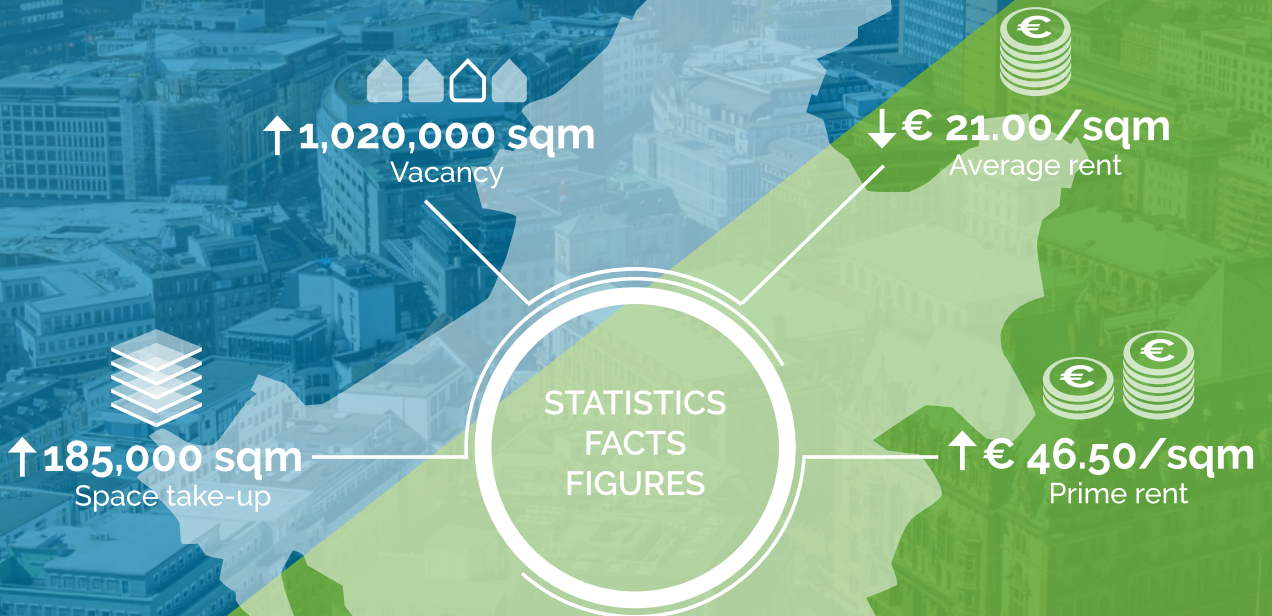


Q2 2021

RESEARCH OFFICE MARKET FRANKFURT

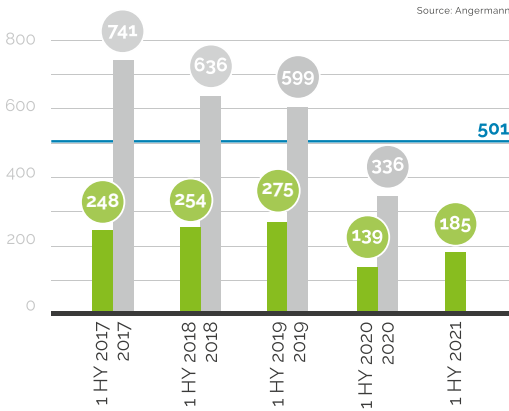


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Seit 1953.

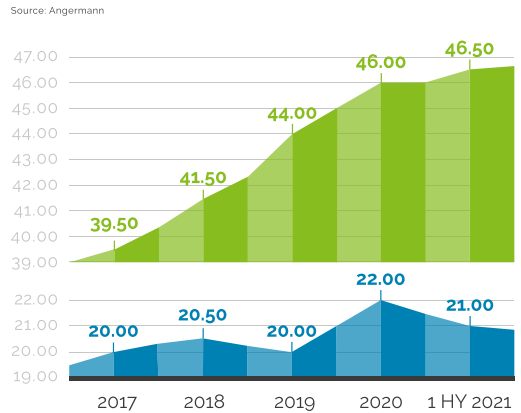
OFFICE SPACE TAKE-UP

IN 000 SQM / — 10-YEAR AVERAGE



DEVELOPMENT OFFICE RENTS

IN €/SQM ■ PRIME RENT ■ AVERAGE RENT



KEY FACTS

- 33% increase in the volume of take-up year-on-year
- Major deals in new construction projects provide stimulation
- Letting activity in the mid-range size segment on the rise
- Prime rent rises, average rent falls
- Supply of office space increases once again
- Office space take-up of 400,000 sqm realistic for 2021 as a whole

„THE FOCUS ON NEW WORK AND THE EXPECTED RETURN OF EMPLOYEES FROM HOME OFFICES ARE ENCOURAGING LETTING ACTIVITY.“

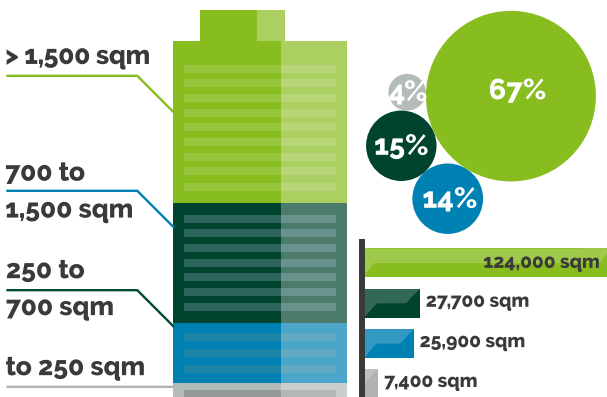


Ron Klotsch,
Director

TAKE-UP BY SIZE CATEGORY

1st half year 2021

Source: Angermann

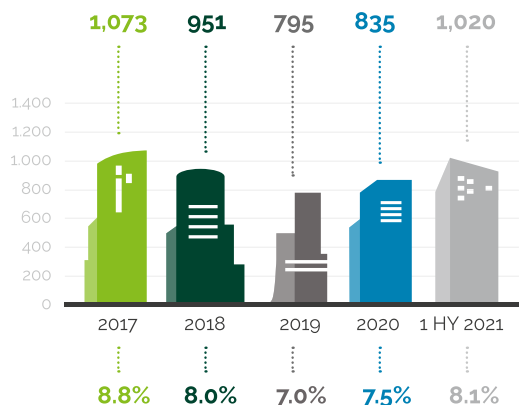


OFFICE VACANCY

Development 2017 - 2021

in 000 sqm, vacancy rate in %

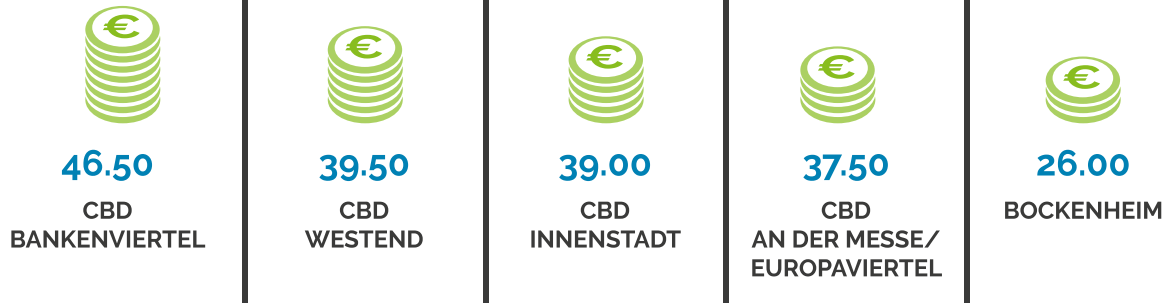
Source: Angermann



HIGHEST RENTS IN MOST SOUGHT-AFTER OFFICE LOCATIONS

1st half year 2021 – approx. €/sqm/month excluding service charges & VAT

Source: Angermann



TOP 5

DEALS

1st half year 2021

- 01** Nestlé Deutschland AG
19,000 sqm, Baseler Straße 46-48
- 02** Stadt Frankfurt am Main
16,000 sqm, Ben-Gurion-Ring 158-164
- 03** Siemens
15,000 sqm, Flughafen
- 04** Stadt Frankfurt am Main
7,600 sqm, Gerbermühlstraße 3
- 05** Commerzbank AG
7,300 sqm, Junghofstraße 13-15

BUSINESS SECTORS

1st half year 2021

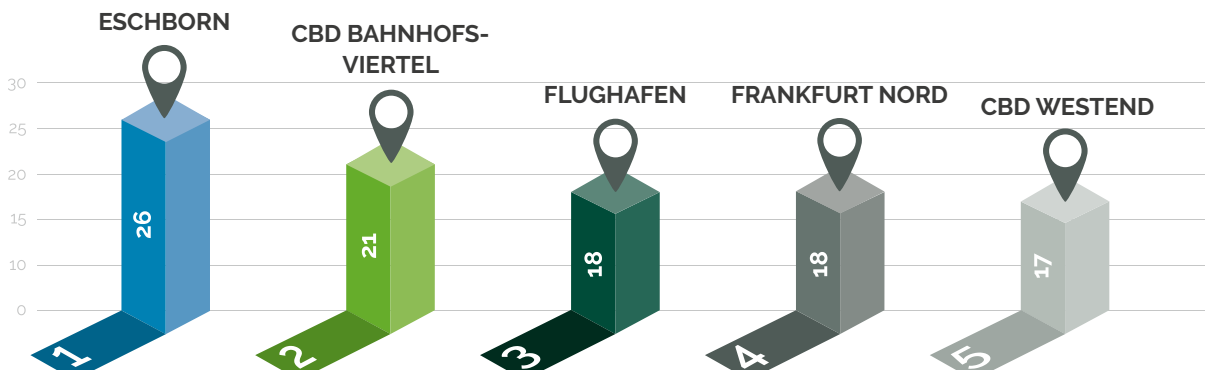
- 01** Industry
38,200 sqm
- 02** Public Sector
29,100 sqm
- 03** Banks / Financial Services
16,900 sqm
- 04** IT- and Internet Services
13,200 sqm
- 05** Consulting
12,600 sqm

Source: Angermann

TOP 5 OFFICE LOCATIONS




















1st half year 2021 - office space take-up in 000 sqm

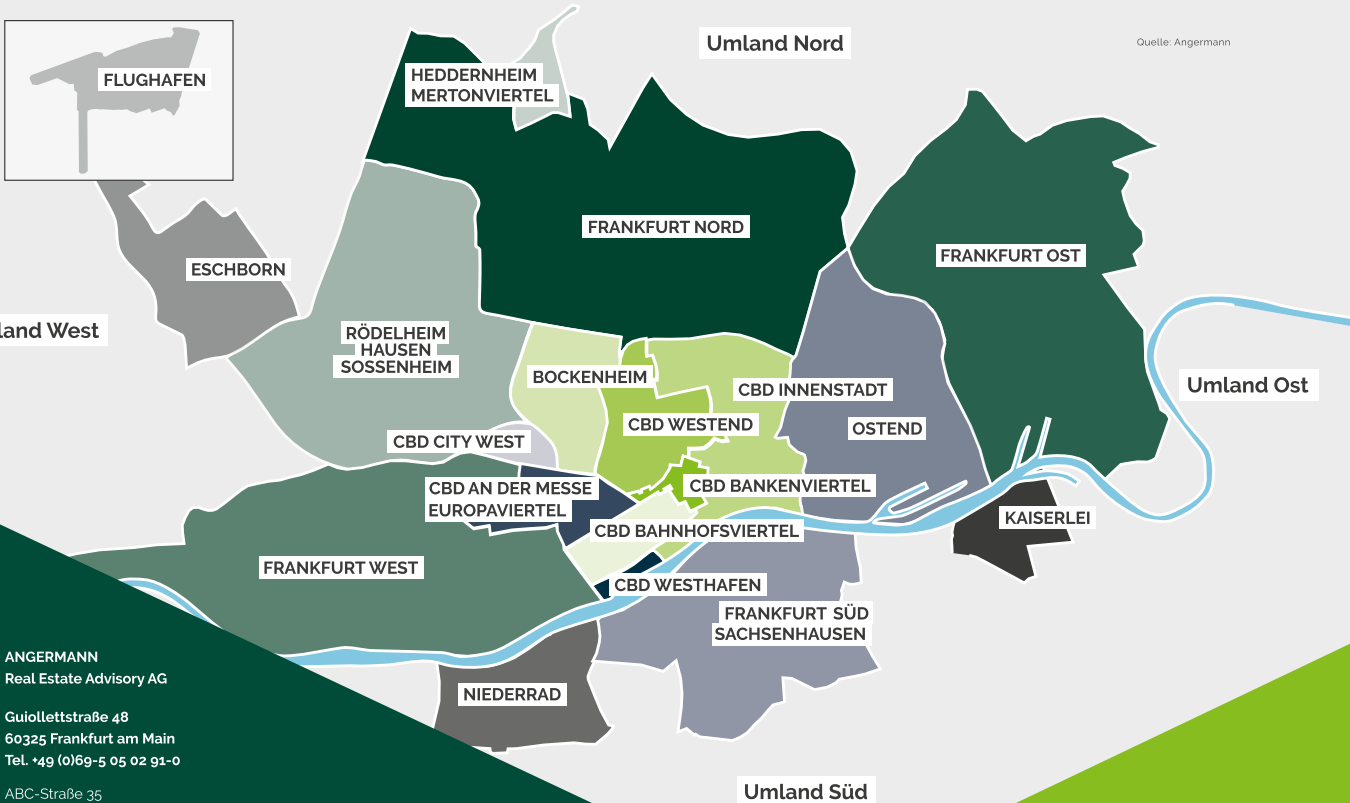
Source: Angermann



RENTAL PRICE MAP

1st half year 2021 – approx. €/sqm excluding service charges & VAT

	CBD Bankenviertel	34.50 / 46.50		Frankfurt Nord	11.50 / 14.50	
	CBD Westend	24.00 / 39.50		Frankfurt Ost	9.50 / 14.00	
	CBD Innenstadt	21.50 / 39.00		Frankfurt West	10.50 / 15.00	
	Bockenheim	18.00 / 26.00		Rödelheim/Hausen/Sossenheim	10.50 / 14.50	
	CBD Bahnhofsviertel	17.00 / 23.50		Heddernheim/Mertonviertel	11.00 / 15.50	
	CBD Westhafen	21.00 / 24.50		Kaiserlei	13.00 / 16.00	Umland Nord 11.00 / 17.50
	CBD An der Messe/Europaviertel	19.00 / 37.50		Niederrad	13.50 / 17.25	Umland Ost 9.50 / 15.00
	Ostend	17.00 / 21.50		Eschborn	13.50 / 19.50	Umland West 9.50 / 14.00
	Frankfurt Süd/Sachsenhausen	15.50 / 23.50		Flughafen	19.00 / 24.00	Umland Süd 10.00 / 14.25
	CBD City West	17.00 / 21.50				



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