

Q3 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

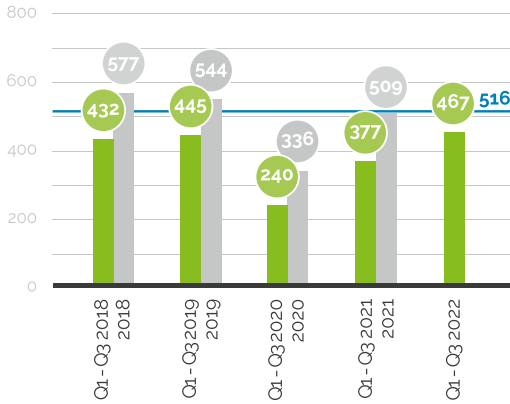
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Seit 1953.

OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average

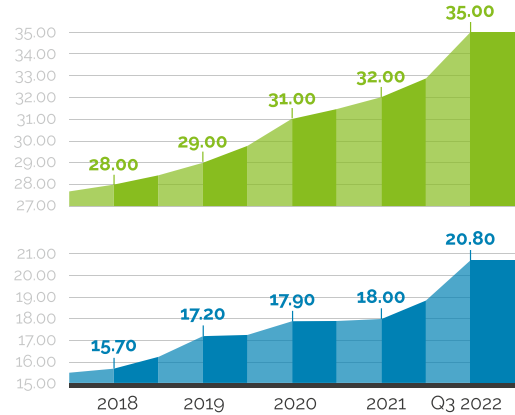
Source: Angermann



DEVELOPMENT OFFICE RENTS

in €/sqm — Prime rent — Average rent

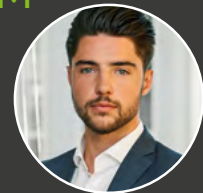
Source: Angermann



KEY FACTS

- 24% increase in the volume of take-up year-on-year
- Major lettings dominate Q3
- IT and multimedia sector leads the industry ranking
- Renewed fall in available office space
- Prime rent rises to a new record level
- Take-up is again highest in the City

„MOMENTUM CONTINUES, SUGGESTING THAT LETTING PERFORMANCE COULD EXCEED 600,000 SQM FOR THE SECOND TIME SINCE 2017.“

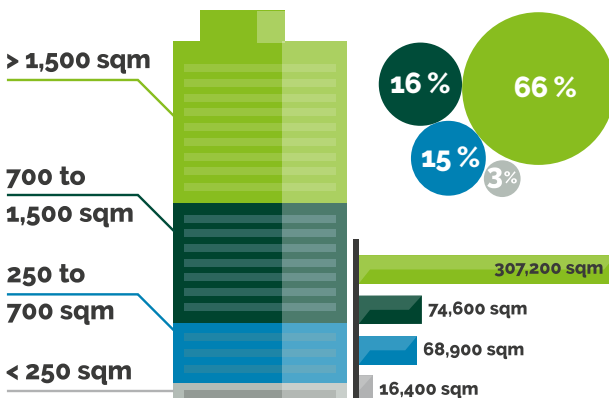


Leon Müller,
Senior Consultant

TAKE-UP BY SIZE CATEGORY

1st-3rd Quarter 2022

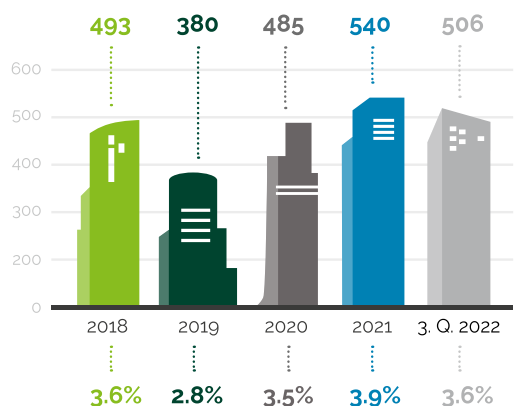
Source: Angermann



OFFICE VACANCY

Development 2018 - 2022
in 000 sqm, vacancy rate in %

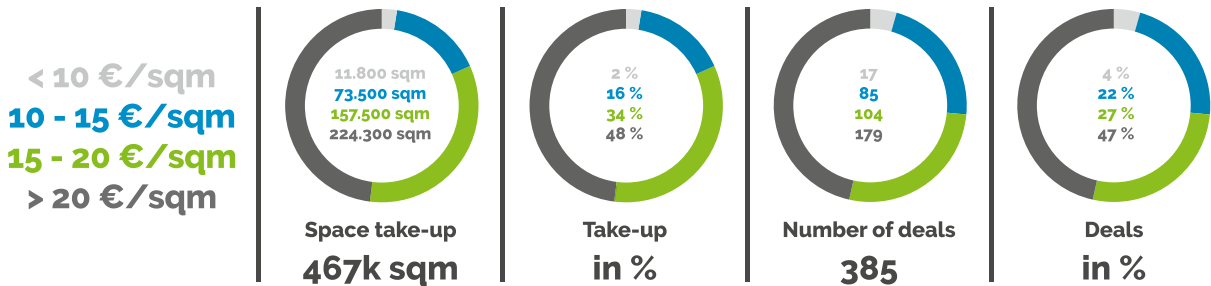
Source: Angermann



TAKE-UP BY PRICE CATEGORY

1st - 3rd Quarter 2022

Source: Angermann



DEALS

1st - 3rd Quarter 2022

TOP 5

- 01** **Dataport AÖR**
Q3 - 40,030 sqm, Wikingerweg 1
- 02** **Hamburger Sparkasse**
Q2 - 30,800 sqm, Deutschlandhaus
- 03** **VTG**
Q1 - 11,500 sqm, HafenCity
- 04** **NDR**
Q2 - 9,800 sqm, Hugh-Greene-Weg 1
- 05** **Kasse.Hamburg**
Q2 - 8,923 sqm, Gasstraße 27

BUSINESS SECTORS

1st - 3rd Quarter 2022

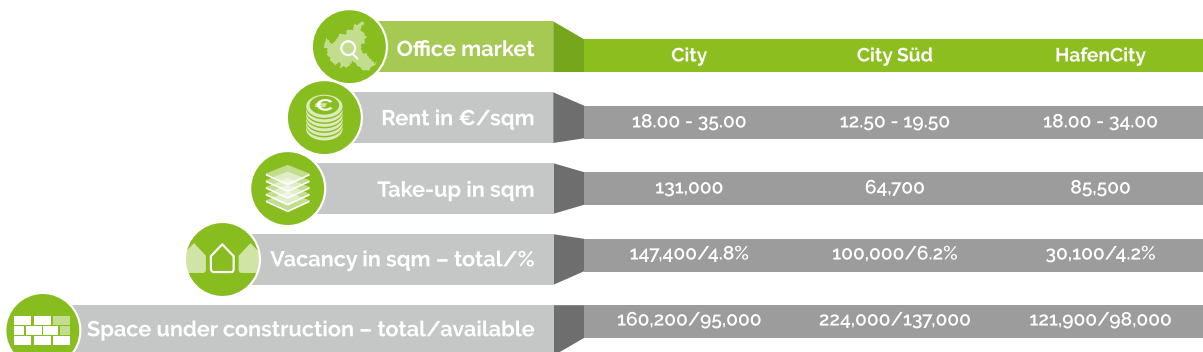
- 01** **IT/Multimedia**
69,900 sqm
- 02** **Industry**
53,500 sqm
- 03** **Banks/Financial Service Providers**
42,300 sqm
- 04** **Real Estate**
39,300 sqm
- 05** **Traffic/Transport /Logistics**
31,800 sqm

Source: Angermann

IN FOCUS - CITY, CITY SÜD AND HAFENCITY




1st - 3rd Quarter 2022

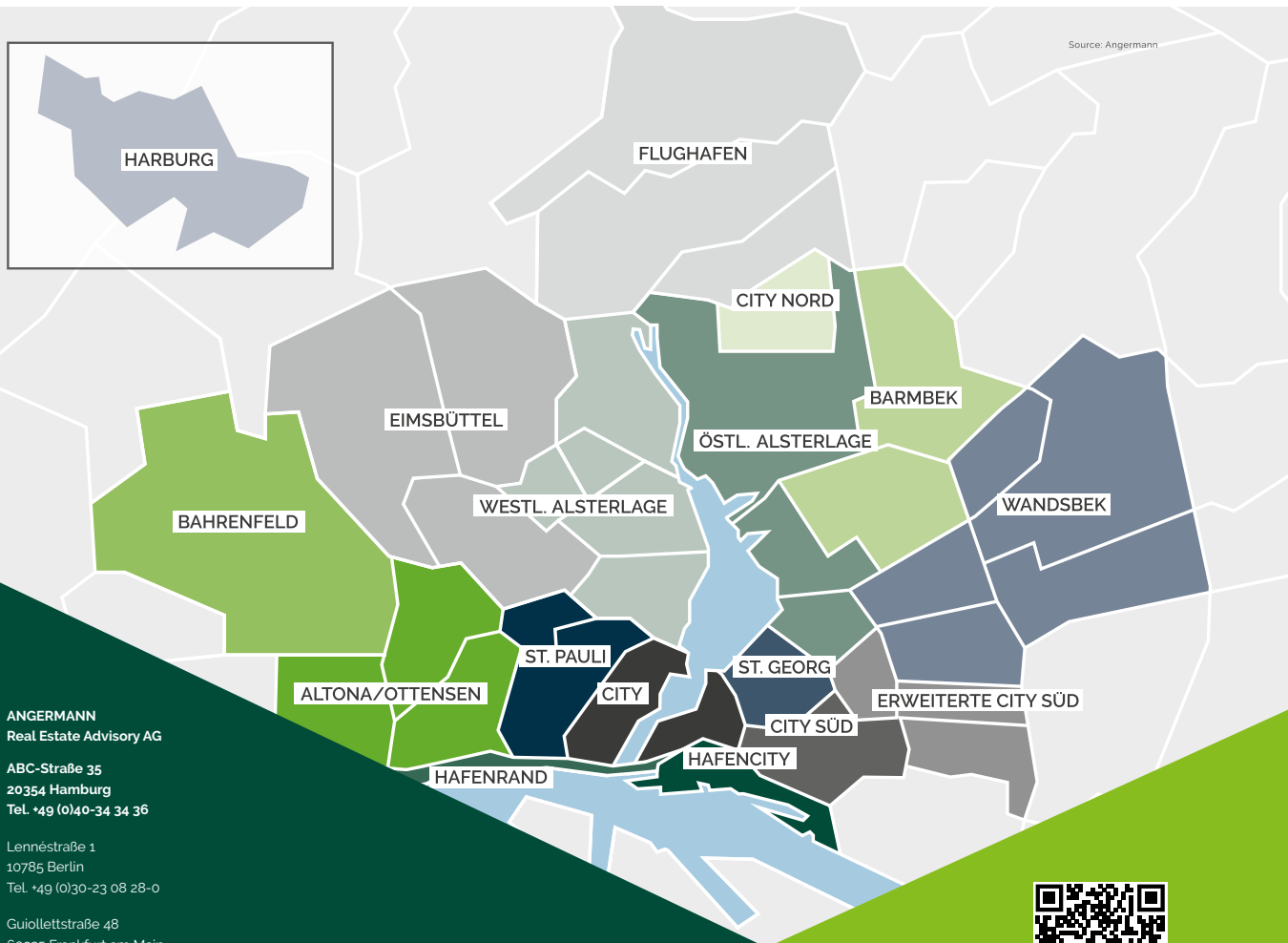
Source: Angermann



RENTS AND TAKE-UP BY LOCATION

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

Altona/Ottensen	12.50 - 22.00	9,400 sqm	HafenCity	18.00 - 34.00	85,500 sqm 
Bahrenfeld	10.00 - 16.50	39,700 sqm	Hafenrand	15.00 - 24.00	9,900 sqm
Barmbek	11.50 - 16.50	3,100 sqm	Östliche Alsterlage	10.50 - 16.50	12,400 sqm
City Nord	9.50 - 16.00	1,300 sqm	Westliche Alsterlage	12.00 - 21.00	14,900 sqm
City	18.00 - 35.00	131,000 sqm 	St. Pauli	13.00 - 20.00	4,400 sqm
City Süd	12.50 - 19.50	64,700 sqm 	St. Georg	12.50 - 21.50	7,700 sqm
Erweiterte City Süd	8.00 - 14.00	10,900 sqm	Wandsbek	8.50 - 13.00	4,900 sqm
Eimsbüttel	11.00 - 17.00	12,600 sqm	Harburg	10.00 - 18.00	3,600 sqm
Eimsbüttel	11.00 - 17.00	12,600 sqm			
Flughafen	8.50 - 15.00	1,800 sqm			



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