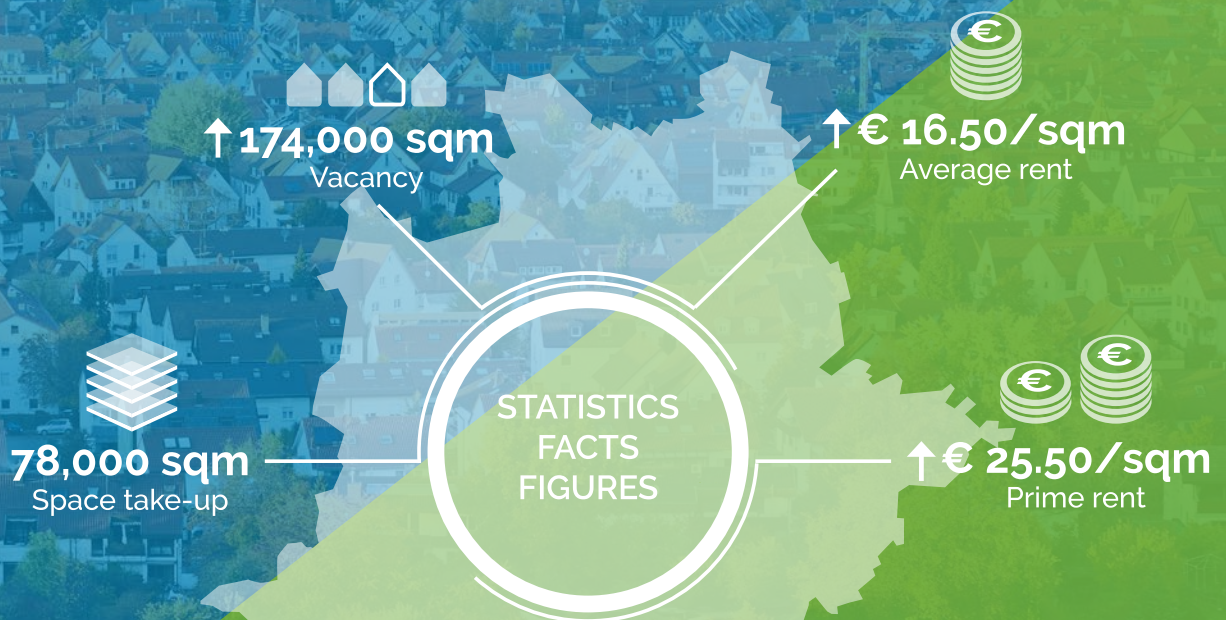


Q2 2020

RESEARCH OFFICE MARKET STUTTGART

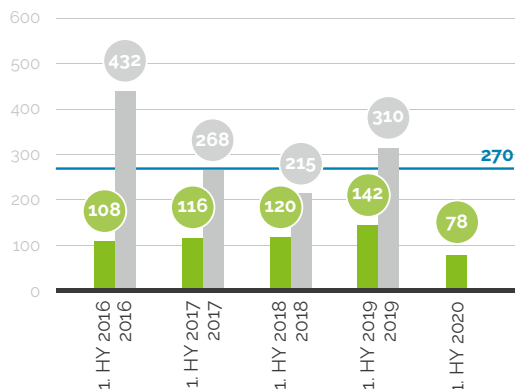


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Seit 1953.

OFFICE SPACE TAKE-UP

in 000 sqm / — 10-year average

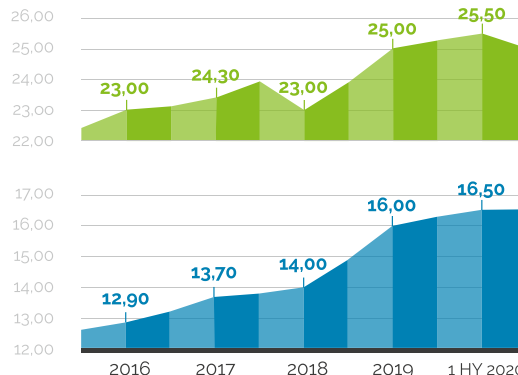
Source: Angermann



DEVELOPMENT OFFICE RENTS

in €/sqm ■ Prime rent ■ Average rent

Source: Angermann



KEY FACTS

- Transaction volume up 45% year-on-year
- No major deals in the first half of 2020
- Public Sector registering the strongest demand
- Automotive and mechanical engineering industries taking a cautious approach
- Prime rent reaches a record high of €25,50/sqm
- Demand for office space in city centre locations remains high

Supply of vacant office space still extremely tight despite increased volume

"THE CORONA CRISIS IS CHALLENGING STUTTGART'S OFFICE TENANTS TO RETHINK THEIR OFFICE SPACE CONCEPTS."



Jawed Sadiqi,
Manager Office Agency

DEALS STUTTGART

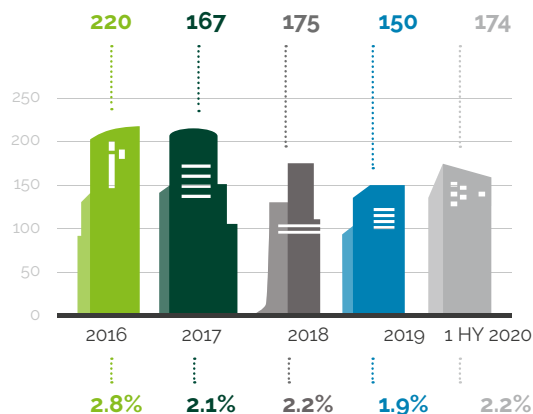
1st half 2020

- TOP 5**
- 01 Bundesanstalt für Post u. Telekom.**
14.545 sqm, Stuttgart-Bad Cannstatt
 - 02 Stadt Stuttgart**
4.262 sqm, Katharinenstraße 20 + 22
 - 03 Industrieunternehmen**
3.555 sqm, Vaihingen
 - 04 ALTEN GmbH**
3.232 sqm, Möhringen
 - 05 Regus**
2.700 sqm, Leinfelden Echterdingen

OFFICE VACANCY

Development 2016-2020
in 000 sqm, vacancy rate in %

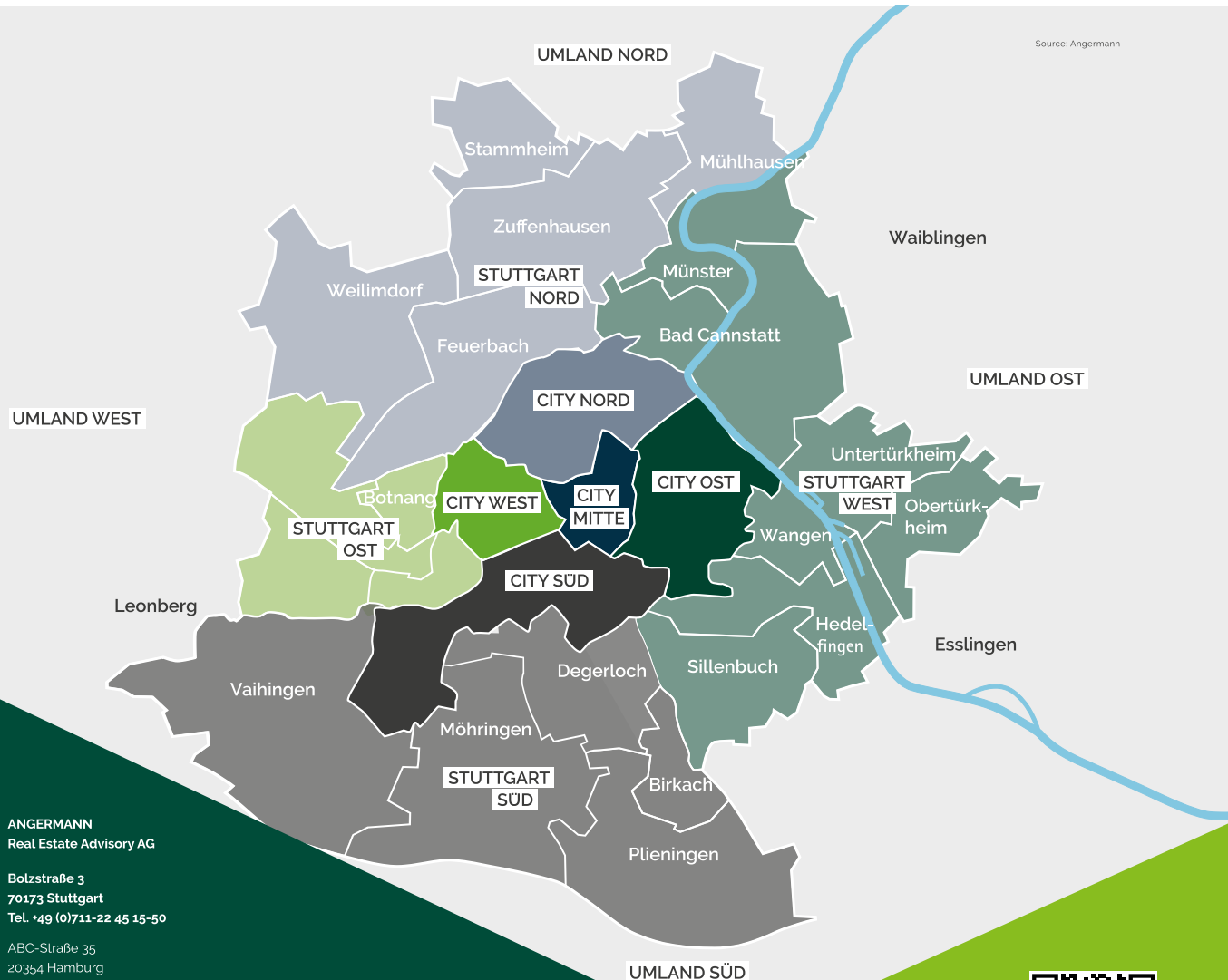
Source: Angermann



RENTS BY LOCATION

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

■ Mitte	16.50 - 25.50	■ Stuttgart Nord	12.50 - 19.00
■ City Nord	14.00 - 21.00	■ Stuttgart Süd	13.00 - 22.00
■ City Süd	14.50 - 22.00	■ Stuttgart West	14.00 - 28.00
■ City West	14.50 - 20.00	■ Stuttgart Ost	14.00 - 18.00
■ City Ost	12.00 - 17.00		



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