REVIEW

OFFICE MARKET

CENTRAL LONDON Q1 2026

RESEARCH & INSIGHTS

BNP PARIBAS REAL ESTATE

Real Estate for a changing world

Q1 2026 OFFICE MARKET UPDATE Central London

"The Central London office investment market began 2026 on a stable footing. Despite ongoing macroeconomic volatility, strong occupational fundamentals have supported further prime capital value recovery, and greater demand for diversifying income streams in safe-haven markets have attracted a broader range of active investors."

Investment Volumes

Central London office investment volume in Q1 2026 reached £1.7bn. Whilst down 3% y-o-y, but also the most active quarter by number of transactions since 2022

£1.7bn
INVESTMENT VOLUMES

Central London Prime Yields

Prime yields remain stable so far this year, with the West End and City remaining at 4.00% and 5.25%, respectively.

4.00% / 5.25%
PRIME YIELDS WEST END & CITY

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INVESTMENT OVERVIEW

In Q1 2026 Central London office investment volumes totalled £1.7bn, a 3% y-o-y decline and a 42% q-o-q reduction following a strong finish to 2025. While volumes remain below the five-year Q1 average of £2.5bn, this was the most active quarter by number of transactions since 2022. Overseas institutions and family offices remained the most active buyer group in Q1 2026, accounting for just under 60% of total investment volumes. While marginally below the long-term average of c.68%, robust cross-border demand remains a defining feature of the market.

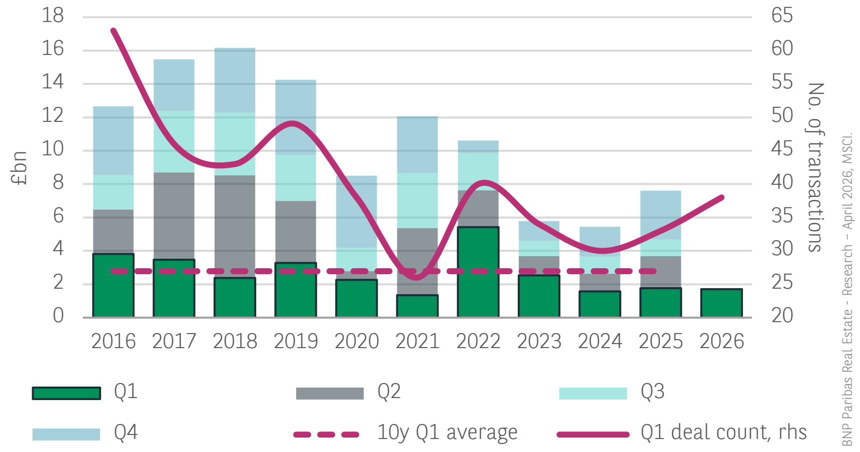
Momentum has been supported by an increased in deal flow in the City, where there were two high-profile £100m+ transactions – Kanam's sale of 1 Wood Street, EC2 for £132m (a yield of 5.9%) to Meadow Partners & LBS, and Global Relay's £113m purchase of AOG's 45 Cannon Street, EC4, for their own occupation, equating to a yield of 5.4% and a capital value of £1,251 per sq ft. While overall City volume fell 18% y-o-y, the number of deals rose to the highest quarterly level since Q1 2022.

The West End continues to attract the most capital, with volume reaching £1bn in Q1 2026, an increase of 2.6% y-o-y, although still below the five-year Q1 average of £1.3bn. The largest deal of the quarter was the Wells & More building, 45 Mortimer Street, W1, which GPE sold for £172m at a 5.3% yield to Feldberg Capital. This was closely followed by Ares' acquisition of the Copyright Building on Berners Street, W1 for £165m, equating to an initial yield of 4.9%.

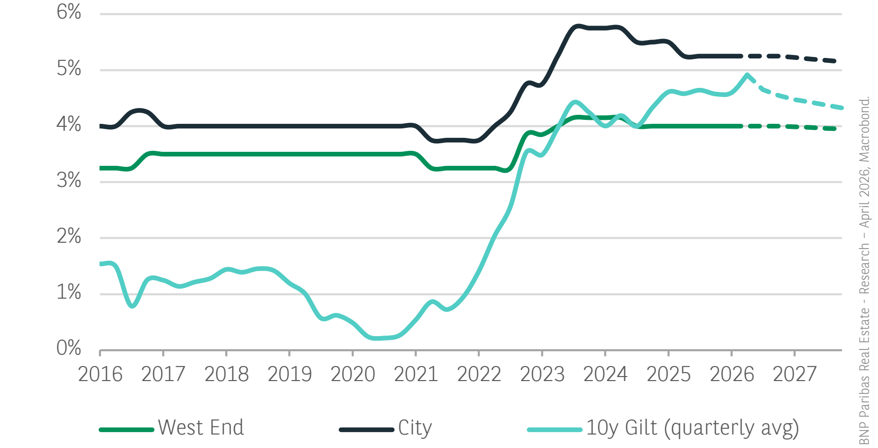
Prime yields were broadly stable through the opening months of 2026, with the West End holding at 4.00% and the City at 5.25%, although competitive bidding for best-in-class assets is beginning to place selective downward pressure on pricing. A prime example of this is the ongoing sale og 33 Old Borad Street, EC3 by SEA Holdings. The asset is let to Lloys Banking Group with 13 years to expiry – for a price equating to a sub-5% yield is a prime example. Looking ahead, elevated debt costs and higher risk-free rates are likely to constrain any material equivalent yield compression in the near term. Ongoing political and economic volatility is also likely to suppress volumes in Q2 and 3 as some sellers opt to postpone disposals until more clarity emerges. That said, the occupier backdrop continues to reinforce appetite for prime and well-located core-plus assets. In a tightening leasing market, there remains clear scope for further rental reversion in future-proof buildings, particularly where existing income has yet to catch up with market tone. Continued positive net absorption, falling supply and the ongoing focus on high-quality, centrally-located space all strengthen that case.

At the same time, the delivery of new supply is likely to remain constrained this year. Rising construction costs, elevated debt costs and wider viability pressures continue to challenge development economics. Coupled with robust occupier demand, this has reinforced investor conviction that current pricing presents an attractive entry point and, provided occupational markets remain supportive, we expect Central London office investment activity to remain resilient through 2026.

Central London Office Investment Volume



Prime Central London Office Yields and 10y Gilt Yield



Q1 2026

OFFICE MARKET UPDATE
Central London

"Q1 2026 saw occupier activity moderate, but demand for best-in-class space and larger scale requirements remained firmly intact."

OCCUPIER OVERVIEW

Leasing activity across Central London moderated during Q1 2026 following the exceptionally strong finish to 2025. Total take-up reached 2.5m sq ft, representing a 12.5% decline on the previous quarter and a sharper fall of 19.7% y-o-y, although activity remained broadly aligned with long-term market norms and close to the five-year quarterly average of 2.85m sq ft.

Activity during the quarter was underpinned by a number of larger requirements, with seven transactions completing above the 50,000 sq ft threshold. The largest lettings included BP's pre-let of approximately 192,000 sq ft at The Ink Building, Timber Yard, SE1, alongside Gibson Dunn's acquisition of 155,000 sq ft at 1 Exchange Square, EC2.

Media Tech emerged as the most active occupier group during Q1 2026, accounting for 23.5% of total take-up and approximately 578,000 sq ft, marking the sector's strongest quarterly performance since 2021. Key transactions included Databricks Inc. securing circa 136,000 sq ft at The Network Building, Howland Street, W1, significantly expanding its Central London presence as part of continued UK workforce growth. The Services sector ranked second with a 19.8% share of activity, largely supported by BP's major commitment at The Ink Building, Timber Yard, while Banking & Finance represented 17.0% of quarterly take-up. Within the Banking & Finance sector, Pacific Life RE completed the sector's largest transaction, pre-letting approximately 81,000 sq ft at 1 Exchange Square, EC2.

The City recorded a measured opening to the year, with take-up totalling 1.0m sq ft, down 15.8% q-o-q and marginally below the five-year quarterly average of 1.4m sq ft. Despite softer activity, the City remained the largest contributor to Central London leasing volumes, accounting for 41% of total take-up during Q1 2026.

In contrast, the West End experienced a stronger start to the year, with take-up rising to 0.8m sq ft, an increase of 27.1% on the previous quarter and 6.9% higher y-o-y. The submarket captured a 32.9% share of Central London activity, supported by four transactions above 25,000 sq ft.

Take-Up*

Central London office take-up reached 2.5m sq ft in Q1 2026, a y-o-y decline of 19.7%.

**Take-up figures based on all deals over 1,000 sq ft.*

2.5M sq ft
TAKE-UP*

Vacancy Rate

Central London office vacancy stood at 8.4% as of Q1 2026, falling below the five-year average of 10.6%.

8.4%
VACANCY RATE

Occupier Sector

Media Tech has been the most active sector in Q1 2026, accounting for 23.5% share of Central London take-up, with the Services sector being the second most active sector in Q1, with a 19.8% share.

23.5%
MEDIA TECH SECTOR MARKET SHARE

Prime Office Rents

Prime West End rents reached £175 per sq ft, up 6.1% y-o-y. Prime rents in the City also increased 8.8%, to £92.50 per sq ft.

£175/£92.50
WEST END AND CITY PRIME OFFICE RENTS

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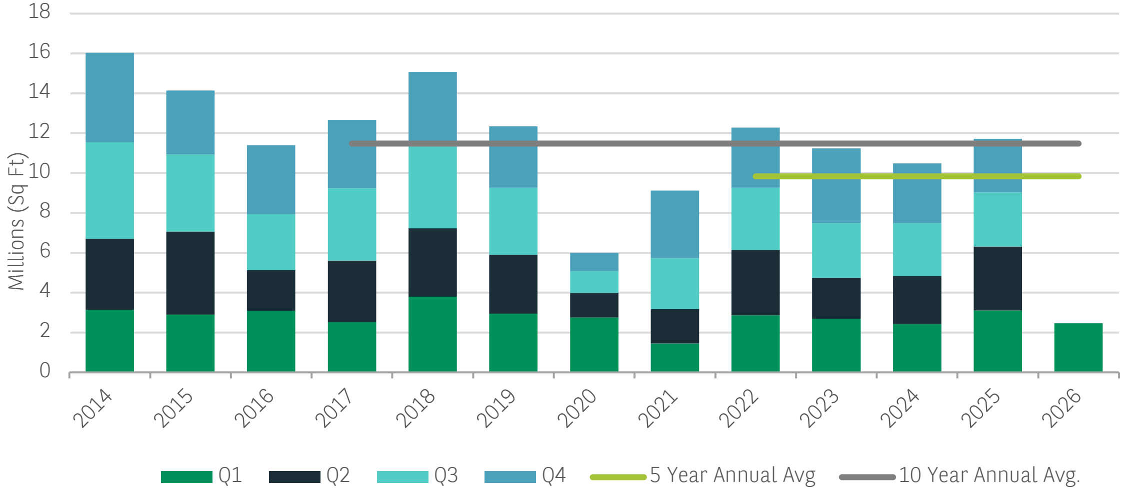
Central London Take-Up



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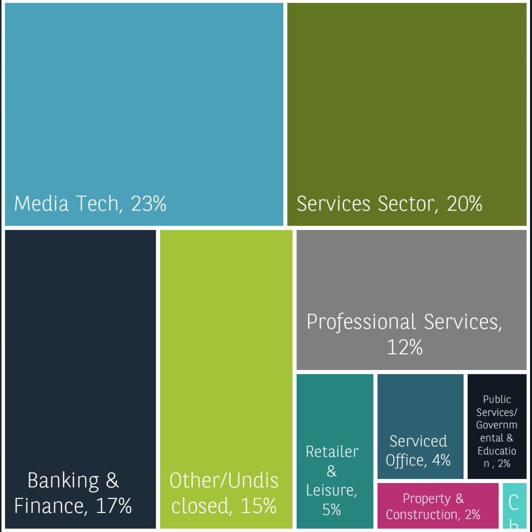
"Headline supply continues to tighten across Central London, but the shortage of genuine high-quality space remains the defining theme across core markets."

Central London Occupier Breakdown – Q1 2026



OFFICE SUPPLY AND VACANCY RATE

Demand for premium workspace continues to dominate occupier requirements, with Grade A space accounting for 78.0% of all take-up during Q1 2026.

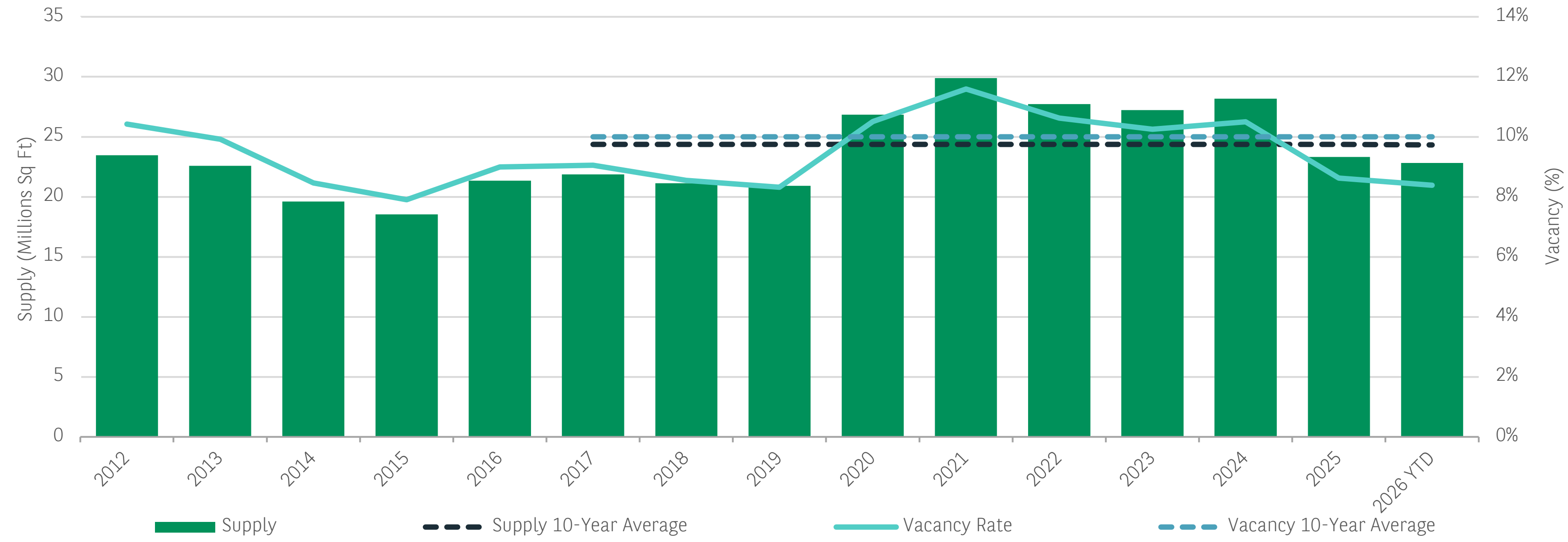
Sustained competition for high-quality accommodation has continued to drive rental growth, with prime City rents increasing 8.8% y-o-y to £92.50 psf, while the West End reached £175 psf, reflecting annual growth of 6.1%.

Central London supply stood at 22.8m sq ft at the end of Q1 2026, representing a quarterly decline of 2.1% and a reduction of 10.8% compared with the same period last year. Total availability has now fallen below the five-year quarterly average of 24.6m sq ft. While headline supply levels appear relatively balanced, high-quality accommodation remains limited. Grade B stock continues to dominate overall availability, accounting for 73% of total supply across Central London, highlighting the ongoing shortage of Grade A space.

Vacancy trends continue to diverge across the capital as occupiers remain concentrated on core, well-connected locations. During Q1 2026, the overall Central London vacancy rate reduced to 8.4%, representing a quarterly fall of 23bps and remaining materially below the five-year average of 10.6%.

The West End retained the lowest vacancy profile across Central London, declining further to 6.8% in Q1 2026, comfortably below the five-year average of 7.5%. The City followed a similar trajectory, with vacancy reducing to 9.8%, also significantly below its long-term average of 13.4%.

Central London Office Supply & Vacancy Rate



WEST END

- Q1 2026 take-up totalled approximately 810,000 sq ft, reflecting a quarterly increase of 27.1%.
- Grade A vacancy remains exceptionally constrained at 1.1%, falling as low as 0.3% in Mayfair & St James's.

KEY FIGURES

£175.00 / sq ft
Q1 WEST END PRIME RENT

0.8M sq ft
Q1 WEST END TAKE-UP

£230.00 / sq ft
Q1 WEST END PREMIUM RENT
*Premium rent refers to amenity rich assets, top floor with terrace

6.8%
Q1 WEST END VACANCY RATE

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LEASING BY SUBMARKET: WEST END

West End office take-up reached approximately 810,000 sq ft during Q1 2026, representing annual growth of 6.9% and a substantial 27.1% uplift compared with the previous quarter. Activity also stood 12.9% above the five-year Q1 average, demonstrating continued resilience across the submarket despite broader market moderation.

Media Tech was the dominant occupier group during the quarter, accounting for 36.0% of total take-up, equating to roughly 290,000 sq ft across seven transactions. The largest deal involved Databricks Inc., which expanded its Central London footprint significantly by securing approximately 136,000 sq ft at The Network Building, Howland Street, W1, in March.

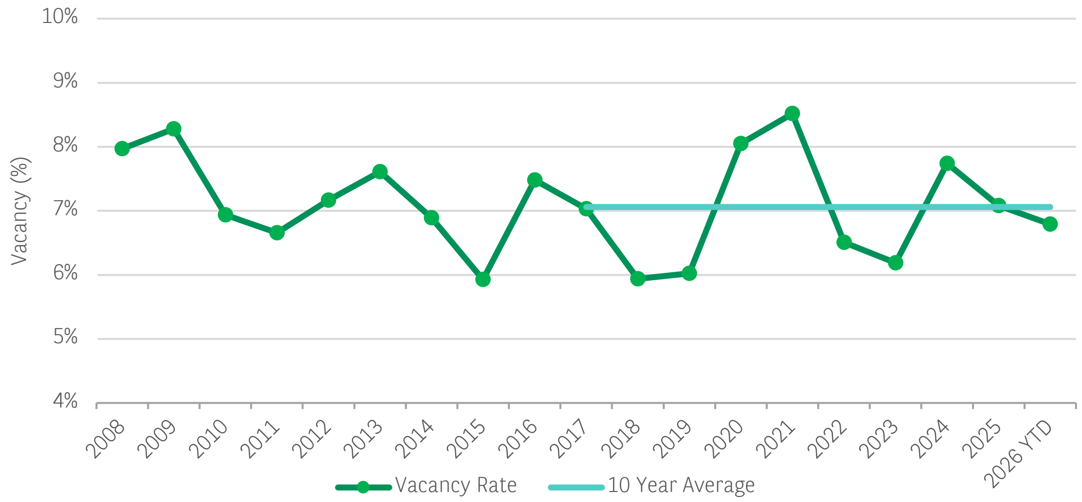
Banking & Finance ranked as the second most active sector, contributing 18.4% of quarterly take-up, or around 149,000 sq ft. Notable transactions included Sona Asset Management's 31,500 sq ft pre-let at Pegasus, Sackville Street, W1, together with Ares Management Corporation's acquisition of approximately 21,000 sq ft at 25 Argyll Street, W1, following its major pre-let commitment at 1 Hanover Street, W1 at the end of 2025.

Supply across the West End continued to tighten during Q1 2026, declining 3.6% q-o-q to 6.2 million sq ft. The reduction has been most acute within Grade A accommodation, which now represents just 15.5% of total availability, leaving less than 1 million sq ft of best-in-class space available across the market.

Constrained supply conditions contributed to a further fall in vacancy, which reduced to 6.8%, representing a 51bps decline y-o-y and remains below the five-year average of 7.5%. Mayfair continues to experience the tightest market dynamics, with Grade A vacancy reducing to just 0.3%.

Ongoing shortages of premium office space continues to support rental growth at the top end of the market. Prime rents increased by 6.1% y-o-y to reach £175 psf during Q1 2026, establishing another record high. With competition for best-in-class space remaining intense and a limited development pipeline in core locations, premium quoting rents of up to £225 psf continue to emerge across select schemes.

Vacancy



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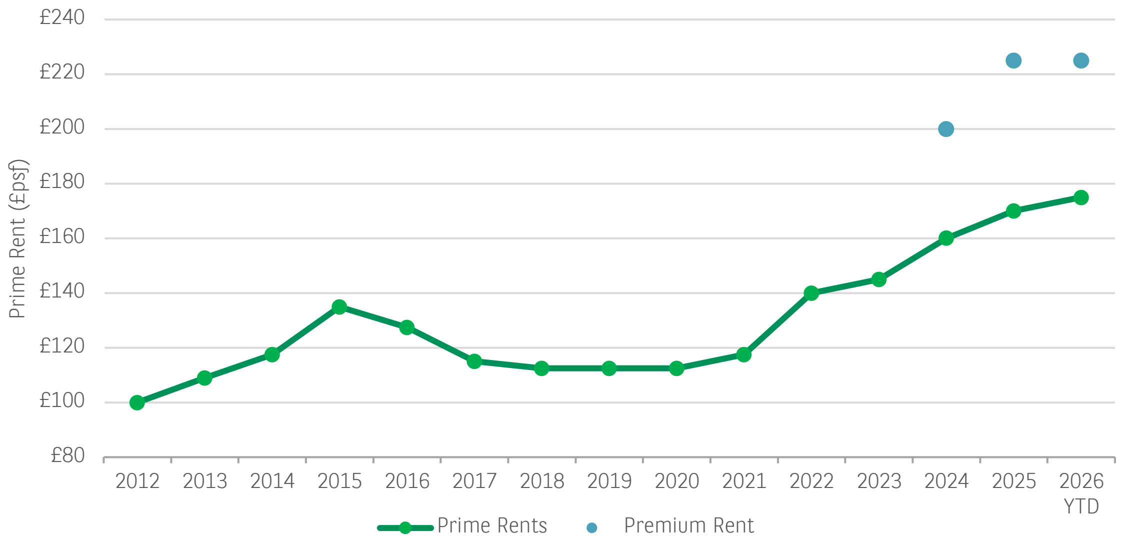
Prime Rent



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THE CITY

- Take-up softened at the beginning of 2026, reaching 1.0m sq ft, a quarterly reduction of 15.8%.
- Supply contracted during Q1, contributing to a decline in vacancy to 9.8%.

KEY FIGURES

£92.50 / sq ft
Q1 CITY PRIME RENT

£150.00 / sq ft
Q1 CITY PREMIUM RENT
*Premium rent refers to amenity rich assets, top floor with terrace

9.8%
Q1 CITY VACANCY RATE

1.0M sq ft
14 CITY TAKE-UP

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LEASING BY SUBMARKET: THE CITY

City office take-up totalled 1.0 million sq ft during Q1 2026, representing a 15.8% decline on the previous quarter, although the market still recorded several major transactions, including three lettings above 50,000 sq ft. Activity was 34.1% lower y-o-y, with the City accounting for 40.7% of all Central London take-up during the quarter.

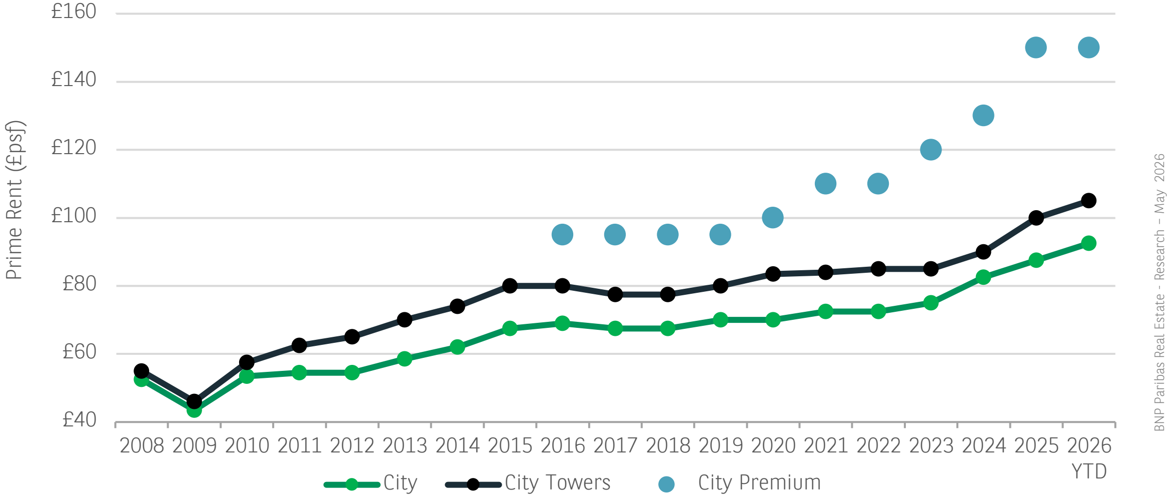
Banking & Finance remained the largest occupier sector, contributing to 26.5% of total activity and more than 265,000 sq ft of take-up. The sector's largest transaction involved Pacific Life RE pre-letting approximately 81,000 sq ft at 1 Exchange Square, EC2. The global reinsurance firm is set to relocate to the BREEAM Outstanding development upon completion later this year.

Professional Services followed closely, representing 24.5% of quarterly activity, supported primarily by Gibson Dunn's significant commitment at 1 Exchange Square, EC2. The law firm secured approximately 148,000 sq ft, making it both the largest transaction in the City and one of the largest across Central London during Q1 2026. Additional notable deals included Brown & Brown acquiring approximately 52,000 sq ft at 2 Leman Street, E1, marking the largest Aldgate transaction since 2024, alongside Landmark's pre-let of approximately 50,000 sq ft at 1 Great St Helens, EC3.

Available supply in the City reduced to 9.3 million sq ft during Q1 2026, reflecting a quarterly decline of 1.0% and a y-o-y reduction of 9.8%. The contraction in availability contributed to vacancy decreasing from 11.0% in Q1 2025 to 9.8% at the close of Q1 2026.

Demand for Grade A accommodation remains particularly acute, with vacancy for best-in-class stock reducing further to just 2.6%. Continued competition for premium office space has underpinned rental growth, with prime City rents increasing to £92.50 psf during Q1 2026, reflecting annual rental growth of 8.8%. This continued rental performance is being supported by a substantial development pipeline, with more than 3.8 million sq ft scheduled for delivery by year-end, over 3 million sq ft of which is concentrated within the City Core.

Prime Rent



Vacancy

MIDTOWN

- Q1 take-up declined q-o-q to approximately 140,000 sq ft, although Grade A accommodation accounted for 69% of activity.
- Midtown vacancy reduced to 6.8%, remaining below the five-year average of 9.9%.

KEY FIGURES

£85.50 / sq ft
Q1 MIDTOWN PRIME RENT

6.8%
Q1 MIDTOWN VACANCY RATE

140k sq ft
Q1 MIDTOWN TAKE-UP

LEASING BY SUBMARKET: MIDTOWN

Midtown office take-up totalled approximately 140,000 sq ft during Q1 2026, representing a 31.5% decline on the previous quarter and a 24.3% decrease y-o-y.

Activity remained broadly consistent with historical trends and was broadly aligned with the five-year Q1 average of approximately 181,000 sq ft. Leasing activity was supported by three transactions above 10,000 sq ft, while Grade A accommodation represented 69.4% of quarterly take-up.

The Serviced Office sector was the most active occupier group, accounting for 37.4% of total take-up. The largest transaction involved healthcare and life sciences consultancy Inizio securing approximately 40,000 sq ft at The Waterman, Farringdon Road, EC1.

Media Tech ranked second, capturing an 18.6% share of activity, supported by Playtech Software's acquisition of approximately 20,000 sq ft at Fetter Yard, 86 Fetter Lane, EC4.

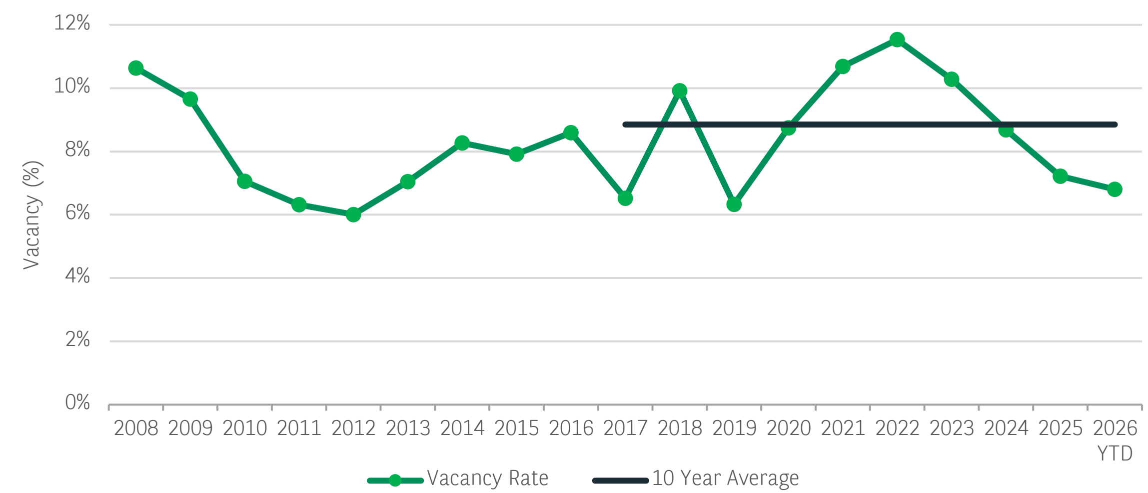
Available supply across Midtown declined by 5.8% during the quarter to 1.6 million sq ft, remaining below both the five-year average of 2.3 million sq ft and the ten-year average of 1.9 million sq ft.

The reduction in supply contributed to vacancy falling to 6.8%, down from 7.2% in Q4 2025. Vacancy therefore continues to sit materially below Midtown's five-year and ten-year averages of 9.9% and 8.8% respectively.

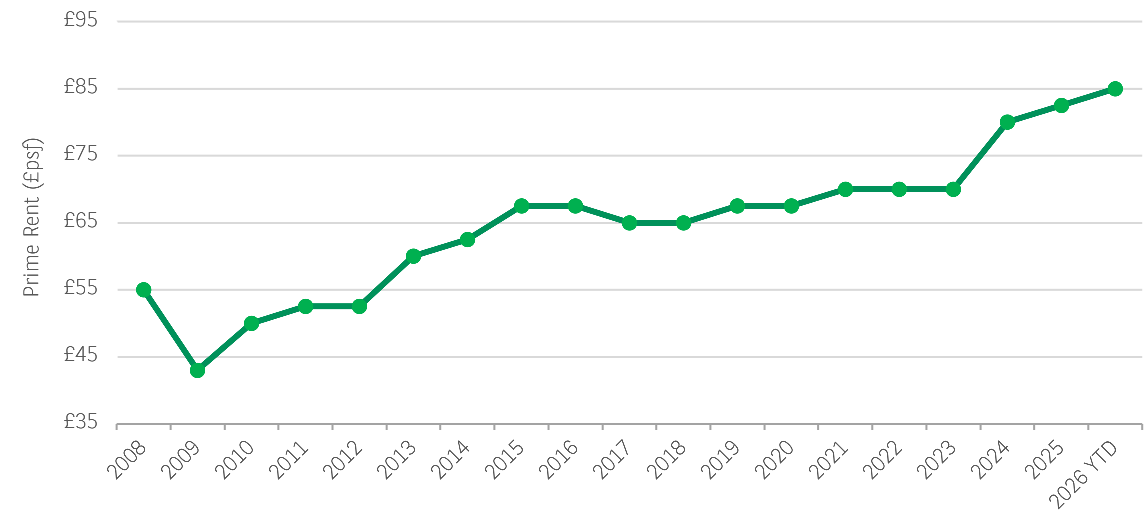
Prime rents across Midtown increased to £85.00 psf during Q1 2026, representing annual growth of 6.3%.

Rental performance continues to be underpinned by a resilient development pipeline, with nearly 688,000 sq ft of new accommodation expected to complete during 2026 alone, while more than 1.8 million sq ft is currently scheduled for delivery across Midtown by 2029.

Vacancy



Prime Rent



SOUTHBANK

- Q1 take-up reached approximately 325,000 sq ft, driven primarily by activity from the Services sector.
- Vacancy marginally increased during the quarter to 10.0%, moving above the five-year average.

KEY FIGURES

£87.50 / sq ft
Q1 SOUTHBANK PRIME RENT

10.0%
Q1 SOUTHBANK VACANCY RATE

325k sq ft
Q1 SOUTHBANK TAKE-UP

LEASING BY SUBMARKET: SOUTHBANK

Southbank office take-up totalled approximately 325,000 sq ft during Q1 2026, marking a strong start to the year following an active close to 2025. Activity increased 58.3% q-o-q and rose 78.2% y-o-y, placing leasing volumes comfortably above the five-year Q1 average of approximately 257,000 sq ft.

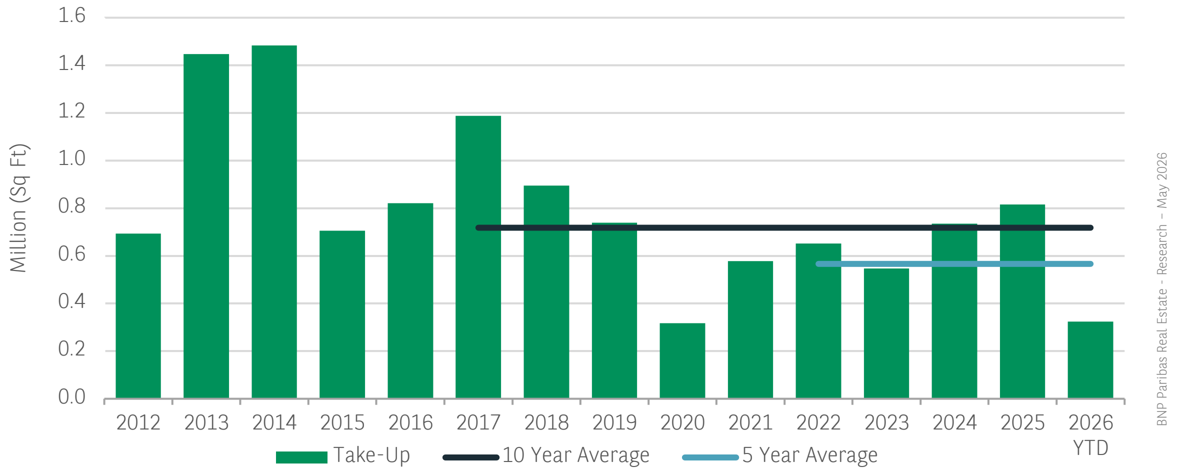
The Services sector dominated activity during the quarter, accounting for around 220,000 sq ft across five transactions and representing 68.0% of the market. The largest deal across Central London during Q1 involved BP's pre-let of approximately 191,000 sq ft at The Ink Building, Timber Yard, SE1, with the occupier selecting the scheme as its new global headquarters.

Media Tech also remained highly active, contributing 23.2% of total take-up and reflecting sustained occupier demand across eight of the 26 transactions completed within Southbank during Q1 2026. The sector's largest letting involved decision intelligence company Quantexa securing approximately 51,000 sq ft at The Delft, Montague Close, SE1.

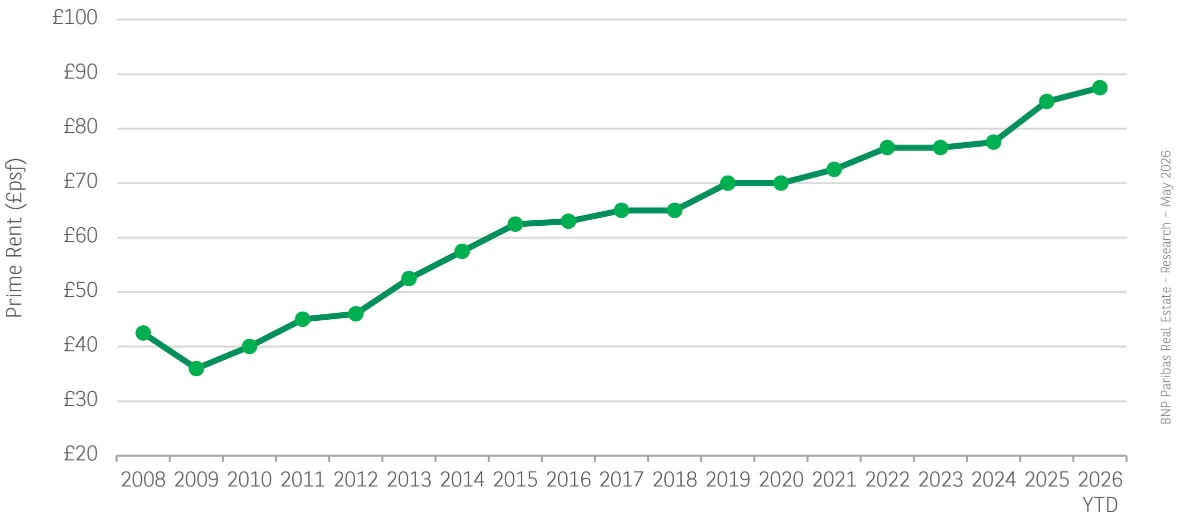
Available supply across Southbank increased marginally to 2.3 million sq ft during Q1 2026, rising 4.9% q-o-q and 2.6% y-o-y. Total availability now sits slightly above both the five-year average of 2.2 million sq ft and the ten-year average of 1.7 million sq ft. Vacancy increased modestly to 10.0%, representing a 32bps quarterly rise and sitting marginally above the five-year average of 9.9%.

Prime rents across Southbank continued to strengthen, increasing to £87.50 psf and reflecting annual growth of 12.9%, the strongest rental growth recorded across Central London. This performance continues to be supported by an active development pipeline, with approximately 641,000 sq ft scheduled for completion during 2026 across a mixture of refurbishment and new-build schemes. Notably, Edge London Bridge on St Thomas Street, SE1, is expected to complete in the second half of the year, delivering approximately 260,000 sq ft of premium sustainable office accommodation.

Take-Up



Prime Rent



CANARY WHARF & DOCKLANDS

- Q1 take-up reduced q-o-q to approximately 22,000 sq ft, representing a significant y-o-y decline of 84.3%.
- Vacancy declined further to 10.2%, moving increasingly below both short and long-term averages.

KEY FIGURES

£58.50 / sq ft
Q1 CANARY WHARF & DOCKLANDS PRIME RENT

10.2%
Q1 CANARY WHARF & DOCKLANDS VACANCY RATE

22k sq ft
Q1 CANARY WHARF & DOCKLANDS TAKE-UP

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LEASING BY SUBMARKET: CANARY WHARF & DOCKLANDS

Canary Wharf and Docklands experienced a subdued opening to 2026 following a particularly active 2025, which represented the strongest year for the submarket since 2019. During Q1 2026, take-up totalled approximately 22,000 sq ft across three transactions. Activity therefore declined 84.3% y-o-y, volumes remained below the five-year Q1 average of around 98,000 sq ft.

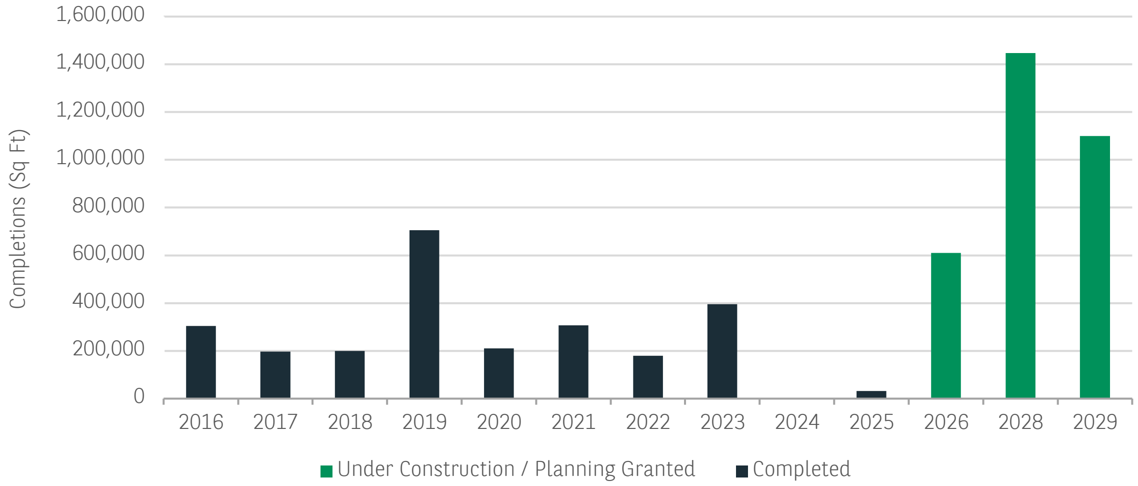
The Public Services, Government & Education sector accounted for the largest share of activity, contributing 68.5% of total take-up. This was driven by the quarter's largest transaction, with LCA Education Group securing approximately 15,000 sq ft at the Import Building, Clove Crescent, E14, within the Republic campus. The occupier has continued to expand its presence in the area and has nearly doubled its footprint within the building since initially taking space during 2024.

Availability reduced slightly during Q1 2026, declining 4.1% q-o-q to 2.0 million sq ft, the lowest level recorded since 2017. Supply has now fallen 32.4% y-o-y and remains significantly below the five-year average of 3.0 million sq ft.

Vacancy across the submarket reduced further to 10.2% during Q1 2026, compared with 10.6% in the previous quarter. This continues to position the market materially below both the five-year average of 15.6% and the ten-year average of 13.4%, indicating improving occupational stability following previous shifts in the area.

Prime rents across Canary Wharf and Docklands remain comparatively stable relative to other secondary Central London markets. Prime rents increased to £58.50 psf during Q1 2026, while rates across the wider Docklands market held at £27.50 psf. Rental performance continues to be supported by ongoing development activity and major refurbishment initiatives, including the repositioning of 33 Canada Square, now known as One Eden, which recently secured consent for a substantial upgrade programme that will deliver approximately 545,000 sq ft of best-in-class office accommodation.

Development Pipeline



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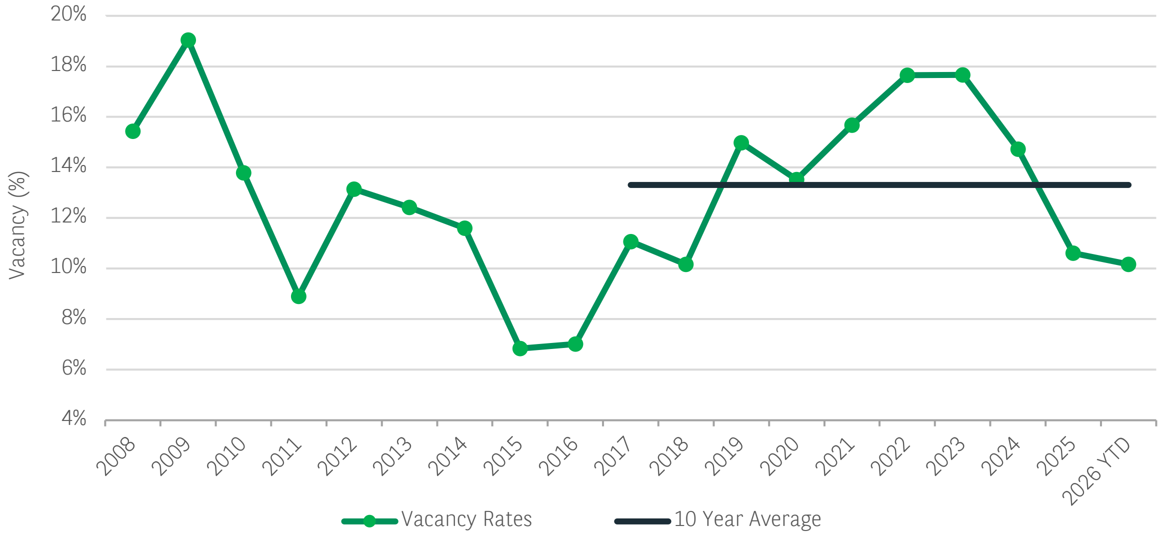
Vacancy



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TOP INVESTMENT TRANSACTIONS

ADDRESS	LOT SIZE	CAPITAL VALUE (PER SQ FT.)	YIELD	PURCHASER	VENDOR
Wells & More, 45 Mortimer Street, W1	£172,000,000	£1,483	5.25%	Feldberg Capital	Great Portland Estates
The Copyright Building, 30 Berners Street, W1	£146,000,000	£1,351	4.92%	Ares	Union
1 Wood Street, EC2	£132,000,000	£717	5.91%	Meadow Partners/LBS Properties	KanAm
Horseferry House, Horseferry Road, SW1	£131,800,000	£799	6.60%	Sinar Mas	Derwent
45 Cannon Street, EC4	£113,000,000	£1,251	5.48%	Global Relay	AOG
90 Whitfield Street, W1	£110,500,000	£1,068	5.00%	Lone Star Real Estate	Derwent London
Fetter Yard, 86 Fetter Lane, EC4	£76,000,000	£724	7.70%	Ares	Europa Capital
Washington House, 40-41 Conduit Street, W1	£72,000,000	£2,286	-	Wendover	Cola Holdings
70 Wilson Street, EC2	£64,700,000	£877	-	Valeo	UBS Triton Fund
Bavaria House, 13-14 Appold Street, EC2	£60,000,000	£1,395	-	Alitus Real Estate	Junhao

TOP LEASING TRANSACTIONS

ADDRESS (FLOOR)	SQ FT	APPROX. RENT (PER SQ FT.)	TERM	TENANT	LANDLORD
Ink Building, Timber Square, SE1 (Entire Building)	192,000	£80.00	15 Years	BP	Landsec
1 Exchange Square, EC2 (8th-12th)	148,000	-	-	Gibson Dunn	Network Rail/Permodalan Nasional Berhad
Network Building, 10 Howland Street, W1 (LG, G-8th)	136,000	£103.50	15 Years	Databricks	Derwent London
40 Broadway, SW1 (LG, G-7th)	98,000	-	15 Years	Formula 1	Tellon Capital
1 Exchange Square, EC2 (6th-7th)	81,000	-	-	Pacific Life RE	Network Rail/Permodalan Nasional Berhad
Aldgate Tower, 2 Leman Street, E1 (6th-7th)	52,000	-	15 Years	Brown & Brown	Brookfield/China Life
Delft, 5 Montague Close, SE1 (G, 1st, 5th-7th)	51,000	£140.00	10 Years	Quantexa	Great Portland Estates
1 Great St Helens, EC3 (LG, G-9th)	50,000	-	-	Landmark	Rafer Investments
1 Triton Square, NW1 (3rd)	44,000	-	-	Gilead Sciences	Royal London Asset Management Property
20 Whitfield Street, W1 (Entire Building)	43,000	£143.00	15 Years	Dr. Martens	Global Holdings Management Group

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Disclaimer: As of Q2 2023, BNPPRE UK has changed data provider, resulting in amendments to historical data.

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