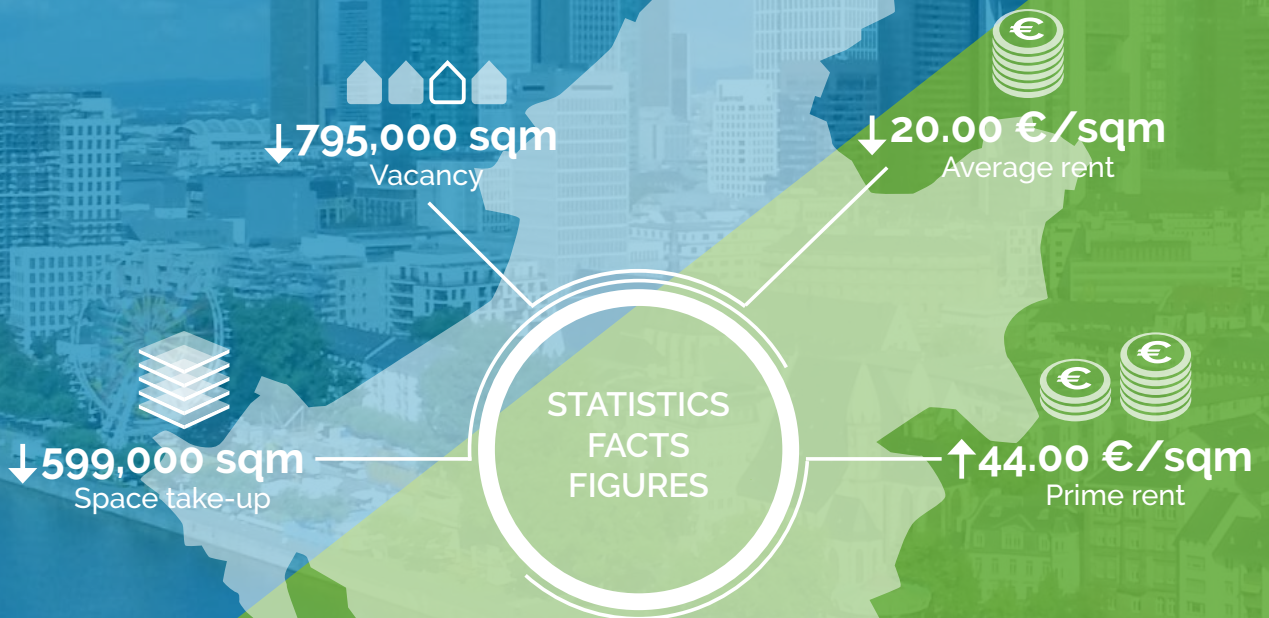


Q4 2019

RESEARCH OFFICE MARKET FRANKFURT

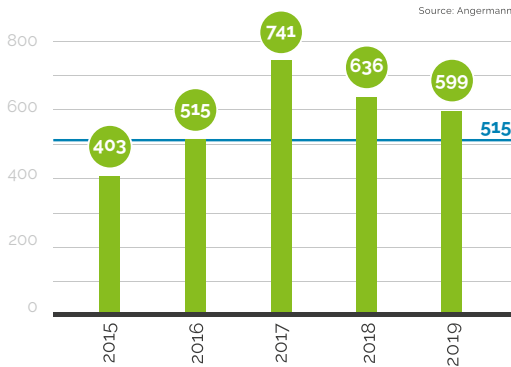


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Seit 1953.

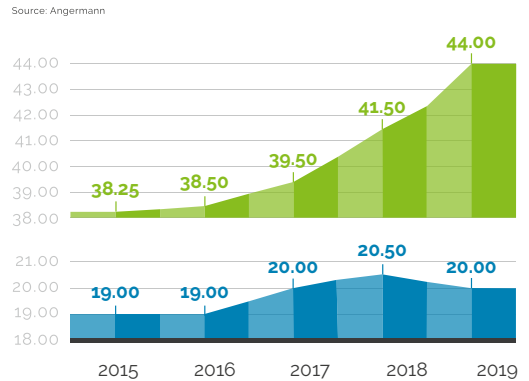
OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average



DEVELOPMENT OFFICE RENTS

in €/sqm — Prime rent — Average rent



KEY FACTS

- Office space take-up well above the 10-year average
- Take-up of 324,000 sqm in the second half year overtakes the first half-year performance of 275,000 sqm
- Financial services and banking sector is by far the most active group on the leasing side
- Letting performance in 2019 driven by large-scale lettings
- Decreasing supply of available office space
- High proportion of pre-letting amongst new-build projects
- Prime rent on the up but downturn in average rent

“WE EXPECT AN ABOVE-AVERAGE LETTING PERFORMANCE IN THE FRANKFURT LETTING MARKET OVER THE COURSE OF 2020.”

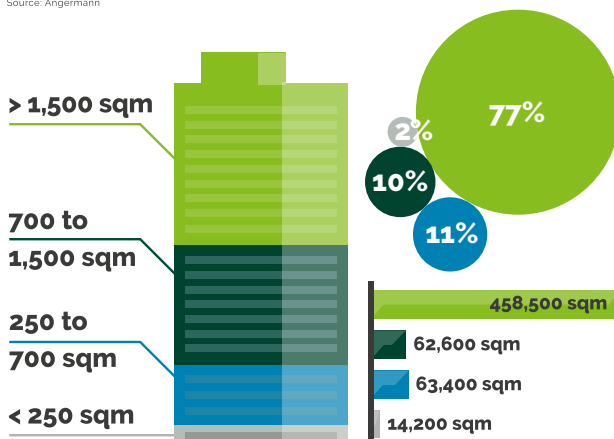


Volkmar Begemann
Management Board member

TAKE-UP BY SIZE CATEGORY

Total Year 2019

Source: Angermann

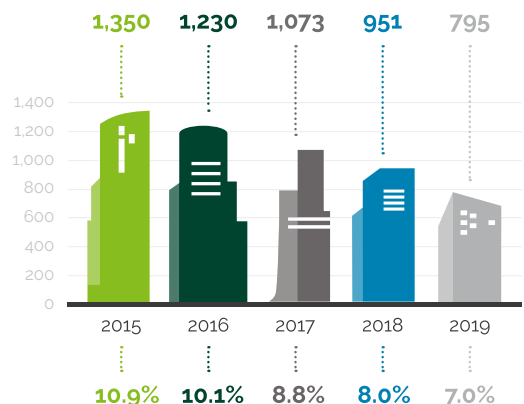


OFFICE VACANCY

Development 2015-2019

in 000 sqm, vacancy rate in %

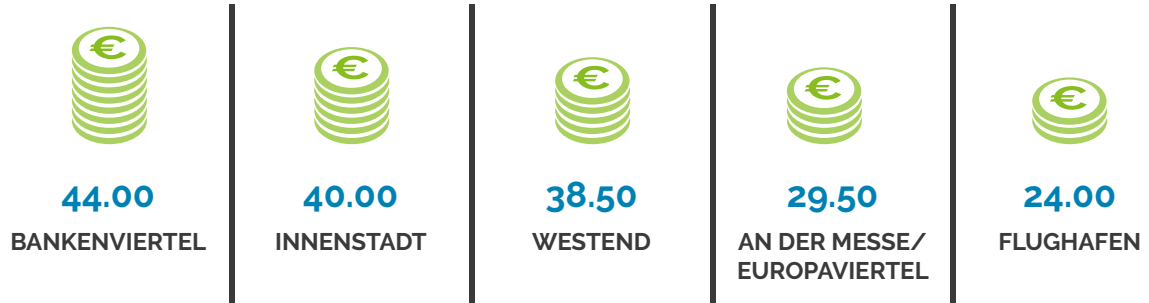
Source: Angermann



HIGH-PRICE OFFICE LOCATION

Total Year 2019 – approx. €/sqm/month excluding service charges & VAT

Source: Angermann



TOP 5

DEALS

Total Year 2019

Source: Angermann

- 01** Deka Immobilien GmbH
45,000 sqm, Lyoner Straße 13
- 02** Stadt Frankfurt am Main
26,800 sqm, Solmsstraße 27-37
- 03** ING Deutschland
24,000 sqm, Theodor-Heuss-Allee 44-46
- 04** Randstad Deutschland GmbH & Co. KG
14,800 sqm, Frankfurter Str. 100, Eschborn
- 05** Danfoss GmbH
13,600 sqm, Nordring 144, Kaiserlari

BUSINESS SECTORS

Total Year 2019

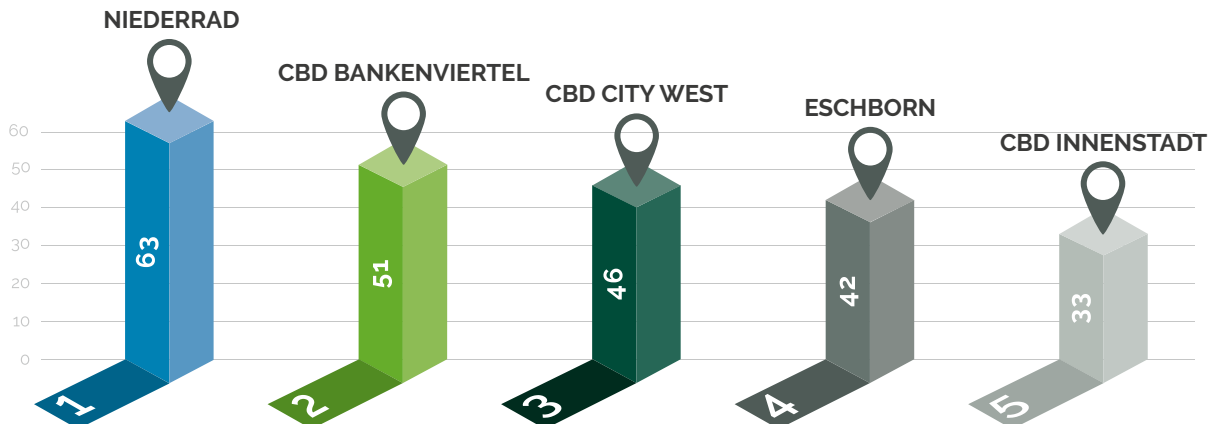
Source: Angermann

- 01** Banks/Financial services
184,000 sqm
- 02** Consulting
89,400 sqm
- 03** Public utilities
83,200 sqm
- 04** Services
40,000 sqm
- 05** Traffic/Transport/Logistics
26,800 sqm

TOP 5 OFFICE LOCATIONS




















Total Year 2019 – office space take-up in 000 sqm

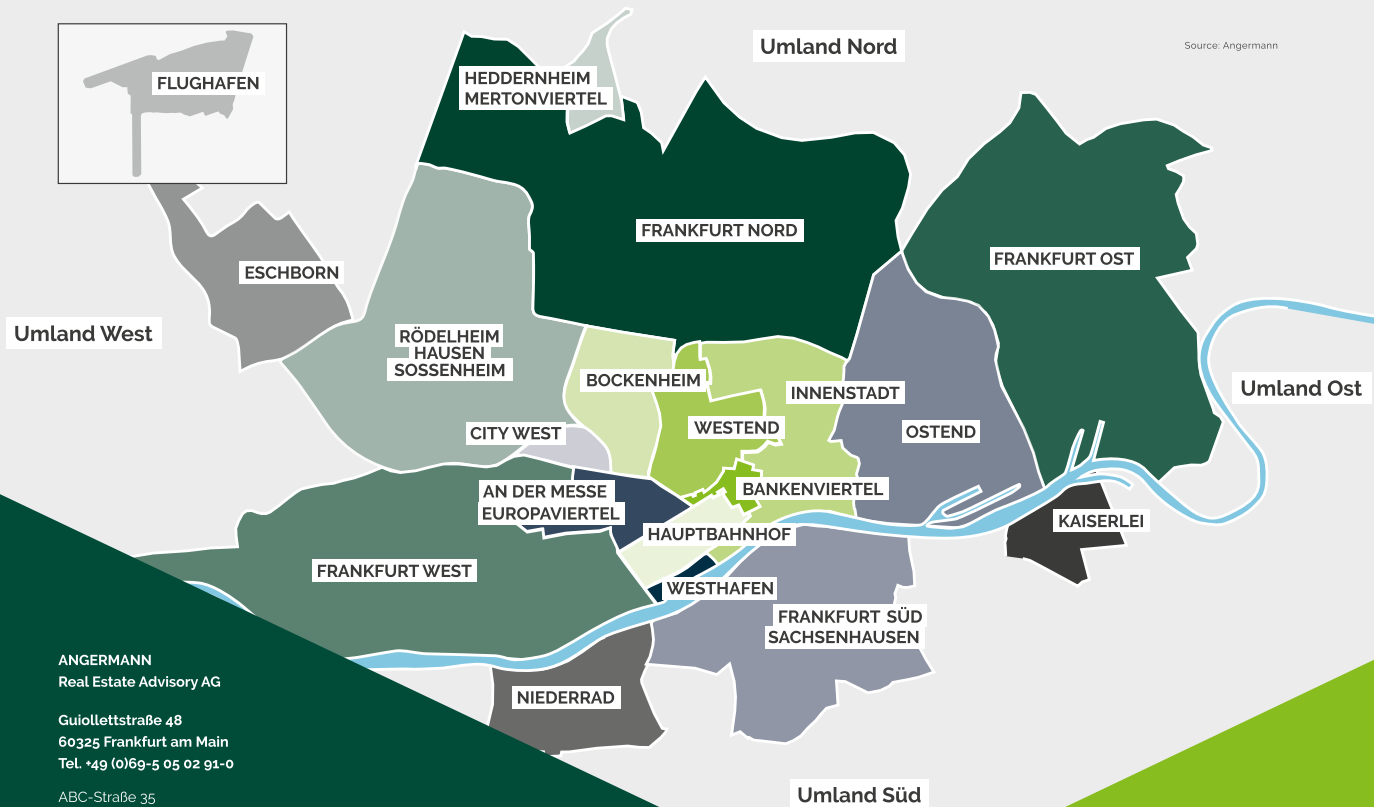
Source: Angermann



RENTS BY LOCATION

Rental ranges in approx. €/sqm/month excluding service charges & VAT

	Bankenviertel	32,00 / 44,00		Frankfurt Nord	12,00 / 15,00	
	Westend	23,50 / 38,50		Frankfurt Ost	9,00 / 13,75	
	Innenstadt	22,00 / 40,00		Frankfurt West	10,50 / 15,00	
	Bockenheim	18,50 / 24,00		Rödelheim/Hausen/Sossenheim	9,75 / 14,25	
	Hauptbahnhof	15,50 / 21,00		Heddernheim/Mertonviertel	11,00 / 15,75	
	Westhafen	21,00 / 25,00		Kaiserlei	12,50 / 15,75	Umland Nord 10,00 / 17,00
	An der Messe/Europaviertel	19,00 / 29,50		Niederrad	13,25 / 17,25	Umland Ost 9,50 / 15,00
	Ostend	16,25 / 20,00		Eschborn	12,50 / 18,00	Umland West 9,00 / 14,00
	Frankfurt Süd/Sachsenhausen	14,50 / 22,50		Flughafen	19,00 / 24,00	Umland Süd 9,75 / 14,00
	City West	17,00 / 20,50				



Source: Angermann

ANGERMANN
Real Estate Advisory AG

Guillettstraße 48
60325 Frankfurt am Main
Tel. +49 (0)69-5 05 02 91-0

ABC-Straße 35
20354 Hamburg
Tel. +49 (0)40-34 34 36

Lennéstraße 1
10785 Berlin
Tel. +49 (0)30-23 08 28-0

Windmühlenstraße 3
30159 Hanover
Tel. +49 (0)511-93 61 92-0

Bolzstraße 3
70173 Stuttgart
Tel. +49 (0)711-22 45 15-50



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