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**Supply market evaluation from 01.05.2024  
from a total of 3.288.429 sqm, 3.599 rental units and  
667 office buildings**

# **Report Office Market Analysis Historic City Centre**

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## FILTER CRITERIA

### Historic city centre City

✓ Altstadt-Lehel

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

### City centre

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

### Suburban areas

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

Show data: Number of square meters

**Contact partner: Antonia Schmidt**

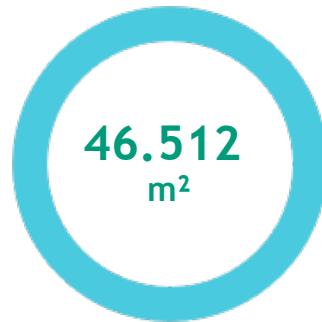
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## SUPPLY MARKET LOCATION

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46.512 m<sup>2</sup>  
100.00%



110 RU  
100.00%



53 OB  
100.00%

■ Historic city centre ■ City centre ■ City ■ Suburban areas

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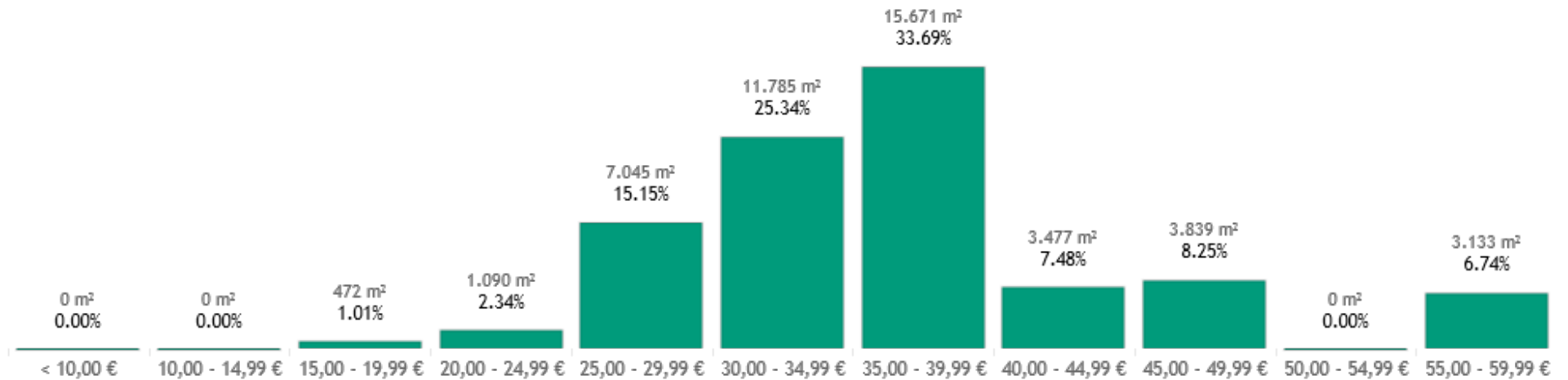
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## OFFERED RENTAL PRICE (area in sqm)



Ø 36.74 €/m²

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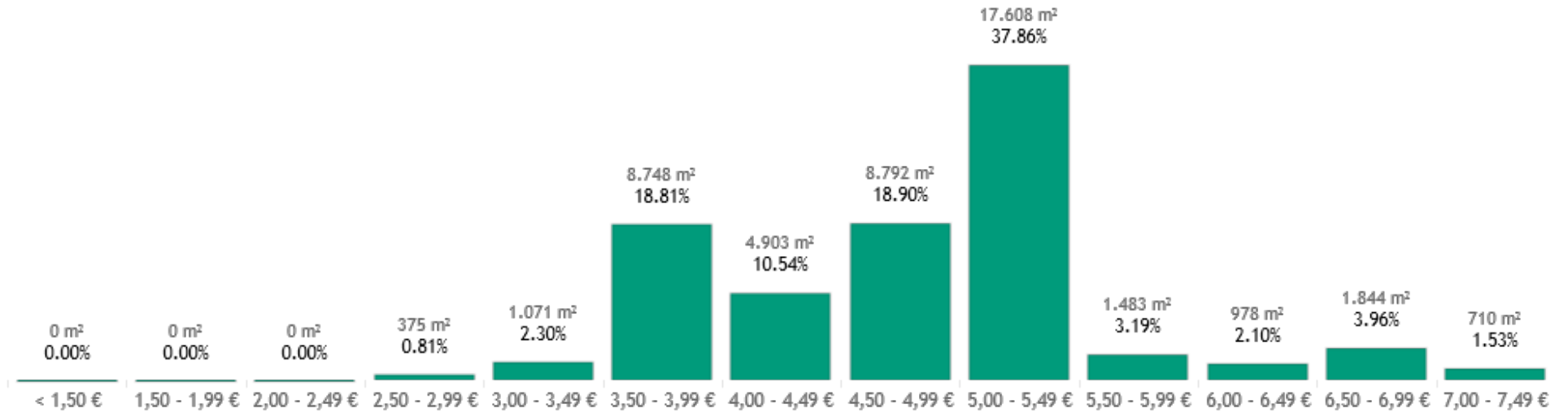
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## SERVICE CHARGES (area in sqm)



Ø 4.66 €/m²

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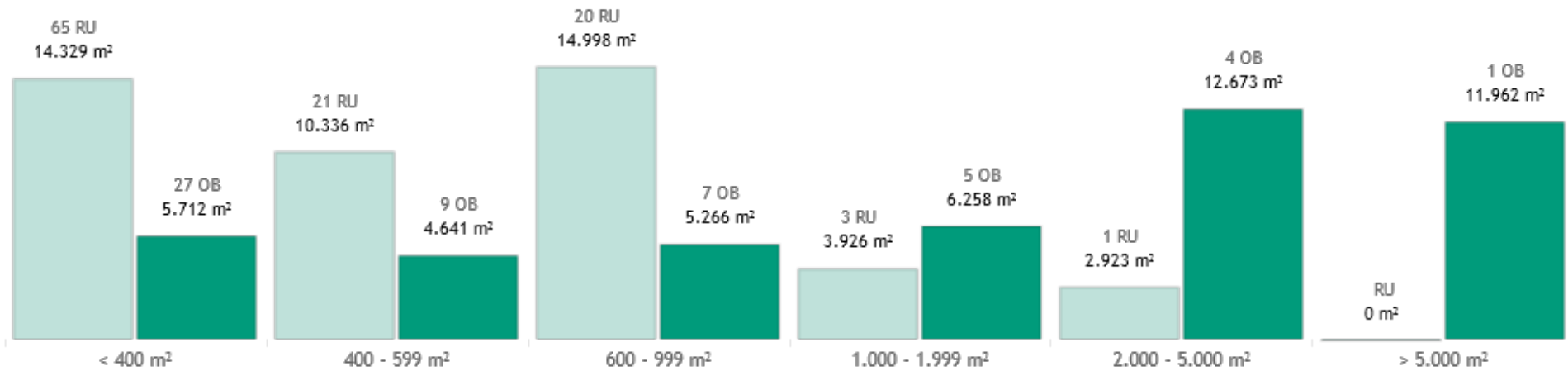
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## OFFICE SPACES (area in sqm)



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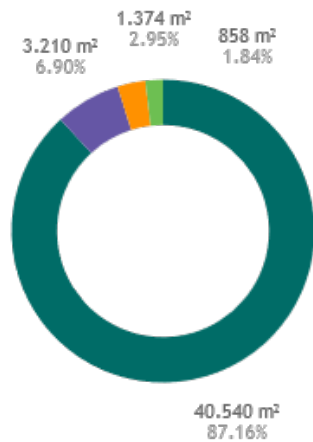
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## CALCULATION OF SPACE (area in sqm)



 BGF	40.540 m <sup>2</sup>	88.16%
 NGF	3.210 m <sup>2</sup>	6.98%
 GIF	1.374 m <sup>2</sup>	2.99%
 Others	858 m <sup>2</sup>	1.87%

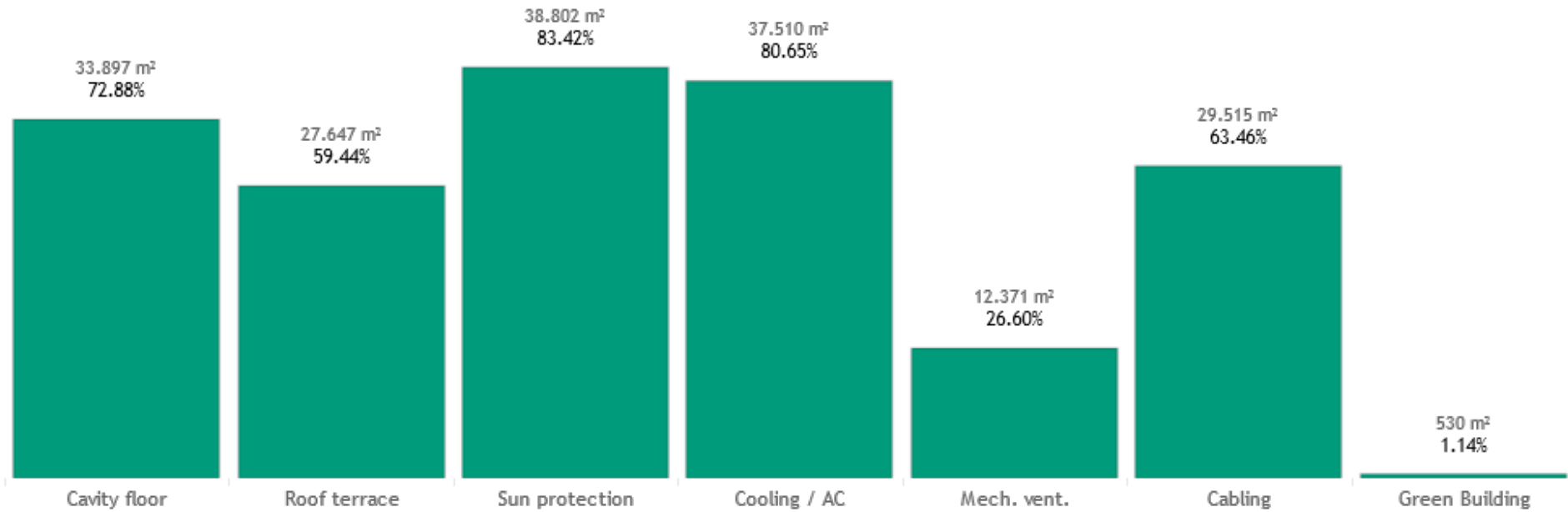
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## DATA AND FIT-OUT FEATURES (area in sqm)



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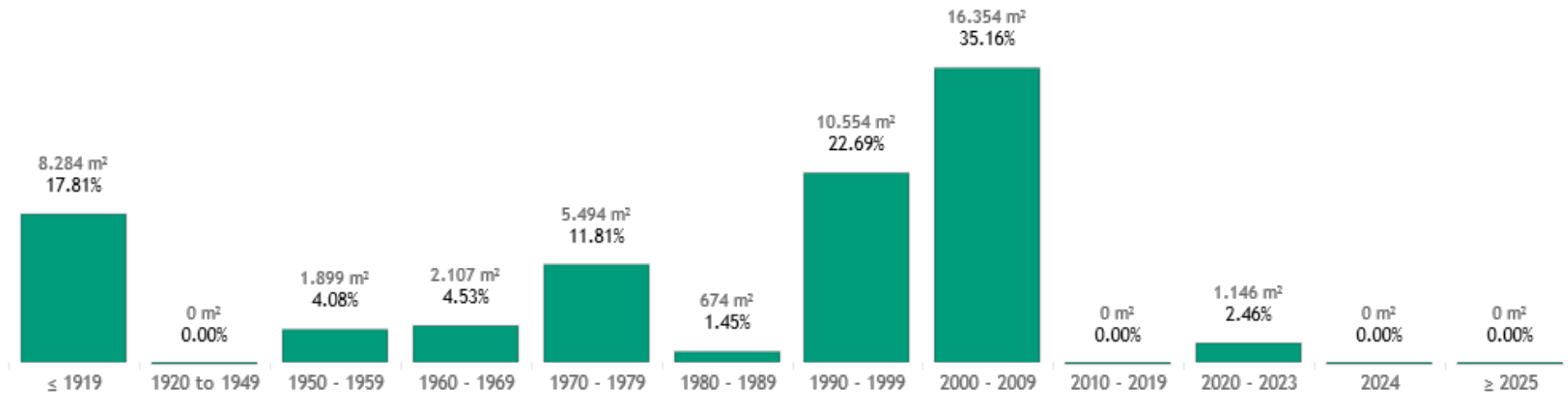
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## YEAR OF CONSTRUCTION (area in sqm)



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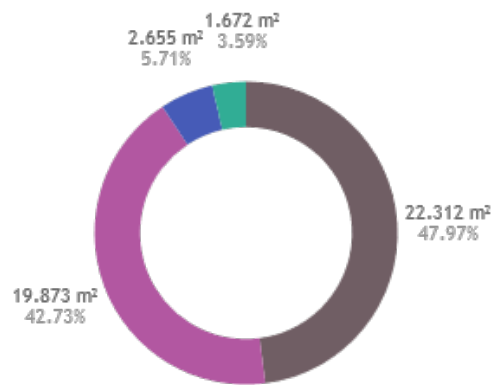
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## DISTANCE S-RAILWAY CONNECTION (area in sqm)



 <= 0,50 km	22.312 m <sup>2</sup>	47.97%
 0,51 - 1,0 km	19.873 m <sup>2</sup>	42.73%
 1,01 - 1,5 km	2.655 m <sup>2</sup>	5.71%
 > 1,5 km	1.672 m <sup>2</sup>	3.59%

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## DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



 <= 0,50 km	42.345 m <sup>2</sup>	91.04%
 0,51 - 1,0 km	4.167 m <sup>2</sup>	8.96%
 1,01 - 1,5 km	0 m <sup>2</sup>	0%
 > 1,5 km	0 m <sup>2</sup>	0%

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## DISTANCE CAFÉS AND RESTAURANTS (area in sqm)



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## DISTANCE HOTELS (area in sqm)



 <= 0,50 km	45.258 m <sup>2</sup>	97.3%
 0,51 - 1,0 km	1.254 m <sup>2</sup>	2.7%
 1,01 - 1,5 km	0 m <sup>2</sup>	0%
 > 1,5 km	0 m <sup>2</sup>	0%

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667 office buildings**

# **Report Office Market City Centre Munich**

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## FILTER CRITERIA

### Historic city centre City

Altstadt-Lehel

### City centre

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

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

Show data: Number of square meters

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## SUPPLY MARKET LOCATION

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604.239 m<sup>2</sup>  
100.00%



665 RU  
100.00%



178 OB  
100.00%

■ Historic city centre ■ City centre ■ City ■ Suburban areas

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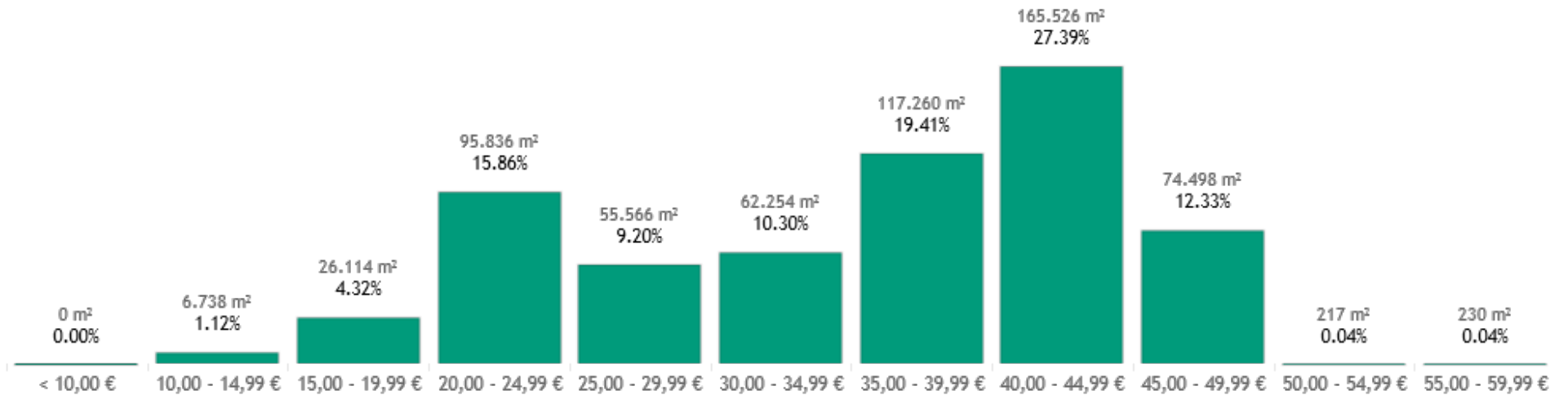
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## OFFERED RENTAL PRICE (area in sqm)



Ø 34.57 €/m²

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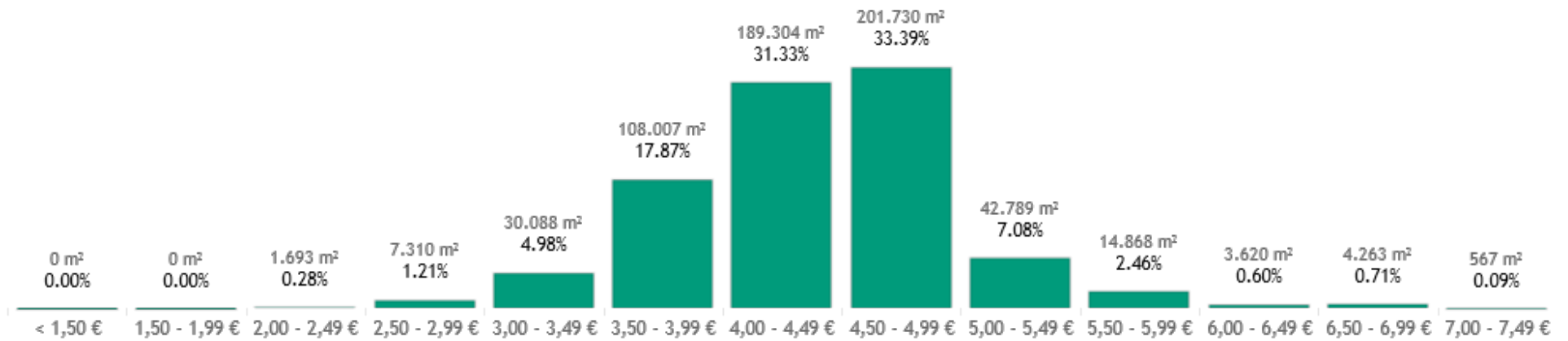
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## SERVICE CHARGES (area in sqm)



Ø 4.20 €/m²

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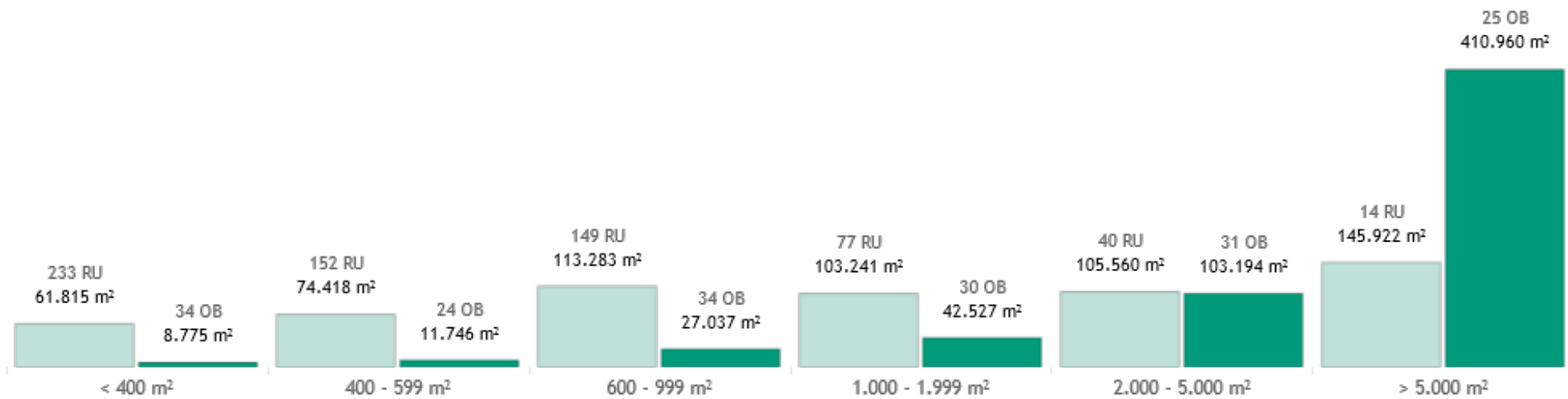
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## OFFICE SPACES (area in sqm)



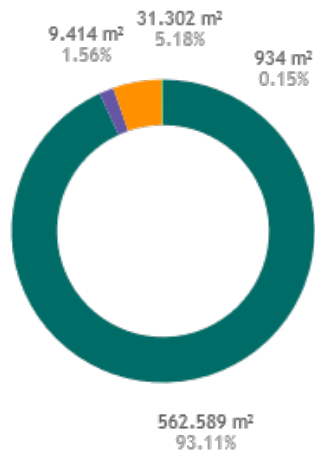
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## CALCULATION OF SPACE (area in sqm)



 BGF	562.589 m <sup>2</sup>	93.11%
 NGF	9.414 m <sup>2</sup>	1.56%
 GIF	31.302 m <sup>2</sup>	5.18%
 Others	934 m <sup>2</sup>	0.15%

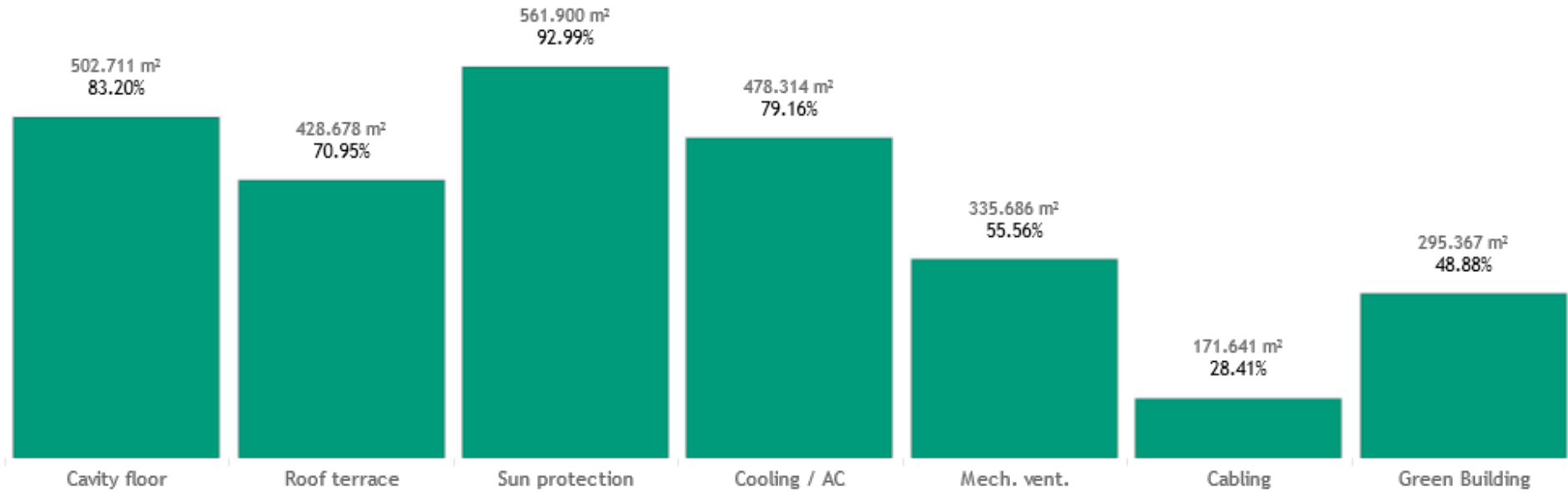
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## DATA AND FIT-OUT FEATURES (area in sqm)



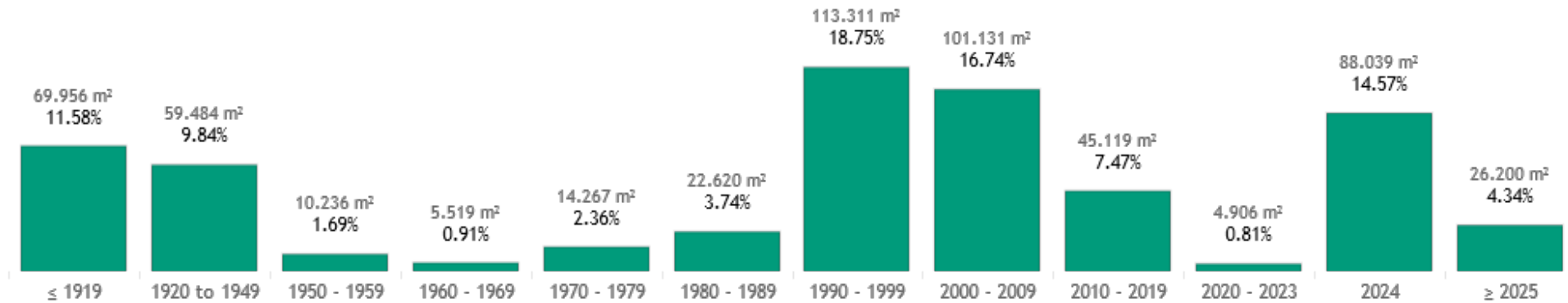
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## YEAR OF CONSTRUCTION (area in sqm)



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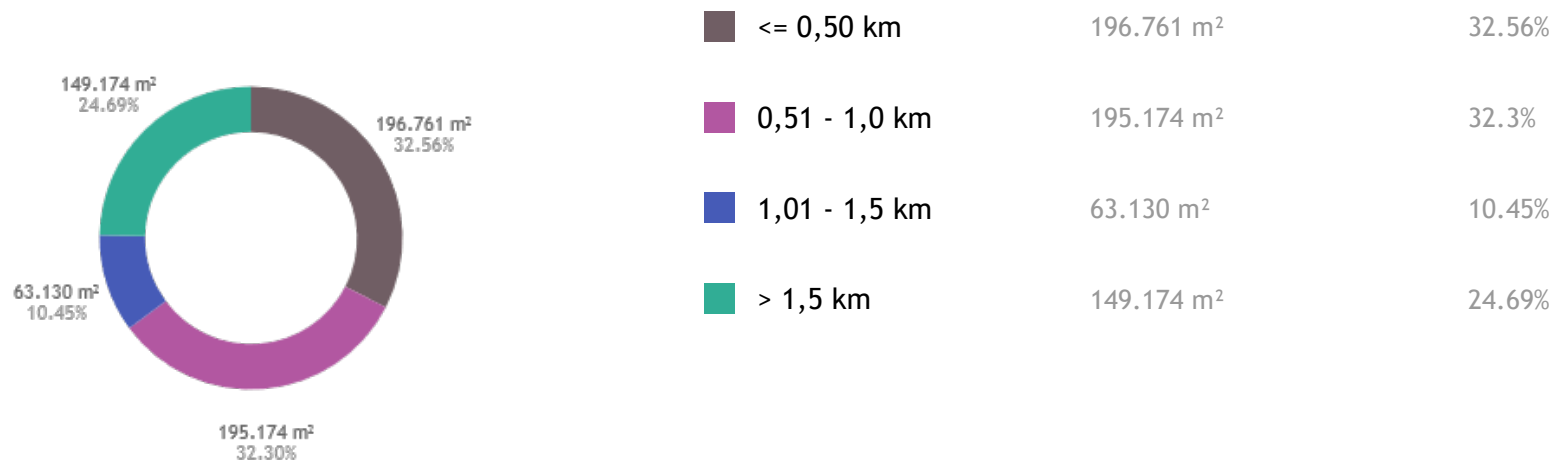
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## DISTANCE S-RAILWAY CONNECTION (area in sqm)



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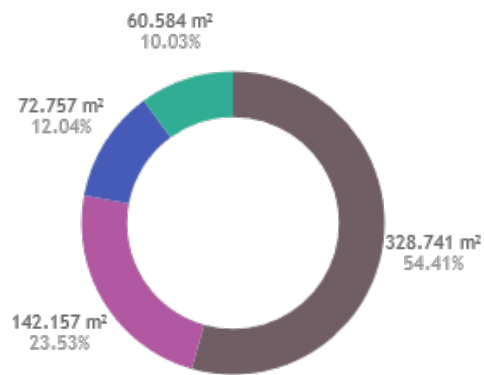
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## DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



 <= 0,50 km	328.741 m <sup>2</sup>	54.41%
 0,51 - 1,0 km	142.157 m <sup>2</sup>	23.53%
 1,01 - 1,5 km	72.757 m <sup>2</sup>	12.04%
 > 1,5 km	60.584 m <sup>2</sup>	10.03%

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## DISTANCE CAFÉS AND RESTAURANTS (area in sqm)



 <= 0,50 km	583.954 m <sup>2</sup>	96.64%
 0,51 - 1,0 km	20.285 m <sup>2</sup>	3.36%
 1,01 - 1,5 km	0 m <sup>2</sup>	0%
 > 1,5 km	0 m <sup>2</sup>	0%

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## DISTANCE HOTELS (area in sqm)



 <= 0,50 km	516.091 m <sup>2</sup>	85.41%
 0,51 - 1,0 km	88.148 m <sup>2</sup>	14.59%
 1,01 - 1,5 km	0 m <sup>2</sup>	0%
 > 1,5 km	0 m <sup>2</sup>	0%

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# Report Office Market Analysis City

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## FILTER CRITERIA

### Historic city centre City

Altstadt-Lehel

### City centre

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

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

Show data: Number of square meters

#### Contact partner: Antonia Schmidt

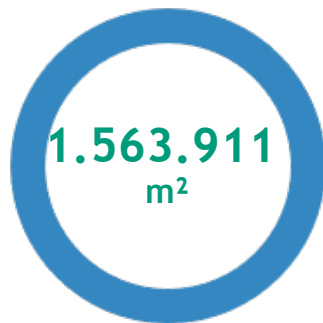
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## SUPPLY MARKET LOCATION

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1.563.911 m<sup>2</sup>  
100.00%



1.808 RU  
100.00%



282 OB  
100.00%

■ Historic city centre ■ City centre ■ City ■ Suburban areas

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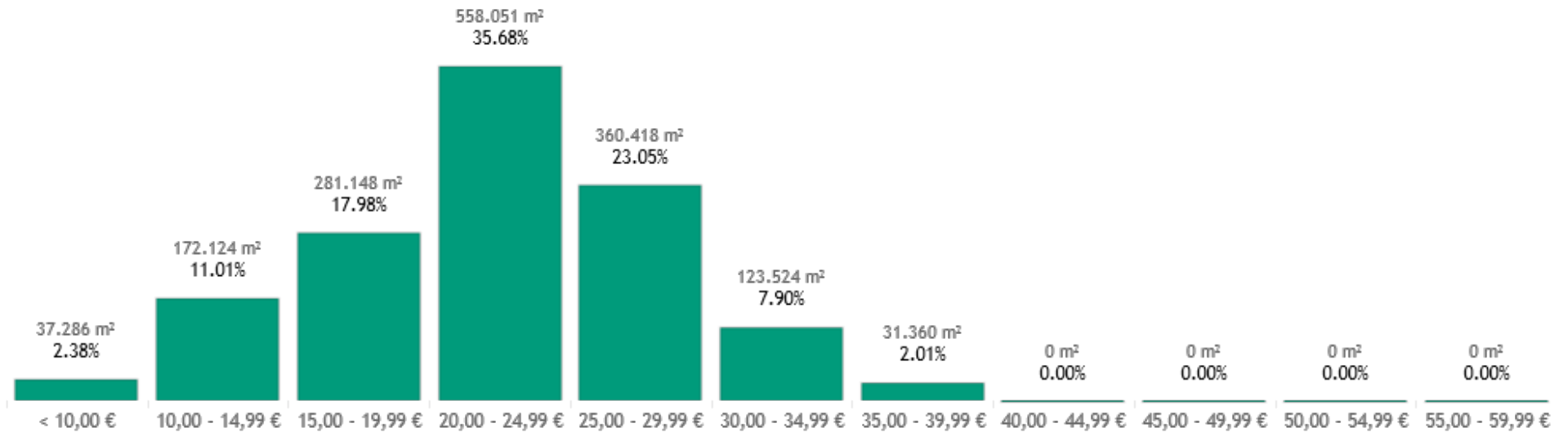
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## OFFERED RENTAL PRICE (area in sqm)



Ø 22.16 €/m²

**Contact partner: Antonia Schmidt**

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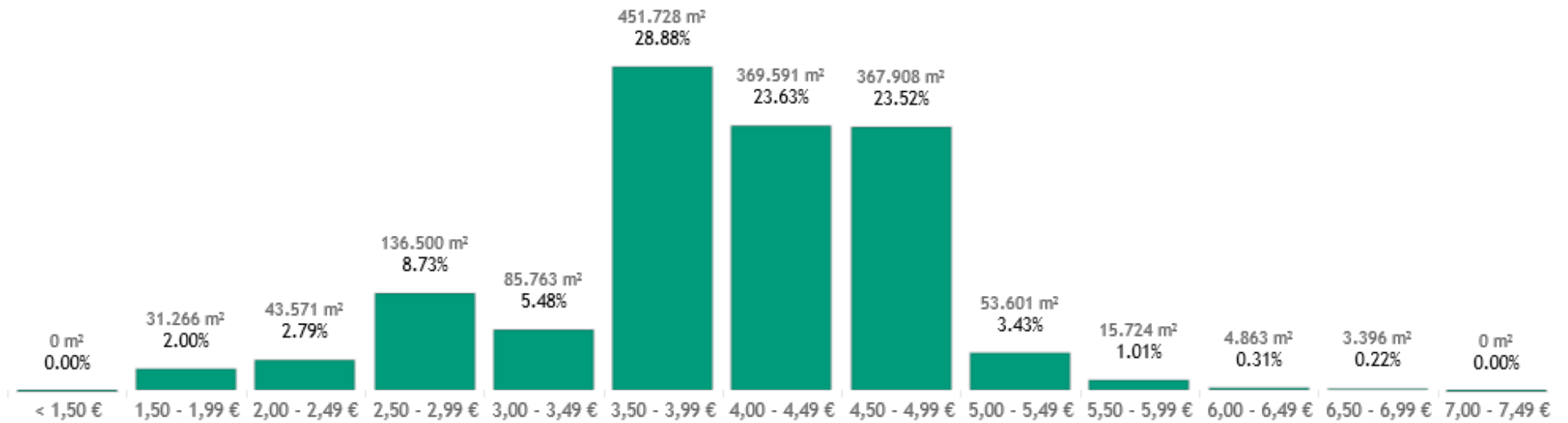
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## SERVICE CHARGES (area in sqm)



Ø 3.82 €/m²

Contact partner: Antonia Schmidt

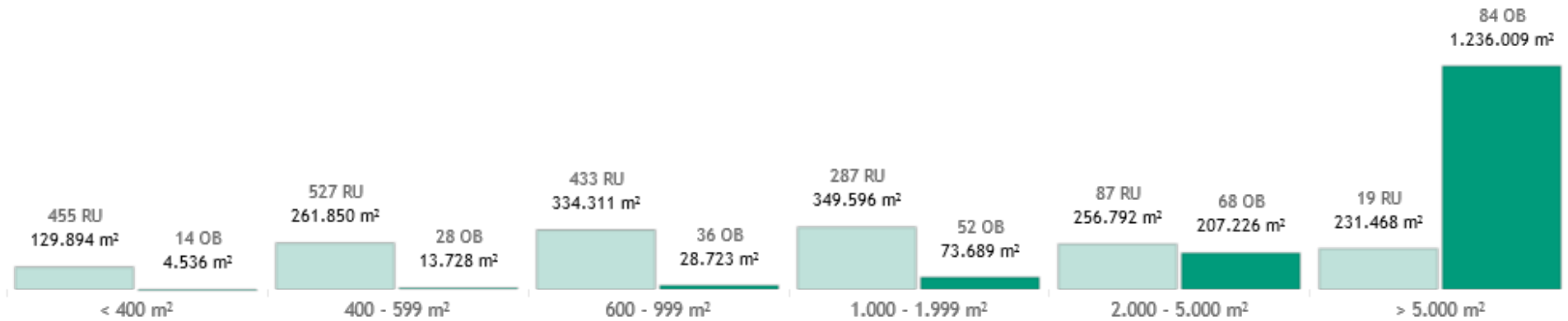
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## OFFICE SPACES (area in sqm)



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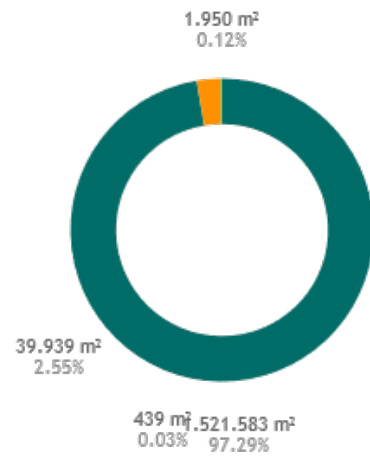
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## CALCULATION OF SPACE (area in sqm)



 BGF	1.521.583 m <sup>2</sup>	97.29%
 NGF	439 m <sup>2</sup>	0.03%
 GIF	39.939 m <sup>2</sup>	2.55%
 Others	1.950 m <sup>2</sup>	0.12%

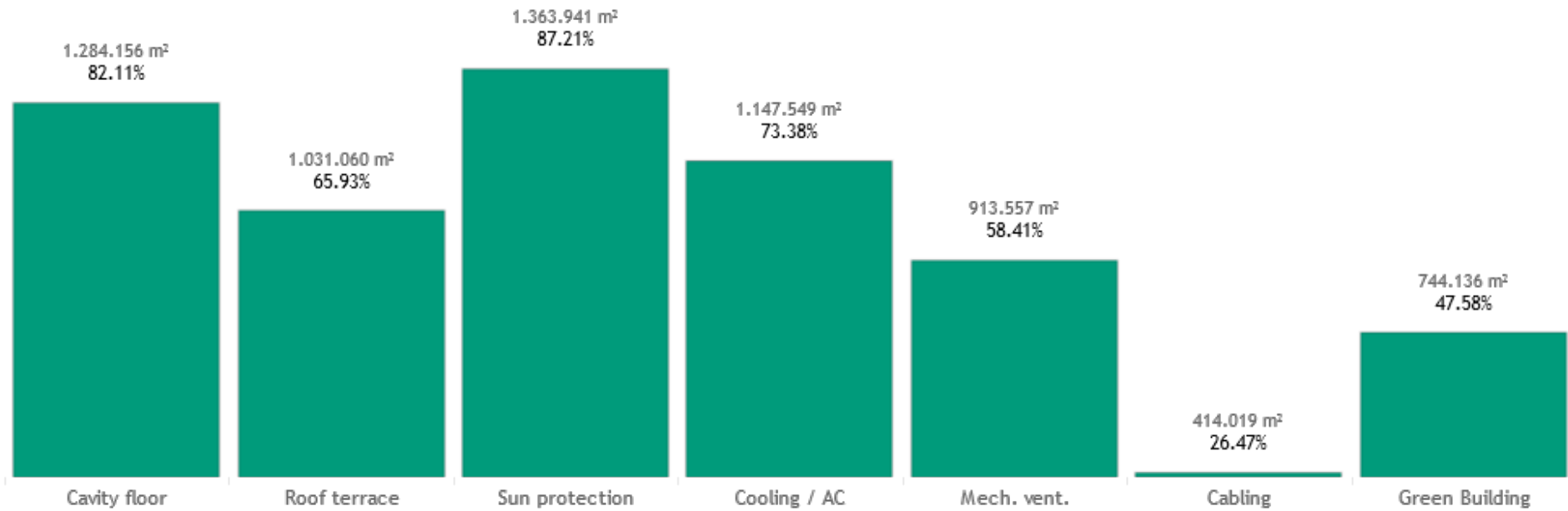
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## DATA AND FIT-OUT FEATURES (area in sqm)



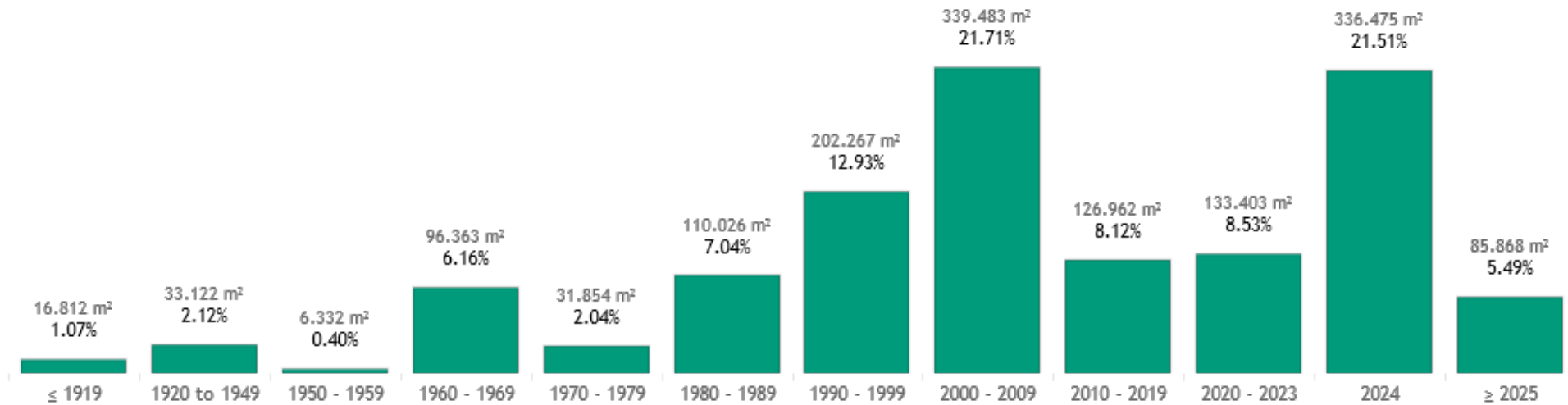
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## YEAR OF CONSTRUCTION (area in sqm)



Contact partner: **Antonia Schmidt**

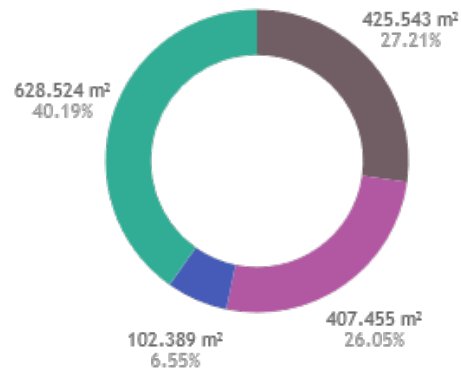
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## DISTANCE S-RAILWAY CONNECTION (area in sqm)



■ ≤ 0,50 km	425.543 m <sup>2</sup>	27.21%
■ 0,51 - 1,0 km	407.455 m <sup>2</sup>	26.05%
■ 1,01 - 1,5 km	102.389 m <sup>2</sup>	6.55%
■ > 1,5 km	628.524 m <sup>2</sup>	40.19%

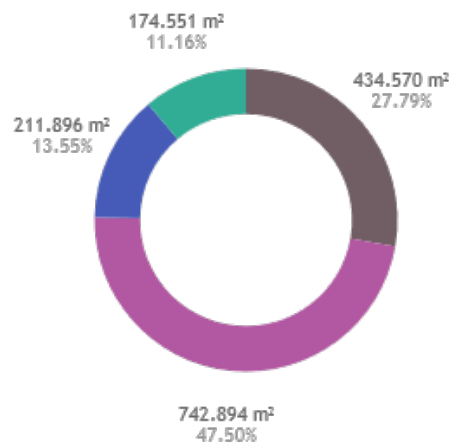
**Contact partner: Antonia Schmidt**





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## DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



 <= 0,50 km	434.570 m <sup>2</sup>	27.79%
 0,51 - 1,0 km	742.894 m <sup>2</sup>	47.5%
 1,01 - 1,5 km	211.896 m <sup>2</sup>	13.55%
 > 1,5 km	174.551 m <sup>2</sup>	11.16%

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## DISTANCE CAFÉS AND RESTAURANTS (area in sqm)



 <= 0,50 km	1.489.120 m <sup>2</sup>	95.22%
 0,51 - 1,0 km	74.791 m <sup>2</sup>	4.78%
 1,01 - 1,5 km	0 m <sup>2</sup>	0%
 > 1,5 km	0 m <sup>2</sup>	0%

**Contact partner: Antonia Schmidt**

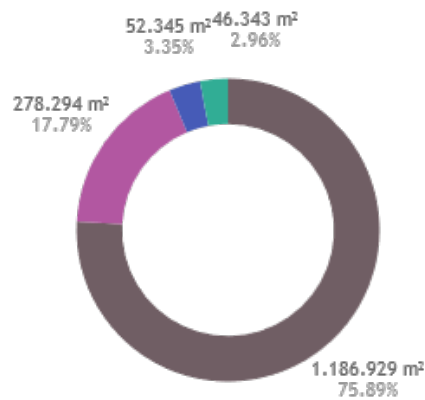
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## DISTANCE HOTELS (area in sqm)



 <= 0,50 km	1.186.929 m <sup>2</sup>	75.89%
 0,51 - 1,0 km	278.294 m <sup>2</sup>	17.79%
 1,01 - 1,5 km	52.345 m <sup>2</sup>	3.35%
 > 1,5 km	46.343 m <sup>2</sup>	2.96%

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**Supply market evaluation from 01.05.2024  
from a total of 3.288.429 sqm, 3.599 rental units and  
667 office buildings**

# Report Office Market Analysis Suburban Areas

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## FILTER CRITERIA

### Historic city centre City

Altstadt-Lehel

### City centre

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

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
  - ✓ Grasbrunn
  - ✓ Haar
  - ✓ Kirchheim-Heimstetten
  - Vaterstetten
  - ✓ Eching
  - Freising
  - ✓ Garching
  - ✓ Hallbergmoos-Airport
  - Business Park
  - ✓ Ismaning
  - ✓ Munich-Airport
  - ✓ Neufahrn
  - ✓ Oberding-Schwaig
  - ✓ Oberschleißheim
  - ✓ Unterföhring
  - ✓ Unterschleißheim
- Dachau
- ✓ Germering
  - ✓ Gilching
  - ✓ Gräfelfing
  - ✓ Gröbenzell
  - ✓ Gauting
  - Karlsfeld
  - ✓ Martinsried
  - ✓ Neuried
  - ✓ Planegg
  - ✓ Puchheim
  - ✓ Baierbrunn
  - ✓ Brunthal
  - ✓ Grünwald
  - ✓ Neubiberg
  - ✓ Oberhaching
  - ✓ Ottobrunn
  - ✓ Pullach
  - ✓ Putzbrunn
  - ✓ Taufkirchen
  - ✓ Unterhaching

Show data: Number of square meters

#### Contact partner: Antonia Schmidt

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## SUPPLY MARKET LOCATION

---



999.305 m<sup>2</sup>  
100.00%



973 RU  
100.00%



150 OB  
100.00%

■ Historic city centre ■ City centre ■ City ■ Suburban areas

---

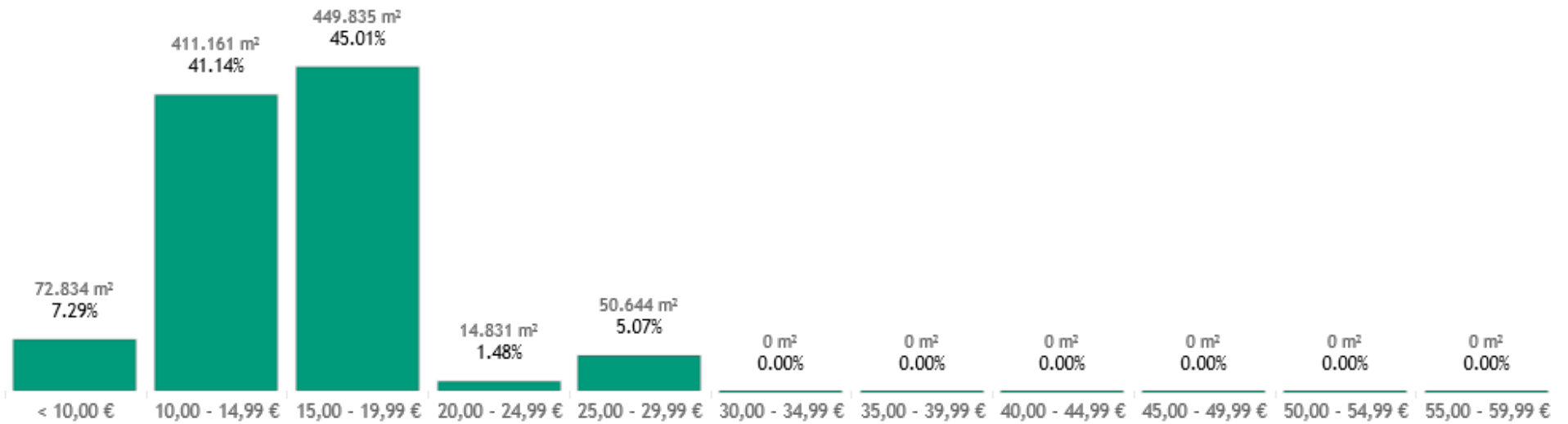
Contact partner: **Antonia Schmidt**

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## OFFERED RENTAL PRICE (area in sqm)



Ø 15.27 €/m²

Contact partner: Antonia Schmidt

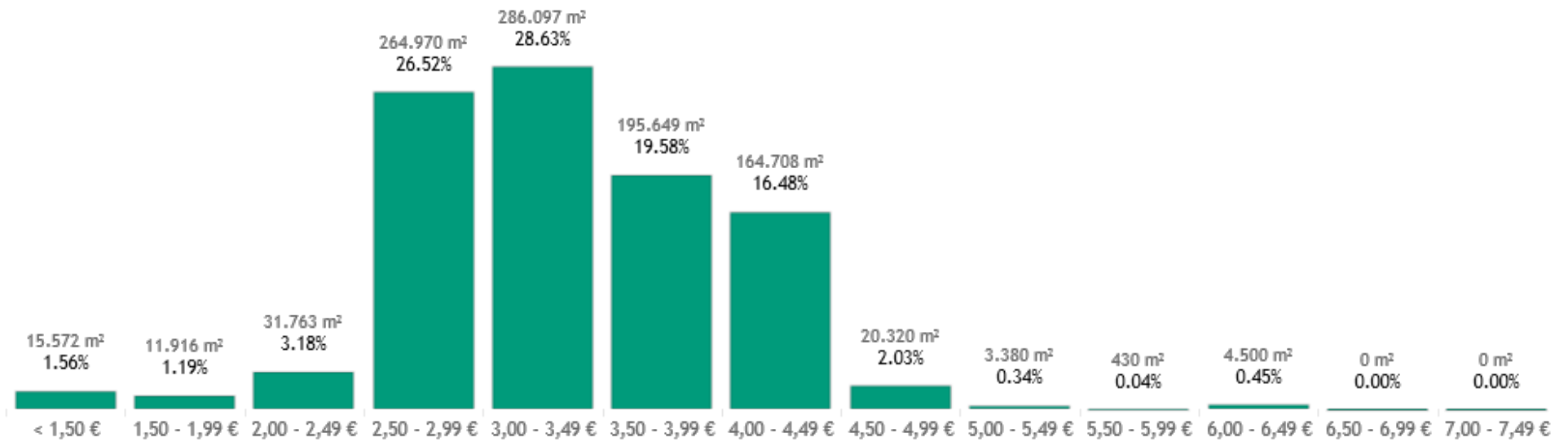
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## SERVICE CHARGES (area in sqm)



Ø 3.22 €/m²

Contact partner: **Antonia Schmidt**

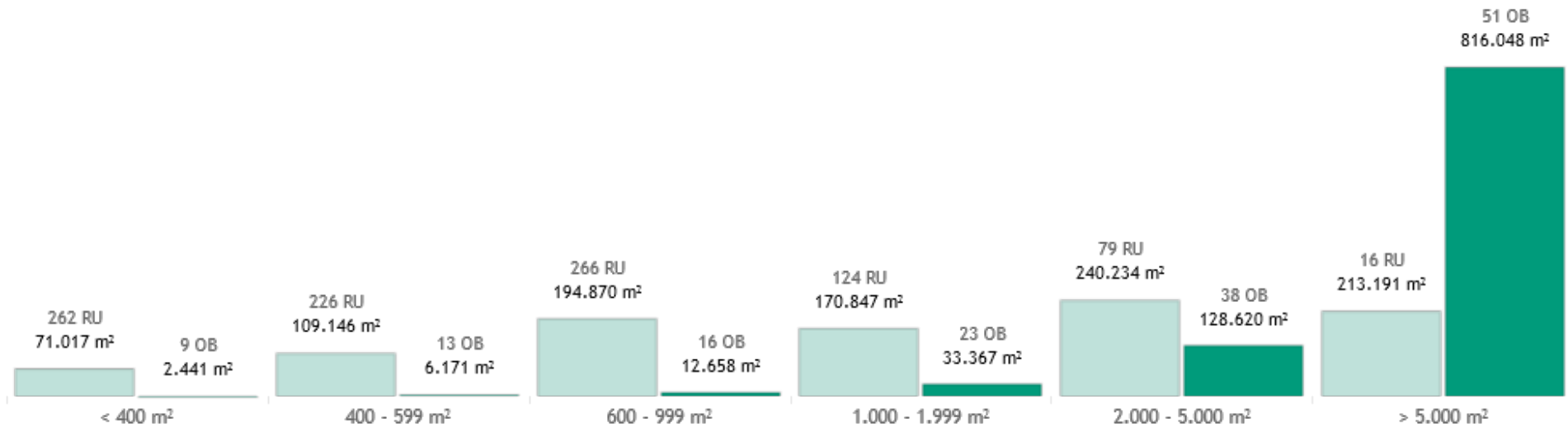
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## OFFICE SPACES (area in sqm)



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## CALCULATION OF SPACE (area in sqm)



 BGF	985.819 m <sup>2</sup>	98.65%
 NGF	296 m <sup>2</sup>	0.03%
 GIF	13.190 m <sup>2</sup>	1.32%
 Others	0 m <sup>2</sup>	0%

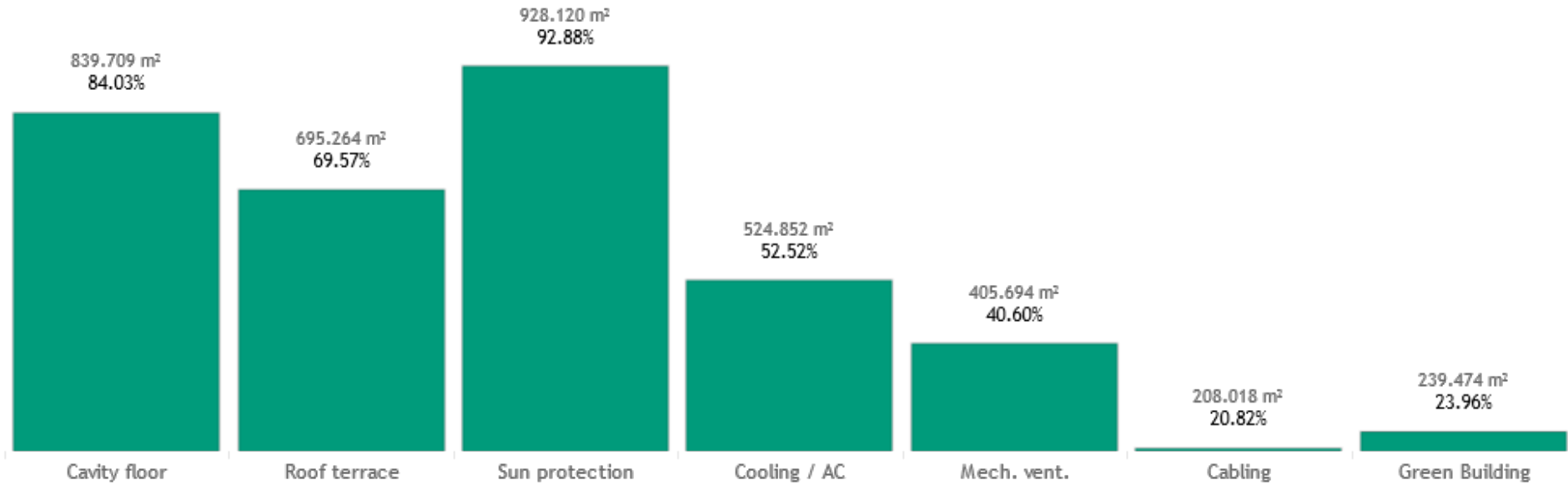
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## DATA AND FIT-OUT FEATURES (area in sqm)



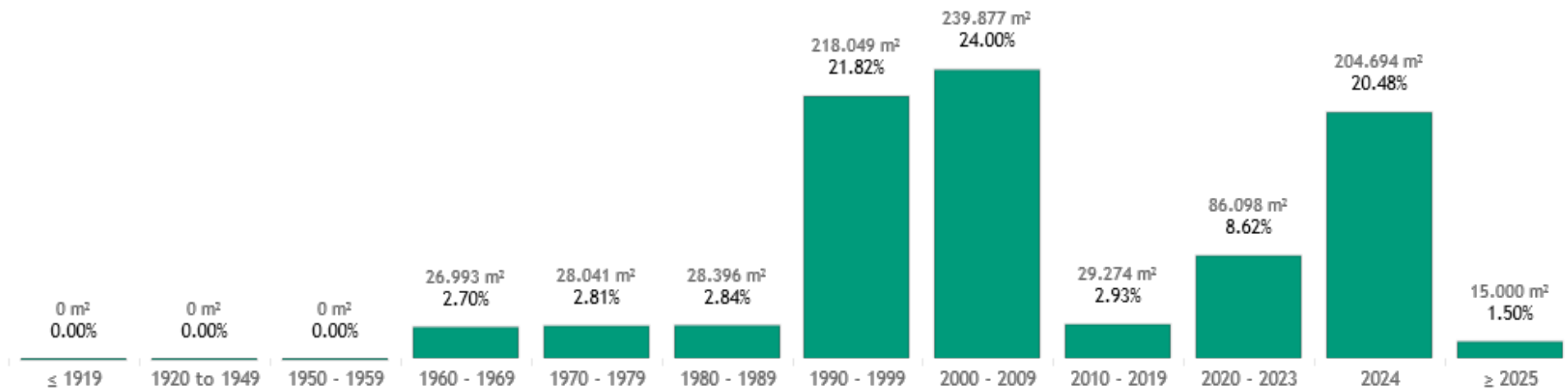
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## YEAR OF CONSTRUCTION (area in sqm)



**Contact partner: Antonia Schmidt**

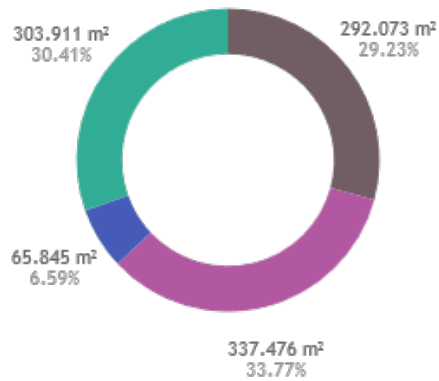
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## DISTANCE S-RAILWAY CONNECTION (area in sqm)



■ ≤ 0,50 km	292.073 m <sup>2</sup>	29.23%
■ 0,51 - 1,0 km	337.476 m <sup>2</sup>	33.77%
■ 1,01 - 1,5 km	65.845 m <sup>2</sup>	6.59%
■ > 1,5 km	303.911 m <sup>2</sup>	30.41%

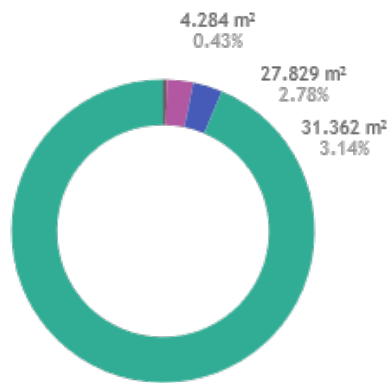
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## DISTANCE UNDERGROUND RAILWAY CONNECTION (area in sqm)



 <= 0,50 km	4.284 m <sup>2</sup>	0.43%
 0,51 - 1,0 km	27.829 m <sup>2</sup>	2.78%
 1,01 - 1,5 km	31.362 m <sup>2</sup>	3.14%
 > 1,5 km	935.830 m <sup>2</sup>	93.65%

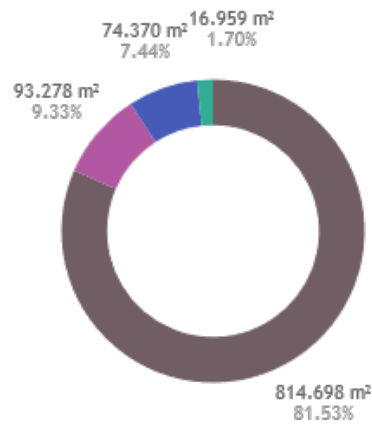
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## DISTANCE CAFÉS AND RESTAURANTS (area in sqm)



 <= 0,50 km	814.698 m <sup>2</sup>	81.53%
 0,51 - 1,0 km	93.278 m <sup>2</sup>	9.33%
 1,01 - 1,5 km	74.370 m <sup>2</sup>	7.44%
 > 1,5 km	16.959 m <sup>2</sup>	1.7%

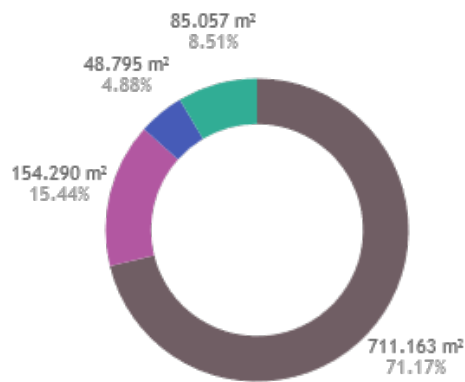
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## DISTANCE HOTELS (area in sqm)



 <= 0,50 km	711.163 m <sup>2</sup>	71.17%
 0,51 - 1,0 km	154.290 m <sup>2</sup>	15.44%
 1,01 - 1,5 km	48.795 m <sup>2</sup>	4.88%
 > 1,5 km	85.057 m <sup>2</sup>	8.51%

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