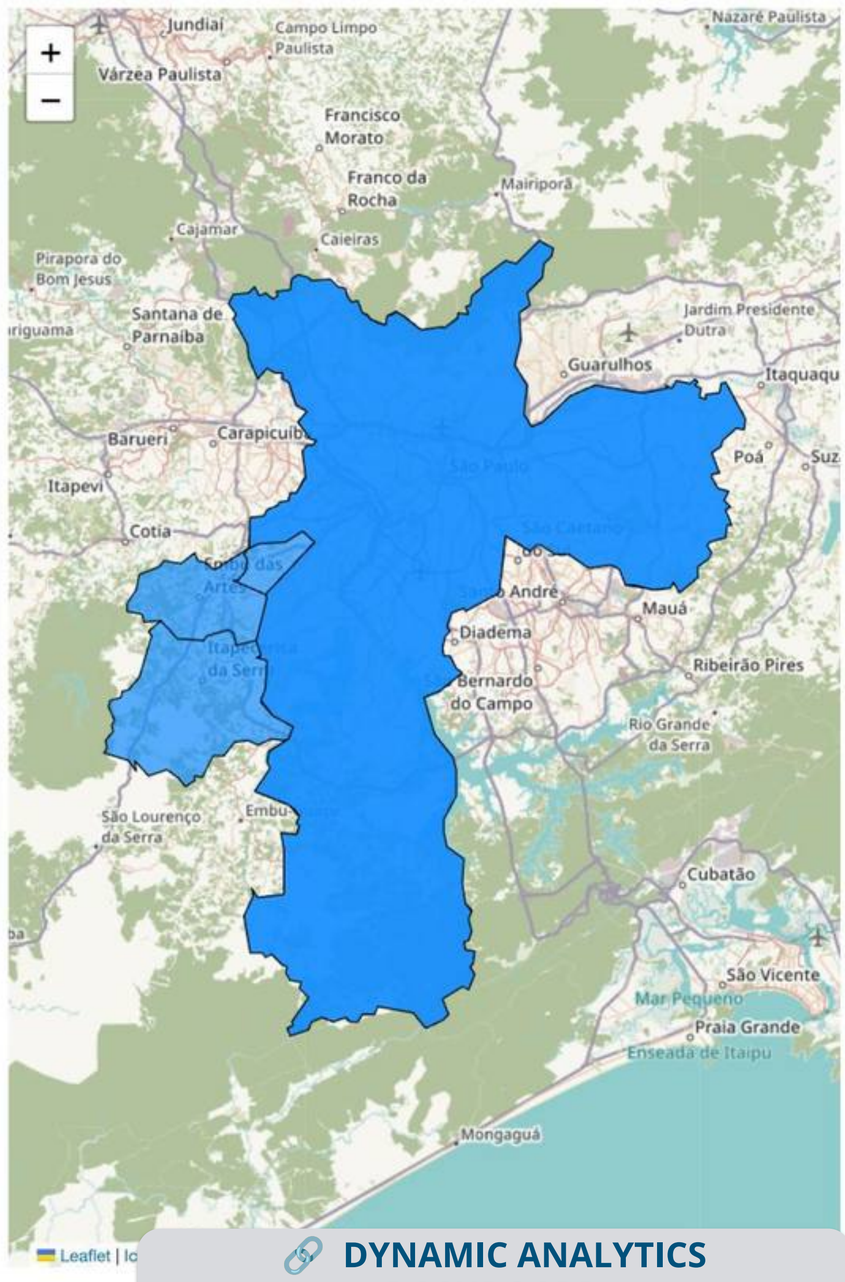
| 884.037 | 785.355 | 98.682 | 0 | 53.250 | 56.207 |
|---|---|---|---|---|---|
| Estoque Total (m²) | Ocupação (m²) | Vacância (m²) | Novo Estoque (m²) | Absorção Líquida (m²) | Absorção Bruta (m²) |










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

Selecione um Eixo e uma Classe

| 2T26 | 3T26 | |
|---|---|---|
| R$ 32,18 | R$ 38,34 | ↗ |

**Taxa de Vacância**

11,16%

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

**FILTER:** Logistics > Details > Corridor: Régis Bittencourt > Class: A+/A, Others > Quarter: Q3/26

- The Régis Bittencourt Corridor ended the 3rd quarter of 2026 with a total inventory of 884,037 m², consolidating its position as a strategic logistics corridor linking São Paulo to the South of the country — and accounting for 3.9% of all logistics inventory in the State of São Paulo. The market is heavily concentrated in A+/A class (high-end) assets, which represent 94% of local supply, while the Others class accounts for only 6%.

- Market activity in the quarter was significant, with net absorption of +53,250 m² on gross absorption of 56,207 m² in new leases. The absence of new inventory deliveries (0 m²) in the period, after the 43,297 m² delivered in 2Q26, channeled all demand into the corridor's existing inventory.

- The consolidated vacancy rate fell sharply, from 17.19% in 2Q26 to 11.16% in 3Q26 — still above the critical 10% mark and the State of São Paulo average (4.47%), signaling that the corridor operates with more available supply than the São Paulo logistics market as a whole. Vacant space totals 98,682 m², entirely in high-end assets (A+/A) — the Others class is fully occupied (0 m² vacant).

- The average asking rent in the corridor recorded strong appreciation, rising from R$ 32.18/m² in 2Q26 to R$ 38.34/m² in 3Q26, considering all classes. The construction pipeline totals 87,228 m², entirely in the A+/A class (high-end).

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# Logistic Condominiums
## State of Rio de Janeiro

**Logístico > Visão Geral > Região: Mult. > Estado: RJ > Classe: Mult. > Trimestre: 3T26**

RealtyCorp Analytics

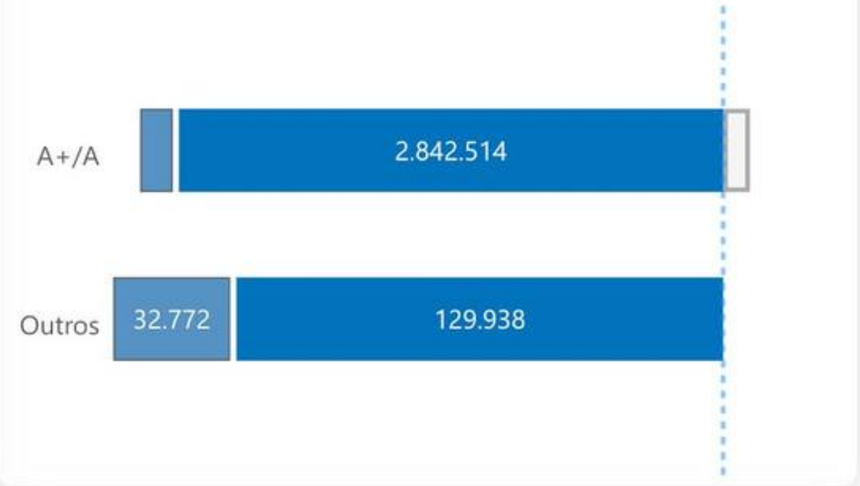
| 3.206.994 | 2.972.452 | 234.542 | 7,31% | 67.195 | 101.191 |
|---|---|---|---|---|---|
| Estoque Total (m²) | Ocupação (m²) | Vacância (m²) | Taxa de Vacância | Absorção Líquida (m²) | Absorção Bruta (m²) |

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





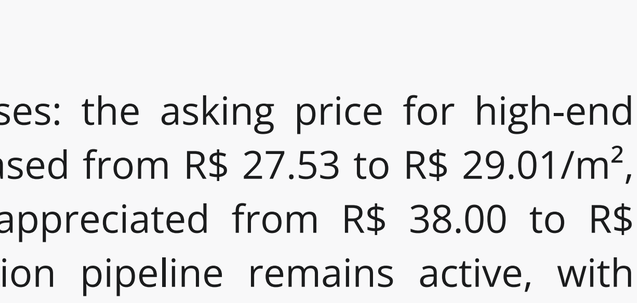





### Painel de Tendências

| | A+ / A | | | Outros | | |
|---|---|---|---|---|---|---|
| | 2T26 | 3T26 | △ | 2T26 | 3T26 | △ |
| **Taxa de Vacância** | 9,01% | 6,63% | ↘ | 20,76% | 20,14% | ↘ |
| **Absorção Líquida (m²)** | 62.647 | 66.181 | ↗ | 5.227 | 1.014 | ↘ |
| **Novo Estoque (m²)** | 22.026 | 21.196 | ↘ | 0 | 0 | — |
| **Atividade Construtiva (m²)** | 160.478 | 139.283 | ↘ | 0 | 0 | — |
| **Preço de Locação (m²/mês - M.P.)** | R$ 27,53 | R$ 29,01 | ↗ | R$ 38,00 | R$ 40,00 | ↗ |

### Composição - Filtros




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

**FILTER:** Logistics > Overview > State: RJ > Class: All > Quarter: Q3/26

- The logistics market of the State of Rio de Janeiro ended 3Q26 with a total inventory of 3,206,994 m², maintaining a highly specialized profile. The market is dominated by A+/A class (high-end) assets, which represent 95% of the state's universe, while the Others class holds only 5% — a concentration that reinforces the local infrastructure's focus on high technical efficiency operations.

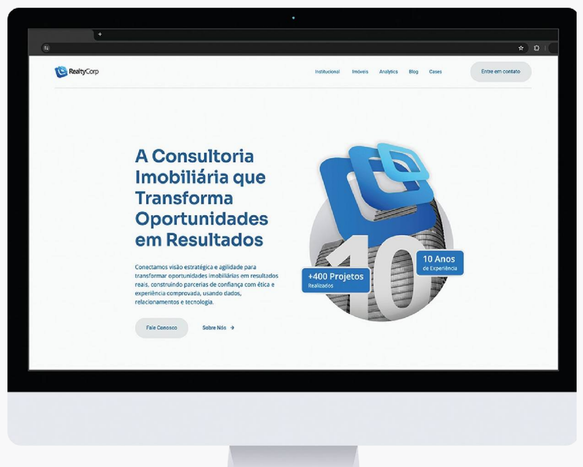
- Occupancy remained on a positive trajectory in the quarter: the market posted net absorption of +67,195 m², supported by gross absorption of 101,191 m². The A+/A class (high-end) remained the protagonist, with a net balance of +66,181 m², while the Others class stayed positive at +1,014 m² — below the +5,227 m² of the previous quarter.

- The consolidated vacancy rate fell from 9.61% to 7.31%, totaling 234,542 m² available. Vacancy in the A+/A class (high-end) decreased from 9.01% to 6.63%, even with the delivery of 21,196 m² of new inventory in the period. The Others class, although still elevated, also declined, from 20.76% to 20.14%.

- Prices rose in both classes: the asking price for high-end warehouses (A+/A) increased from R$ 27.53 to R$ 29.01/m², while the Others class appreciated from R$ 38.00 to R$ 40.00/m². The construction pipeline remains active, with 139,283 m² under development, entirely concentrated in the high-end segment.

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# RC Ecosystem




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**+ 270 Cases**

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