Supply market evaluation from 05.09.2019
from a total of 1.582.844 sqm, 1.726 rental units and
373 office buildings

Report Office Market Analysis Historic City Centre

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FILTER CRITERIA

Historic city centre

✓ **Altstadt-Lehel**

City centre

Au-Haidhausen
Bogenhausen
Maxvorstadt
Schwabing
Neuhausen-Nymphenburg
Schwanthalerhöhe
Ludwigsvorstadt-Isarvorstadt
Sendling-Westpark

City

Bogenhausen-Ost
Trudering-Riem
Berg am Laim
Feldmoching
Milbertshofen-Am Hart
Moosach
Schwabing-Nord
Laim
Aubing-Lochh.-Langwied-Freiham
Allach-Untermenzing
Hadern
Pasing-Obermenzing
Giesing-Harlaching
Thalkirchen-Obersendling
Forstenried-Fürstenried-Solln
Ramersdorf-Perlach

Suburban areas

Aschheim-Dornach
Feldkirchen
Kirchheim-Heimstetten
Haar
Munich-Airport
Hallbergmoos-Airport
Business Park
Eching
Garching
Ismaning
Neufahrn
Oberding-Schwaig
Unterföhring
Unterschleißheim
Baierbrunn
Gauting
Germering
Gilching
Gräfelfing
Gröbenzell
Martinsried
Neuried
Oberschleißheim
Planegg
Puchheim
Pullach
Brunnthal
Grasbrunn
Grünwald
Neubiberg
Oberhaching
Ottobrunn
Putzbrunn
Taufkirchen
Unterhaching

Show data: Number of square meters

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SUPPLY MARKET LOCATION

13.790 m²
100.00%

39 RU
100.00%

22 OB
100.00%

Historic city centre City centre City Suburban areas

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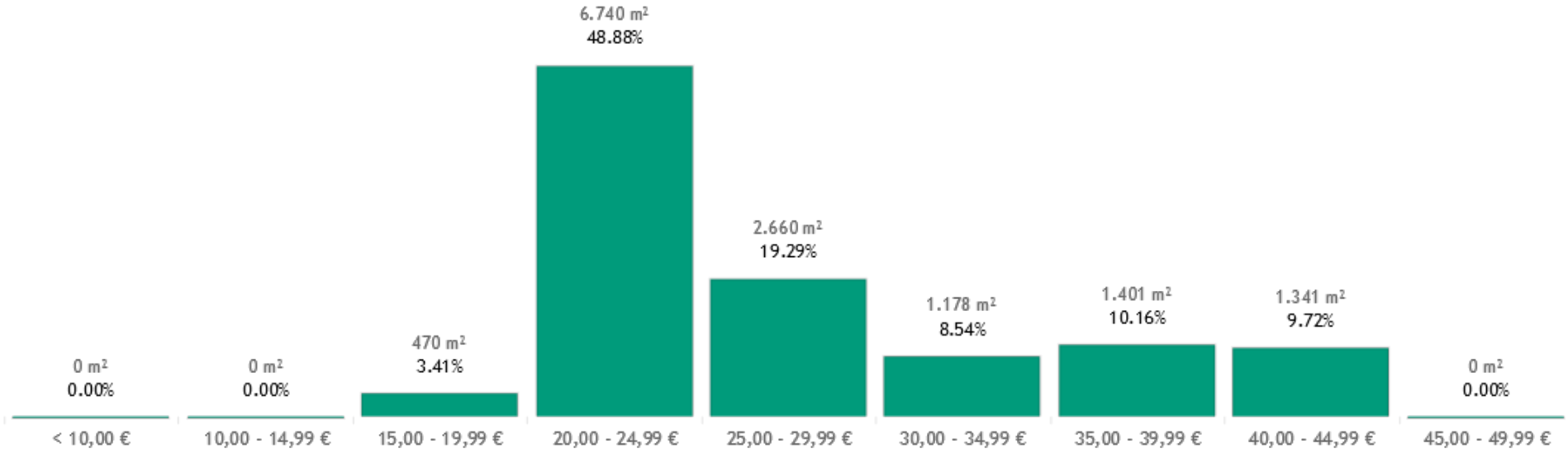
OFFERED RENTAL PRICE (area in sqm)



Ø 27.93 €/m²

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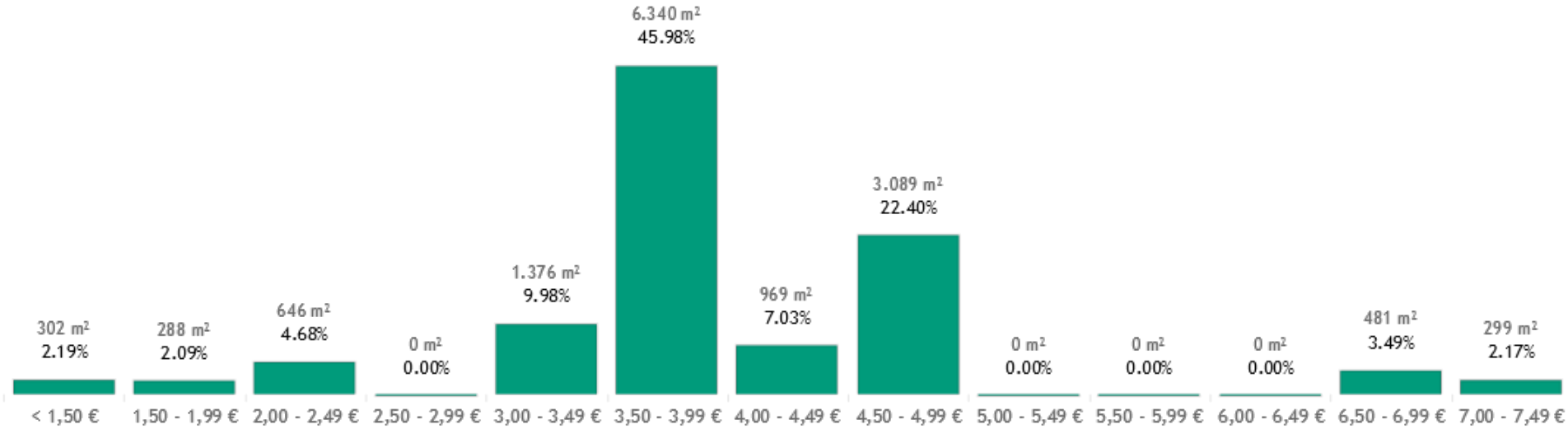
SERVICE CHARGES (area in sqm)



Ø 3.85 €/m²

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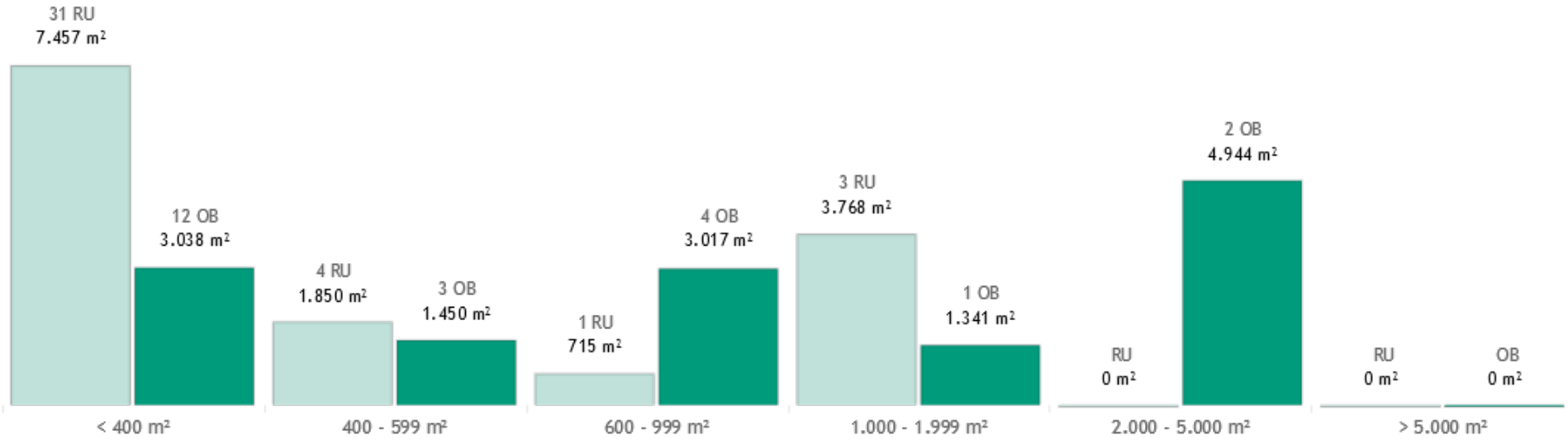
OFFICE SPACES (area in sqm)



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CALCULATION OF SPACE (area in sqm)

BGF	13.280 m²	96.3%
NGF	0 m²	0%
GIF	299 m²	2.17%
Others	211 m²	1.53%

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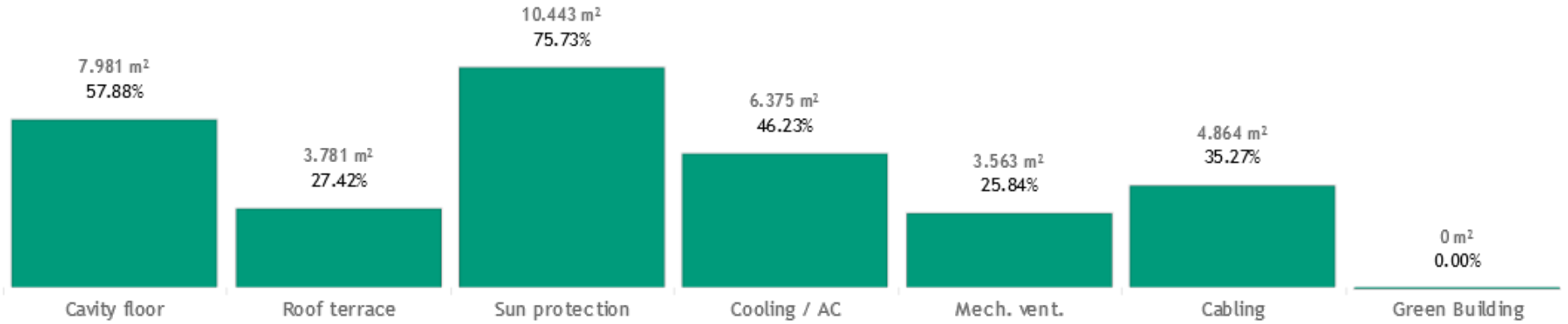
DATA AND FIT-OUT FEATURES (area in sqm)



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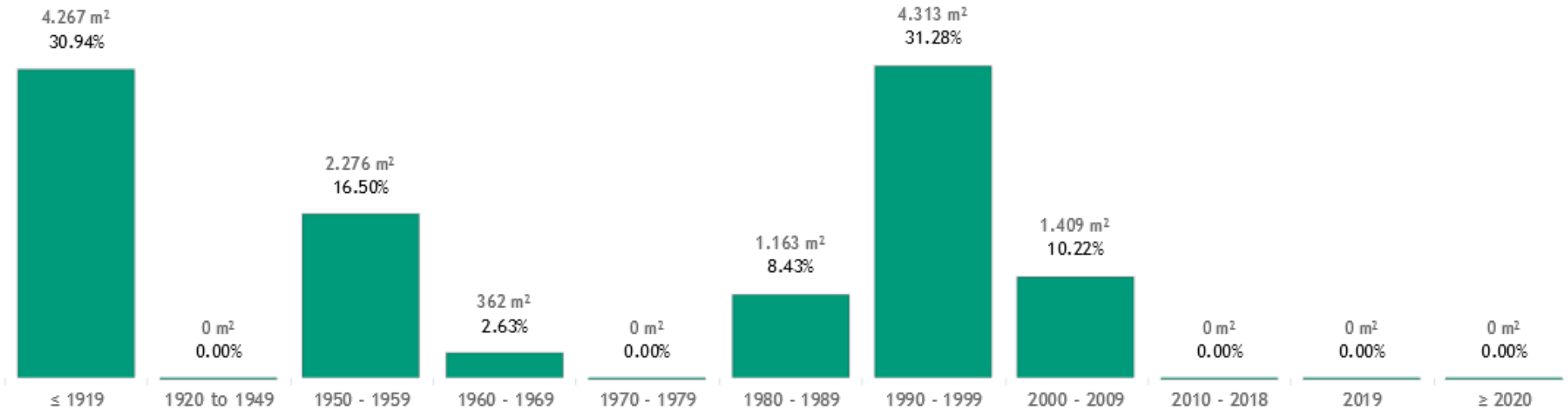
YEAR OF CONSTRUCTION (area in sqm)



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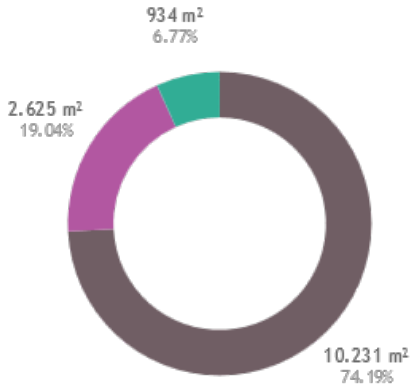
DISTANCE S-RAILWAY CONNECTION (area in sqm)



<= 0,50 km	10.231 m²	74.19%
0,51 - 1,0 km	2.625 m²	19.04%
1,01 - 1,5 km	0 m²	0%
> 1,5 km	934 m²	6.77%

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DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)

<= 0,50 km	12.726 m²	92.28%
0,51 - 1,0 km	1.064 m²	7.72%
1,01 - 1,5 km	0 m²	0%
> 1,5 km	0 m²	0%

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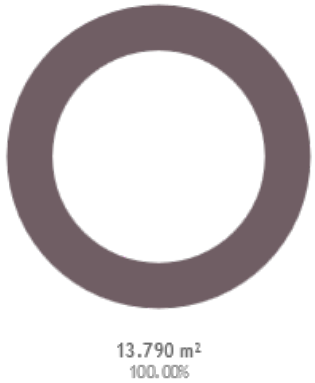
DISTANCE CAFÉS AND RESTAURANTS (area in sqm)



<= 0,50 km	13.790 m²	100%
0,51 - 1,0 km	0 m²	0%
1,01 - 1,5 km	0 m²	0%
> 1,5 km	0 m²	0%

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DISTANCE HOTELS (area in sqm)

<= 0,50 km	12.856 m²	93.23%
0,51 - 1,0 km	934 m²	6.77%
1,01 - 1,5 km	0 m²	0%
> 1,5 km	0 m²	0%

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373 office buildings

Report Office Market City Centre Munich

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FILTER CRITERIA

Historic city centre

Altstadt-Lehel

City centre

- ✓ **Au-Haidhausen**
- ✓ **Bogenhausen**
- ✓ **Maxvorstadt**
- ✓ **Schwabing**
- ✓ **Neuhausen-Nymphenburg**
- ✓ **Schwanthalerhöhe**
- ✓ **Ludwigsvorstadt-Isarvorstadt**
- ✓ **Sendling-Westpark**

City

Bogenhausen-Ost
Trudering-Riem
Berg am Laim
Feldmoching
Milbertshofen-Am Hart
Moosach
Schwabing-Nord
Laim
Aubing-Lochh.-Langwied-Freiham
Allach-Untermenzing
Hadern
Pasing-Obermenzing
Giesing-Harlaching
Thalkirchen-Obersendling
Forstenried-Fürstenried-Solln
Ramersdorf-Perlach

Suburban areas

Aschheim-Dornach
Feldkirchen
Kirchheim-Heimstetten
Haar
Munich-Airport
Hallbergmoos-Airport
Business Park
Eching
Garching
Ismaning
Neufahrn
Oberding-Schwaig
Unterföhring
Unterschleißheim
Baierbrunn
Gauting
Germering
Gilching
Gräfelfing
Gröbenzell
Martinsried
Neuried
Oberschleißheim
Planegg
Puchheim
Pullach
Brunnthal
Grasbrunn
Grünwald
Neubiberg
Oberhaching
Ottobrunn
Putzbrunn
Taufkirchen
Unterhaching

Show data: Number of square meters

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SUPPLY MARKET LOCATION

244.506 m²
100.00%

254 RU
100.00%

78 OB
100.00%

Historic city centre City centre City Suburban areas

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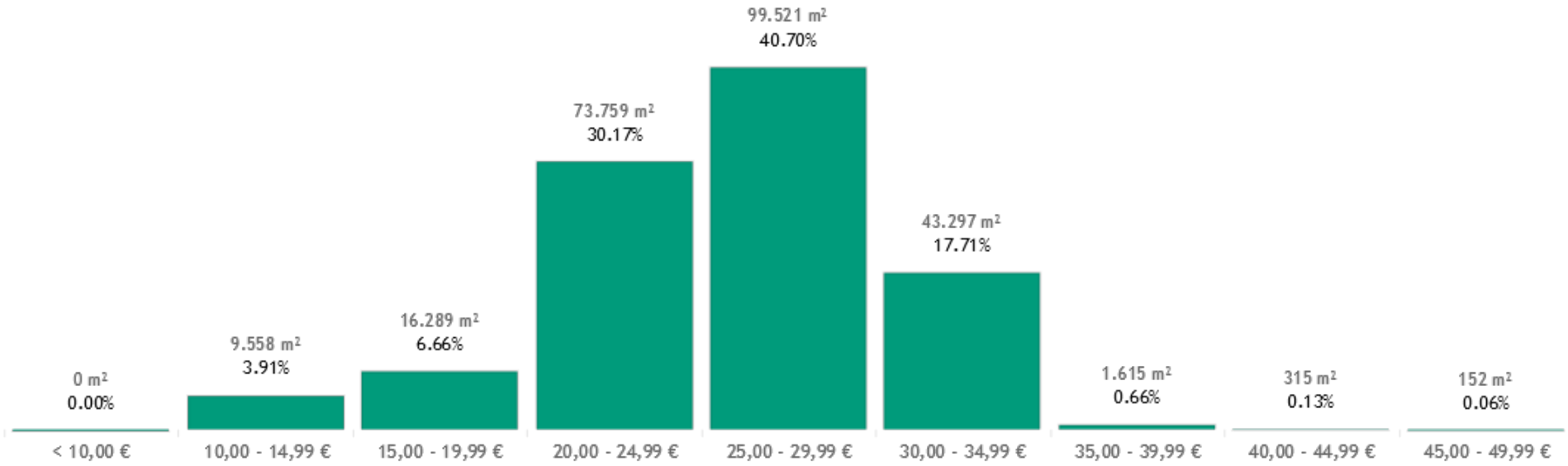
OFFERED RENTAL PRICE (area in sqm)



Ø 25.39 €/m²

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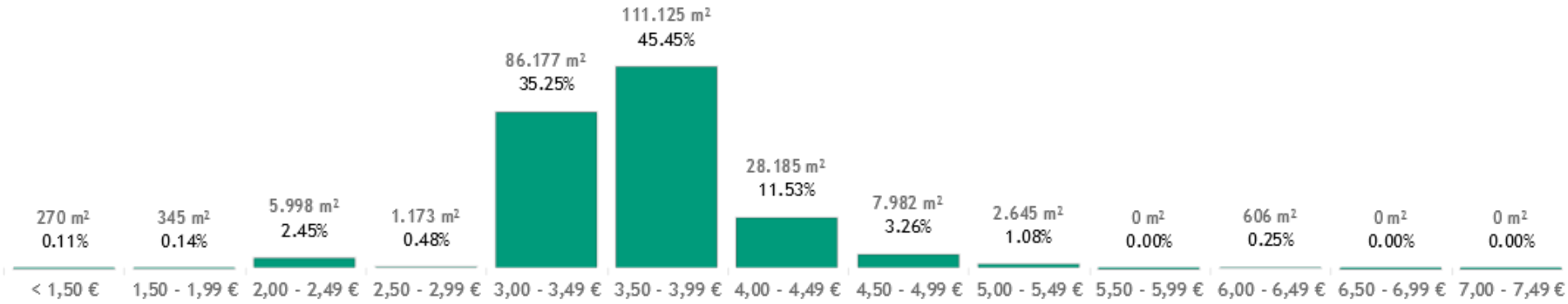
SERVICE CHARGES (area in sqm)



Ø 3.44 €/m²

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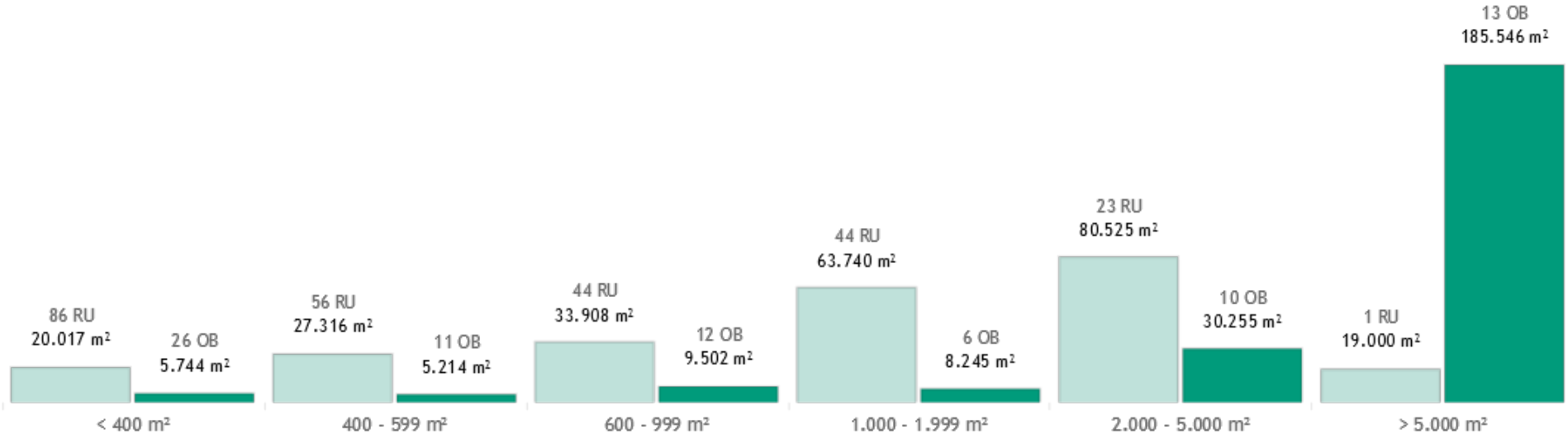
OFFICE SPACES (area in sqm)



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CALCULATION OF SPACE (area in sqm)

BGF	243.332 m²	99.52%
NGF	281 m²	0.11%
GIF	893 m²	0.37%
Others	0 m²	0%

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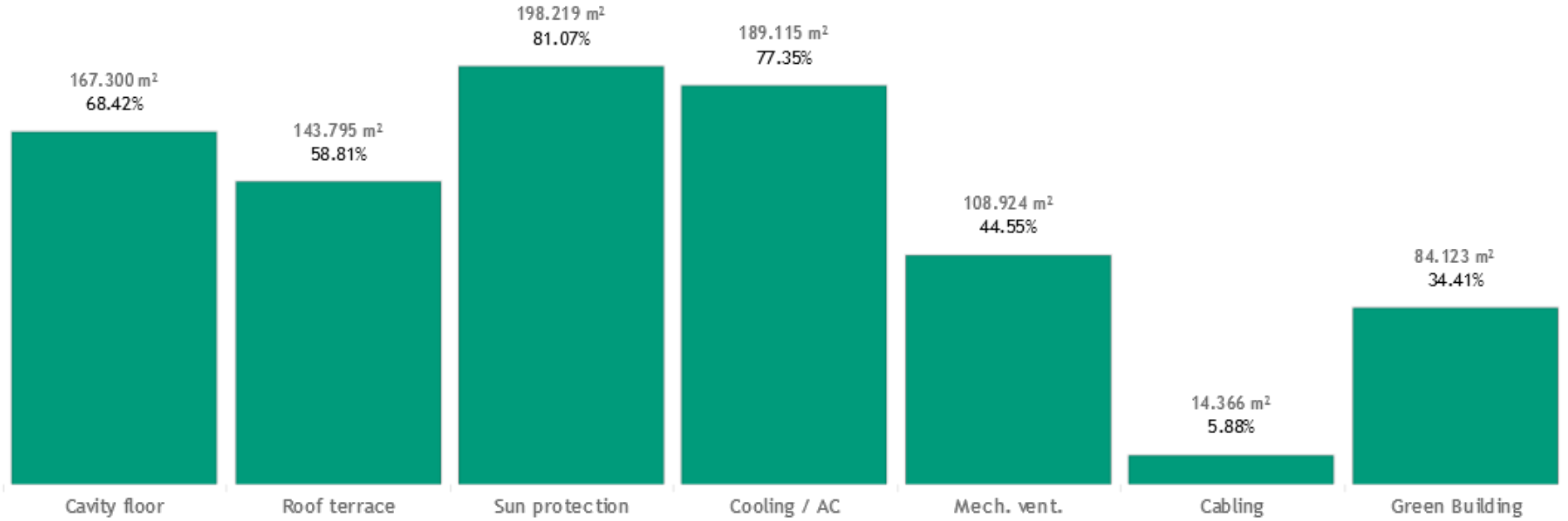
DATA AND FIT-OUT FEATURES (area in sqm)



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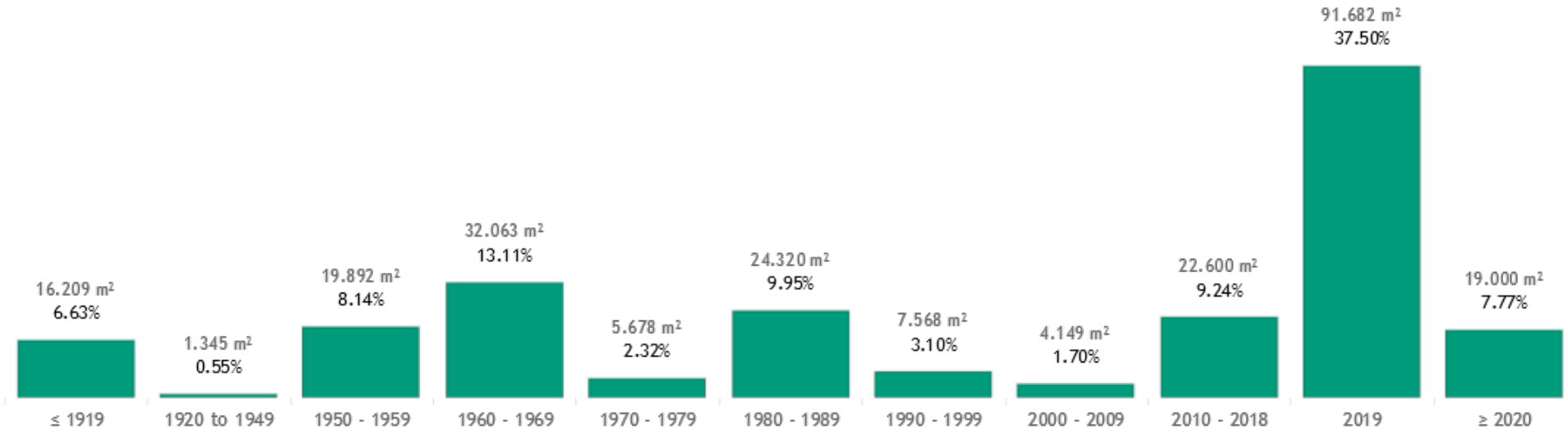
YEAR OF CONSTRUCTION (area in sqm)



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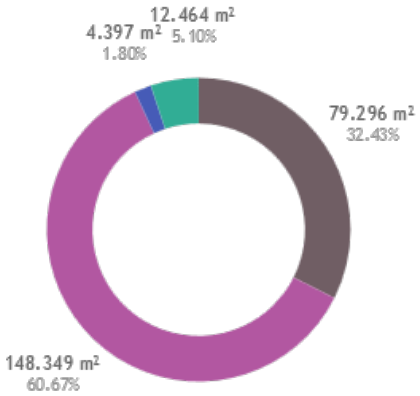
DISTANCE S-RAILWAY CONNECTION (area in sqm)



	<= 0,50 km	79.296 m²	32.43%
	0,51 - 1,0 km	148.349 m²	60.67%
	1,01 - 1,5 km	4.397 m²	1.8%
	> 1,5 km	12.464 m²	5.1%

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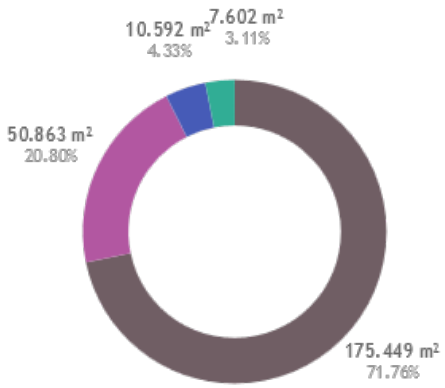
DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



<= 0,50 km	175.449 m²	71.76%
0,51 - 1,0 km	50.863 m²	20.8%
1,01 - 1,5 km	10.592 m²	4.33%
> 1,5 km	7.602 m²	3.11%

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DISTANCE CAFÉS AND RESTAURANTS (area in sqm)

<= 0,50 km	221.929 m²	90.77%
0,51 - 1,0 km	22.577 m²	9.23%
1,01 - 1,5 km	0 m²	0%
> 1,5 km	0 m²	0%

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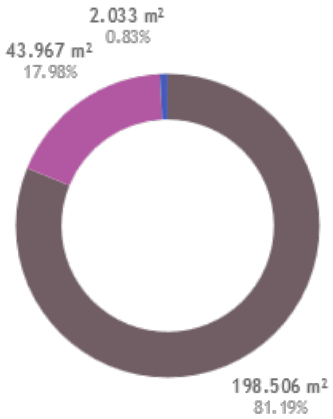
DISTANCE HOTELS (area in sqm)



<= 0,50 km	198.506 m²	81.19%
0,51 - 1,0 km	43.967 m²	17.98%
1,01 - 1,5 km	2.033 m²	0.83%
> 1,5 km	0 m²	0%

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373 office buildings

Report Office Market Analysis City

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FILTER CRITERIA

Historic city centre

Altstadt-Lehel

City centre

Au-Haidhausen
Bogenhausen
Maxvorstadt
Schwabing
Neuhausen-Nymphenburg
Schwanthalerhöhe
Ludwigsvorstadt-Isarvorstadt
Sendling-Westpark

City

- ✓ **Bogenhausen-Ost**
- ✓ **Trudering-Riem**
- ✓ **Berg am Laim**
- ✓ **Feldmoching**
- ✓ **Milbertshofen-Am Hart**
- ✓ **Moosach**
- ✓ **Schwabing-Nord**
- ✓ **Laim**
- ✓ **Aubing-Lochh.-Langwied-Freiham**
- ✓ **Allach-Untermenzing**
- ✓ **Hadern**
- ✓ **Pasing-Obermenzing**
- ✓ **Giesing-Harlaching**
- ✓ **Thalkirchen-Obersendling**
- ✓ **Forstenried-Fürstenried-Solln**
- ✓ **Ramersdorf-Perlach**

Suburban areas

Aschheim-Dornach
Feldkirchen
Kirchheim-Heimstetten
Haar
Munich-Airport
Hallbergmoos-Airport
Business Park
Eching
Garching
Ismaning
Neufahrn
Oberding-Schwaig
Unterföhring
Unterschleißheim
Baierbrunn
Gauting
Germering
Gilching
Gräfelfing
Gröbenzell
Martinsried
Neuried
Oberschleißheim
Planegg
Puchheim
Pullach
Brunnthal
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Oberhaching
Ottobrunn
Putzbrunn
Taufkirchen
Unterhaching

Show data: Number of square meters

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SUPPLY MARKET LOCATION

641.651 m²
100.00%

720 RU
100.00%

137 OB
100.00%

Historic city centre City centre City Suburban areas

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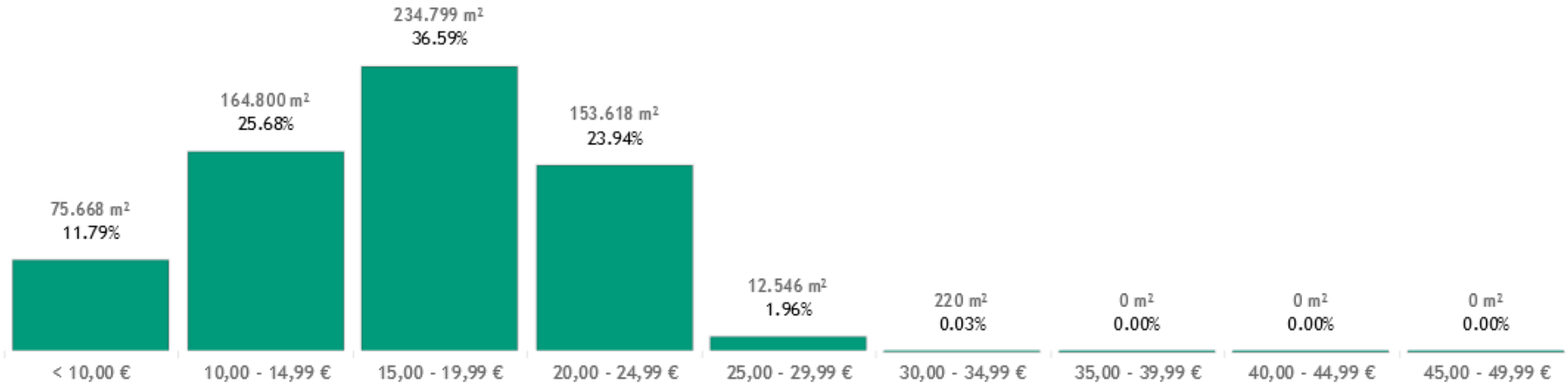
OFFERED RENTAL PRICE (area in sqm)



Ø 16.55 €/m²

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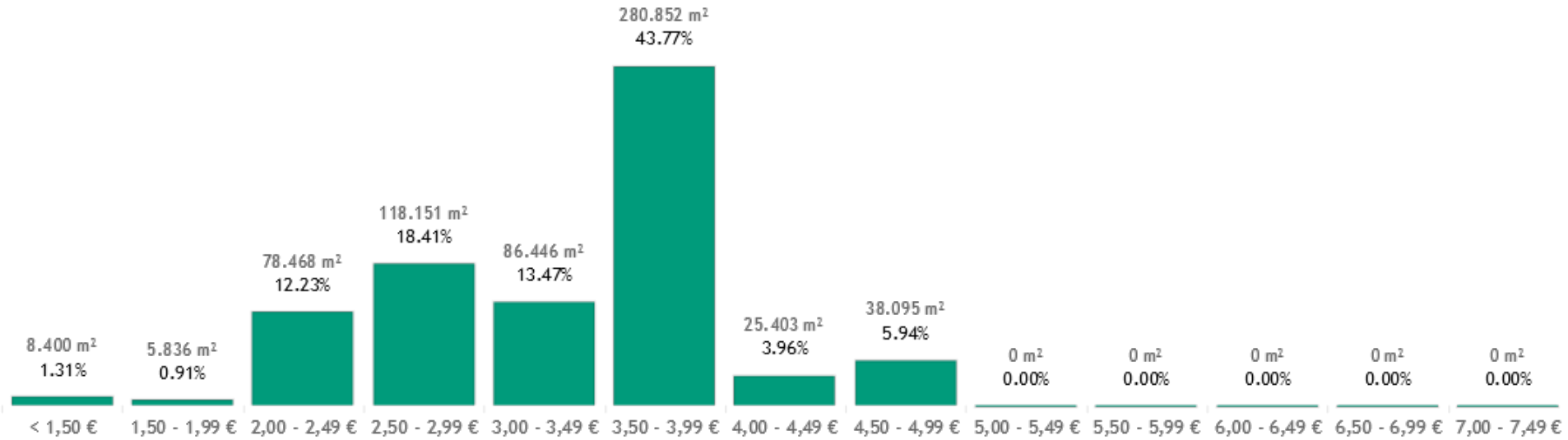
SERVICE CHARGES (area in sqm)



Ø 3.22 €/m²

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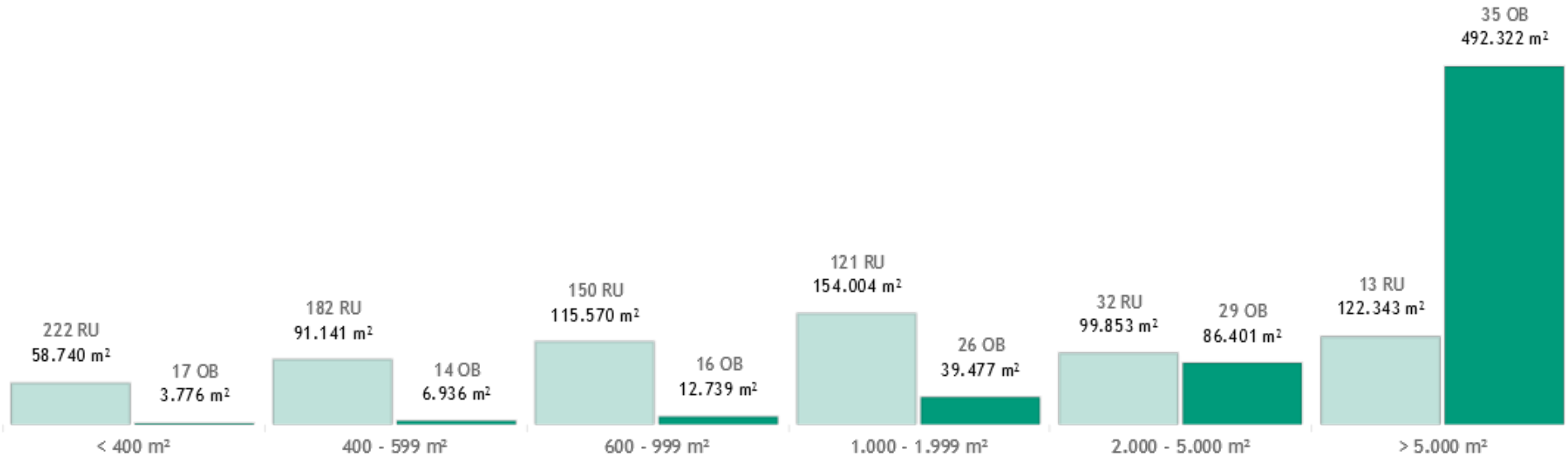
OFFICE SPACES (area in sqm)



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CALCULATION OF SPACE (area in sqm)

BGF	620.357 m²	96.68%
NGF	1.007 m²	0.16%
GIF	19.852 m²	3.09%
Others	435 m²	0.07%

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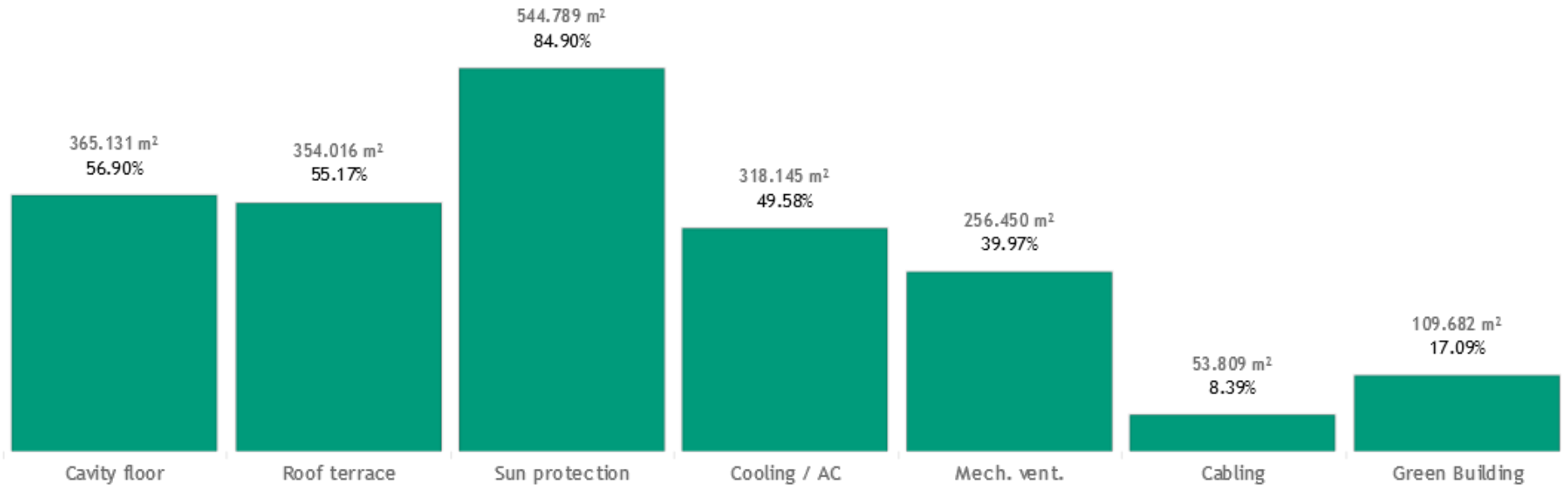
DATA AND FIT-OUT FEATURES (area in sqm)



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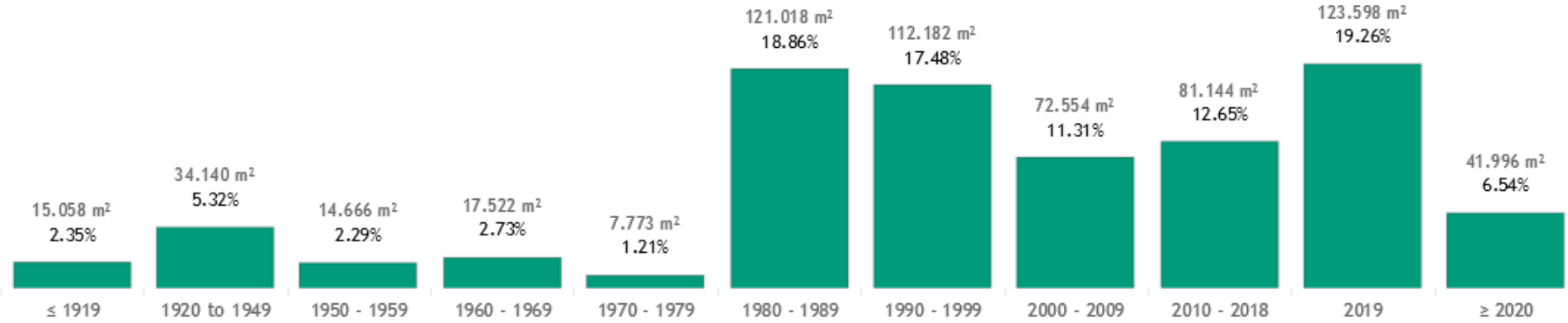
YEAR OF CONSTRUCTION (area in sqm)



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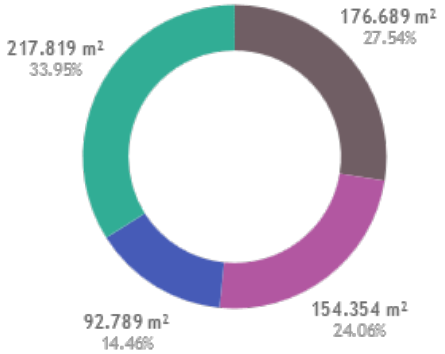
DISTANCE S-RAILWAY CONNECTION (area in sqm)



<= 0,50 km	176.689 m²	27.54%
0,51 - 1,0 km	154.354 m²	24.06%
1,01 - 1,5 km	92.789 m²	14.46%
> 1,5 km	217.819 m²	33.95%

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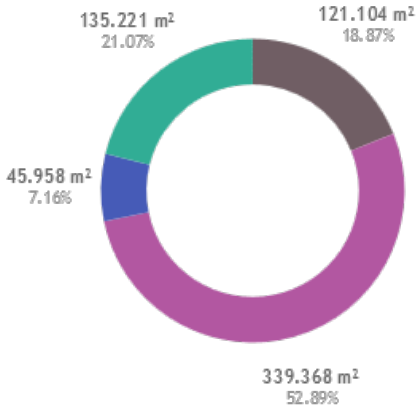
DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



<= 0,50 km	121.104 m²	18.87%
0,51 - 1,0 km	339.368 m²	52.89%
1,01 - 1,5 km	45.958 m²	7.16%
> 1,5 km	135.221 m²	21.07%

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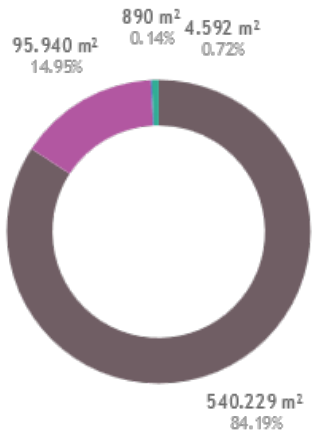
DISTANCE CAFÉS AND RESTAURANTS (area in sqm)



<= 0,50 km	540.229 m²	84.19%
0,51 - 1,0 km	95.940 m²	14.95%
1,01 - 1,5 km	890 m²	0.14%
> 1,5 km	4.592 m²	0.72%

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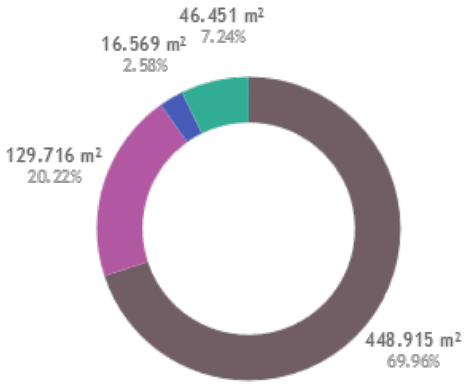
DISTANCE HOTELS (area in sqm)



<= 0,50 km	448.915 m²	69.96%
0,51 - 1,0 km	129.716 m²	20.22%
1,01 - 1,5 km	16.569 m²	2.58%
> 1,5 km	46.451 m²	7.24%

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We would be glad to receive office space updates, questions, criticism, suggestions and positive feedback at the address specified above.

Supply market evaluation from 05.09.2019
from a total of 1.582.844 sqm, 1.726 rental units and
373 office buildings

Report Office Market Analysis Suburban Areas

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FILTER CRITERIA

Historic city centre

Altstadt-Lehel

City centre

Au-Haidhausen
Bogenhausen
Maxvorstadt
Schwabing
Neuhausen-Nymphenburg
Schwanthalerhöhe
Ludwigsvorstadt-Isarvorstadt
Sendling-Westpark

City

Bogenhausen-Ost
Trudering-Riem
Berg am Laim
Feldmoching
Milbertshofen-Am Hart
Moosach
Schwabing-Nord
Laim
Aubing-Lochh.-Langwied-Freiham
Allach-Untermenzing
Hadern
Pasing-Obermenzing
Giesing-Harlaching
Thalkirchen-Obersendling
Forstenried-Fürstenried-Solln
Ramersdorf-Perlach

Suburban areas

- ✓ **Aschheim-Dornach**
- ✓ **Feldkirchen**
- ✓ **Kirchheim-Heimstetten**
- ✓ **Haar**
- ✓ **Munich-Airport**
- ✓ **Hallbergmoos-Airport Business Park**
- ✓ **Eching**
- ✓ **Garching**
- ✓ **Ismaning**
- ✓ **Neufahrn**
- ✓ **Oberding-Schwaig**
- ✓ **Unterföhring**
- ✓ **Unterschleißheim**
- ✓ **Baierbrunn**
- ✓ **Gauting**
- ✓ **Germering**
- ✓ **Gilching**
- ✓ **Gräfelfing**
- ✓ **Gröbenzell**
- ✓ **Martinsried**
- ✓ **Neuried**
- ✓ **Oberschleißheim**
- ✓ **Planegg**
- ✓ **Puchheim**
- ✓ **Pullach**
- ✓ **Brunnthal**
- ✓ **Grasbrunn**
- ✓ **Grünwald**
- ✓ **Neubiberg**
- ✓ **Oberhaching**
- ✓ **Ottobrunn**
- ✓ **Putzbrunn**
- ✓ **Taufkirchen**
- ✓ **Unterhaching**

Show data: Number of square meters

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SUPPLY MARKET LOCATION

682.897 m²
100.00%

713 RU
100.00%

136 OB
100.00%

Historic city centre City centre City Suburban areas

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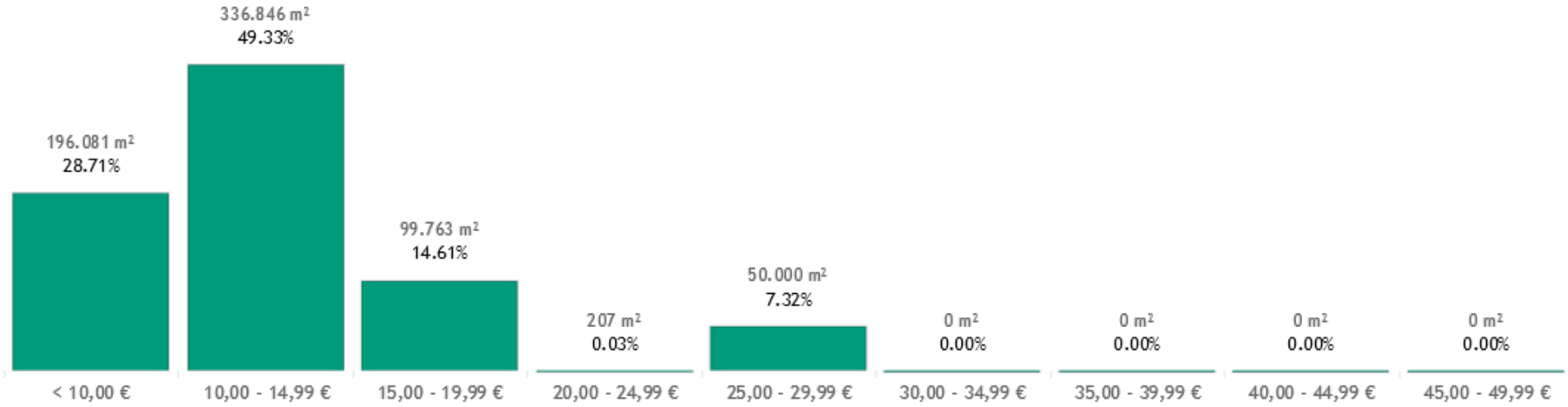
OFFERED RENTAL PRICE (area in sqm)



Ø 12.91 €/m²

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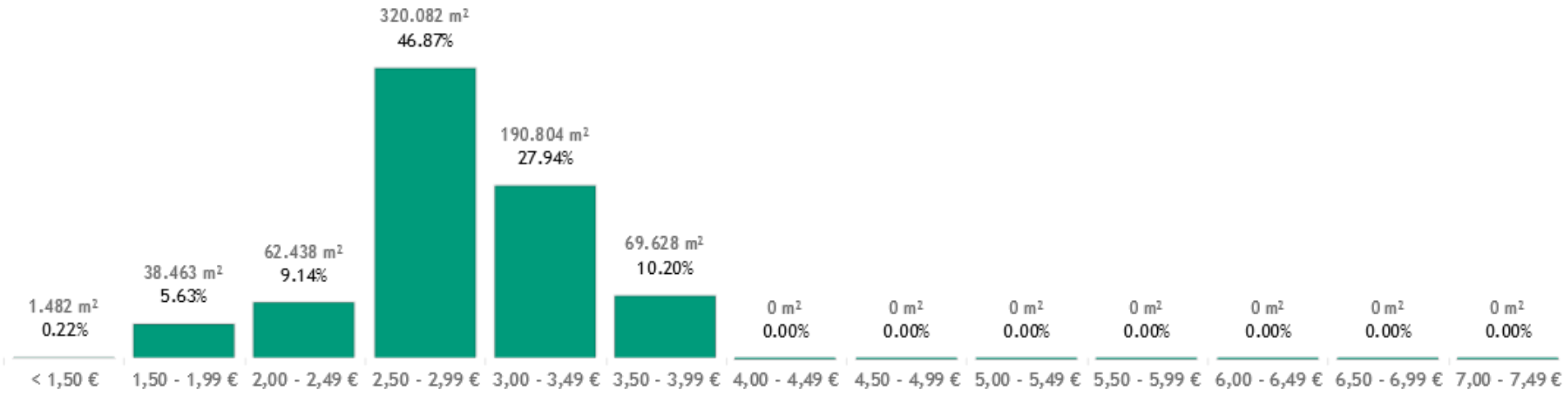
SERVICE CHARGES (area in sqm)



Ø 2.77 €/m²

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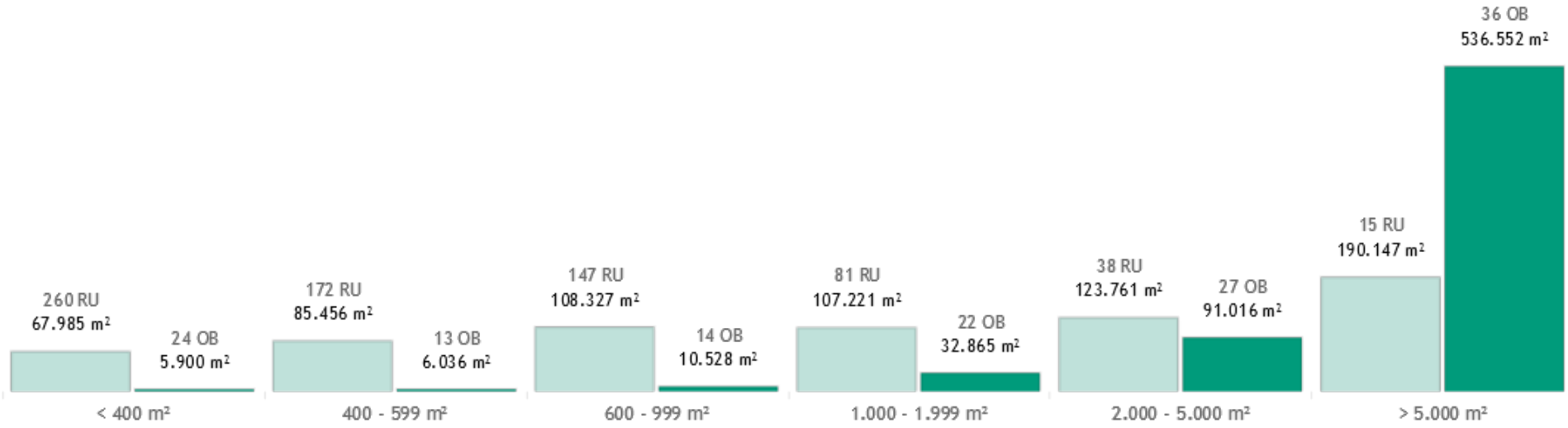
OFFICE SPACES (area in sqm)



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CALCULATION OF SPACE (area in sqm)

BGF	648.996 m²	95.04%
NGF	8.681 m²	1.27%
GIF	25.220 m²	3.69%
Others	0 m²	0%

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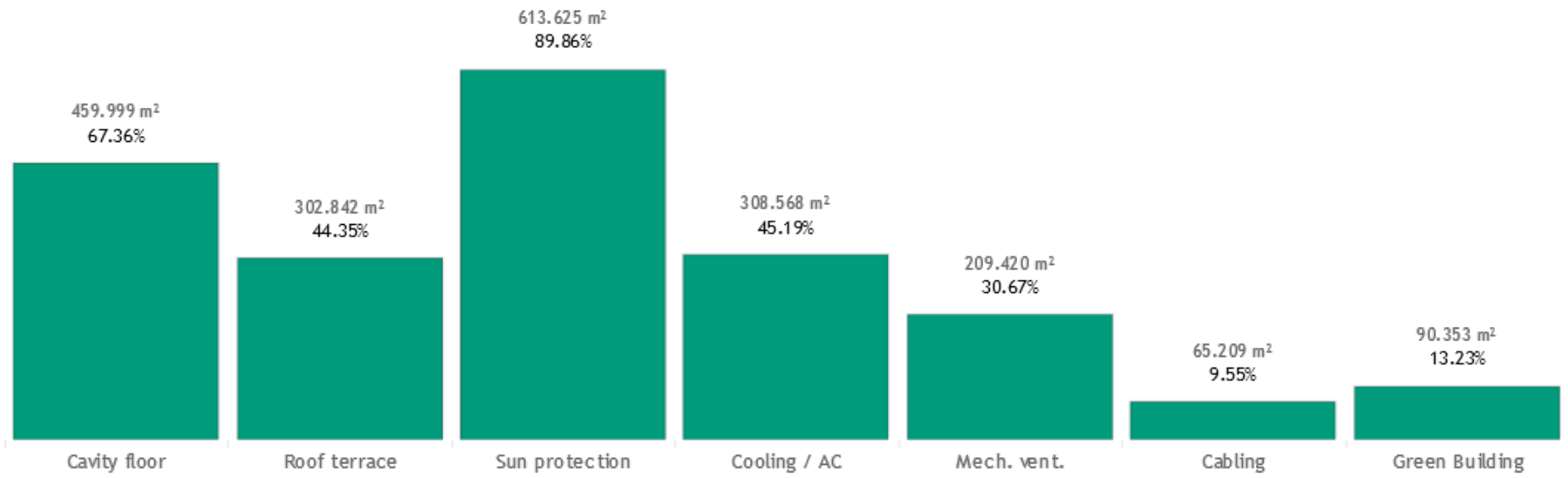
DATA AND FIT-OUT FEATURES (area in sqm)



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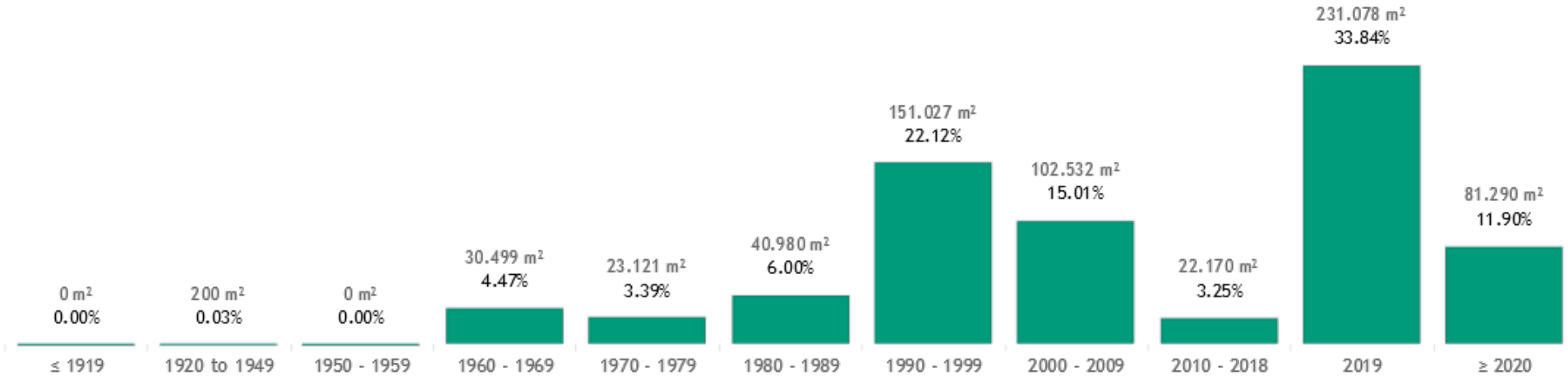
YEAR OF CONSTRUCTION (area in sqm)



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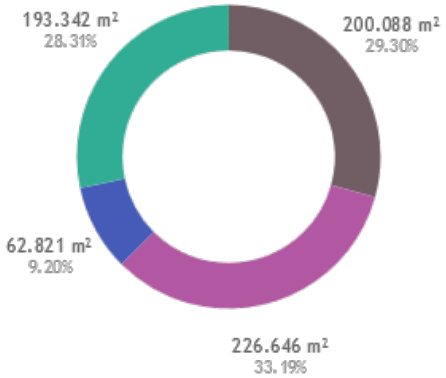
DISTANCE S-RAILWAY CONNECTION (area in sqm)



<= 0,50 km	200.088 m²	29.3%
0,51 - 1,0 km	226.646 m²	33.19%
1,01 - 1,5 km	62.821 m²	9.2%
> 1,5 km	193.342 m²	28.31%

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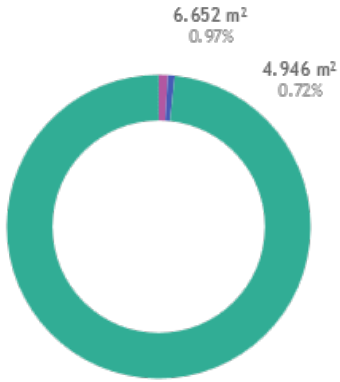
DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



<= 0,50 km	0 m²	0%
0,51 - 1,0 km	6.652 m²	0.97%
1,01 - 1,5 km	4.946 m²	0.72%
> 1,5 km	671.299 m²	98.3%

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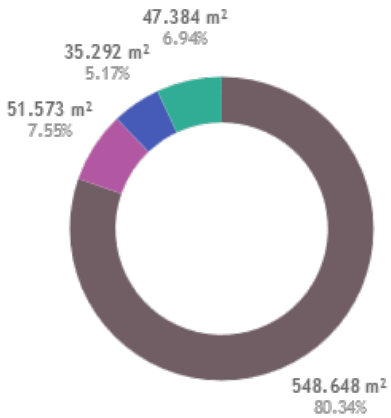

<= 0,50 km	548.648 m²	80.34%
0,51 - 1,0 km	51.573 m²	7.55%
1,01 - 1,5 km	35.292 m²	5.17%
> 1,5 km	47.384 m²	6.94%

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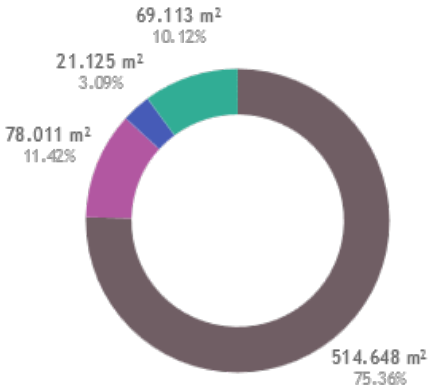
DISTANCE HOTELS (area in sqm)



<= 0,50 km	514.648 m²	75.36%
0,51 - 1,0 km	78.011 m²	11.42%
1,01 - 1,5 km	21.125 m²	3.09%
> 1,5 km	69.113 m²	10.12%

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