

Q2 2020

RESEARCH OFFICE MARKET FRANKFURT



↑ **835,000 sqm**
Vacancy



↑ **€ 21.50/sqm**
Average rent



↓ **139,000 sqm**
Space take-up

STATISTICS
FACTS
FIGURES



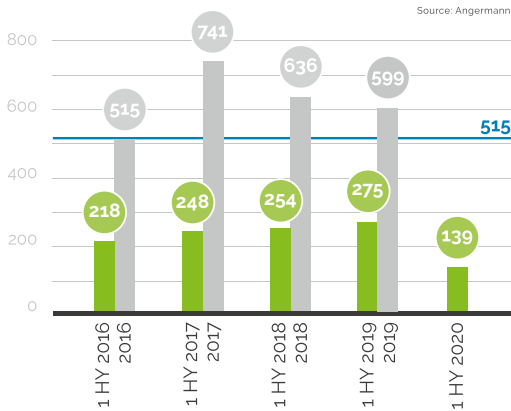
↑ **€ 45.00/sqm**
Prime rent

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Seit 1953.

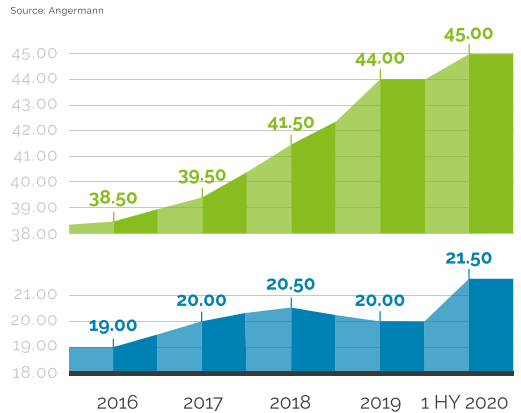
OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average



DEVELOPMENT OFFICE RENTS

in €/sqm — Prime rent — Average rent



KEY FACTS

- Strong uncertainty among office tenants due to COVID-19
- Most users believe that the corona crisis will have a lasting effect on use concepts
- Home office no longer considered just a temporary solution
- Slight increase in office space supply
- Rents have held their ground so far
- Demand is high in the < 500 sqm segment

„THE SECOND HALF OF THE YEAR WILL BRING MORE CLARITY ON CURRENT ISSUES SUCH AS „MORE HOME OFFICE“, „FEWER OPEN-PLAN OFFICES“ AND „WORKPLACE DESIGN.“

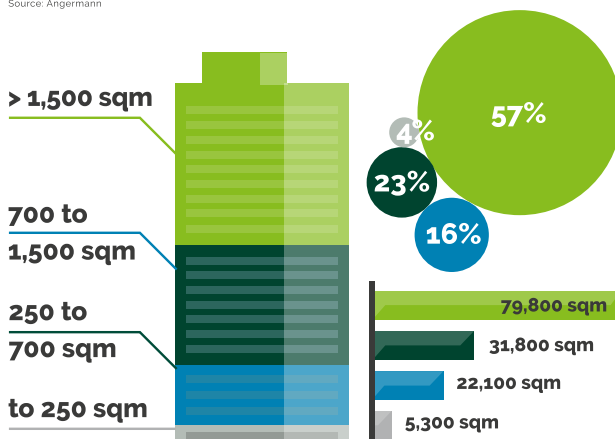


Volkmar Begemann
Board Member

TAKE-UP BY SIZE CATEGORY

1st half year 2020

Source: Angermann

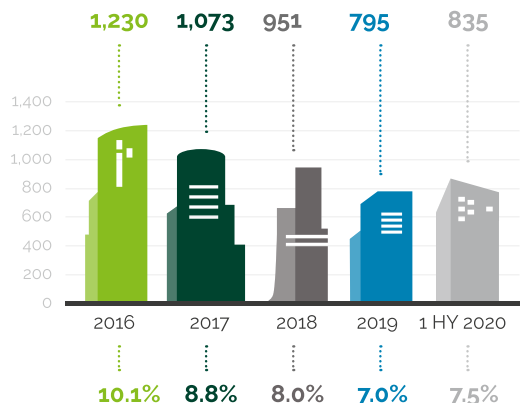


OFFICE VACANCY

Development 2016-2020

in 000 sqm, vacancy rate in %

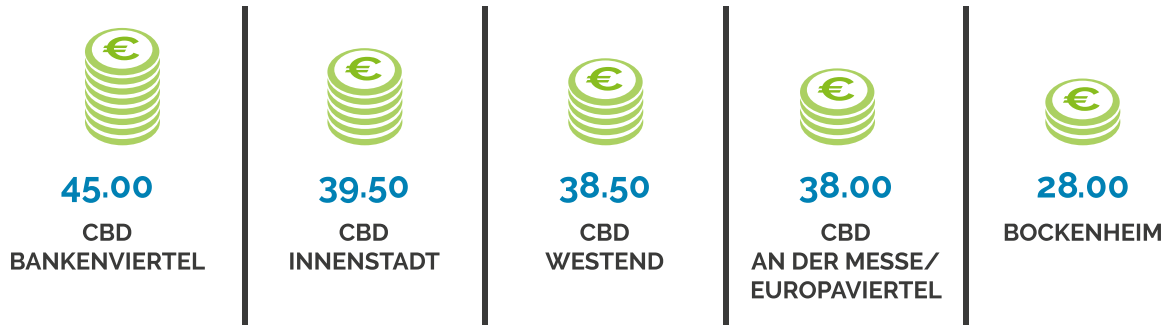
Source: Angermann



HIGHEST RENTS IN MOST SOUGHT-AFTER OFFICE LOCATIONS

1st half year 2020 – approx. €/sqm/month excluding service charges & VAT

Source: Angermann



TOP 5

DEALS

1st half year 2020

- 01** Freshfields Bruckhaus Deringer LLP
14,500 sqm, Große Gallusstraße 10-14
- 02** Allen & Overy LLP
10,000 sqm, Große Gallusstraße 10-14
- 03** Google Germany GmbH
4,634 sqm, Neue Mainzer Straße 32-36
- 04** Schwab Versand GmbH
3,800 sqm, Hanauer Landstraße 523
- 05** DB Energie GmbH
3,360 sqm, Mergenthalerallee 73-75, Eschborn

BUSINESS SECTORS

1st half year 2020

- 01** Consulting
28,500 sqm
- 02** Traffic/Transport/Logistics
18,400 sqm
- 03** Services
15,600 sqm
- 04** IT and Internet Service Provider
10,900 sqm
- 05** Banks / Financial Services
4,100 sqm

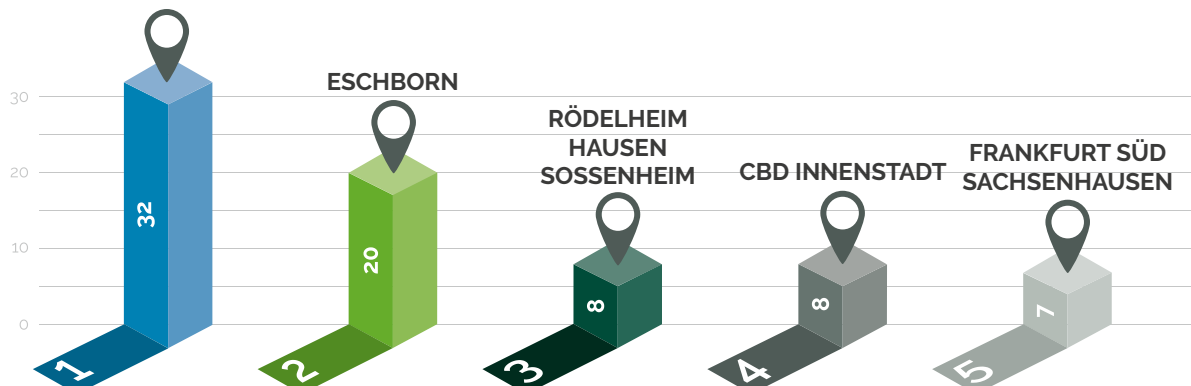
Source: Angermann

TOP 5 OFFICE LOCATIONS

1st half year 2020 – office space take-up in 000 sqm




















Source: Angermann

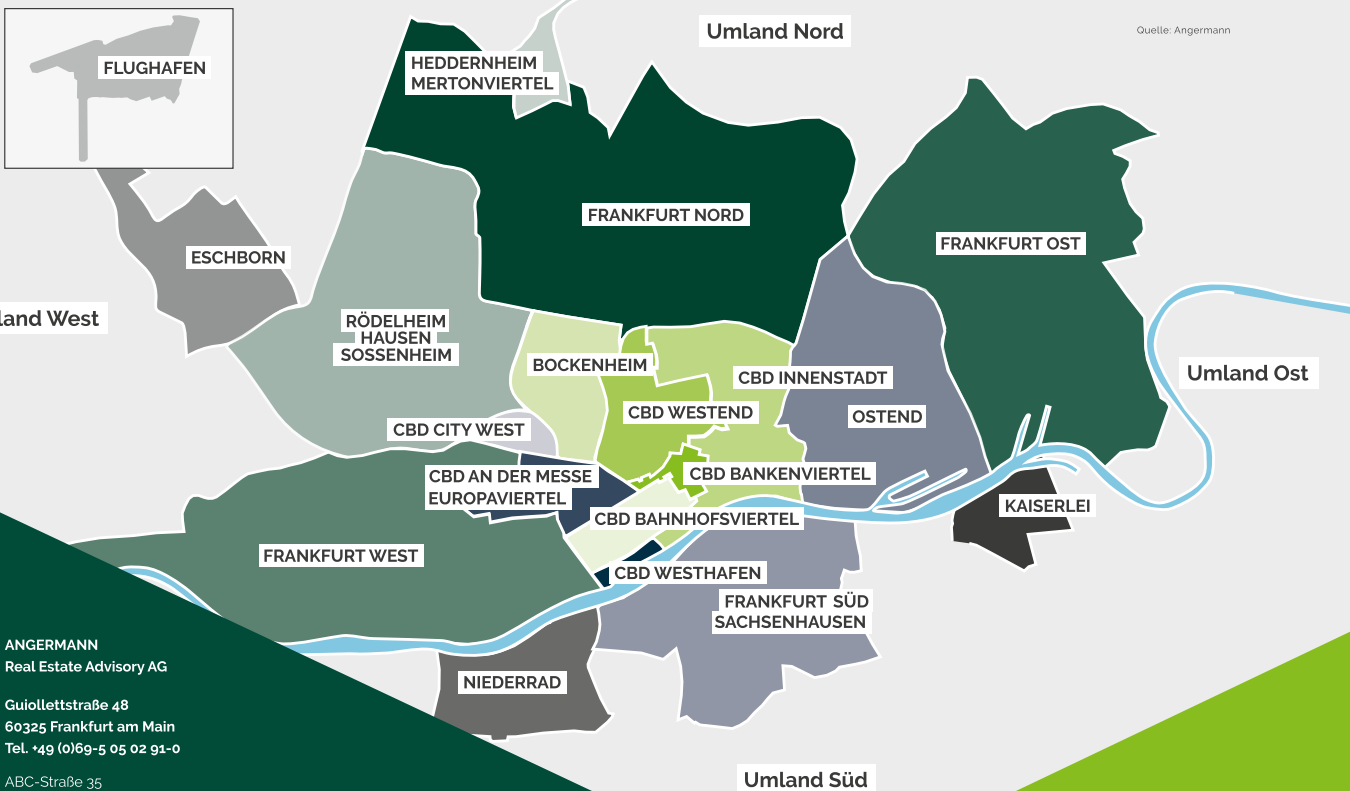
CBD BANKENVIERTEL



RENTAL PRICE MAP

1st half year 2020 – approx. €/sqm excluding service charges & VAT

	CBD Bankenviertel	32.00 / 45.00		Frankfurt Nord	12.00 / 15.00	
	CBD Westend	23.50 / 38.50		Frankfurt Ost	9.00 / 13.75	
	CBD Innenstadt	22.00 / 39.50		Frankfurt West	10.50 / 15.00	
	Bockenheim	19.00 / 28.00		Rödelheim/Hausen/Sossenheim	9.75 / 14.25	
	CBD Bahnhofsviertel	15.50 / 21.00		Heddernheim/Mertonviertel	11.00 / 15.75	
	CBD Westhafen	21.00 / 24.50		Kaiserlei	12.50 / 15.75	Umland Nord 11.00 / 17.00
	CBD An der Messe/Europaviertel	19.00 / 38.00		Niederrad	13.25 / 17.25	Umland Ost 9.50 / 15.00
	Ostend	16.25 / 20.00		Eschborn	12.50 / 18.75	Umland West 9.00 / 14.00
	Frankfurt Süd/Sachsenhausen	15.00 / 22.50		Flughafen	19.00 / 24.00	Umland Süd 9.75 / 14.00
	CBD City West	17.00 / 20.50				



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