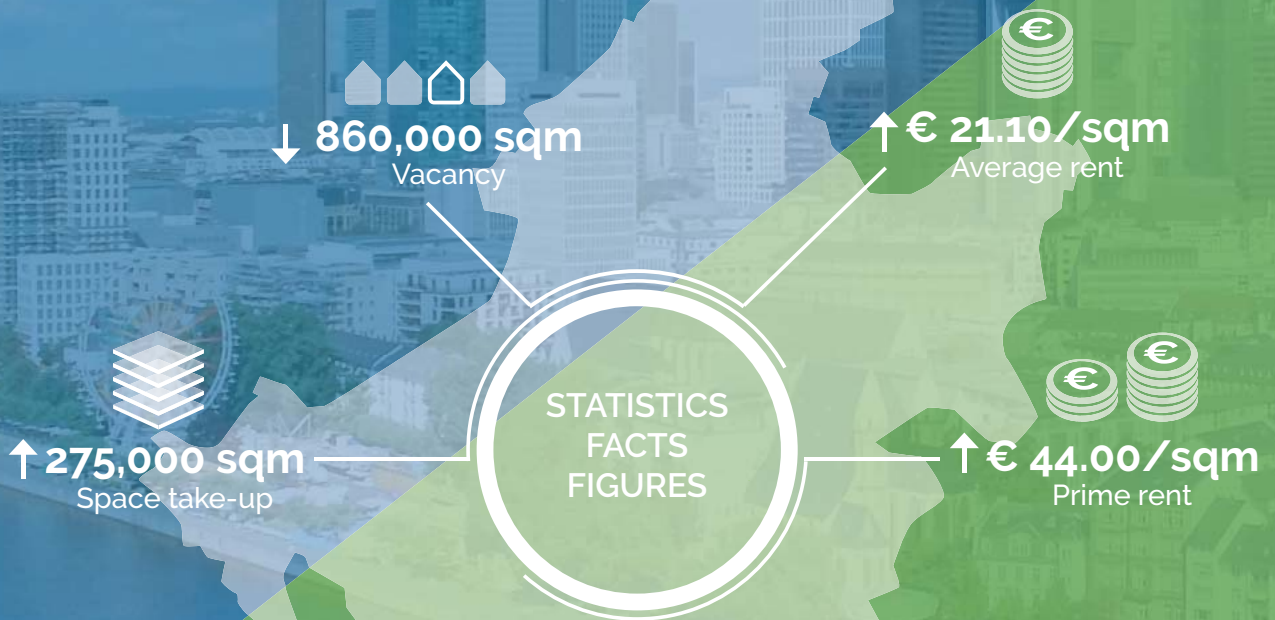


Q2 2019

RESEARCH OFFICE MARKET FRANKFURT

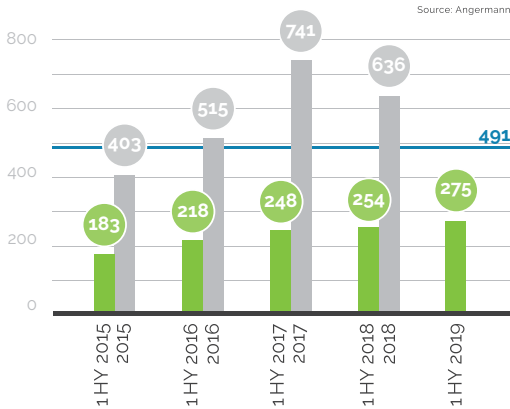


ANGERMANN™

Seit 1953.

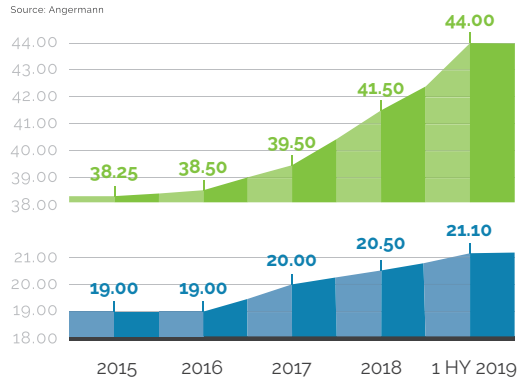
OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average



DEVELOPMENT OFFICE RENTS

in €/sqm ■ Prime rent ■ Average rent



KEY FACTS

- Large-scale lettings have shaped the take-up result
- 8% increase in office space take-up
- Very little office space still available in the Banking District
- Financial sector and consultancy firms dominate
- Around 74% of the office space to be constructed in high-rise buildings by 2020 has already been pre-let
- Office rents rise on average by over 2%
- Office space take-up of 590,000 sqm appears realistic

„DESPITE THE GOOD HALF-YEAR RESULT, A CYCLICAL SLOWDOWN CAN BE EXPECTED IN THE FORTHCOMING SIX MONTHS.“

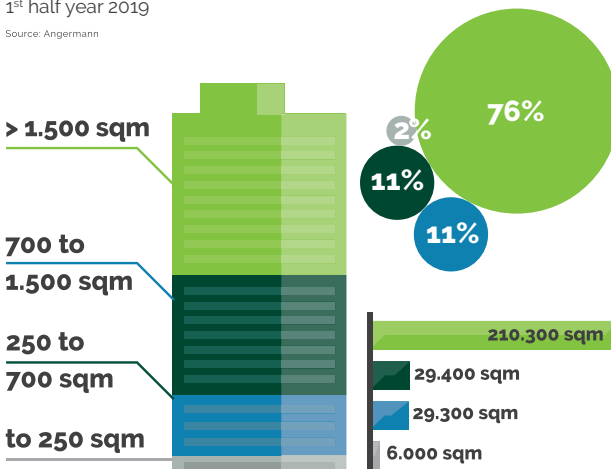


Volkmar Begemann
Board Member

TAKE-UP BY SIZE CATEGORY

1st half year 2019

Source: Angermann

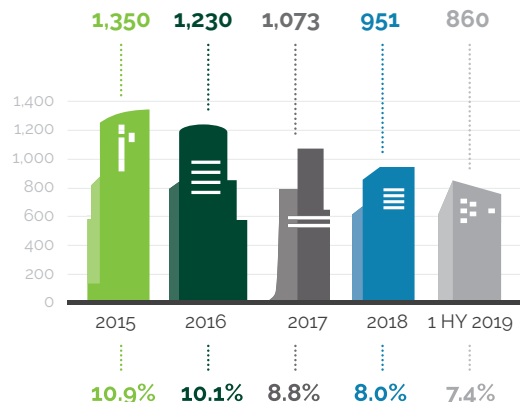


OFFICE VACANCY

Development 2015-2019

in 000 sqm, vacancy rate in %

Source: Angermann



HIGHEST RENTS IN MOST SOUGHT-AFTER OFFICE LOCATIONS

1st half year 2019 – approx. €/sqm/month excluding service charges & VAT

Source: Angermann



TOP 5

DEALS

1st half year 2019

- 01** **Deka Immobilien GmbH**
45,000 sqm, Lyoner Straße 13
- 02** **KPMG**
40,000 sqm, Am Flughafen 11-18
- 03** **Randstad**
14,800 sqm, Eschborn
- 04** **GIZ**
11,000 sqm, Eschborn
- 05** **Regus**
10,000 sqm, Robert-Bosch-Straße 5

BUSINESS SECTORS

1st half year 2019

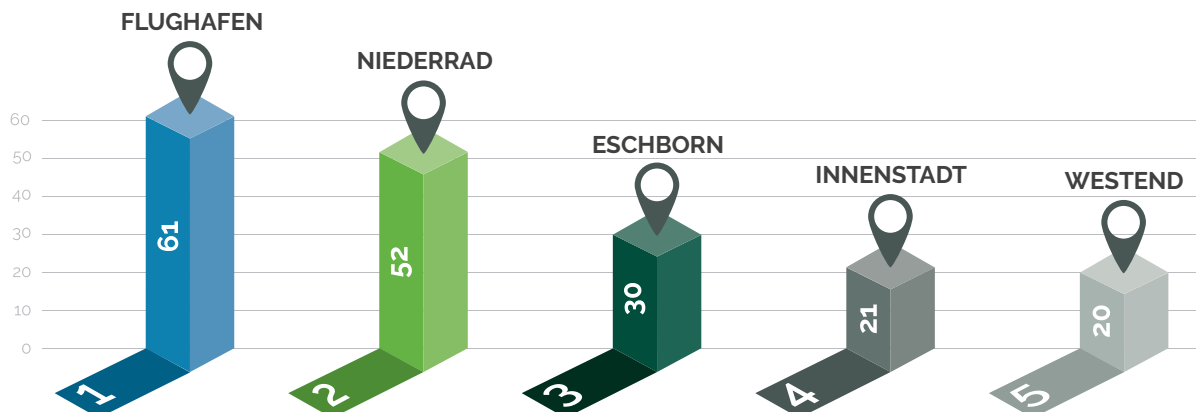
- 01** **Banks/Financial services**
77,400 sqm
- 02** **Consultancy**
64,300 sqm
- 03** **Public utilities**
34,700 sqm
- 04** **Real Estate**
15,800 sqm
- 05** **Traffic/Transport/Logistics**
13,600 sqm

Source: Angermann

TOP 5 OFFICE LOCATIONS




















1st half year 2019 – office space take-up in 000 sqm

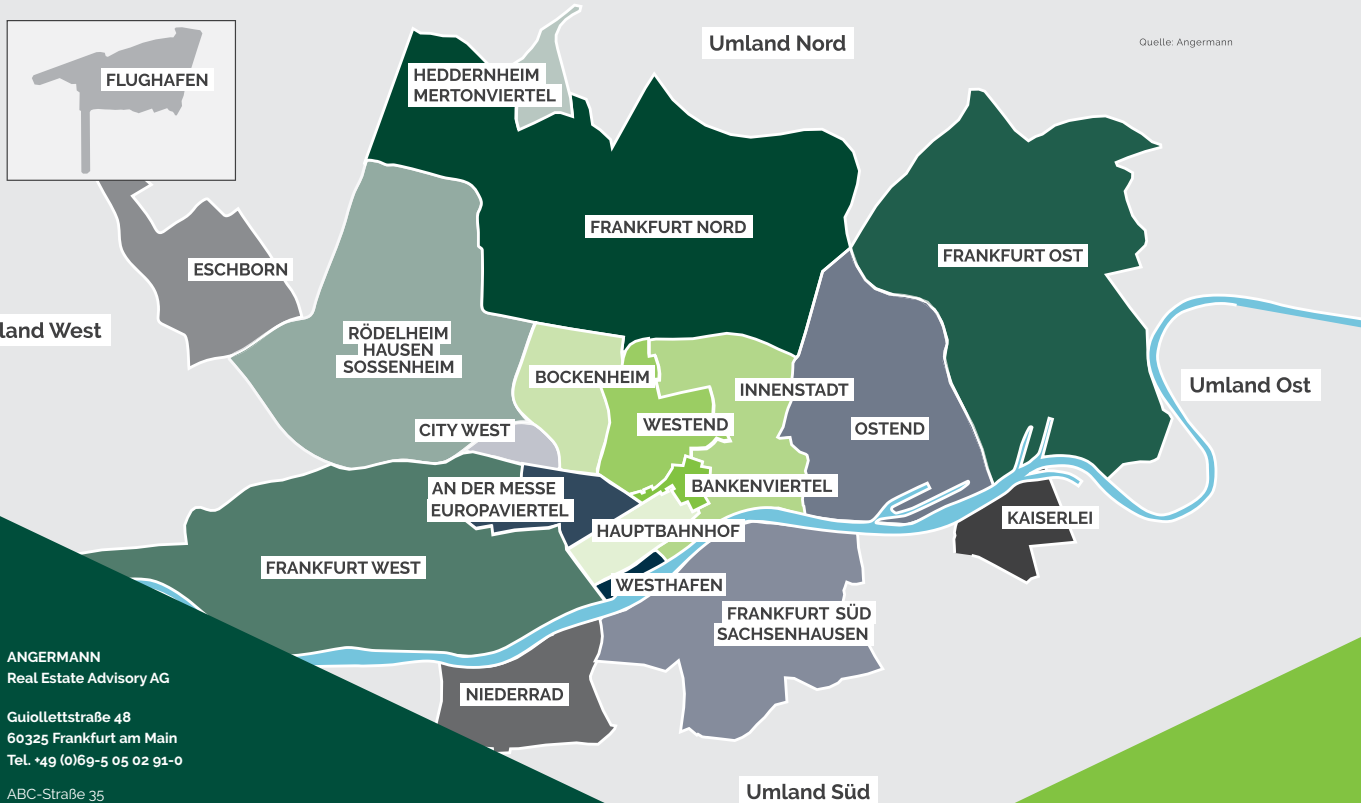
Source: Angermann



RENTAL PRICE MAP

1st half year 2019 – approx. €/sqm excluding service charges & VAT

	Bankenviertel	32,00 / 44,00		Frankfurt Nord	11,50 / 16,75	
	Westend	23,50 / 38,50		Frankfurt Ost	8,25 / 15,75	
	Innenstadt	21,50 / 40,00		Frankfurt West	10,00 / 15,00	
	Bockenheim	16,75 / 20,50		Rödelheim/Hausen/Sossenheim	9,50 / 14,00	
	Hauptbahnhof	15,25 / 21,00		Heddernheim/Mertonviertel	10,00 / 15,00	Umland Nord 9,00 / 15,00
	Westhafen	19,50 / 25,00		Kaiserlei	10,75 / 14,00	Umland Ost 8,00 / 14,00
	An der Messe/Europaviertel	16,50 / 29,00		Niederrad	12,50 / 16,50	Umland West 8,00 / 14,00
	Ostend	14,00 / 18,50		Eschborn	11,75 / 18,00	Umland Süd 9,00 / 12,50
	Frankfurt Süd/Sachsenhausen	14,00 / 22,50		Flughafen	17,00 / 23,00	(Average and Prime Rent)
	City West	15,00 / 18,00				



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