

Q4 2020

RESEARCH OFFICE MARKET FRANKFURT



↑ 835,000 sqm
Vacancy



↑ € 22.00/sqm
Average rent



↓ 336,000 sqm
Space take-up

STATISTICS
FACTS
FIGURES



↑ € 46.00/sqm
Prime rent

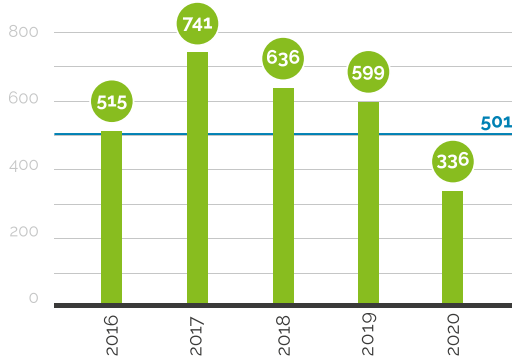
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OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average

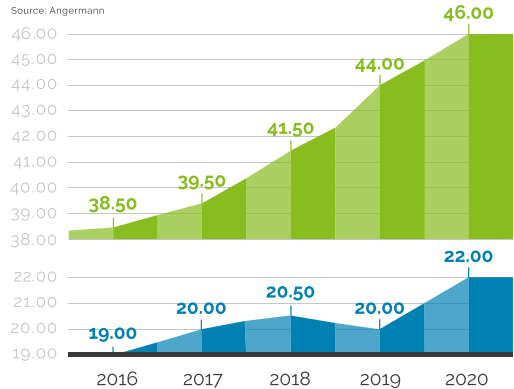
Source: Angermann



DEVELOPMENT OFFICE RENTS

in €/sqm ■ Prime rent ■ Average rent

Source: Angermann



KEY FACTS

- Lowest office letting performance in 20 years
- Nevertheless, a rise in prime and average rents appears likely
- Major deals in developments in the Banking District and Eschborn
- Slight increase in supply of office space
- The availability of space for subletting in the small size category is increasing
- Outlook 2021: despite the lingering uncertainty, the healthy supply of space will encourage highly confident companies to relocate their office premises

„DESPITE COVID-19, THE ADVISORY AND FINANCIAL SERVICES SECTORS CONTINUE TO HAVE A HIGH DEGREE OF CONFIDENCE IN FRANKFURT AS A BUSINESS LOCATION.“

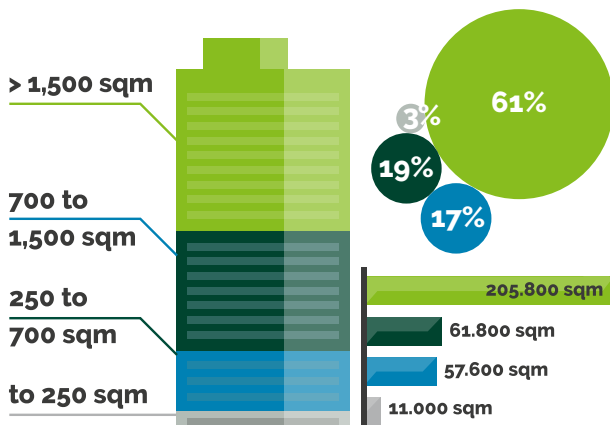


Volkmar Begemann
Board Member

TAKE-UP BY SIZE CATEGORY

Total Year 2020

Source: Angermann

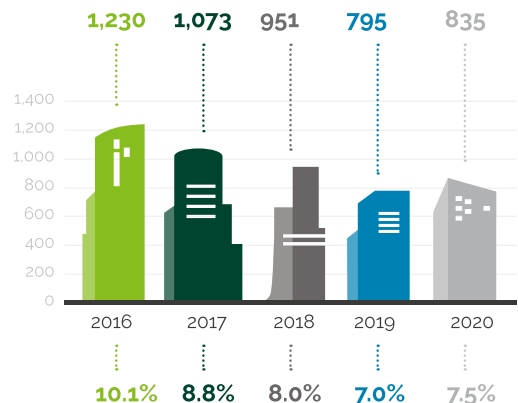


OFFICE VACANCY

Development 2016-2020

in 000 sqm, vacancy rate in %

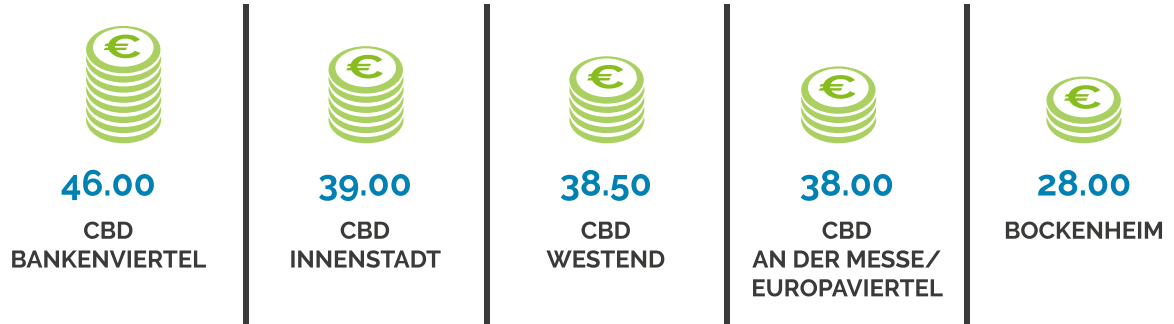
Source: Angermann



HIGHEST RENTS IN MOST SOUGHT-AFTER OFFICE LOCATIONS

Total Year 2020 – approx. €/sqm/month excluding service charges & VAT

Source: Angermann



TOP 5

DEALS

Total Year 2020

- 01** Samsung Electronics Holding
17,500 sqm, Frankfurter Str. 2-8, Eschborn
- 02** DekaBank Deutsche Girozentrale
16,000 sqm, Große Gallusstraße 10-14
- 03** Freshfields Bruckhaus Deringer LLP
14,500 sqm, Große Gallusstraße 10-14
- 04** Allen & Overy LLP
10,000 sqm, Große Gallusstraße 10-14
- 05** MOBIS Parts Europe N.V.
9,500 sqm, Frankfurter Str. 60-68, Eschborn

BUSINESS SECTORS

Total Year 2020

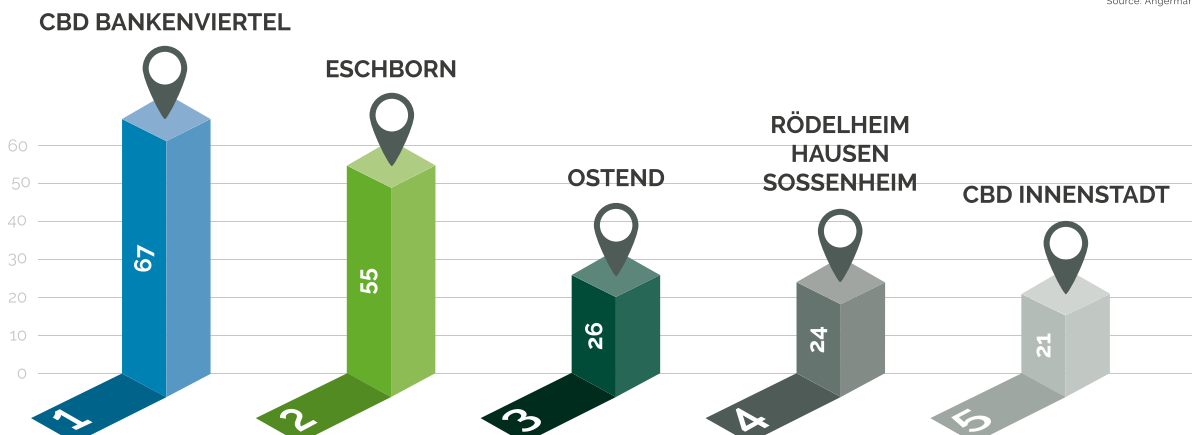
- 01** Consulting
37,700 sqm
- 02** Banks / Financial Services
27,800 sqm
- 03** Real Estate
27,200 sqm
- 04** Public Sector
23,800 sqm
- 05** Services
21,400 sqm

Source: Angermann

TOP 5 OFFICE LOCATIONS




















Total Year 2020 – office space take-up in 000 sqm

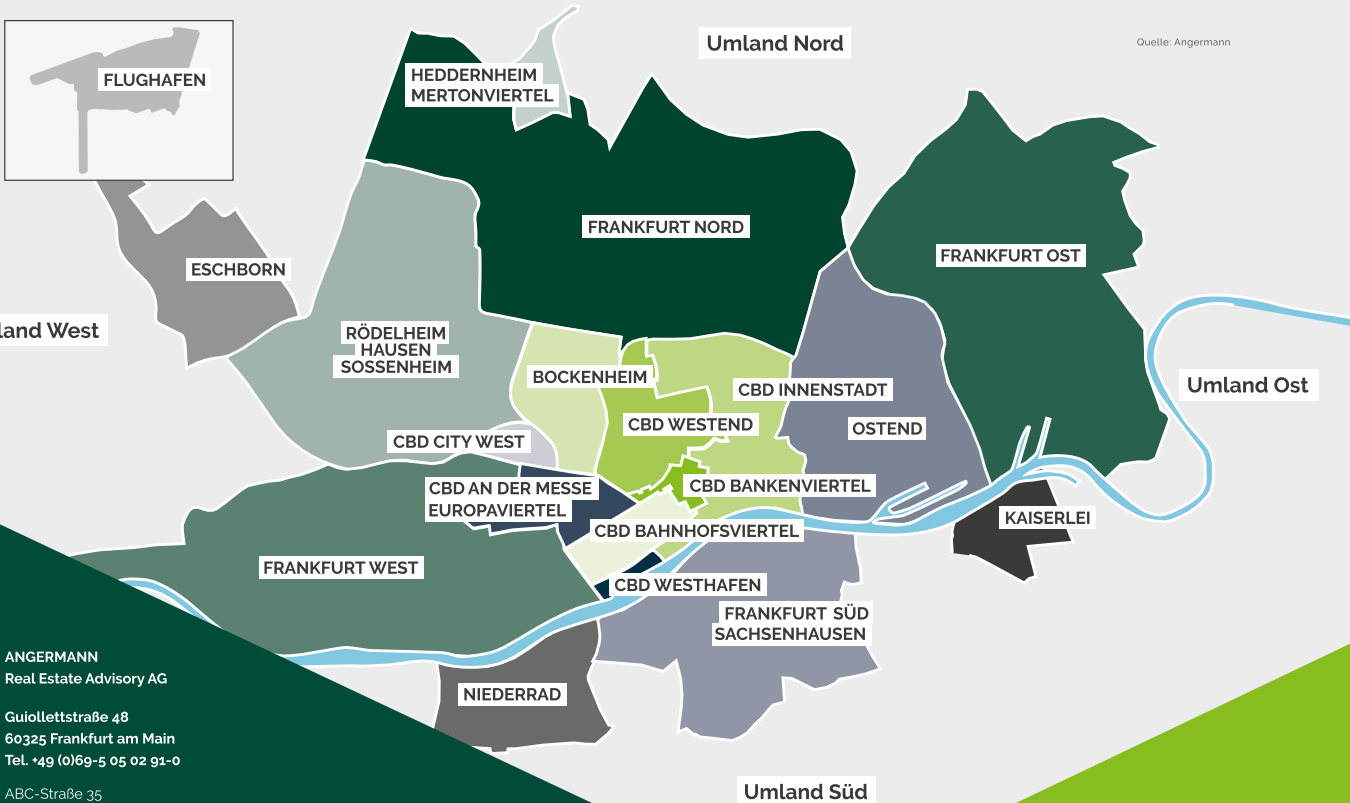
Source: Angermann



RENTAL PRICE MAP

Total Year 2020 – approx. €/sqm excluding service charges & VAT

	CBD Bankenviertel	34,00 / 46,00		Frankfurt Nord	12,00 / 15,00	
	CBD Westend	23,00 / 38,50		Frankfurt Ost	9,00 / 13,75	
	CBD Innenstadt	21,00 / 39,00		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	17,00 / 21,00		Eschborn	13,50 / 20,00	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 / 21,00				



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