

Q2 2022

RESEARCH OFFICE MARKET HAMBURG



512,000 sqm
Vacancy



€ 20.90/sqm
Average rent



309,000 sqm
Space take-up

STATISTICS
FACTS
FIGURES



€ 33.90/sqm
Prime rent

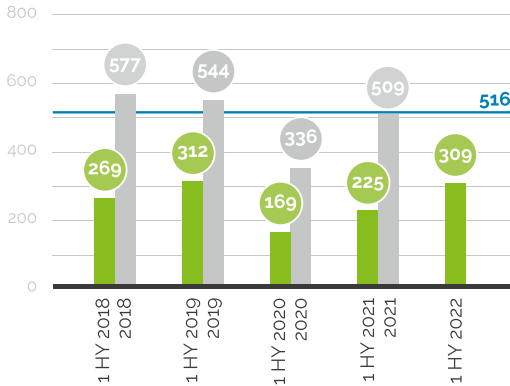
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Seit 1953.

OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average

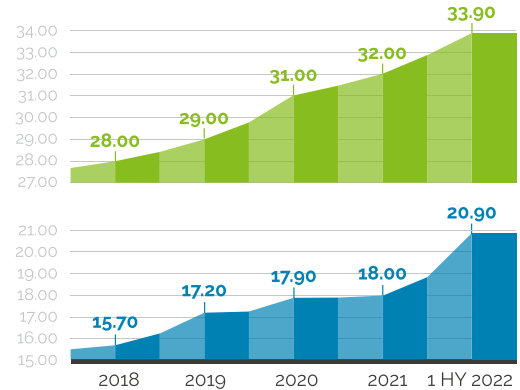
Source: Angermann



DEVELOPMENT OFFICE RENTS

in €/sqm — Prime rent — Average rent

Source: Angermann



KEY FACTS

- Momentum in the office market continues unabated
- 37% increase in take-up year-on-year
- Office tenants focus on modern new construction projects in the city centre
- Dwindling supply of vacant office space
- Average and prime rents at record levels
- Banks / financial service providers lead industry rankings
- City once again the office location with the highest take-up

„OFFICE TENANTS CANNOT HOPE FOR A GREATER SUPPLY OF SPACE OR FALLING RENTS IN CENTRAL LOCATIONS FOR THE FORESEEABLE FUTURE.“

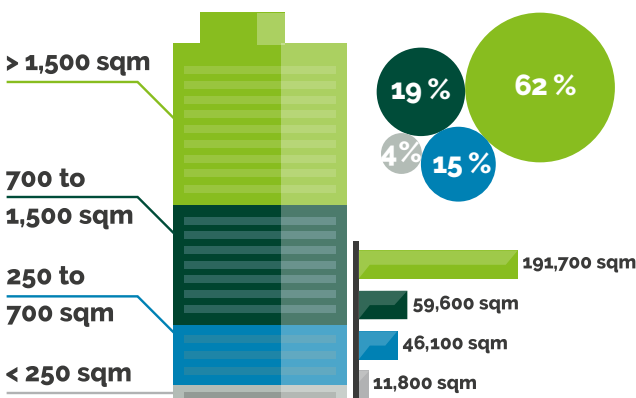


Johannes Welker,
Associate Director

TAKE-UP BY SIZE CATEGORY

1st half year 2022

Source: Angermann

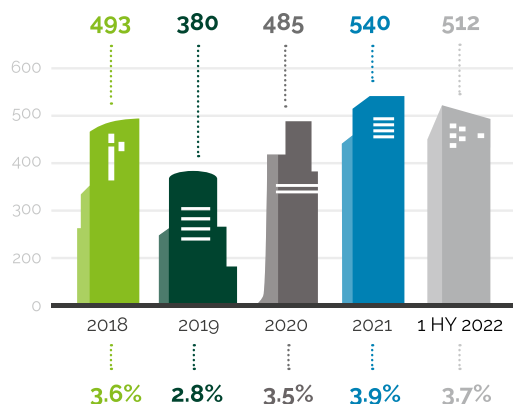


OFFICE VACANCY

Development 2018 - 2022

in 000 sqm, vacancy rate in %

Source: Angermann

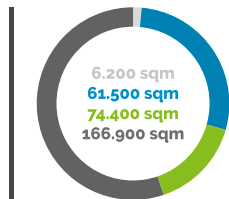


TAKE-UP BY PRICE CATEGORY

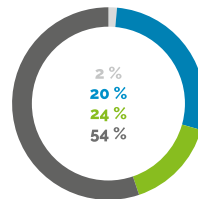
1st half year 2022

Source: Angermann

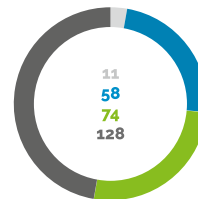
< 10 €/sqm
10 - 15 €/sqm
15 - 20 €/sqm
> 20 €/sqm



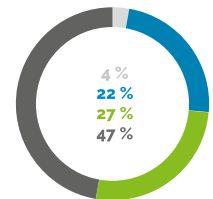
Space take-up
309k sqm



Take-up
in %



Number of deals
271



Deals
in %

TOP 5

DEALS

1st half year 2022

- 01 Hamburger Sparkasse**
Q2 - 30,800 sqm, Deutschlandhaus
- 02 VTG**
Q1 - 11,500 sqm, Hafen-City
- 03 NDR**
Q2 - 9,800 sqm, Hugh-Greene-Weg 1
- 04 Kasse.Hamburg**
Q2 - 8,923 sqm, Gasstraße 27
- 05 HIH Real Estate**
Q2 - 7,757 sqm, Ericusspitze 1

BUSINESS SECTORS

1st half year 2022

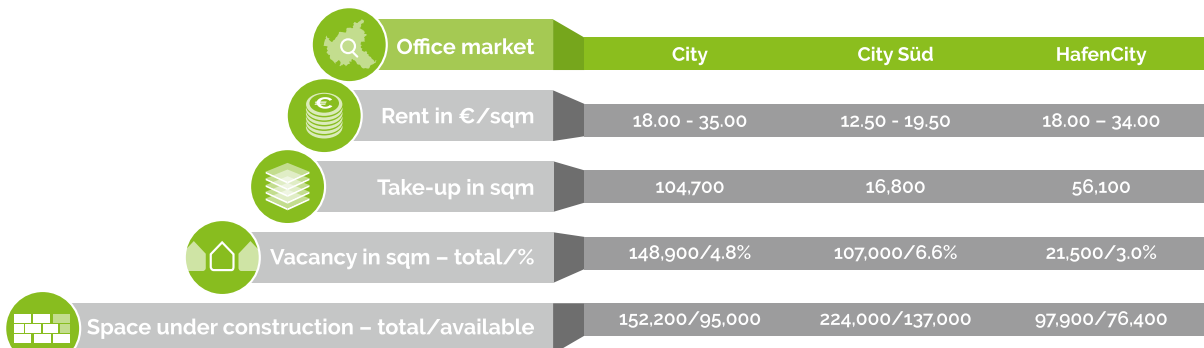
- 01 Banks/Financial Service Providers**
40,100 sqm
- 02 Real Estate**
30,300 sqm
- 03 Traffic/Transport /Logistics**
27,700 sqm
- 04 Consulting**
23,400 sqm
- 05 IT/Multimedia**
23,300 sqm

Source: Angermann

IN FOCUS - CITY, CITY SÜD AND HAFENCITY

1st half year 2022

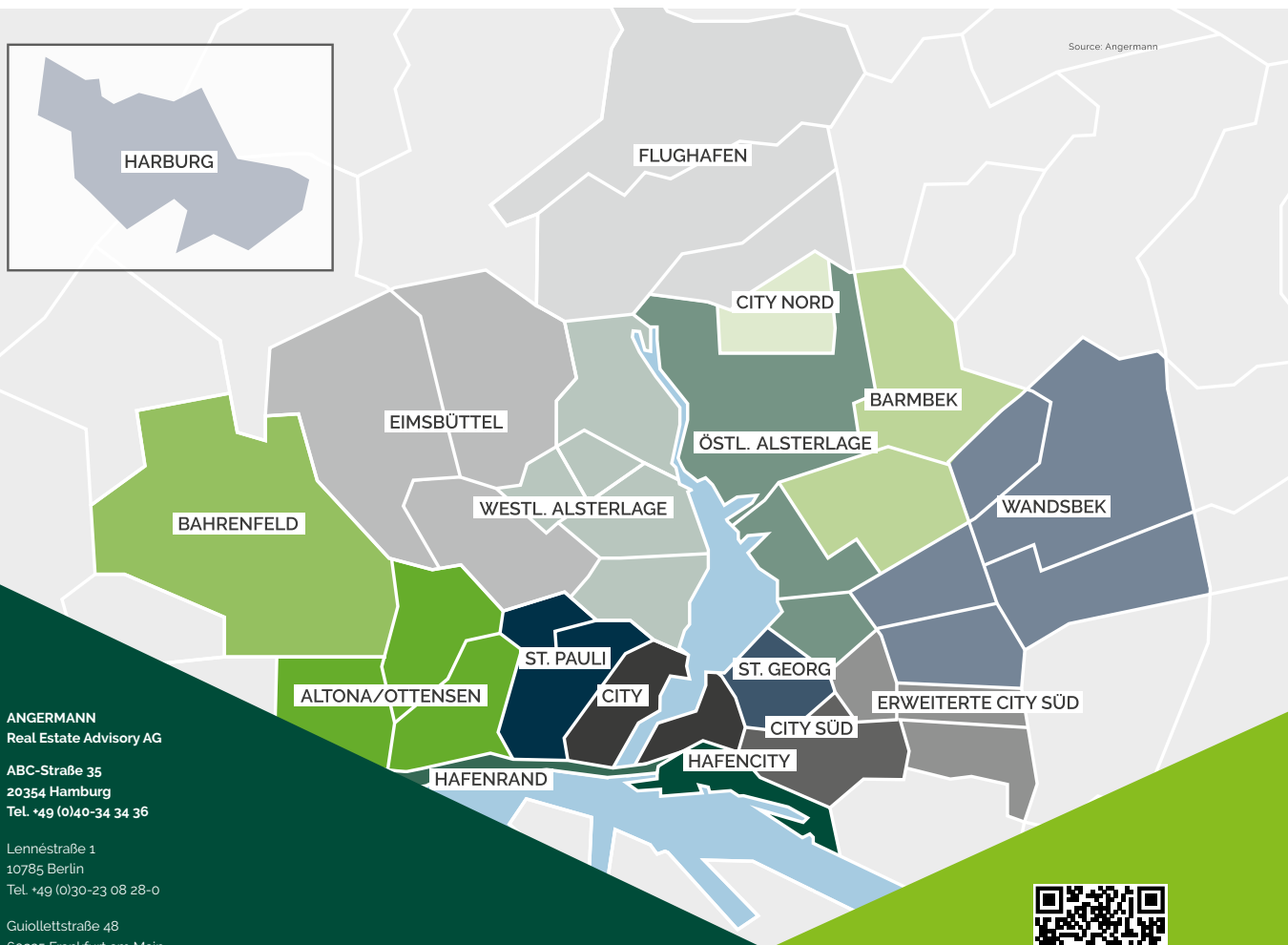
Source: Angermann



RENTS AND TAKE-UP BY LOCATION

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

Altona/Ottensen	12,50 - 22,00	9,100 sqm		HafenCity	18,00 - 34,00	56,100 sqm	
Bahrenfeld	10,00 - 16,50	17,300 sqm		Hafenrand	15,00 - 24,00	6,500 sqm	
Barmbek	11,50 - 16,50	3,100 sqm		Östliche Alsterlage	10,50 - 16,50	9,600 sqm	
City Nord	9,50 - 16,00	1,300 sqm		Westliche Alsterlage	12,00 - 21,00	13,500 sqm	
City	18,00 - 35,00	104,700 sqm		St. Pauli	13,00 - 20,00	1,300 sqm	
City Süd	12,50 - 19,50	16,800 sqm		St. Georg	12,50 - 21,50	5,800 sqm	
Erweiterte City Süd	8,00 - 14,00	10,000 sqm		Wandsbek	8,50 - 13,00	4,200 sqm	
Eimsbüttel	9,00 - 16,00	12,600 sqm		Harburg	10,00 - 18,00	1,800 sqm	
Eimsbüttel	9,00 - 16,00	12,600 sqm					
Flughafen	8,50 - 15,00	500 sqm					



ANGERMANN
Real Estate Advisory AG

ABC-Straße 35
20354 Hamburg
Tel. +49 (0)40-34 34 36

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

Guilottstraße 48
60325 Frankfurt am Main
Tel. +49 (0)69-5 05 02 91-0

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

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



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