

Q4 2021

RESEARCH OFFICE MARKET HAMBURG



↑ **540,000 sqm**
Vacancy



↑ **€ 18.00/sqm**
Average rent



↑ **509,000 sqm**
Space take-up

STATISTICS
FACTS
FIGURES



↑ **€ 32.00/sqm**
Prime rent

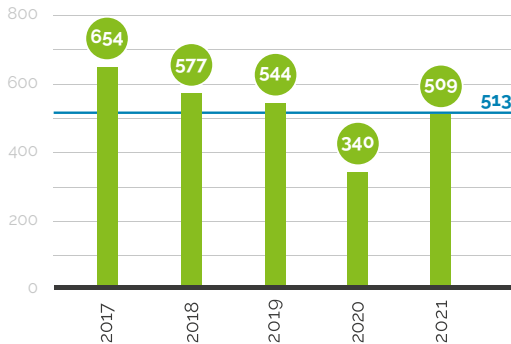
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Seit 1953.

OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average

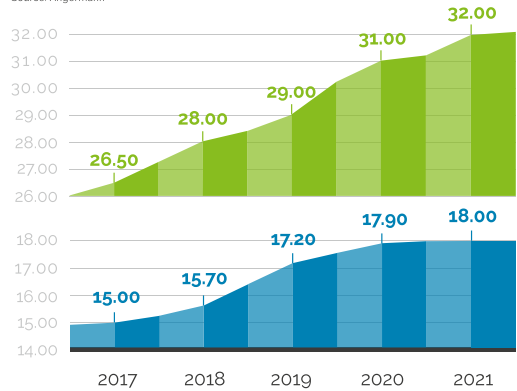
Source: Angermann



DEVELOPMENT OFFICE RENTS

in €/sqm Prime rent Average rent

Source: Angermann



KEY FACTS

- Leasing activity gathers considerable momentum again
- 50% increase in office space take-up year-on-year
- At 284,000 sqm, take-up is higher in the second half-year than in the first (225,000 sqm)
- Supply of office space has increased again, but remains scarce
- Prime and average rents pick up year-on-year
- Transport/logistics was the strongest sector in terms of take-up in 2021

“DUE TO THE UNBRIDLED MOMENTUM IN THE MARKET, A HIGH VOLUME OF TAKE-UP CAN BE EXPECTED FROM EARLY 2022.”

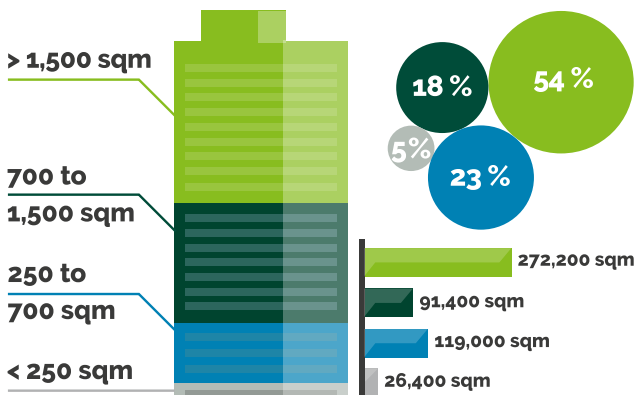


Johannes Welker,
Associate Director

TAKE-UP BY SIZE CATEGORY

Total Year 2021

Source: Angermann

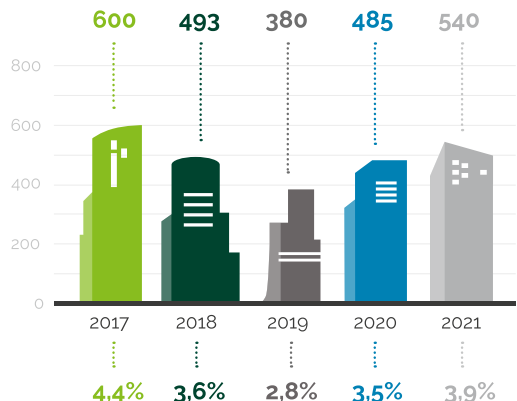


OFFICE VACANCY

Development 2017 - 2021

in 000 sqm, vacancy rate in %

Source: Angermann

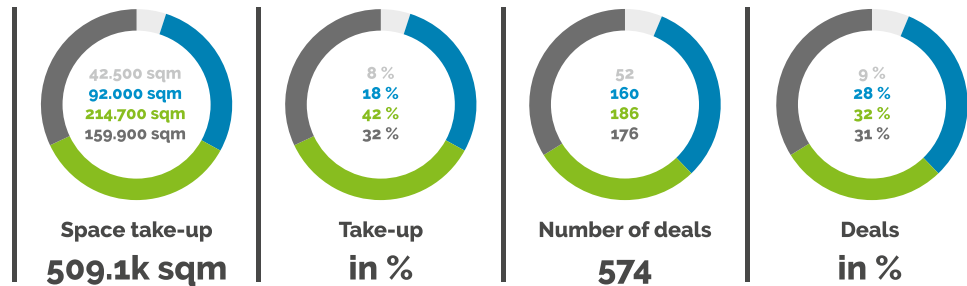


TAKE-UP BY PRICE CATEGORY

Total Year 2021

Source: Angermann

< 10 €/sqm
10 - 15 €/sqm
15 - 20 €/sqm
> 20 €/sqm



DEALS

Total Year 2021

TOP 5

- 01** Joh. Berenberg, Gossler & Co. KG
Q3 - 19,200 sqm, Überseering 30
- 02** Generalstaatsanwaltschaft Hamburg
Q1 - 17,600 sqm, Ludwig-Erhard-Straße 11-17
- 03** Techniker Krankenkasse
Q3 - 14,500 sqm, Bramfelder Straße 160-164
- 04** Maersk Deutschland A/S & Co. KG
Q4 - 13,200 sqm, Klosterwall 2-8
- 05** Signal Iduna
Q2 - 13,000 sqm, Kapstadtring 5

BUSINESS SECTORS

Total Year 2021

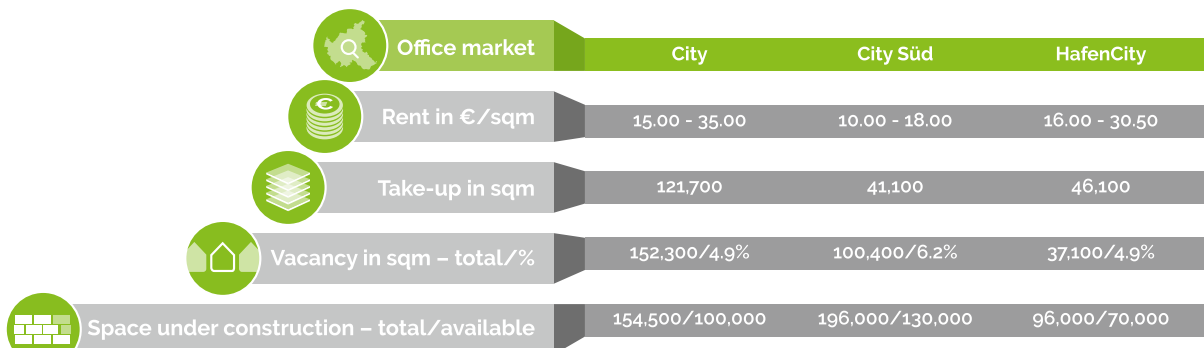
- 01** Traffic/ Transport / Logistics
63,300 sqm
- 02** Industry
49,900 sqm
- 03** Public Sector
36,900 sqm
- 04** Real Estate
36,500 sqm
- 05** Financial Institutions/Services
36,200 sqm

Source: Angermann

IN FOCUS - CITY, CITY SÜD AND HAFENCITY






















Total Year 2021

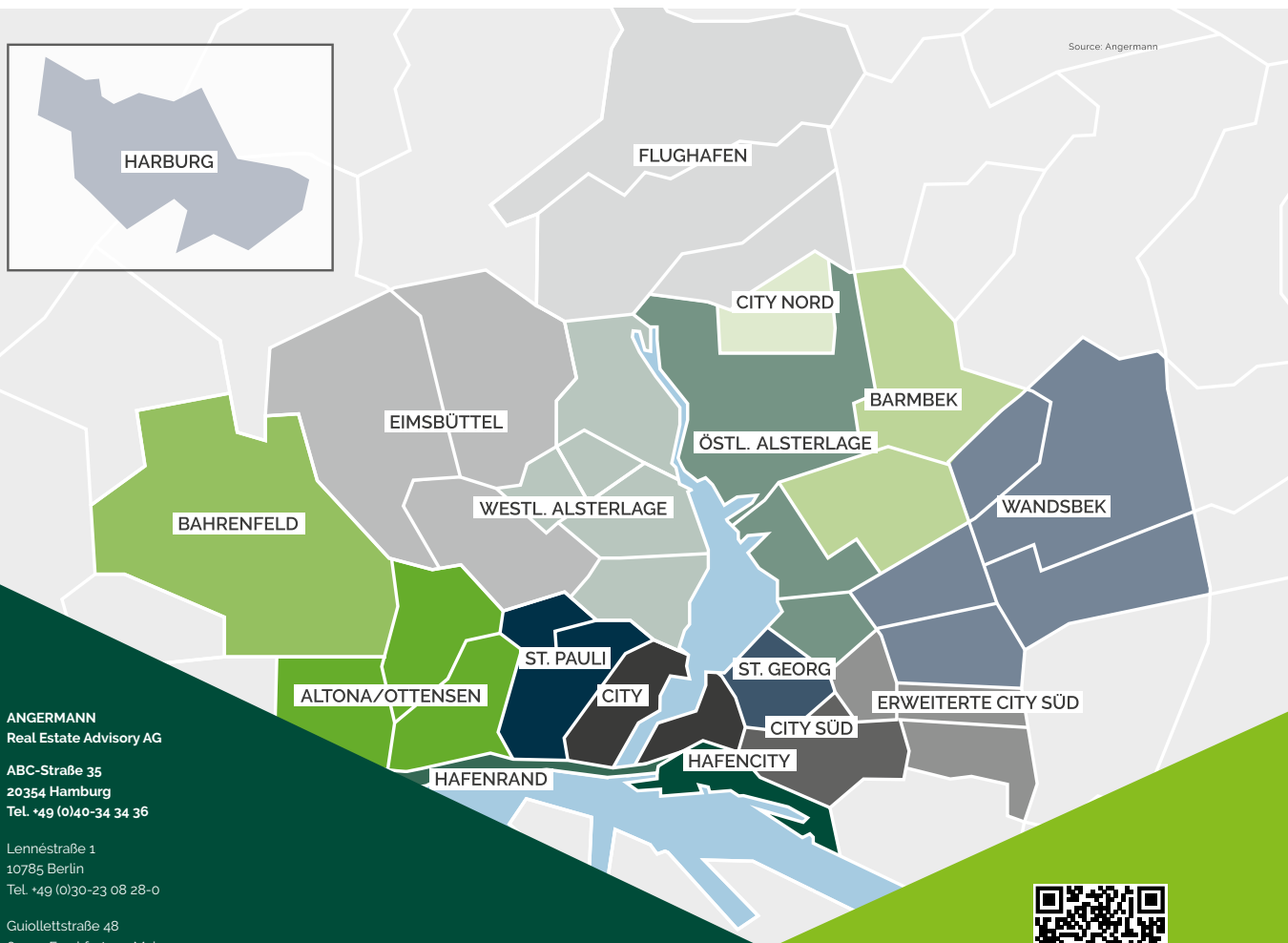
Source: Angermann



RENTS AND TAKE-UP BY LOCATION

Rental ranges in approx. €/sqm/month excluding service charges & VAT

 Altona/Ottensen	12.50 - 22.00	14,700 sqm	 HafenCity	16.00 - 30.50	46,100 sqm 
 Bahrenfeld	8.50 - 16.00	47,400 sqm 	 Hafenrand	15.00 - 24.00	27,100 sqm
 Barmbek	11.50 - 16.50	21,200 sqm 	 Östliche Alsterlage	10.50 - 16.50	12,600 sqm
 City Nord	9.50 - 16.00	45,700 sqm	 Westliche Alsterlage	12.00 - 20.00	15,700 sqm
 City	15.00 - 35.00	121,700 sqm 	 St. Pauli	13.00 - 20.00	11,000 sqm
 City Süd	10.00 - 18.00	41,100 sqm	 St. Georg	12.50 - 21.50	5,300 sqm
 Erweiterte City Süd	8.00 - 14.00	10,600 sqm	 Wandsbek	8.50 - 13.00	11,700 sqm
 Eimsbüttel	9.00 - 16.00	5,900 sqm	 Harburg	10.00 - 18.00	7,400 sqm
 Flughafen	8.50 - 15.00	21,400 sqm			



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