

Q2 2022

RESEARCH OFFICE MARKET FRANKFURT



995,000 sqm
Vacancy



€ 22.50/sqm
Average rent



205,000 sqm
Space take-up

STATISTICS
FACTS
FIGURES



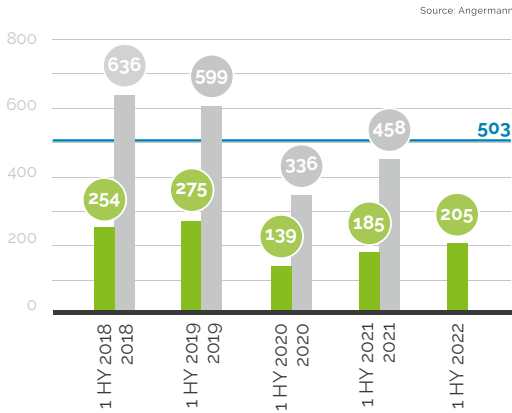
€ 46.50/sqm
Prime rent

ANGERMANN™

Seit 1953.

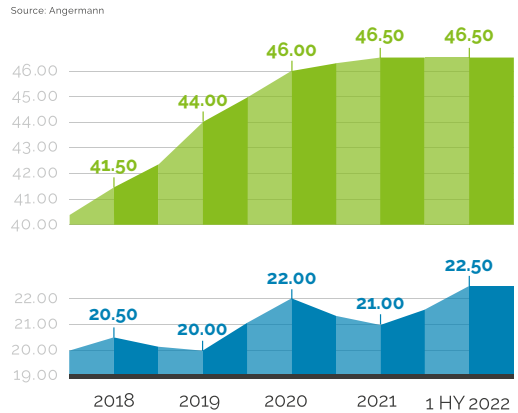
OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average



DEVELOPMENT OFFICE RENTS

in €/sqm — Prime rent — Average rent



KEY FACTS

- 11% increase in letting performance year-on-year
- Significant increase in average rent; prime rent unchanged
- Renaissance of banks and financial services as the sector recording the highest take-up
- Few high-volume lettings over 10,000 sqm
- Supply of vacant office space decreasing despite few businesses moving into the city

„DESPITE THE TENSE POLITICAL AND ECONOMIC SITUATION, THE CONTINUED ROBUST TAKE-UP IS ALLOWING US TO LOOK POSITIVELY INTO THE FUTURE.“

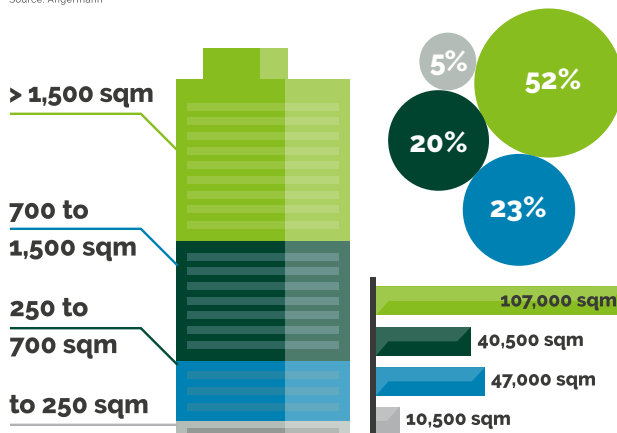


Ron Klotsch, Director

TAKE-UP BY SIZE CATEGORY

1st half year 2022

Source: Angermann

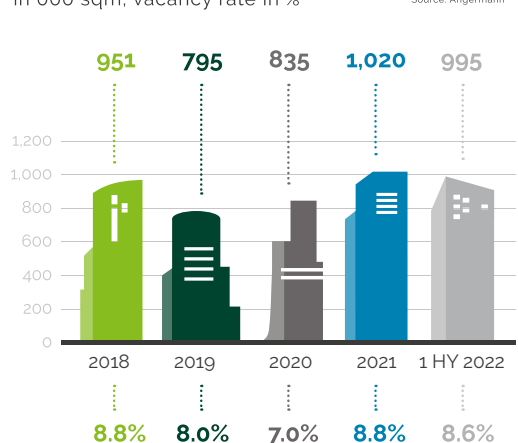


OFFICE VACANCY

Development 2018-2022

in 000 sqm, vacancy rate in %

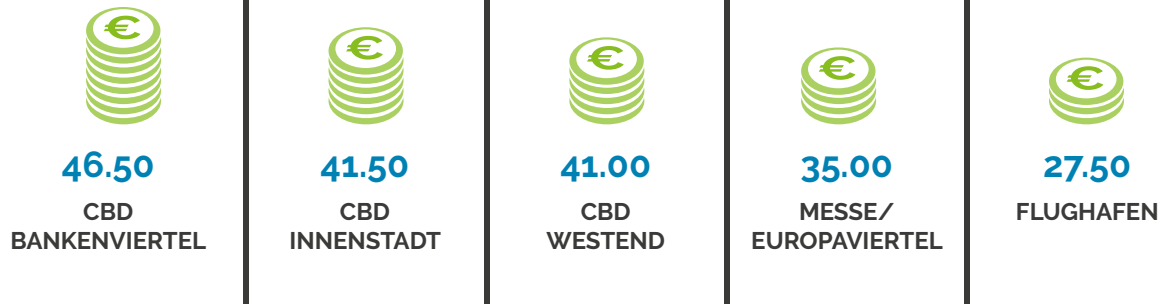
Source: Angermann



HIGHEST RENTS IN MOST SOUGHT-AFTER OFFICE LOCATIONS

1st half year 2022 – approx. €/sqm/month excluding service charges & VAT

Source: Angermann



TOP 5

DEALS

1st half year 2022

- 01** GIZ GmbH
28,000 sqm, Ludwig-Erhard-Straße 7
- 02** Citigroup Gl. Markets D. AG & Co. KGaA
10,100 sqm, Börsenplatz 7-11
- 03** Sparda-Bank Hessen eG
9,100 sqm, Europa-Allee 68
- 04** Noerr LLP
8,700 sqm, Bockenheimer Landstraße 10
- 05** Deutsche Bank AG
6,100 sqm, Theodor-Heuss-Allee 70-74

BUSINESS SECTORS

1st half year 2022

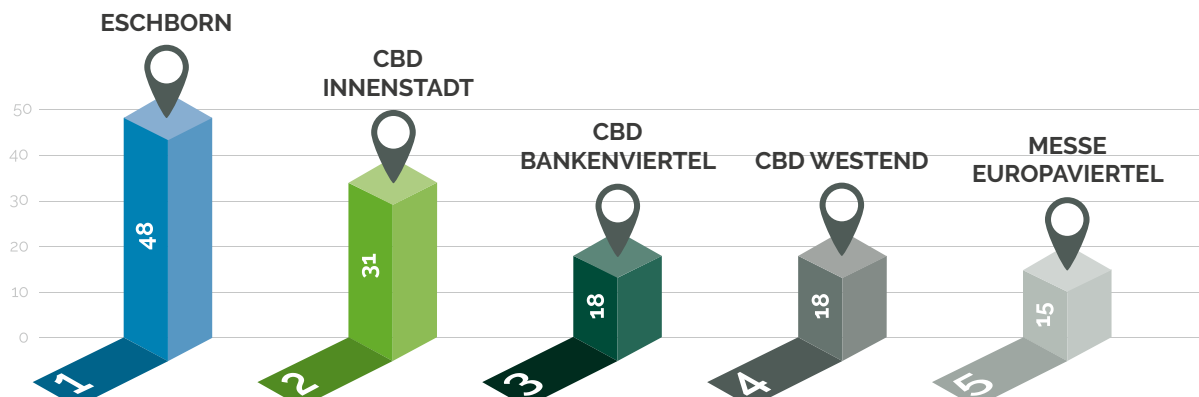
- 01** Banks/Financial Services
50,400 sqm
- 02** Public Sector
31,800 sqm
- 03** Consultancy
21,100 sqm
- 04** Real Estate
16,100 sqm
- 05** Advertising/Multimedia
6,000 sqm

Source: Angermann

TOP 5 OFFICE LOCATIONS




















1st half year 2022 – office space take-up in 000 sqm

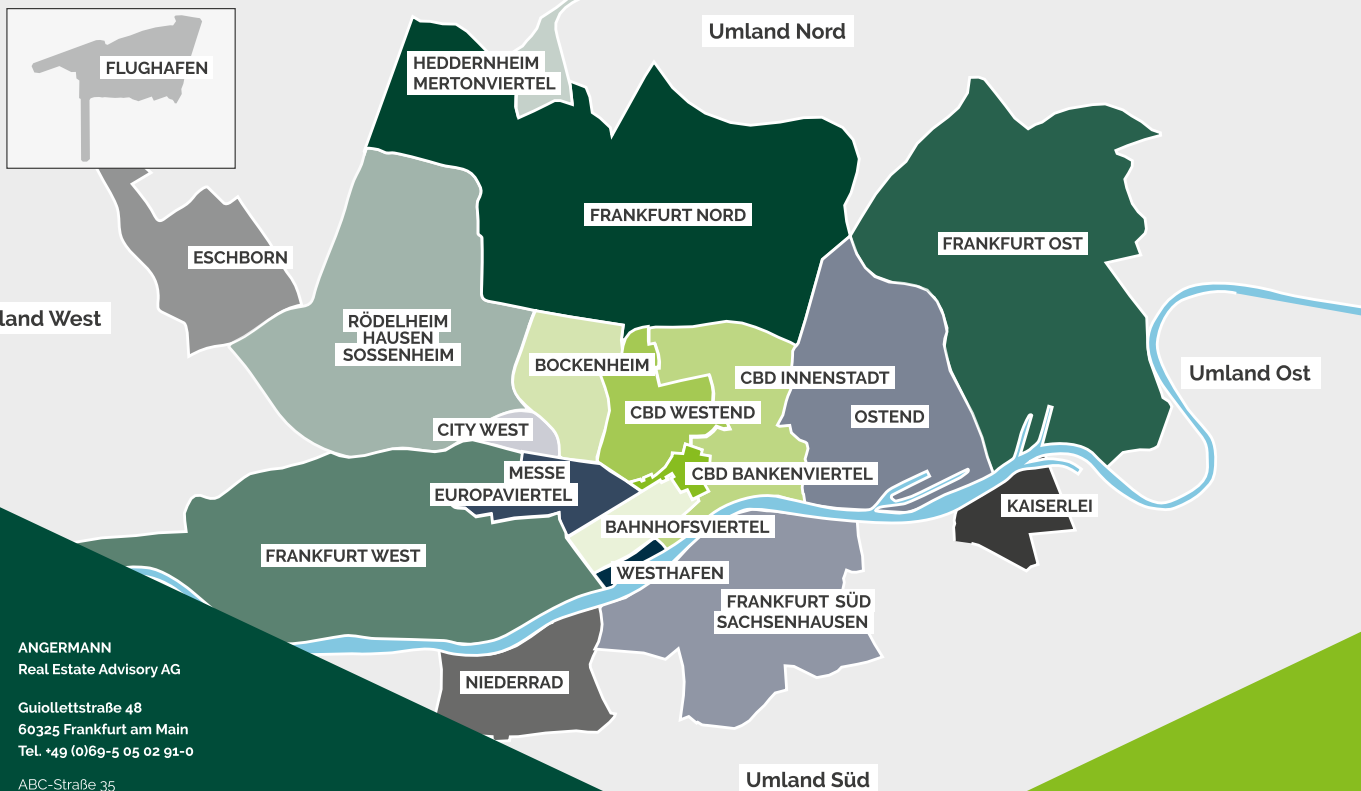
Source: Angermann



RENTAL PRICE MAP

1st half year 2022 – approx. €/sqm excluding service charges & VAT

 CBD Bankenviertel	35,00 / 46,50	 Frankfurt Nord	11,00 / 14,00	
 CBD Westend	28,50 / 40,50	 Frankfurt Ost	10,00 / 14,00	
 CBD Innenstadt	24,50 / 40,50	 Frankfurt West	11,50 / 15,00	
 Bockenheim	20,50 / 30,00	 Rödelheim/Hausen/Sossenheim	12,00 / 14,50	
 Bahnhofsviertel	17,00 / 24,00	 Heddernheim/Mertonviertel	11,50 / 15,50	
 Westhafen	20,50 / 24,50	 Kaiserlei	14,50 / 17,50	Umland Nord 11,50 / 18,00
 Messe/Europaviertel	22,50 / 35,00	 Niederrad	14,50 / 17,00	Umland Ost 10,50 / 15,00
 Ostend	17,50 / 22,50	 Eschborn	15,00 / 20,50	Umland West 9,00 / 14,00
 Frankfurt Süd/Sachsenhausen	16,00 / 22,50	 Flughafen	19,50 / 27,50	Umland Süd 10,00 / 15,50
 City West	17,50 / 22,00			



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

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

Am Graswege 6
30169 Hannover
Tel. +49 (0)511-93 61 92-0

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



www.angermann-realestate.de
www.bürosuche.de



Marktbericht zum
DOWNLOAD!

REAL ESTATE | MERGERS & ACQUISITIONS | BUSINESS CONSULTANTS | AUCTIONING & FINANCE