TOP RETAIL MARKETS

GERMANY

H1 2026

BNP PARIBAS REAL ESTATE

REAL ESTATE FOR A CHANGING WORLD

RETAIL MARKET GERMANY

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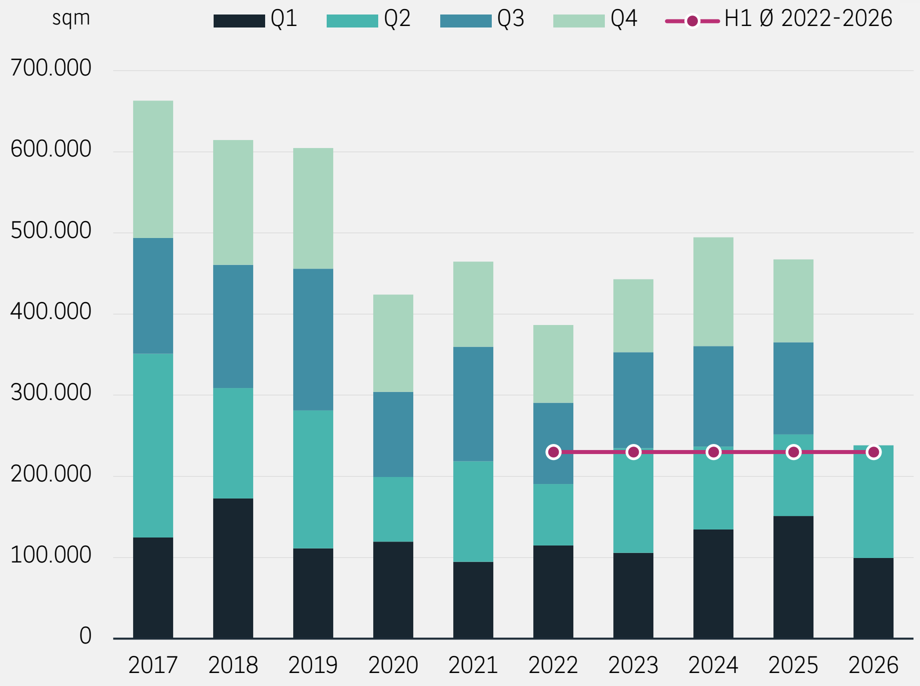
KEY FACTS H1 2026



238,000 sqm
take-up H1 2026

230,000 sqm
Ø 5 years H1

83,000 sqm
A-Cities H1 2026

72,000 sqm
A-Cities Ø 5 years H1

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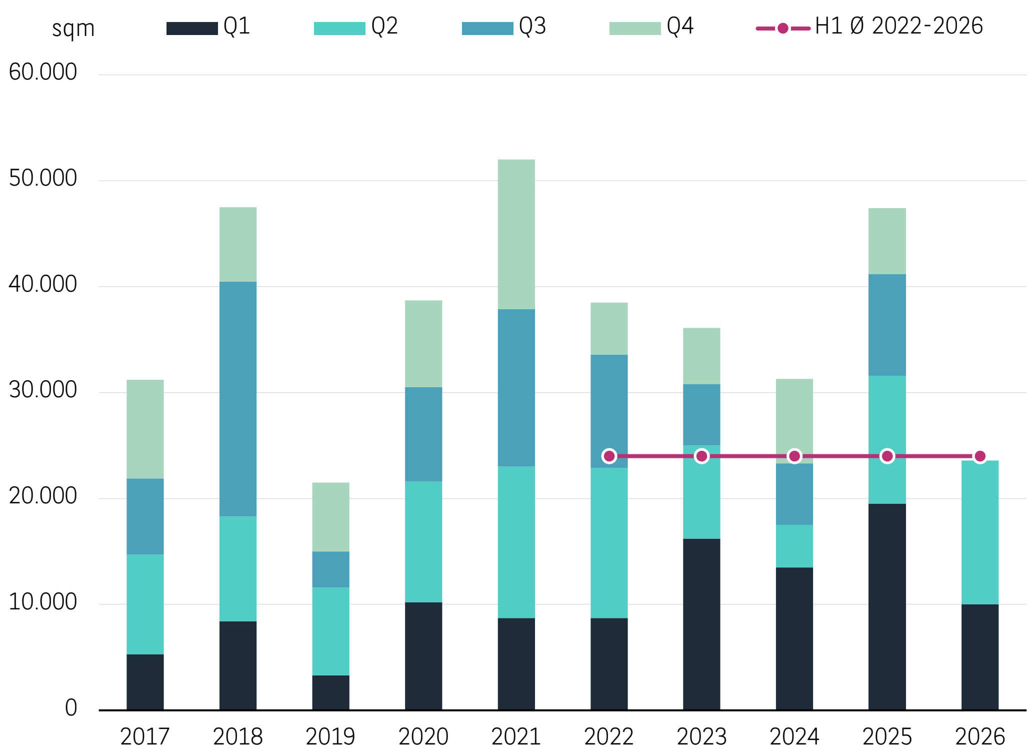
CITIES AT A GLANCE

RETAIL MARKET

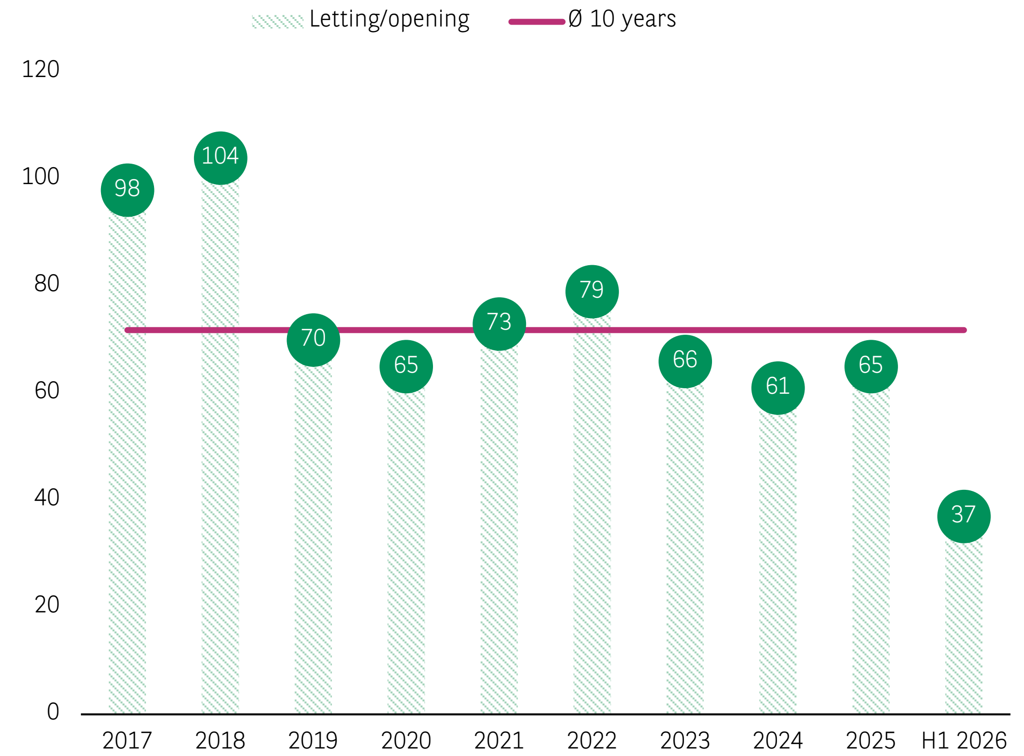
BERLIN

Take-up H1 2026: 24,000 sqm | H1 2025: 32,000 sqm | Ø 5 years 24,000 sqm

Retail take-up in city locations



Number of lettings/openings per year



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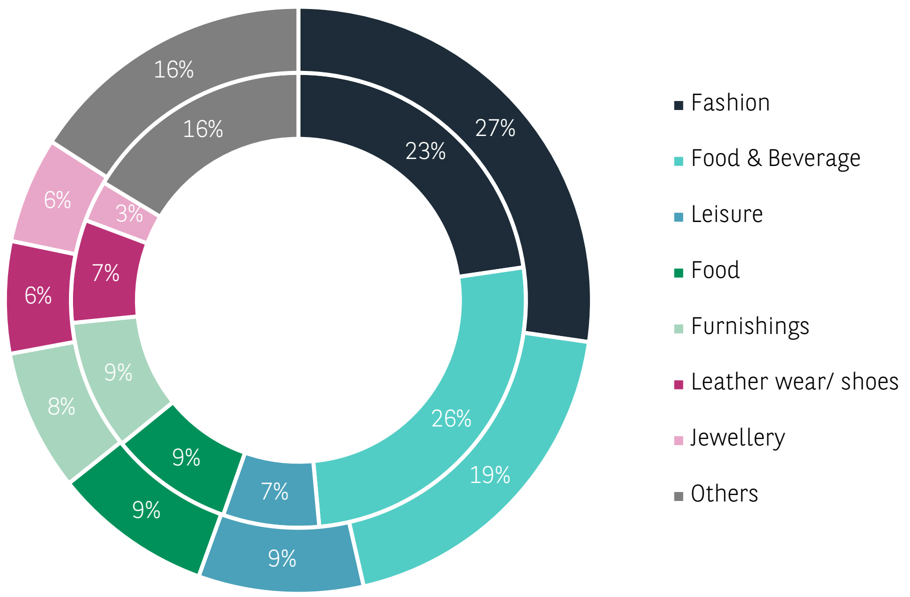
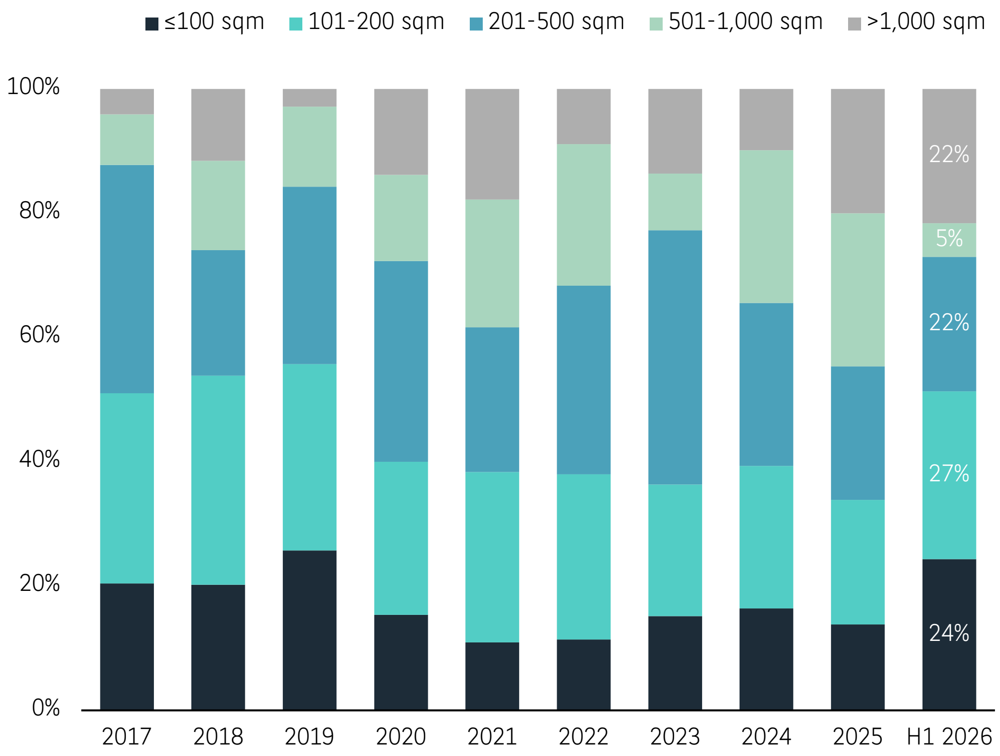
Top sectors last years: Fashion: 27% , Food & Beverage: 19% , Leisure: 9%

Store openings by sector

in %
outer circle = 2022-H1 2026
inner circle = 2017-2021

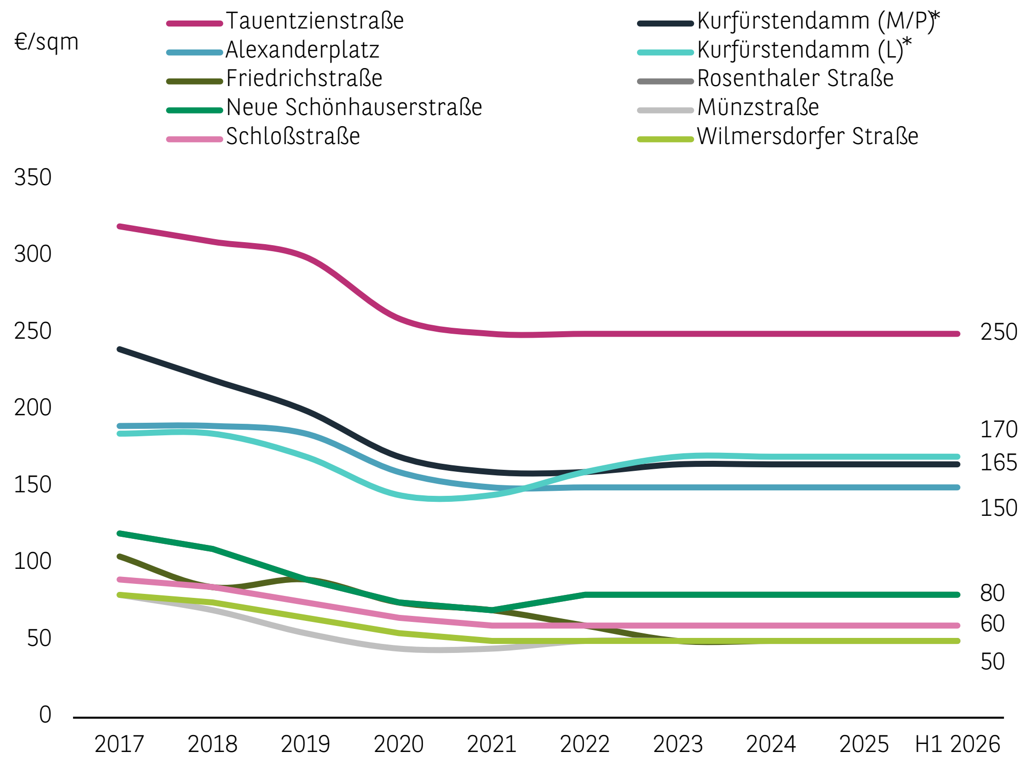


Store openings by size classes

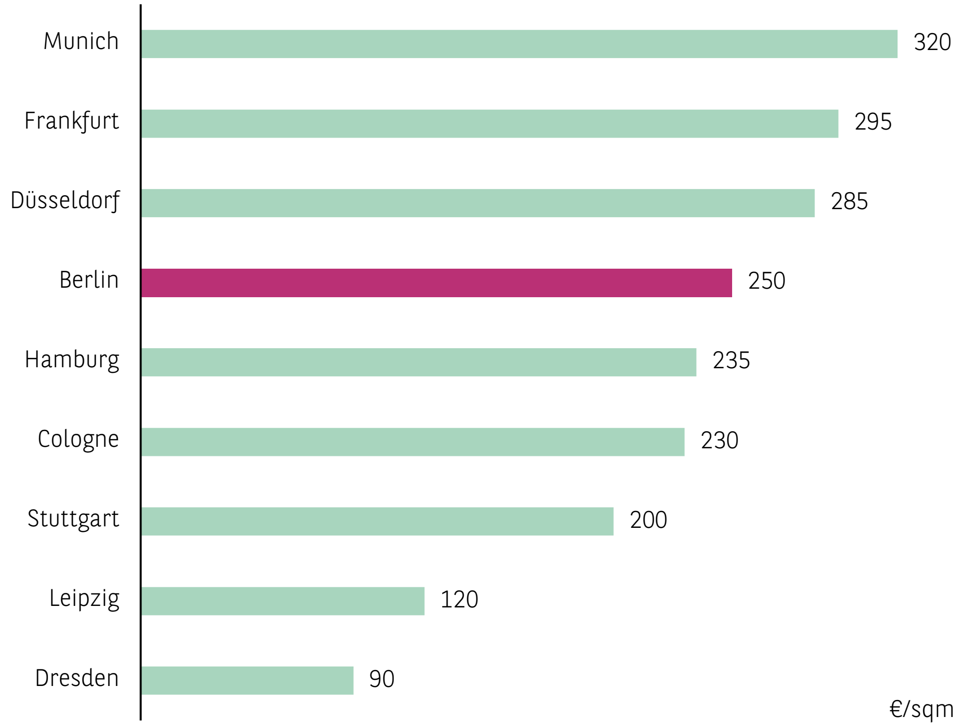


Tauentzienstraße: Prime rent currently at 250 €/sqm

Development of prime rents by location



Prime rents in comparison of major cities



*K/N: Konsum und Niveaubereich des Kudamms | L: Luxusbereich Kudamm

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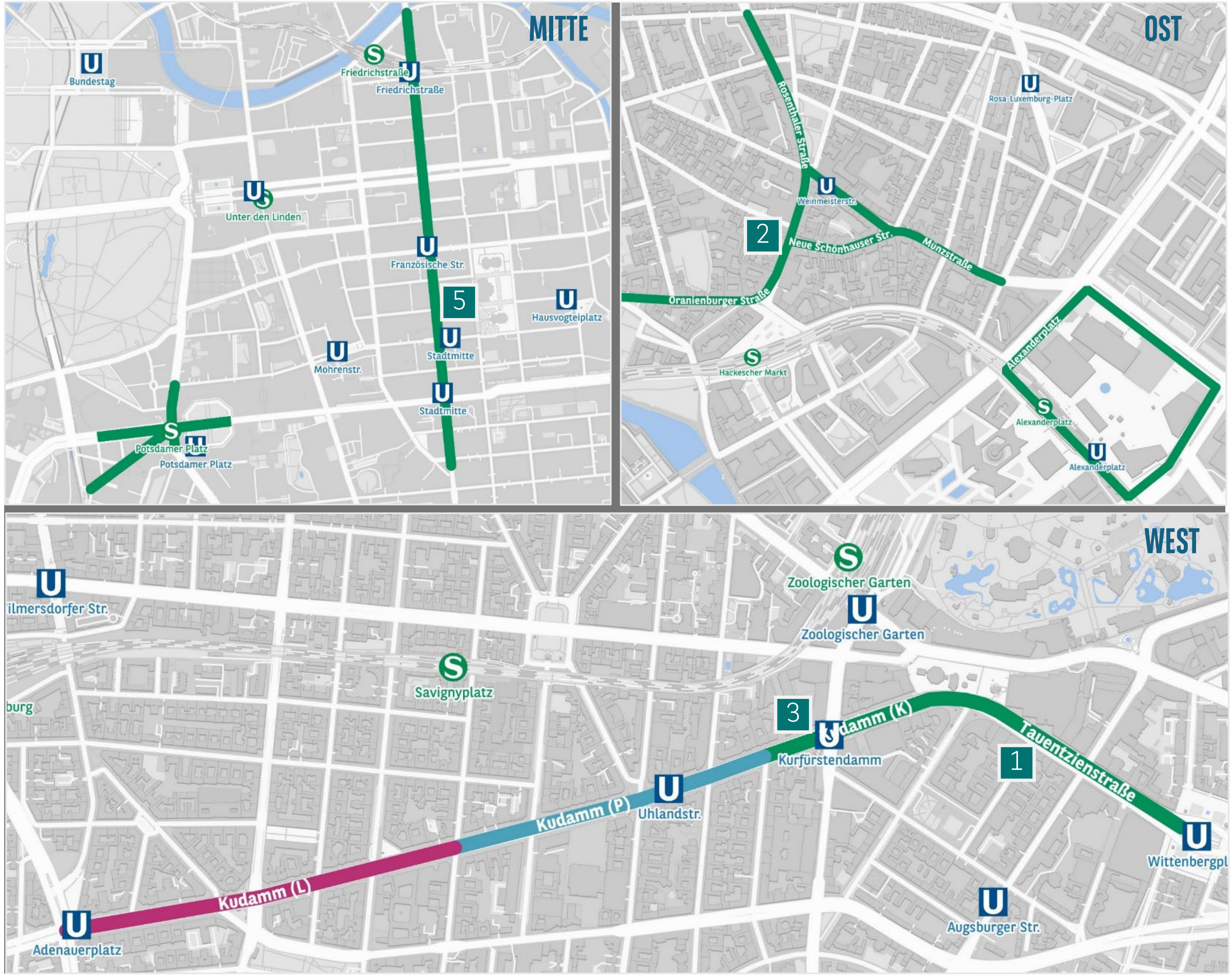
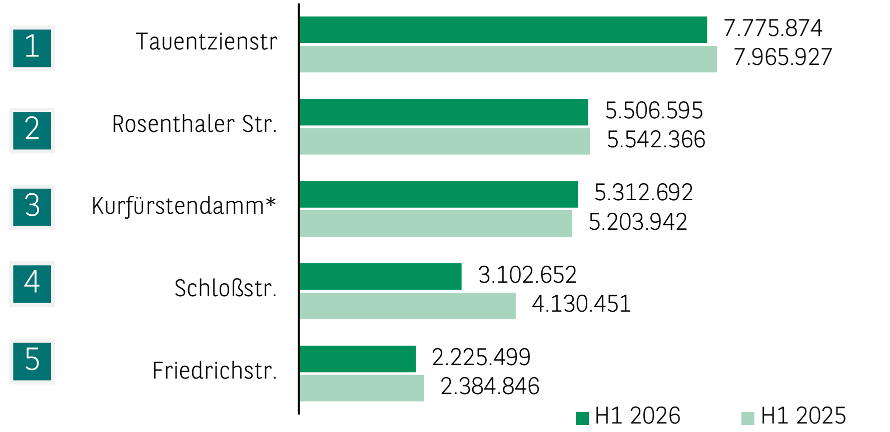
Retail city map

Mass-market location | Premium location | Luxury location

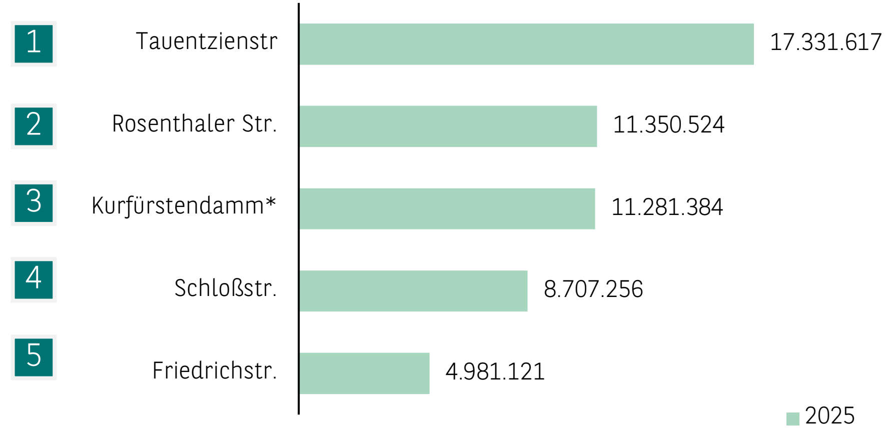


*Kudamm: both sides

Pedestrians per half year



Pedestrians per year

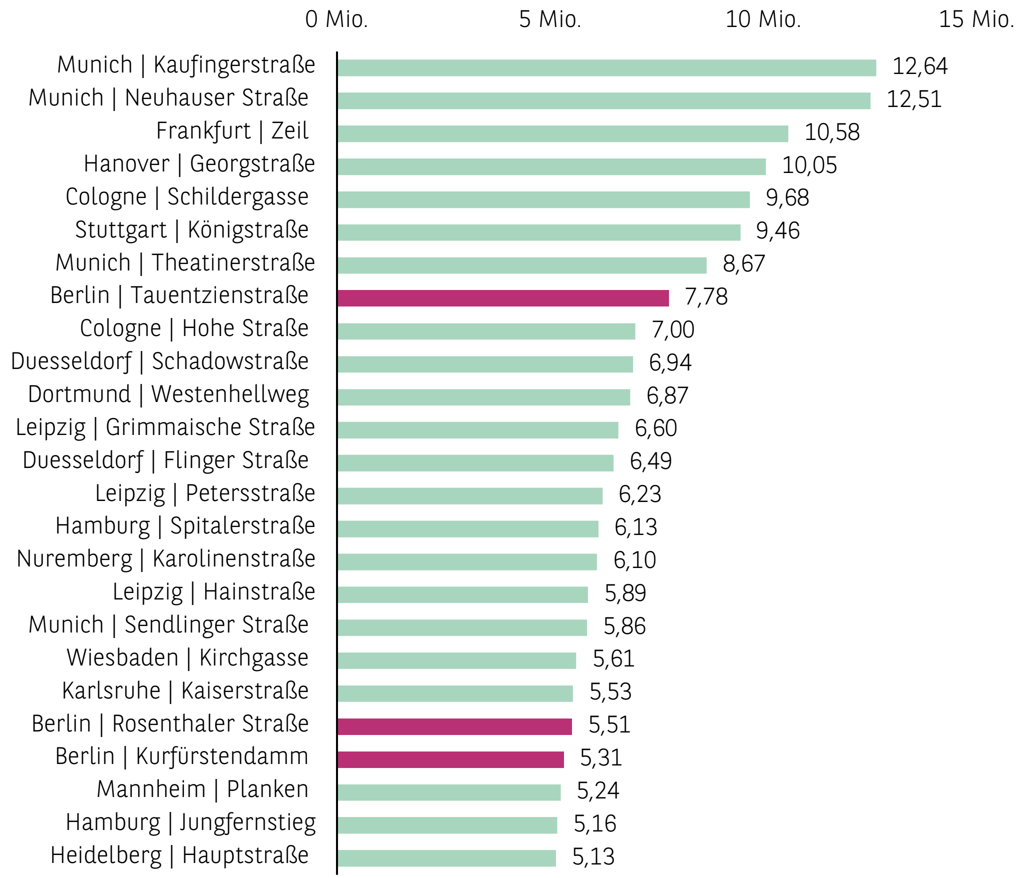


Source: Hystreet.com | Auswertung und Darstellung BNPPRE

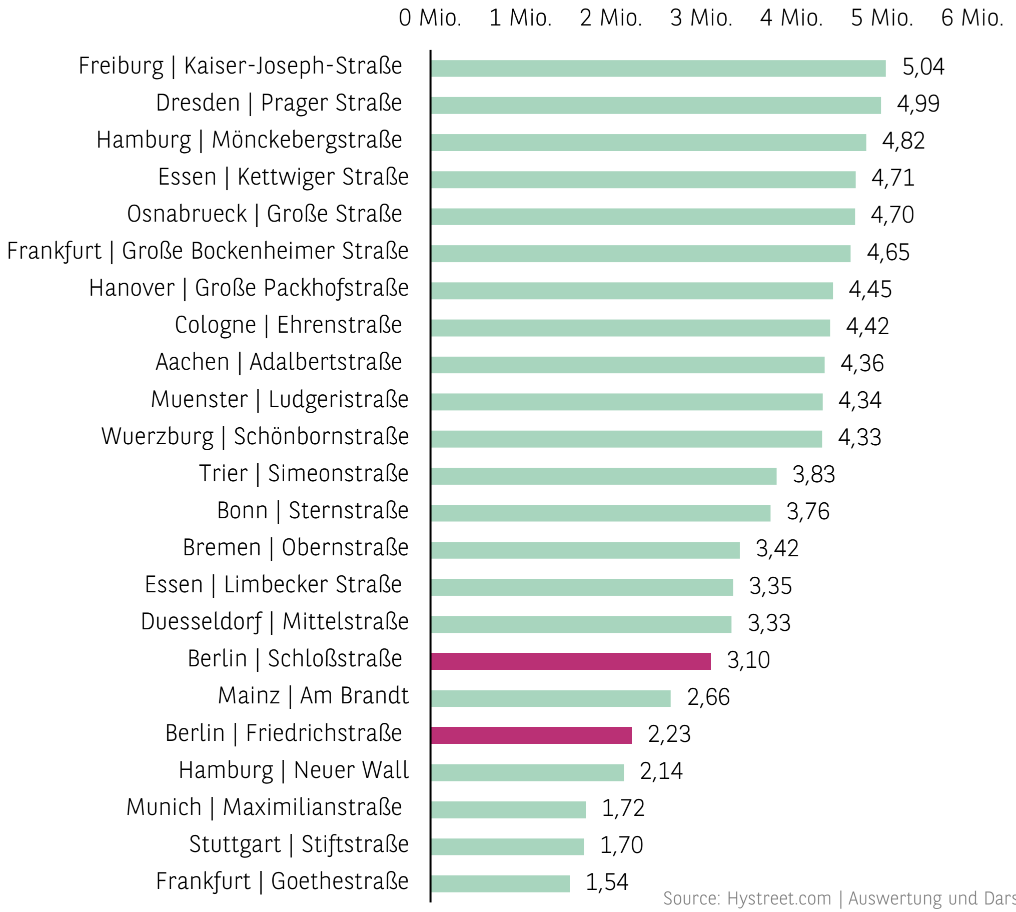
BNP PARIBAS REAL ESTATE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - half year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

BNP PARIBAS
REAL ESTATE

Key Takeaways: Retail market Berlin H1 2026

Take-up and openings:

Berlin remains Germany's leading retail market in terms of take-up, driven by its diverse retail hotspots and extensive shopping centre landscape. With around 24,000 sqm of take-up and nearly 40 lettings/openings in H1 2026, the capital broadly matched its average performance recorded since 2020. The recent lettings of noo.ma, Alo Yoga, Matiere Première and Panos Gotsis further underline Berlin's position at the top of expansion strategies, particularly for brands entering the German market.

Sektor and size classes:

Fashion brands (27%) and food & beverage operators (24%) continue to dominate letting activities in 2026. The average unit size currently stands at around 640 sqm per letting.

Prime rent:

Prime rent on Tauentzienstraße remains stable at €250/sqm

Footfall:

Tauentzienstraße recorded the highest footfall in Berlin (7.78 million visitors in H1 2026), ranking 8th nationwide

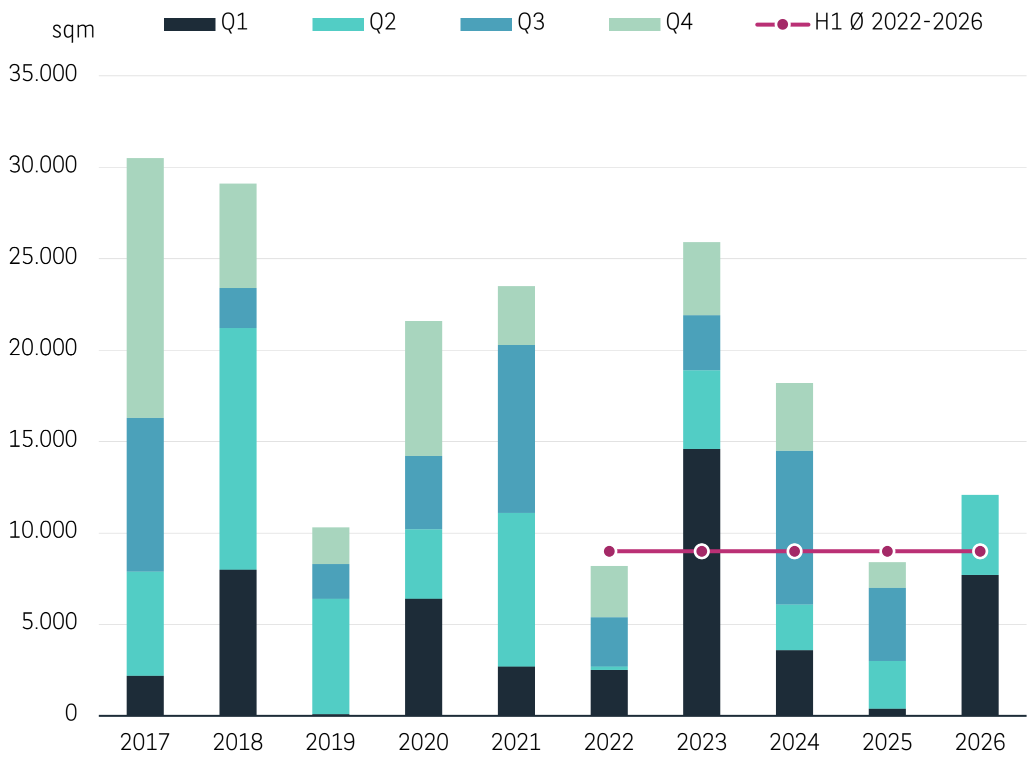
Bild © AdobeStock 251198552

Source: BNPPRE; Hystreet.com

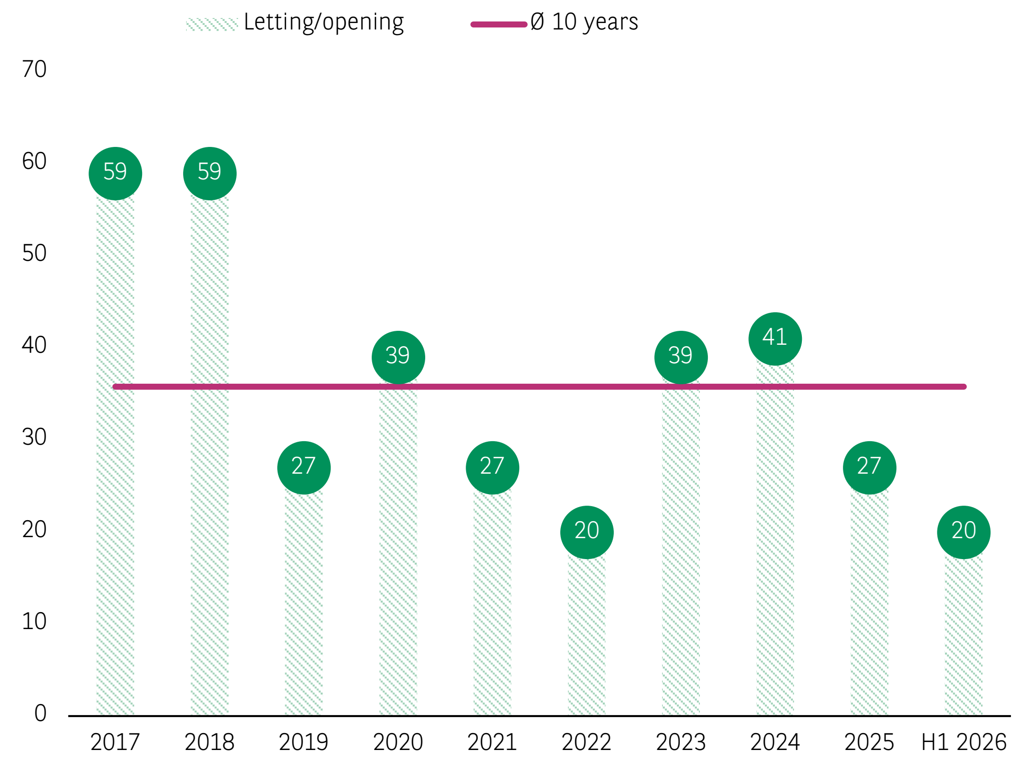
RETAIL MARKET
DUESSELDORF

Take-up H1 2026: 12,000 sqm | H1 2025: 3,000 sqm | Ø 5 years 9,000 sqm

Retail take-up in city locations



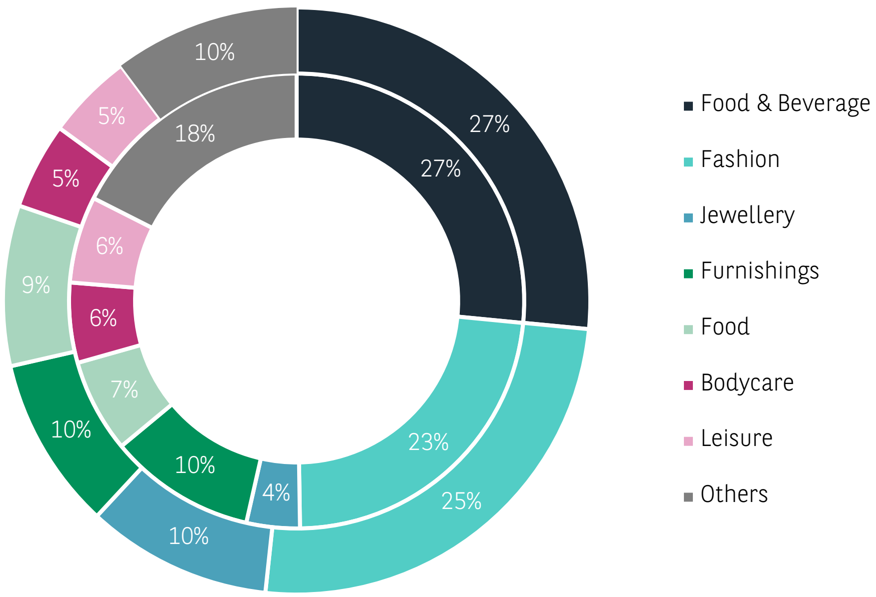
Number of lettings/openings per year



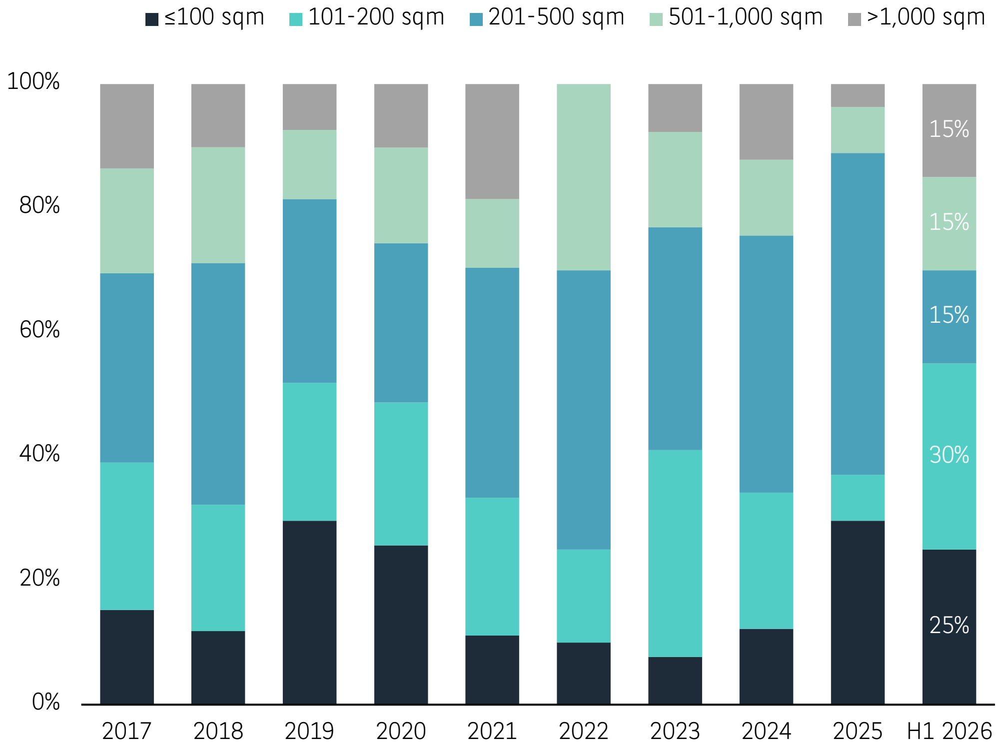
Top sectors last years: Food & Beverage: 27% , Fashion: 25% , Jewelry: 10%

Store openings by sector

in %
outer circle = 2022-H1 2026
inner circle = 2017-2021

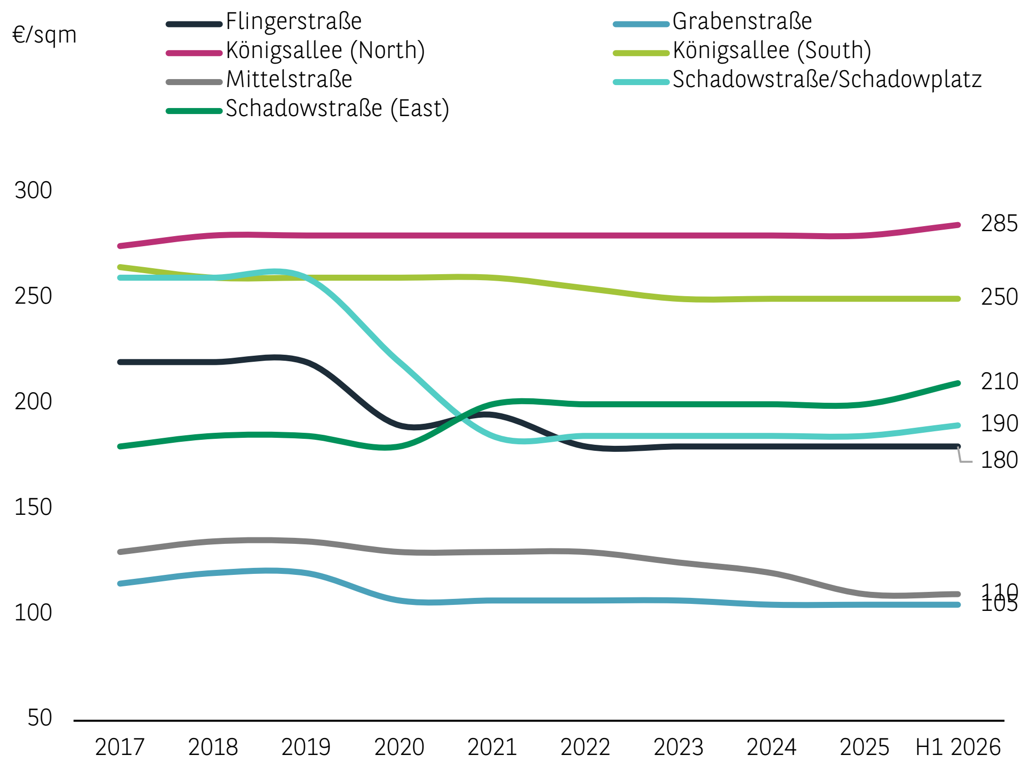


Store openings by size classes

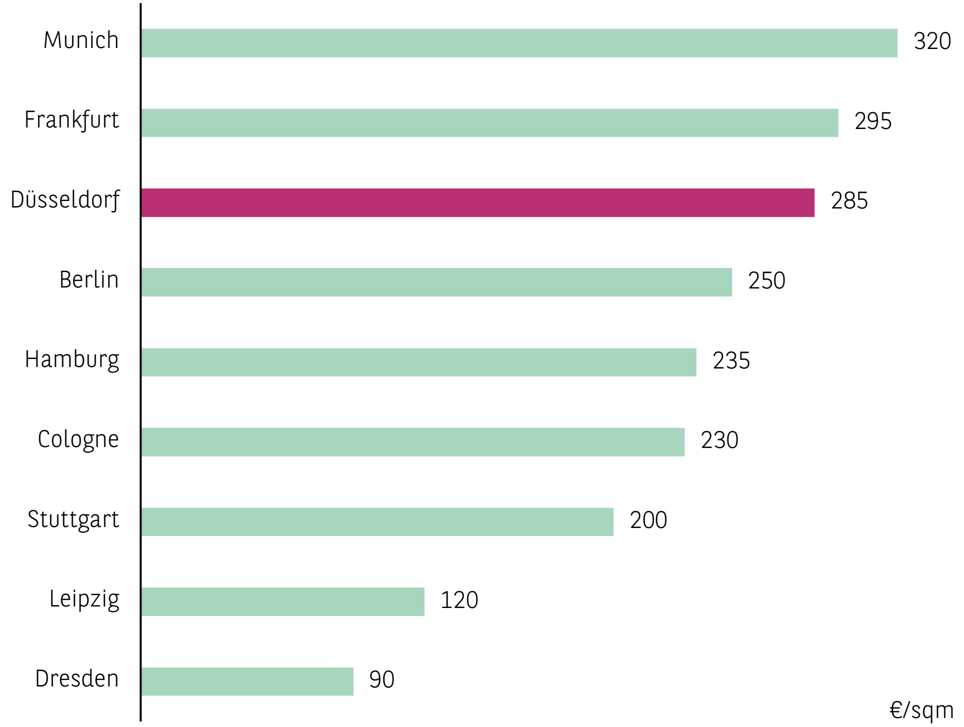


Königsallee: Prime rent currently at 285 €/sqm

Development of prime rents by location



Prime rents in comparison of major cities



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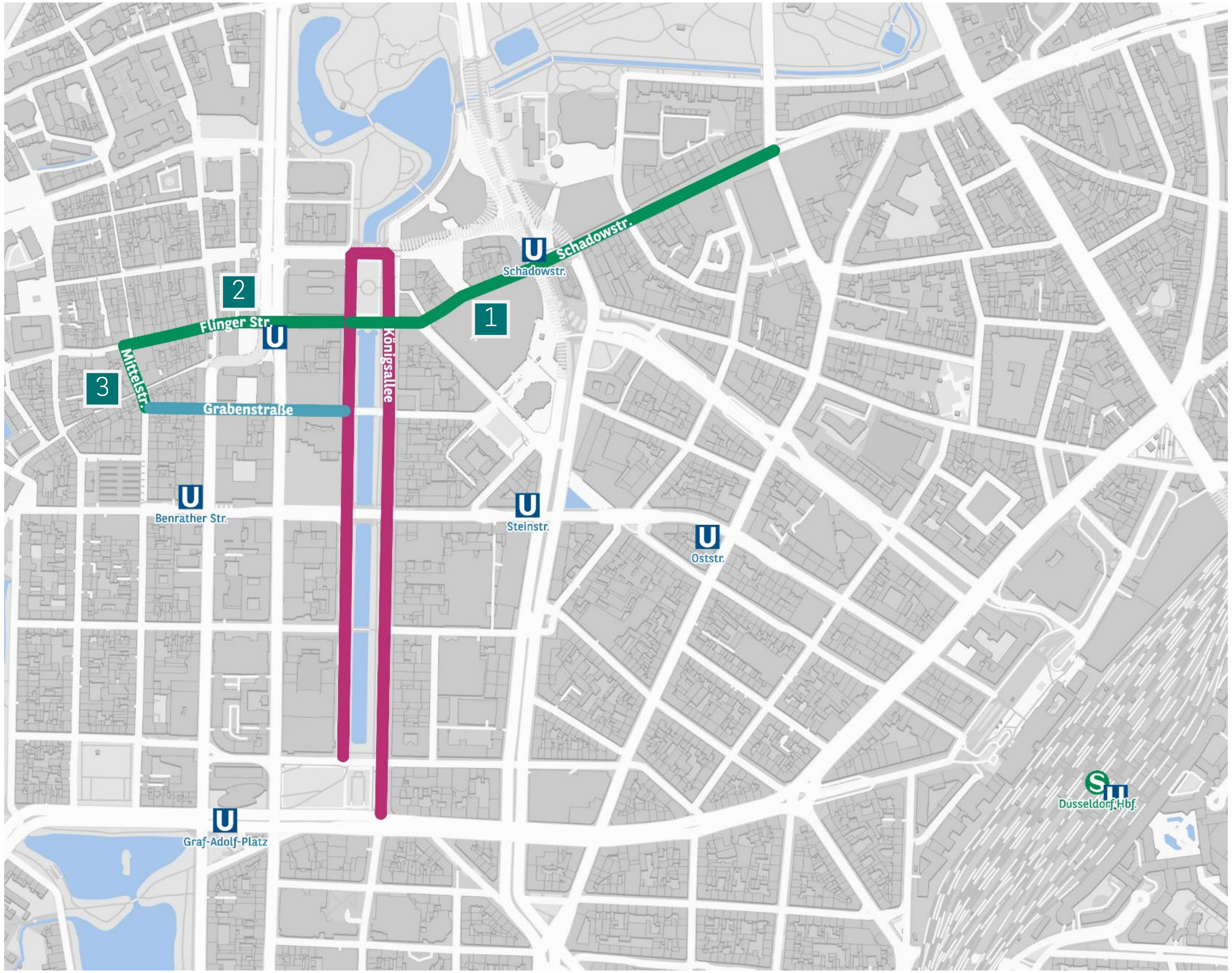
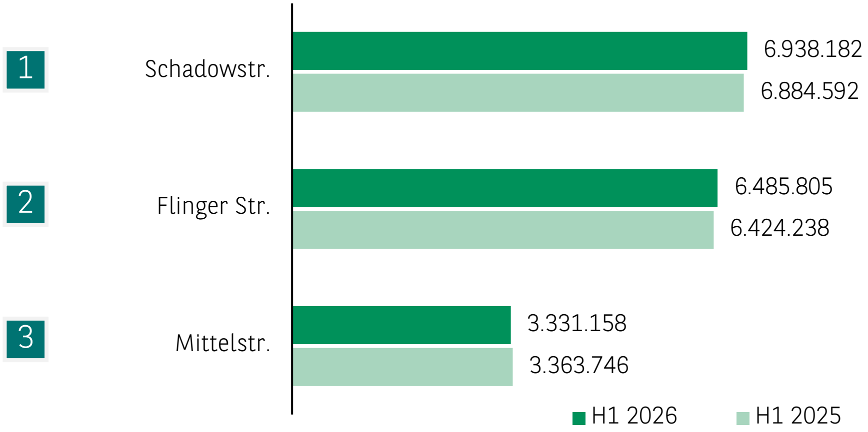
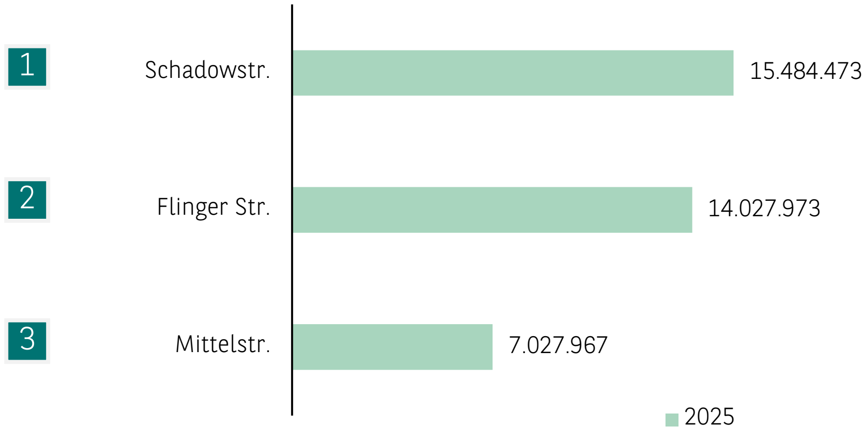
Retail city map



Pedestrians per half year



Pedestrians per year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

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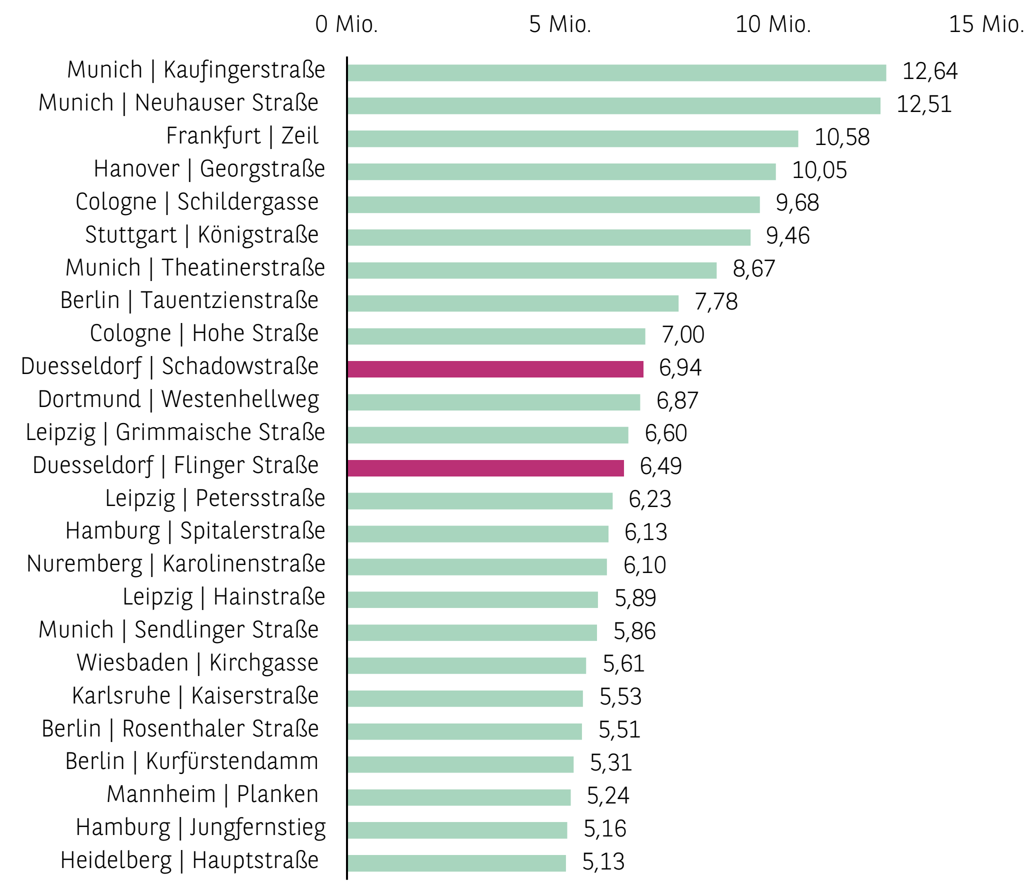
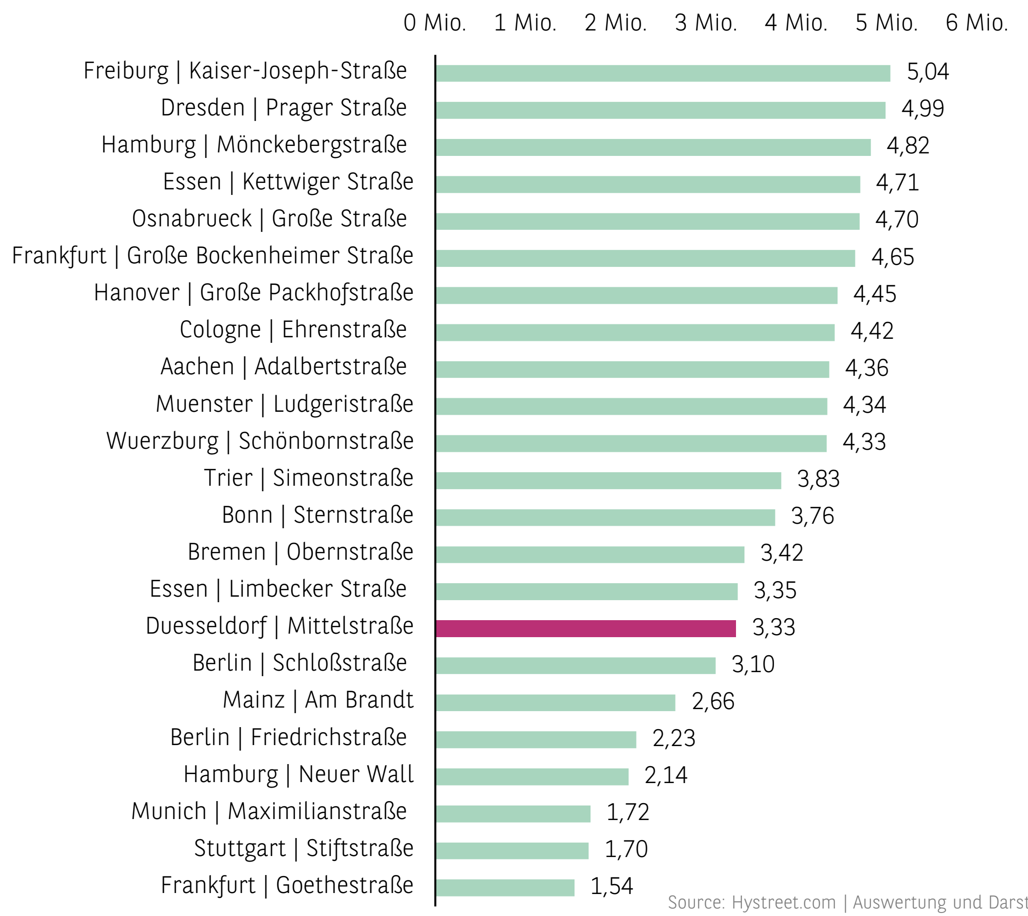
Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - hald year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

BNP PARIBAS REAL ESTATE

Key Takeaways: Retail market Duesseldorf H1 2026

Take-up and openings:

Düsseldorf recorded a take-up of around 12,000 sqm in H1 2026, outperforming its long-term average of 9,000 sqm. Prominent lettings by Lefties (4,600 sqm), Stradivarius (1,500 sqm), Alo Yoga (1,500 sqm) and Abercrombie & Fitch (800 sqm) demonstrate that the NRW capital remains firmly on the radar of expanding retail brands.

Sektor and size classes:

Fashion brands once again dominated letting activity in 2026, accounting for 35% of all deals recorded year-to-date. Beauty retailers also made a notable contribution (15%), with brands such as Skins Cosmetics, L'Occitane and The Body Shop among the most active occupiers. The average unit size currently stands at approximately 610 sqm per letting.

Prime rent:

Prime rents on Königsallee (€285/sqm) and Schadowstraße (€190/sqm) increased slightly

Footfall:

Schadowstraße records the highest footfall in Düsseldorf (6.94 million visitors), ranking 10th nationwide

Source: BNPPRE; Hystreet.com

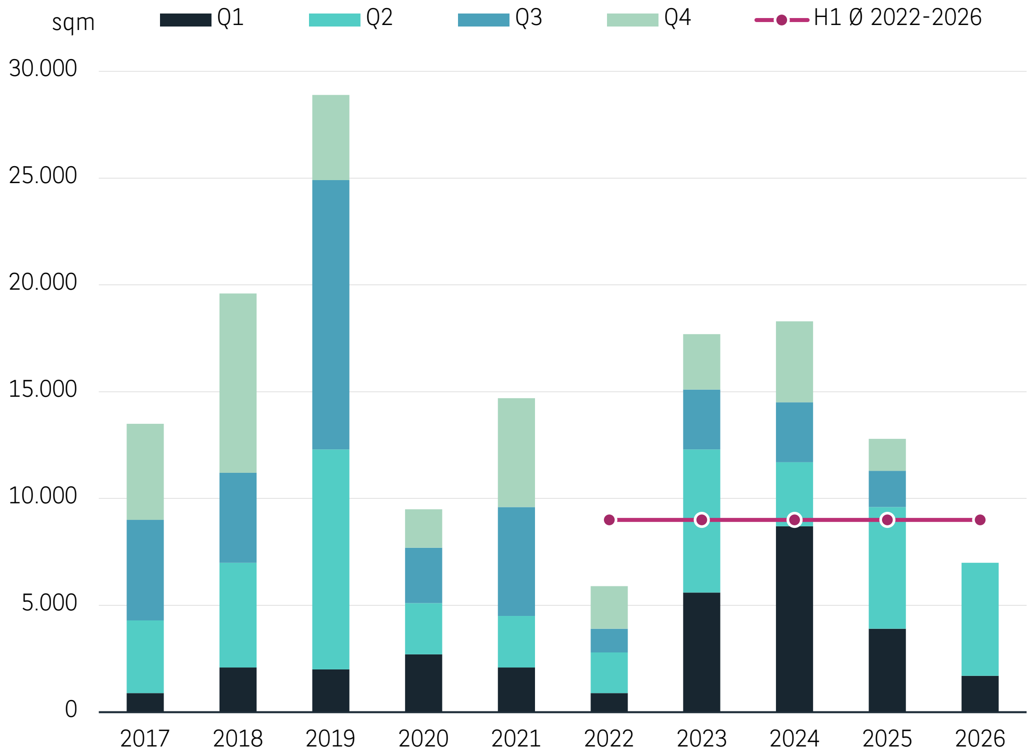
BNP PARIBAS REAL ESTATE

RETAIL MARKET

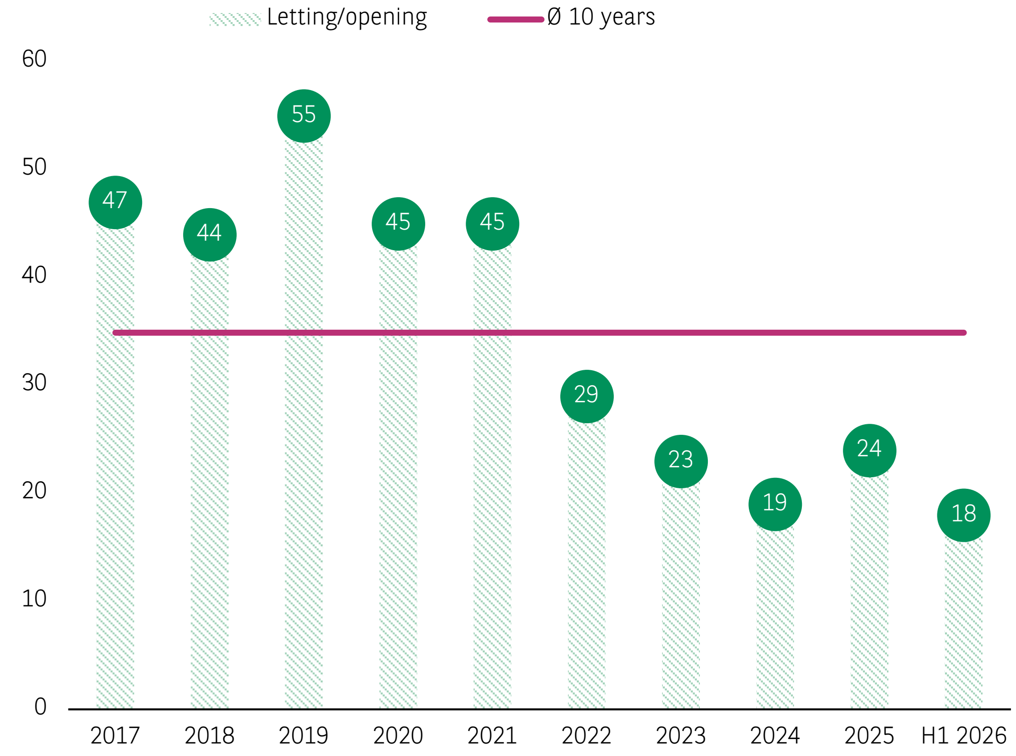
FRANKFURT

Take-up H1 2026: 7,000 sqm | H1 2025: 10,000 sqm | Ø 5 years 9,000 sqm

Retail take-up in city locations



Number of lettings/openings per year



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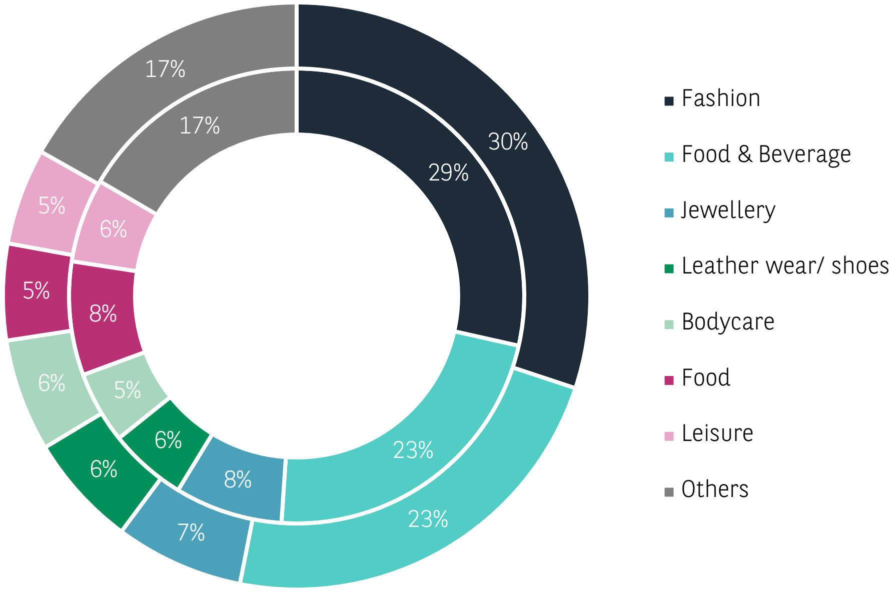
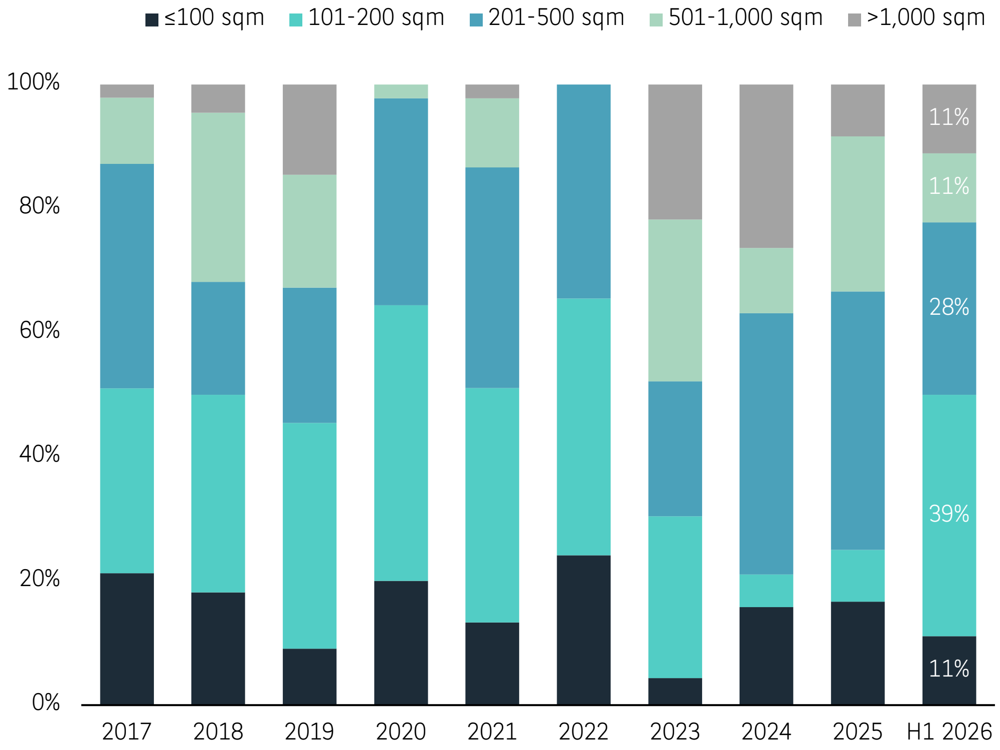
Top sectors last years: Fashion: 30% , Food & Beverage: 23% , Jewelry: 7%

Store openings by sector

in %
outer circle = 2022-H1 2026
inner circle = 2017-2021

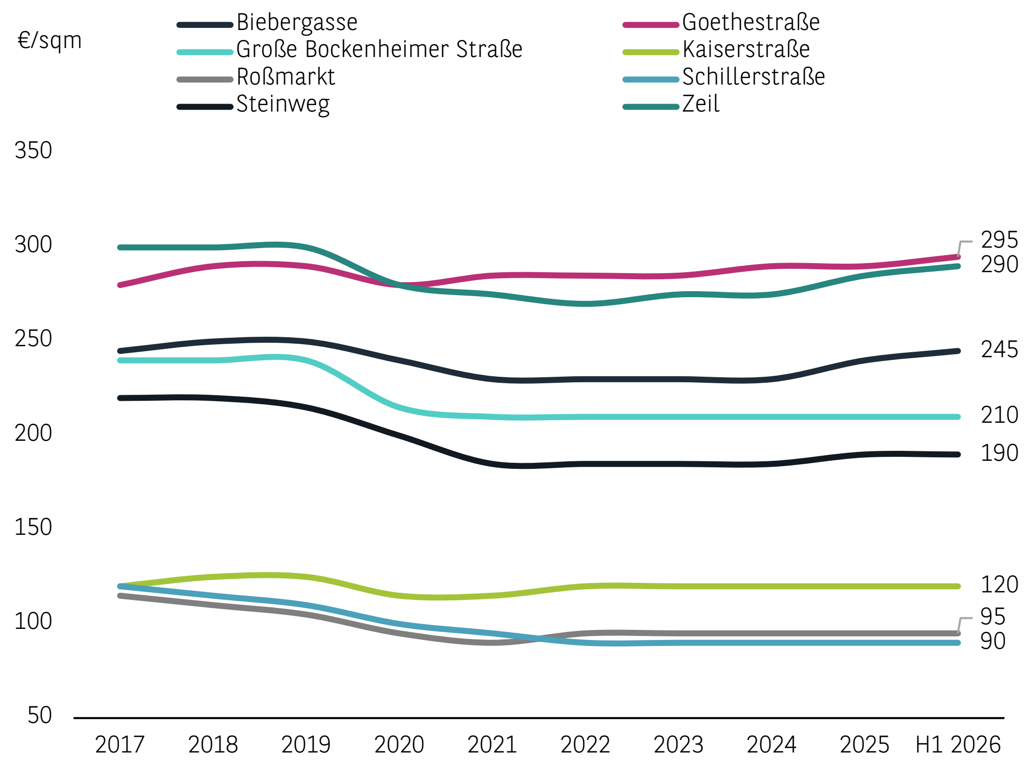


Store openings by size classes

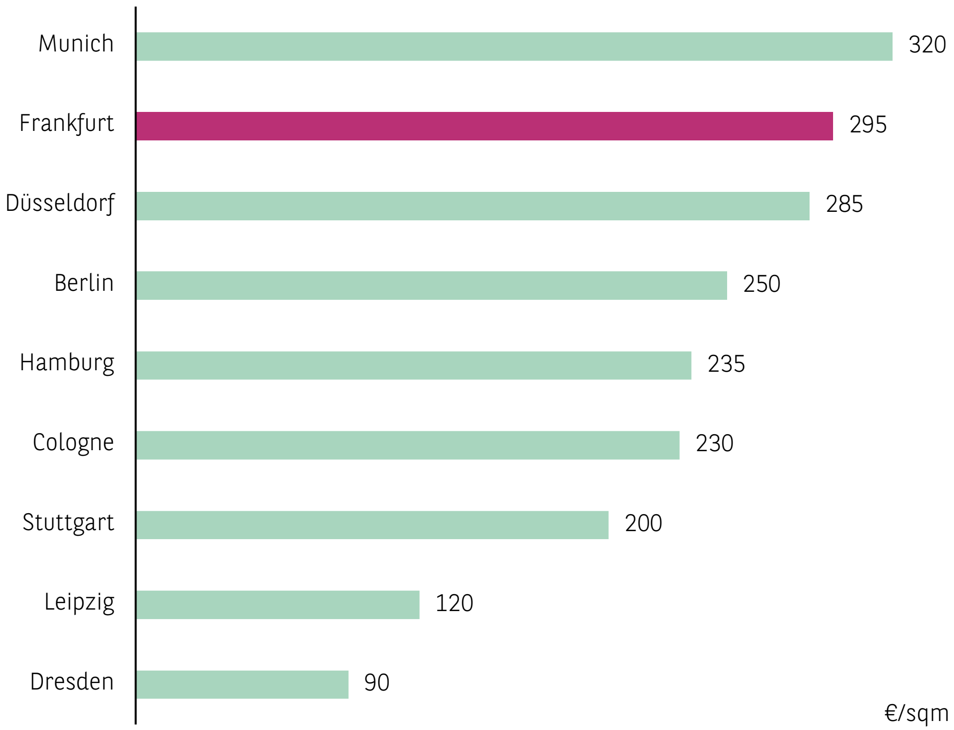


Prime rent on Goethestraße currently at 295 €/sqm and 290 €/sqm on Zeil

Development of prime rents by location

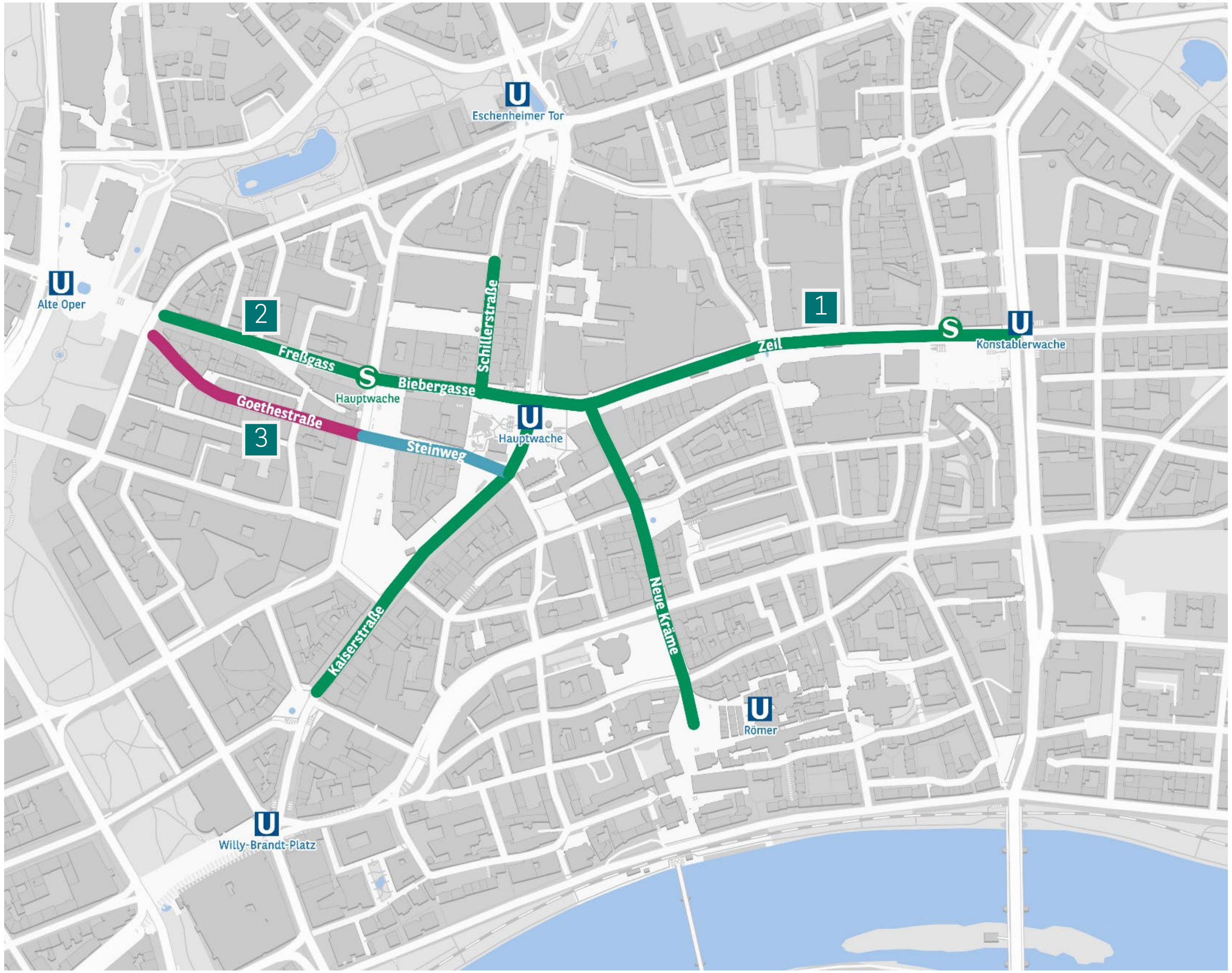


Prime rents in comparison of major cities

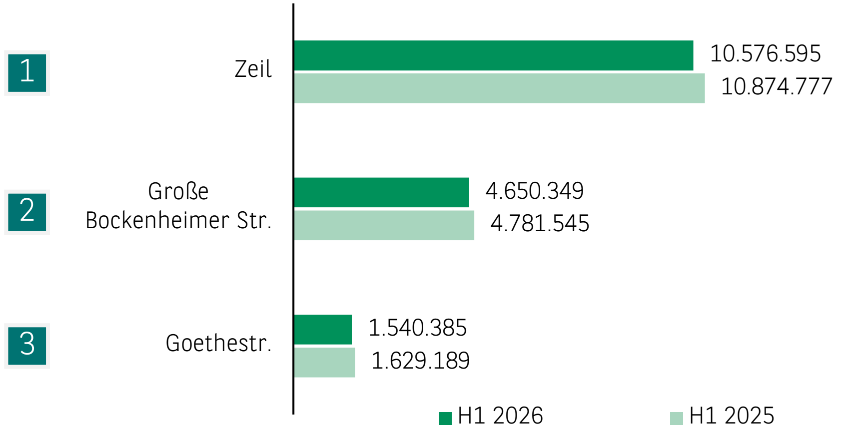


Retail city map

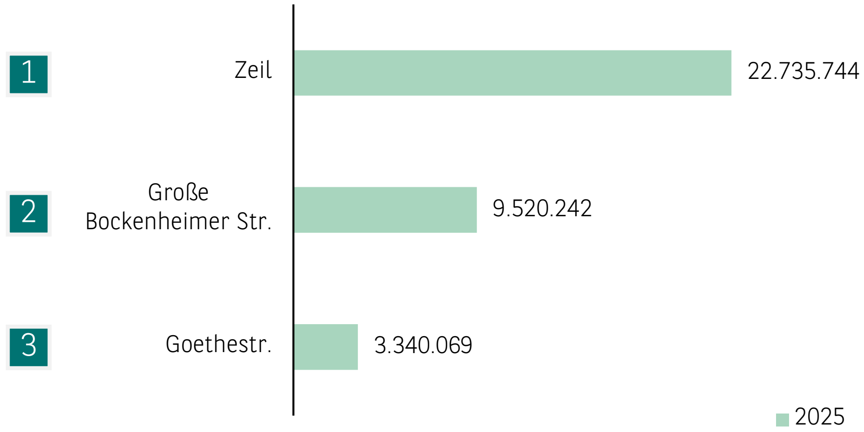
Mass-market location | Premium location | Luxury location



Pedestrians per half year



Pedestrians per year

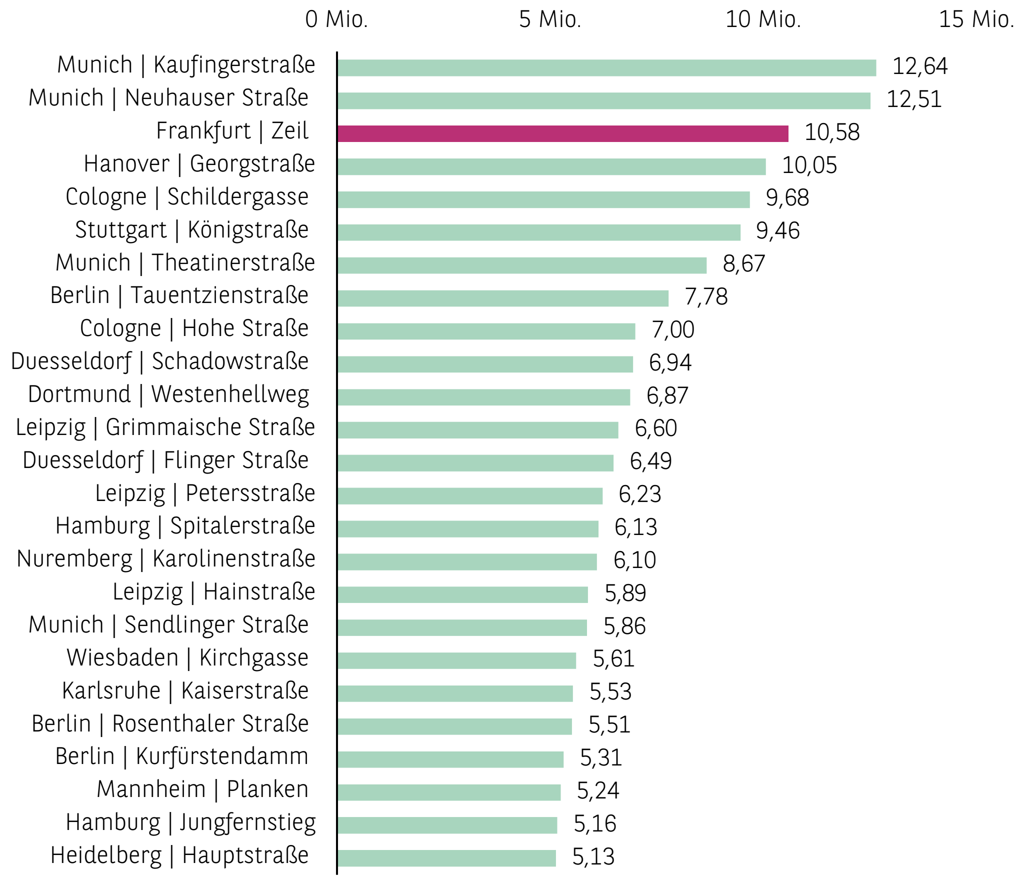


Source: Hystreet.com | Auswertung und Darstellung BNPPRE

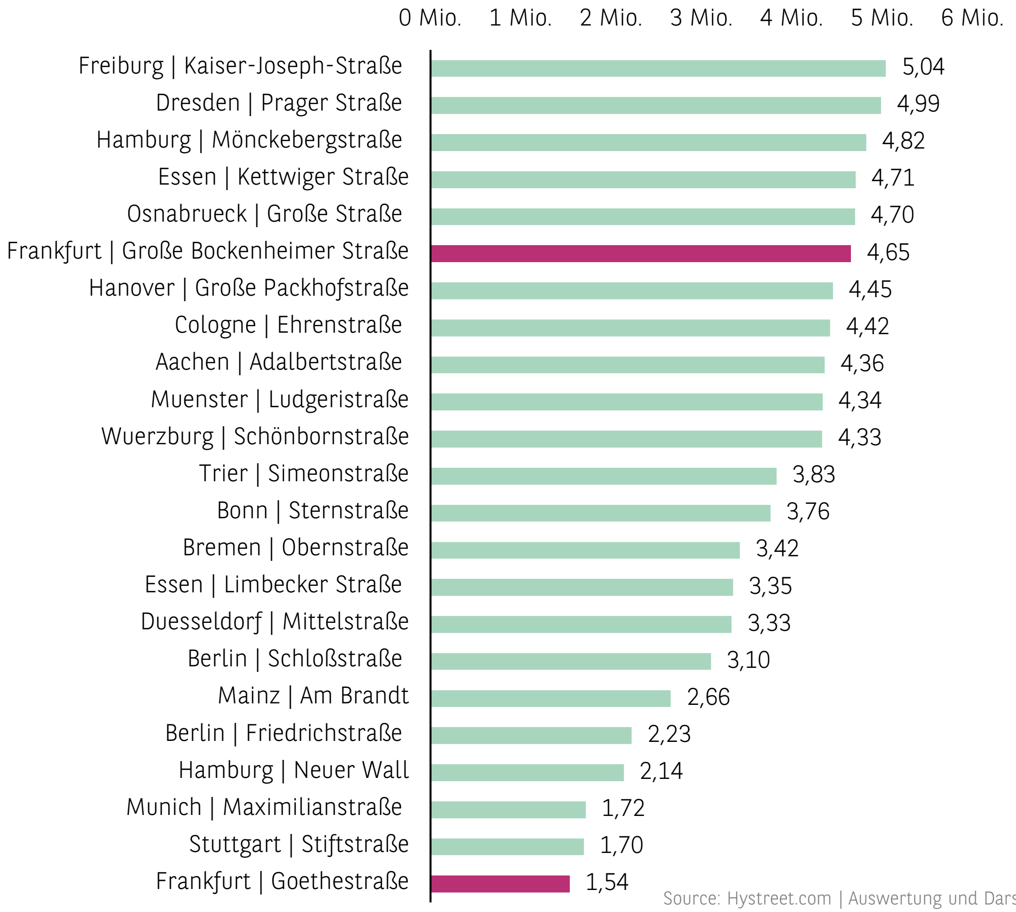
BNP PARIBAS REAL ESTATE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - half year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

BNP PARIBAS
REAL ESTATE

Key Takeaways: Retail market Frankfurt H1 2026

Take-up and openings:

Frankfurt's retail market recorded a take-up of around 7,000 sqm in H1 2026, broadly in line with its long-term average (H1 2020–2026: 7,600 sqm). With nearly 20 lettings completed, letting activities in the city centre remained dynamic. In particular, several deals on Goethestraße highlight continued momentum in the luxury segment, which remains a key pillar of Frankfurt's retail market.

Sektor and size classes:

Fashion brands once again led leasing activity in H1 2026, accounting for 33% of all deals, followed by food & beverage operators (22%). The average deal size currently stands at approximately 390 sqm per letting.

Prime rent:

Slight rental growth on Zeil (€290/sqm) and Goethestraße (€295/sqm)

Footfall:

Zeil records the highest footfall in Frankfurt (10.58 million visitors), maintaining a top-five position nationwide (rank 3)

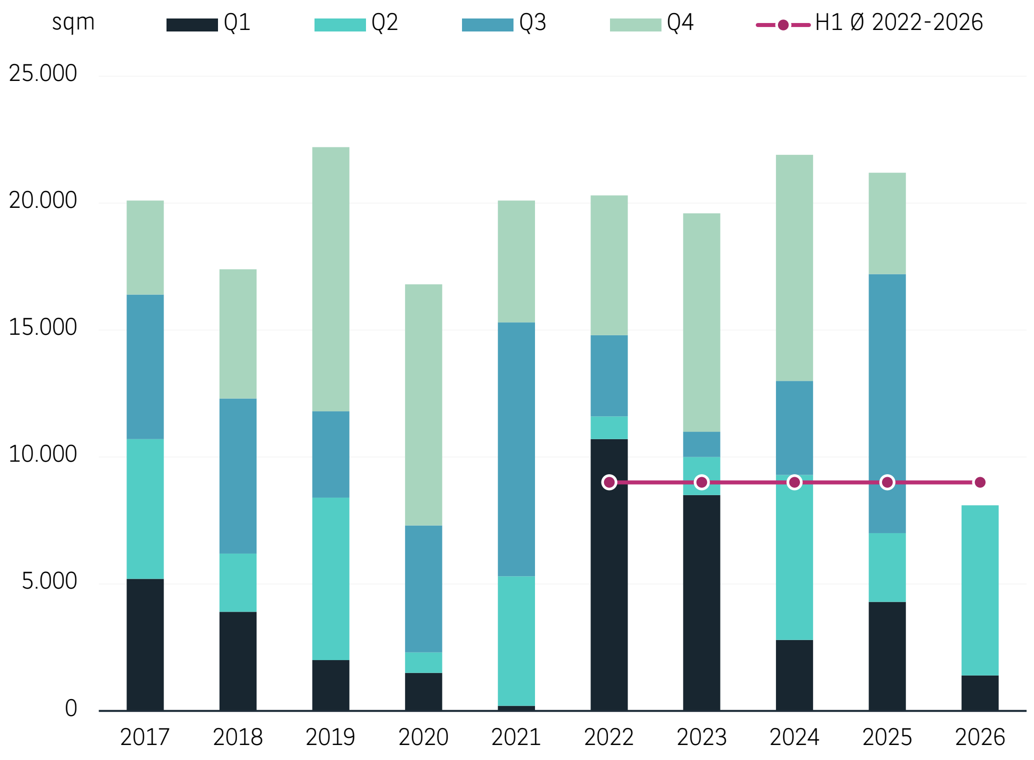
Source: BNPPRE; Hystreet.com

RETAIL MARKET

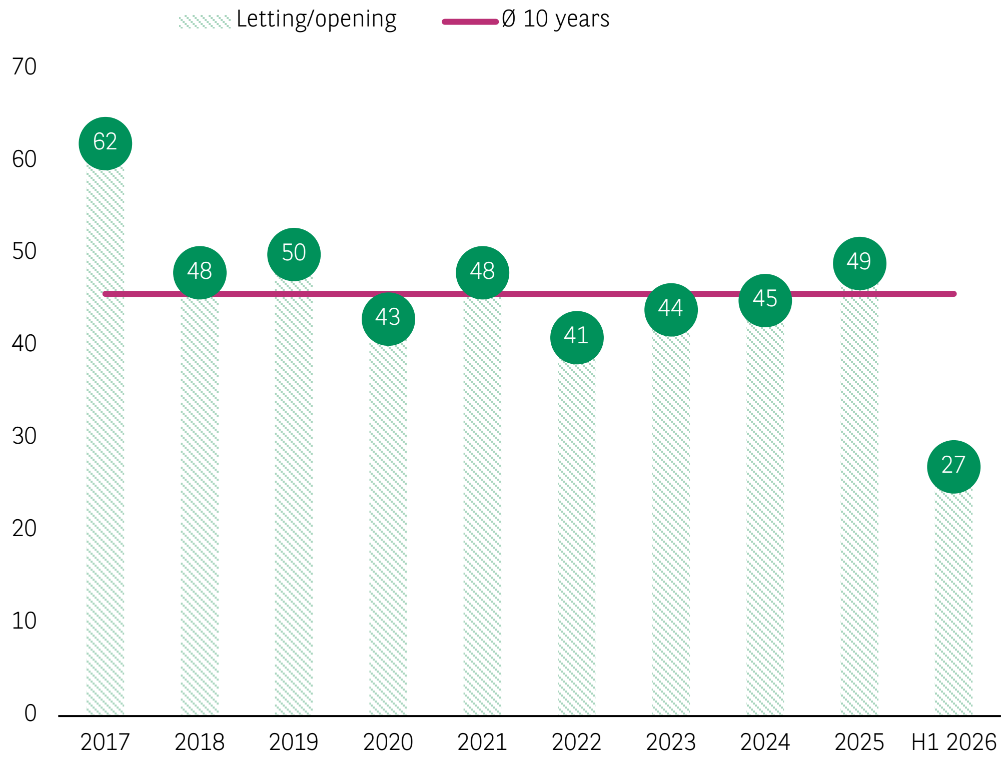
HAMBURG

Take-up H1 2026: 8,000 sqm | H1 2025: 7,000 sqm | Ø 5 years 9,000 sqm

Retail take-up in city locations



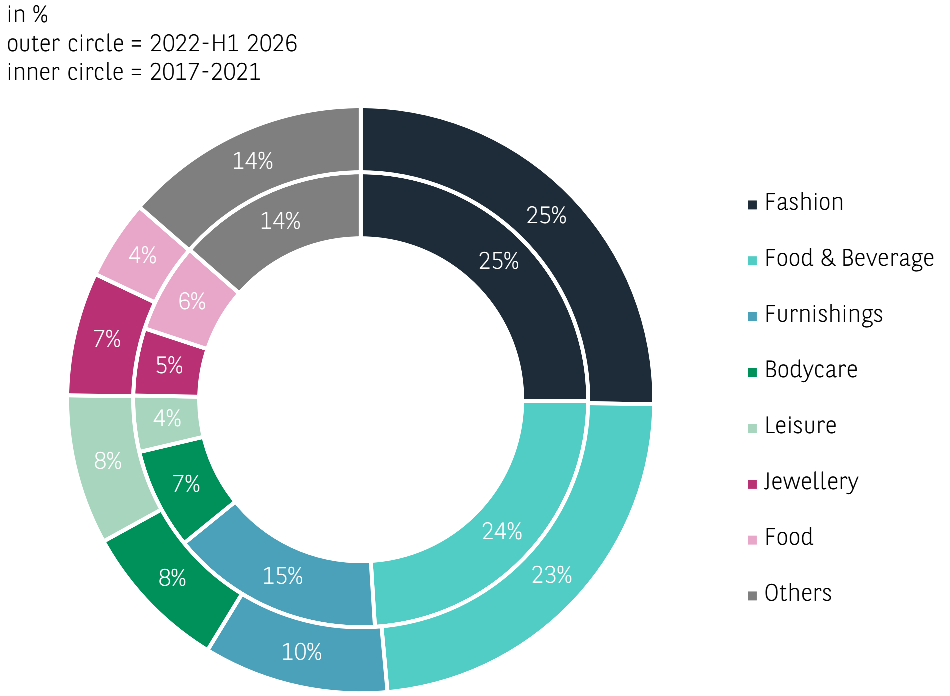
Number of lettings/openings per year



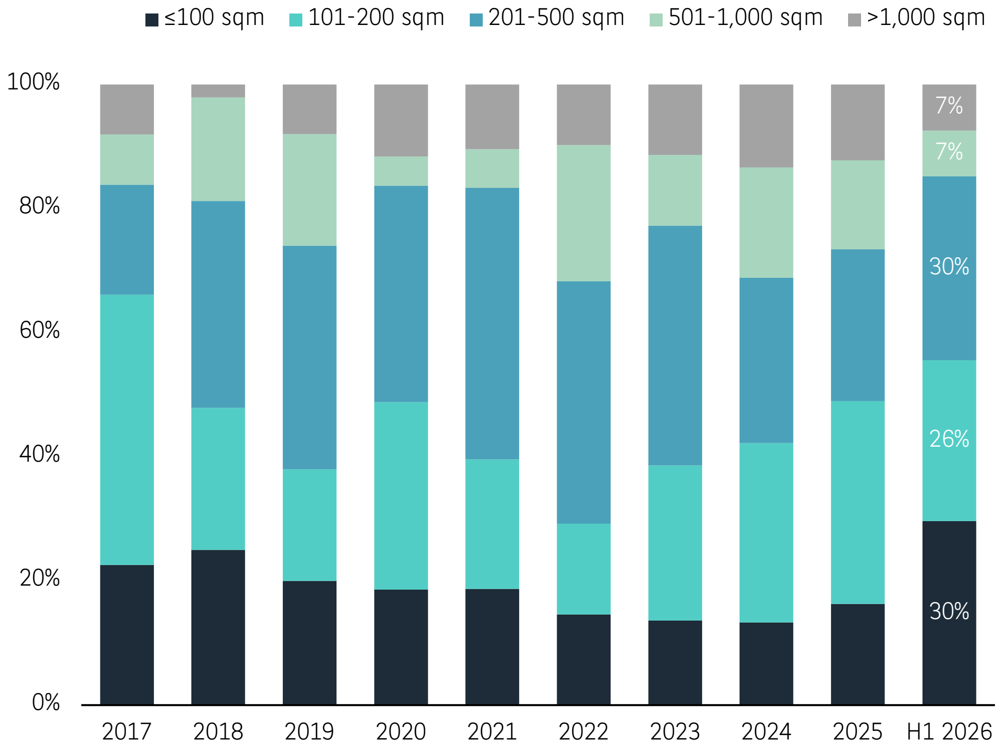
Top sectors last years: Fashion: 25% , Food & Beverage: 23% , Furnishings: 10%

HAMBURG

Store openings by sector

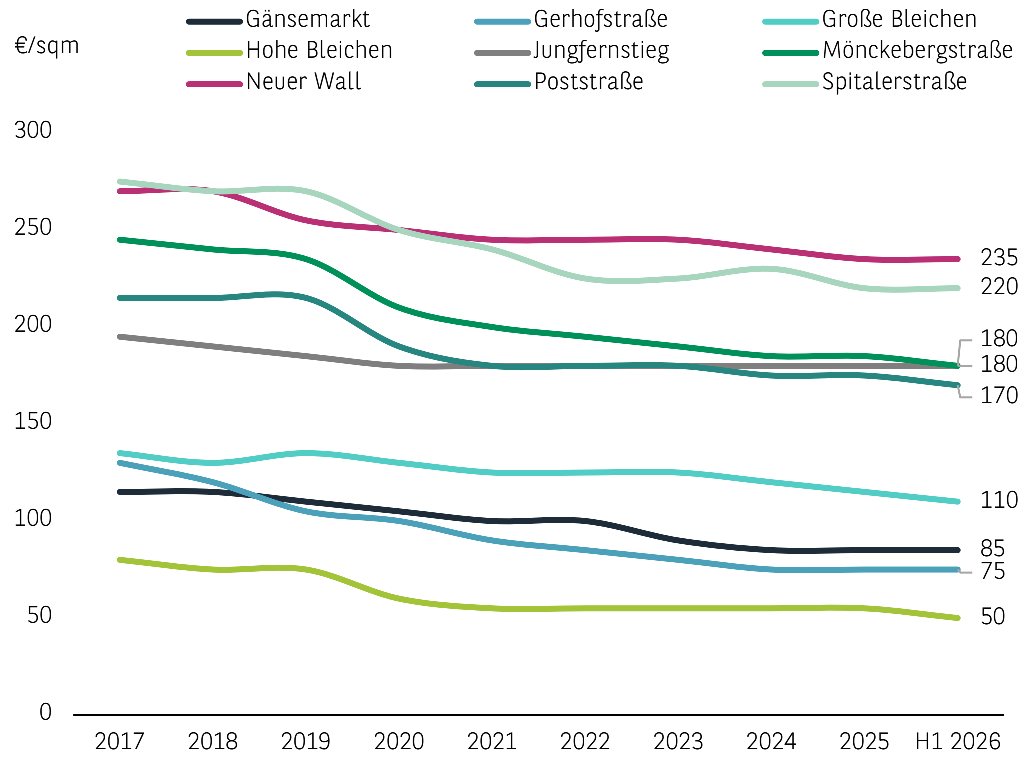


Store openings by size classes

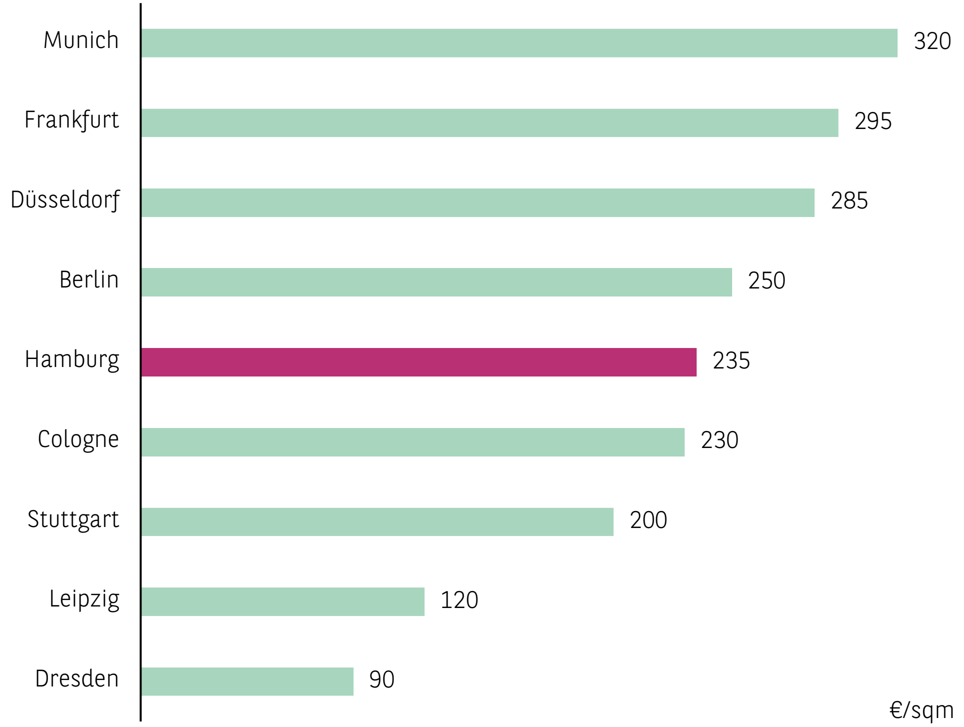


Neue Wall: Prime rent currently at 230 €/sqm

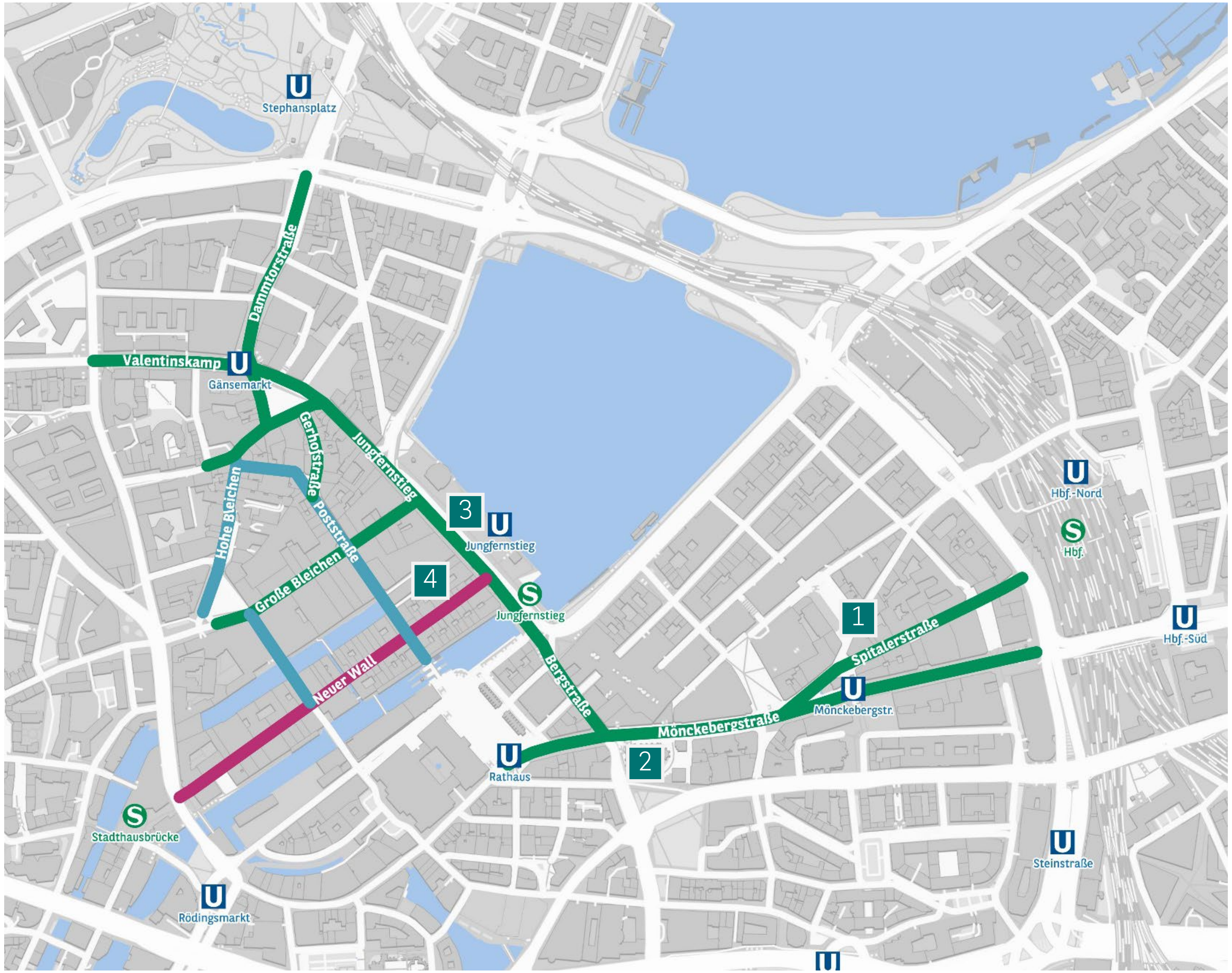
Development of prime rents by location



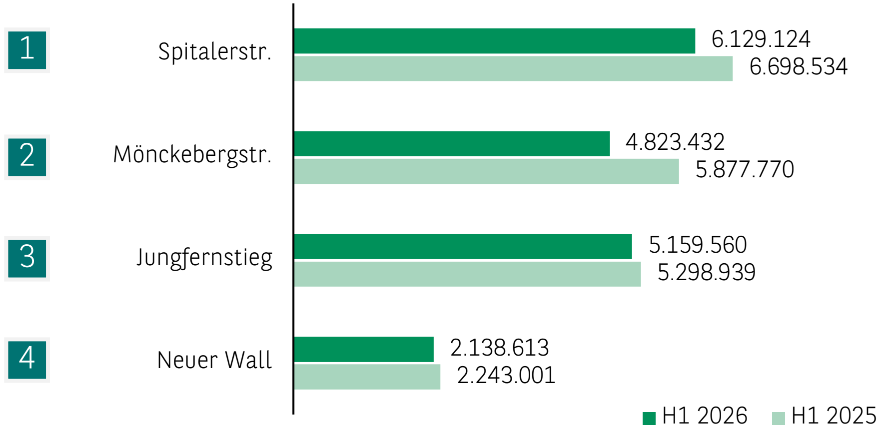
Prime rents in comparison of major cities



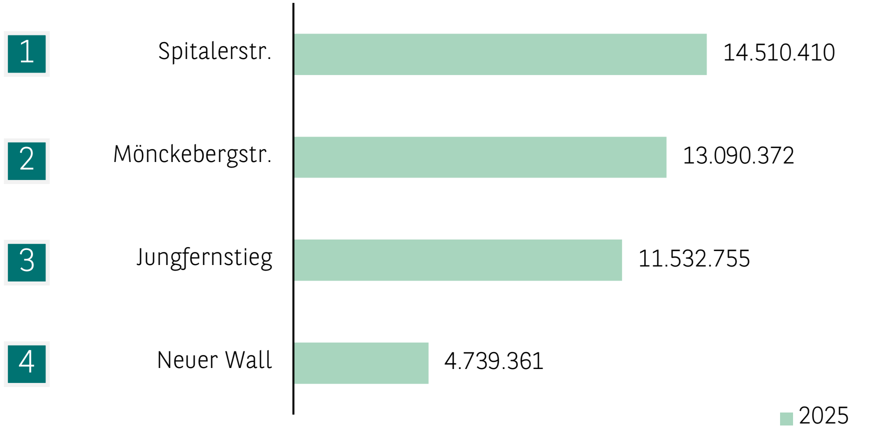
Retail city map



Pedestrians per half year



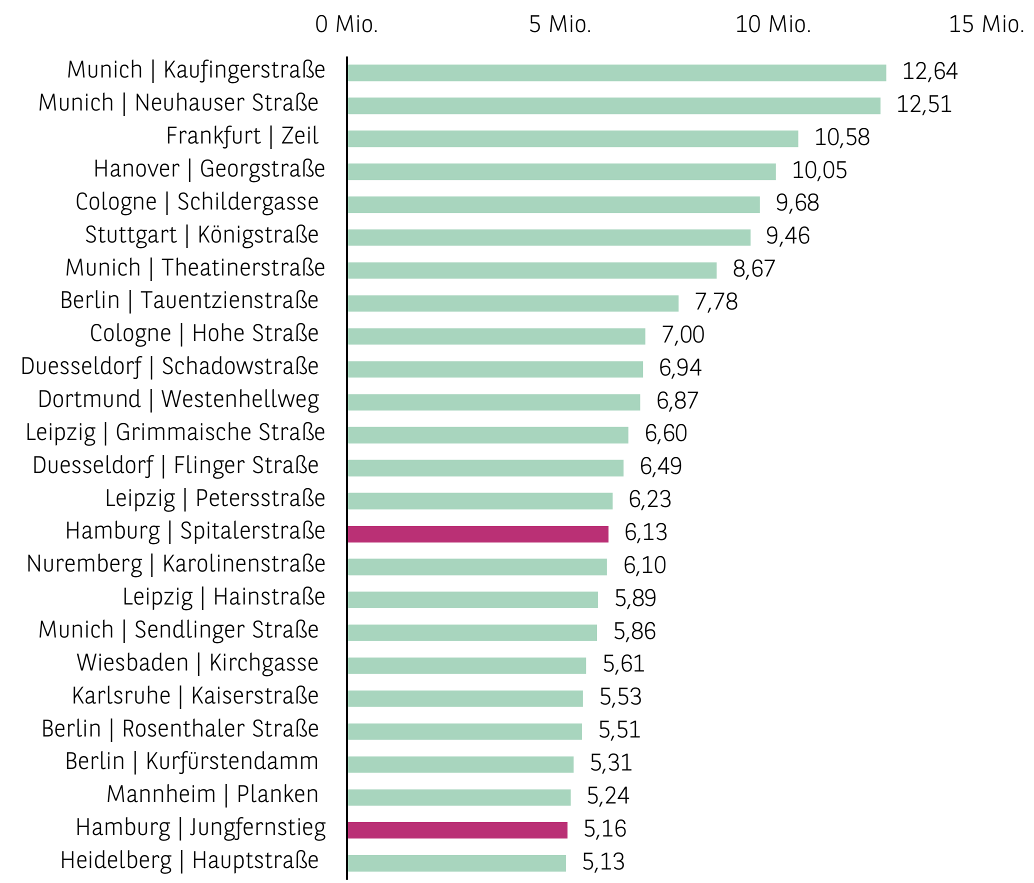
Pedestrians per year



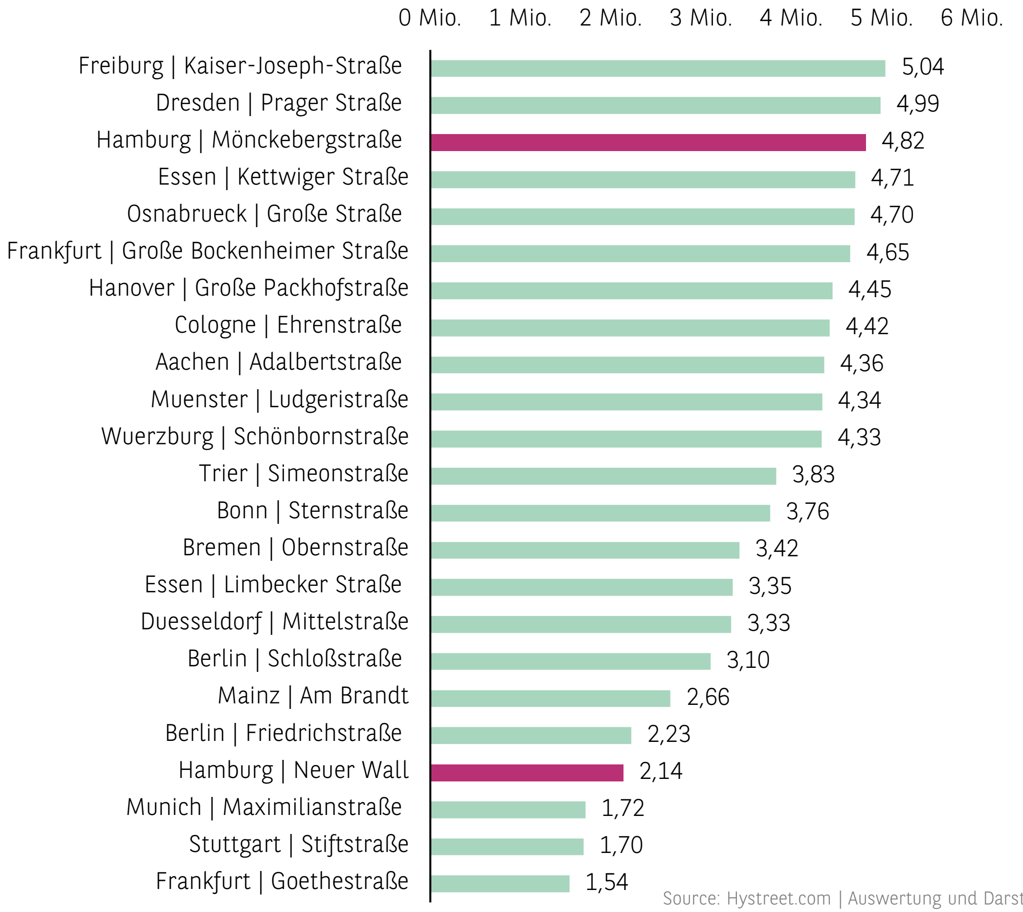
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - half year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

BNP PARIBAS REAL ESTATE

Key Takeaways: Retail market Hamburg H1 2026

Take-up and openings:

Hamburg's retail market remained vibrant in H1 2026, with take-up reaching approximately 8,000 sqm, slightly outperforming the city's long-term average (H1 2020–2026: 7,700 sqm). Lettings such as Moida K-Beauty and Victoria's Secret demonstrate that Hamburg's city centre continues to be a key destination for brands entering the German market, even following the opening of the Westfield Hamburg-Überseequartier shopping centre.

Sektor and size classes:

In addition to fashion retailers (26%) and beauty brands (11%), food & beverage operators (33%) were particularly active in securing retail space in Hamburg during H1 2026. The average deal size currently stands at approximately 300 sqm per letting.

Prime rent:

Prime rents on Neuer Wall remain unchanged at €235/sqm

Footfall:

Spitalerstraße records the highest footfall in Hamburg (6.31 million visitors), ranking 15th nationwide


Bild © AdobeStock 242192391

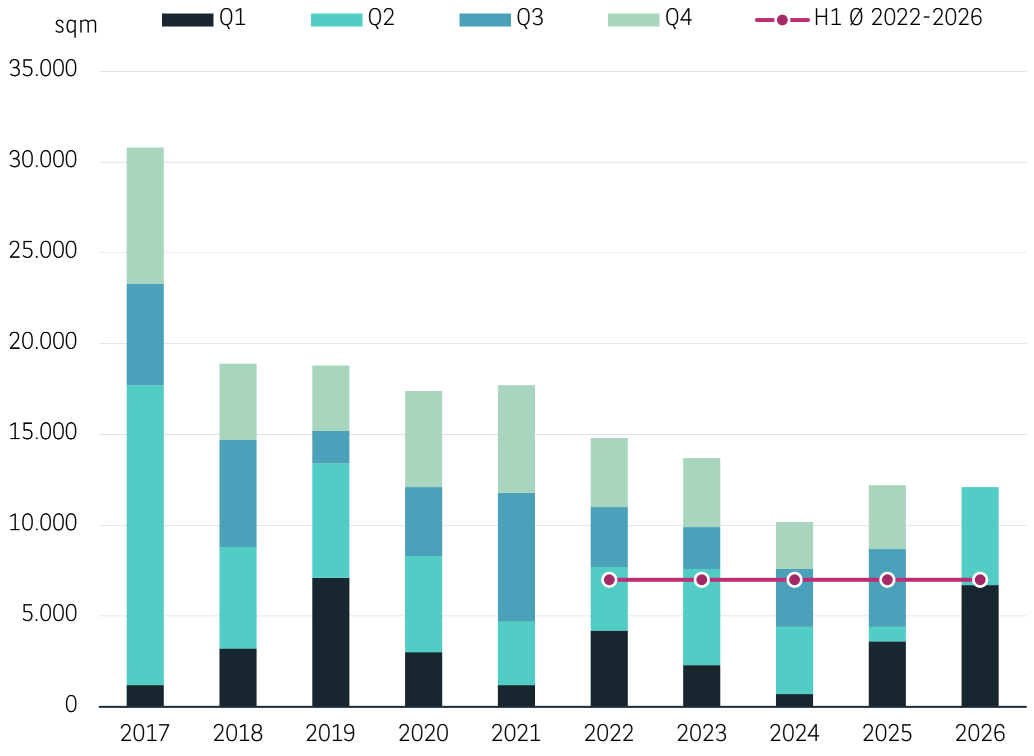
Source: BNPPRE; Hystreet.com

RETAIL MARKET

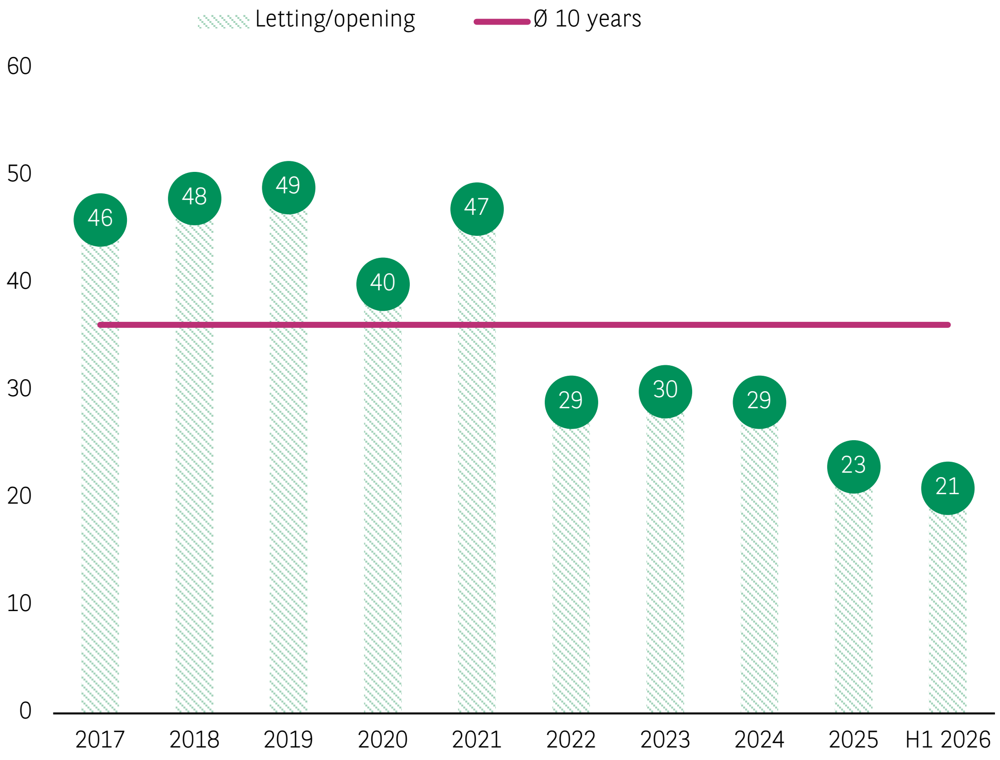
COLOGNE

Take-up H1 2026: 12,000 sqm | H1 2025: 4,000 sqm | Ø 5 years 7,000 sqm

Retail take-up in city locations



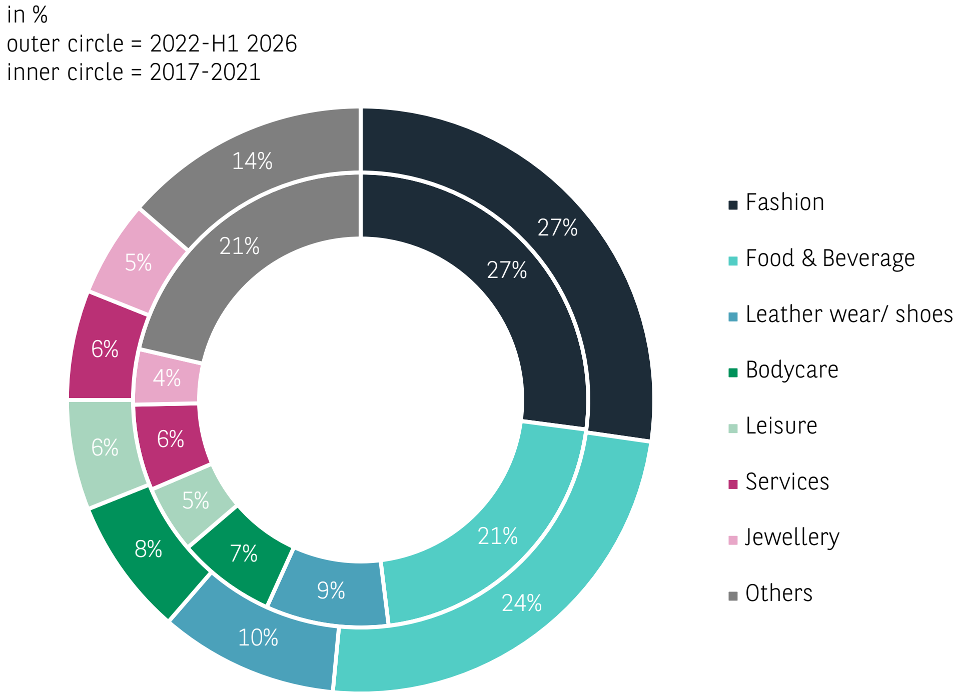
Number of lettings/openings per year



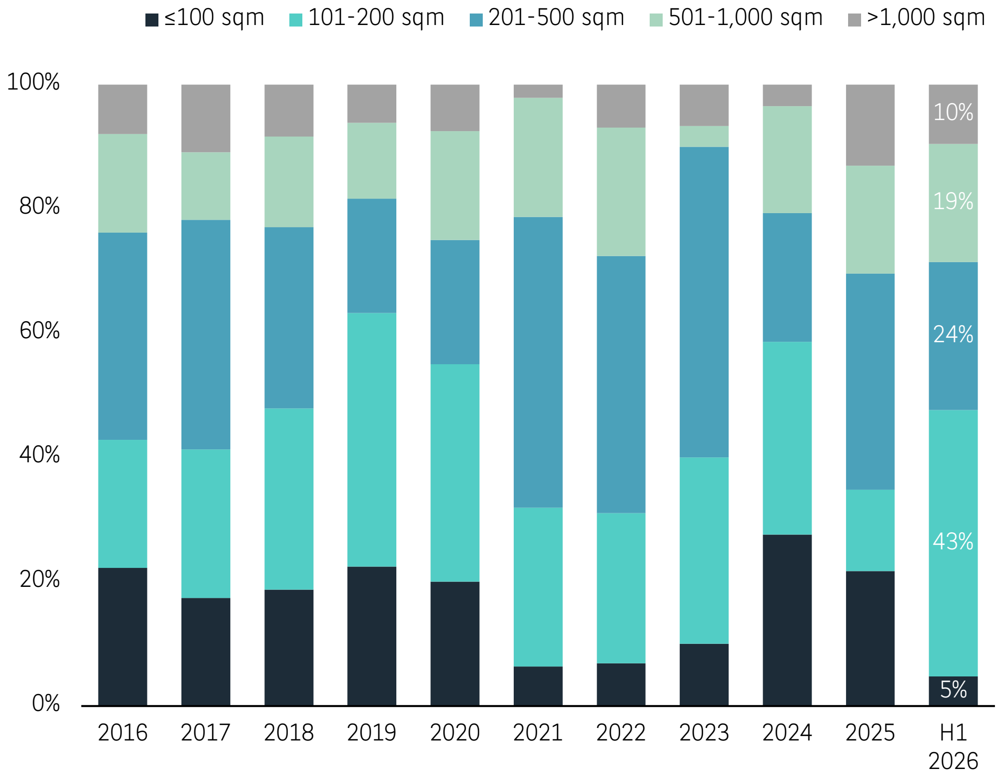
BNP PARIBAS REAL ESTATE

Top sectors last years: Fashion: 27% , Food & Beverage: 24% , Leather wear: 10%

Store openings by sector



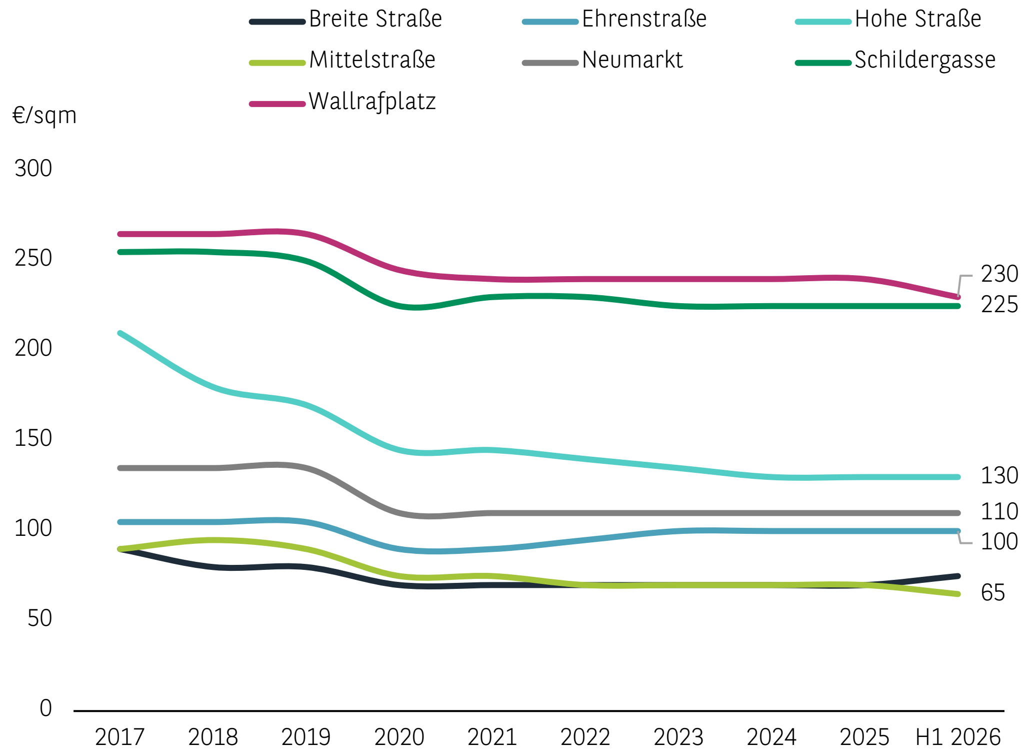
Store openings by size classes



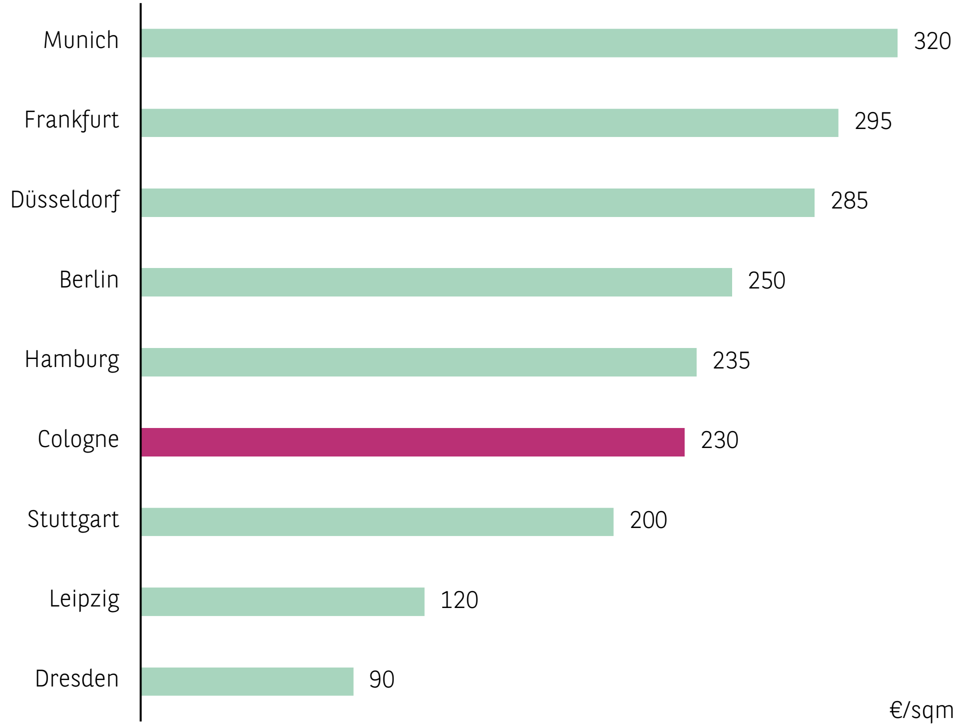
BNP PARIBAS REAL ESTATE

Wallrafplatz: Prime rent currently at 235 €/sqm

Development of prime rents by location



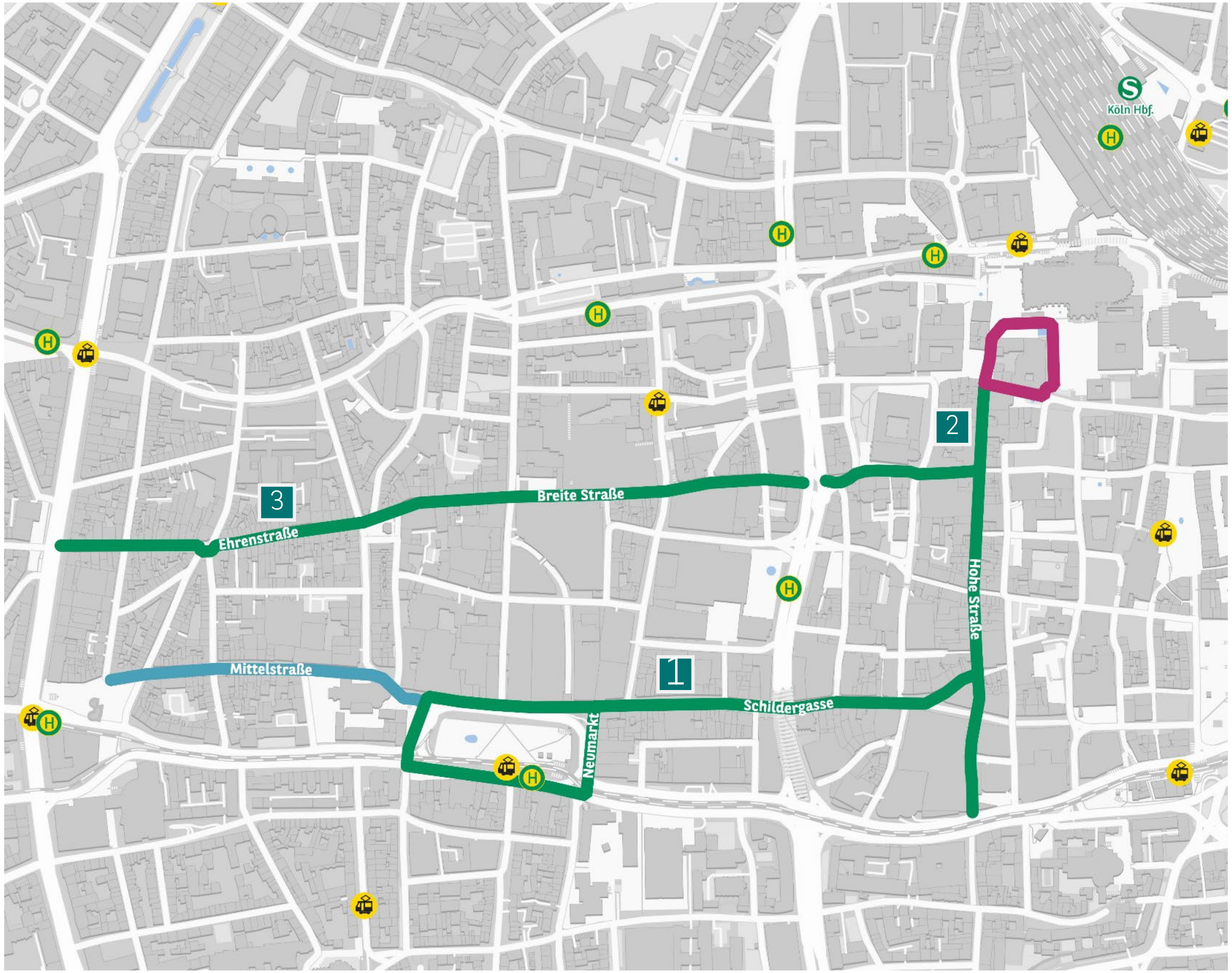
Prime rents in comparison of major cities



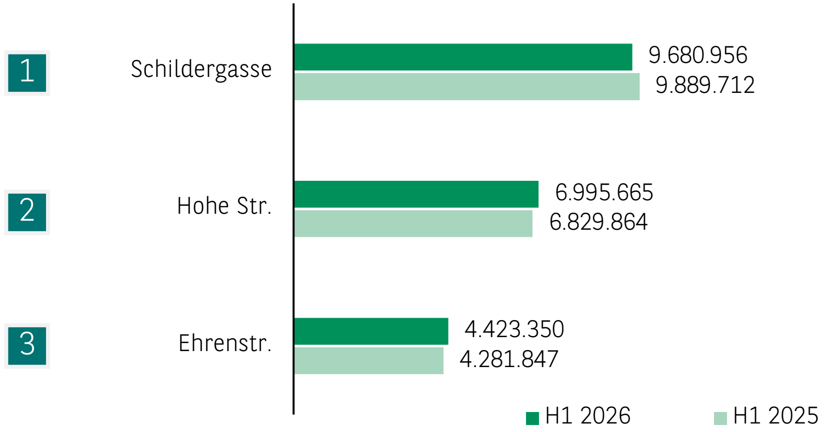
BNP PARIBAS REAL ESTATE

Retail city map

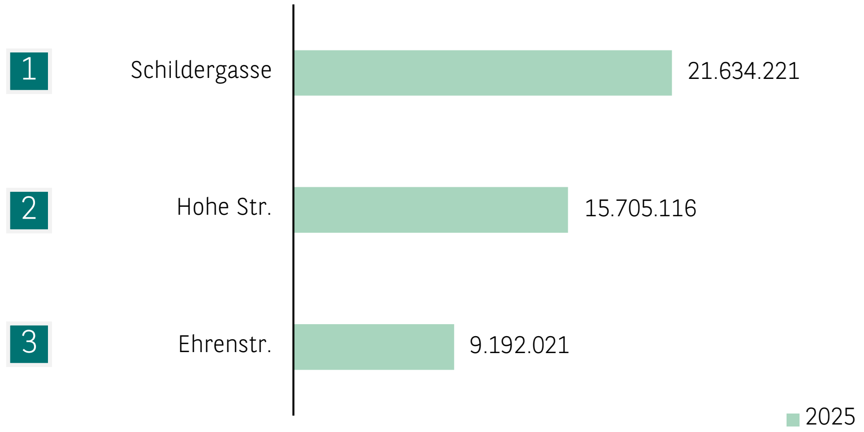
Mass-market location | Premium location | Luxury location



Pedestrians per half year



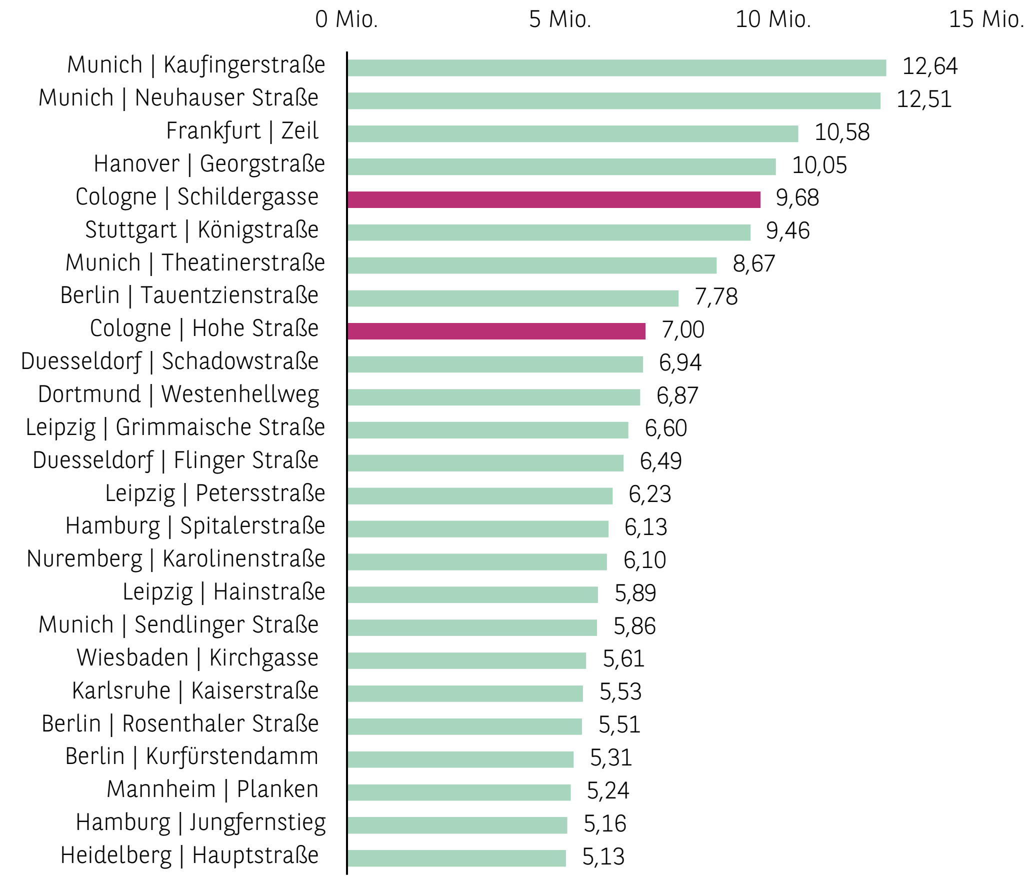
Pedestrians per year



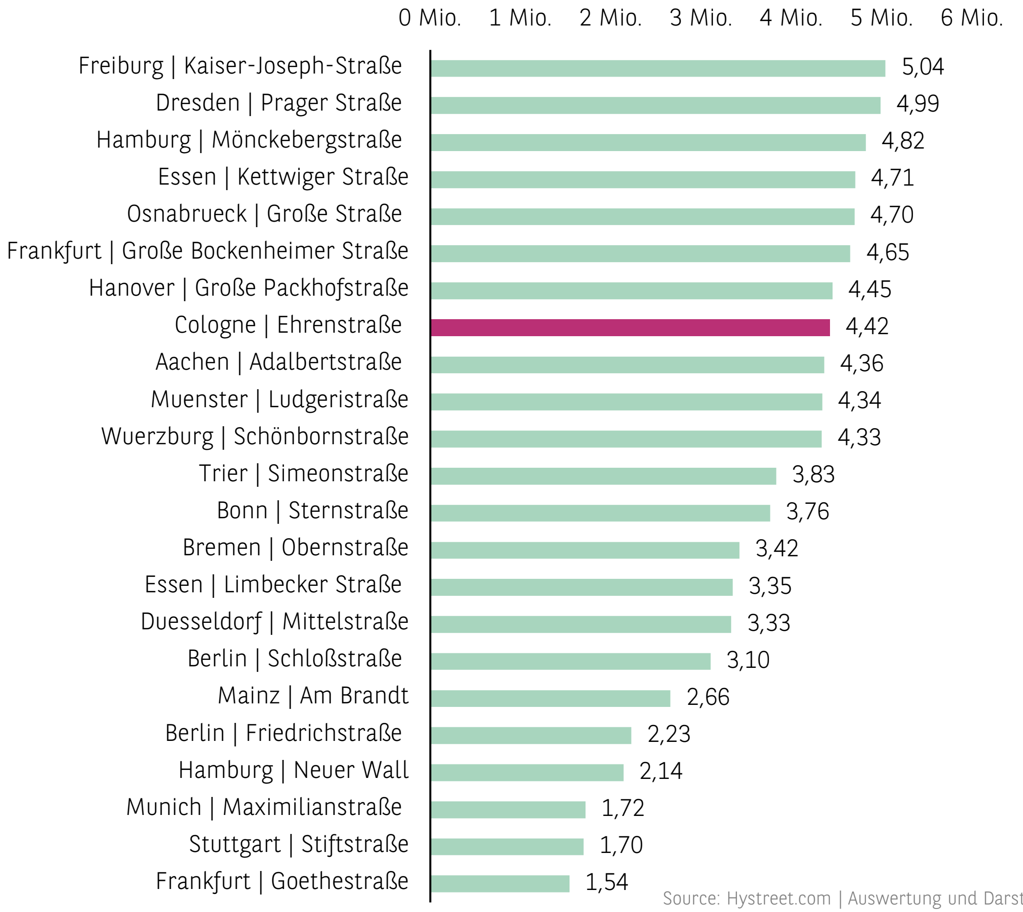
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - full year



Rank 26-50 of the most visited German shopping streets - full yea



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Key Takeaways: Retail market Cologne H1 2026

Take-up and openings:

Cologne’s retail market delivered a very strong performance in H1 2026, with take-up reaching around 12,000 sqm, well above the long-term average (H1 2020–2026: 7,000 sqm). More than 20 lettings and openings were recorded during the first six months of the year, highlighting the market’s robust momentum. Key contributors to take-up included the expanding Swedish retailer Lager 157 and the new food & beverage destination within the AHEU development at Heumarkt, anchored by Privat-Brauerei Reissdorf.

Sektor and size classes:

Food & beverage operators were particularly active in H1 2026, accounting for 29% of all lettings and openings. Fashion brands followed with a 19% share of market activity. The average deal size currently stands at approximately 580 sqm per deal.

Prime rent:

Wallrafplatz prime rent slips slightly to €230/sqm

Footfall:

Schildergasse records the highest footfall in Cologne (9.86 million visitors), ranking 5th nationwide

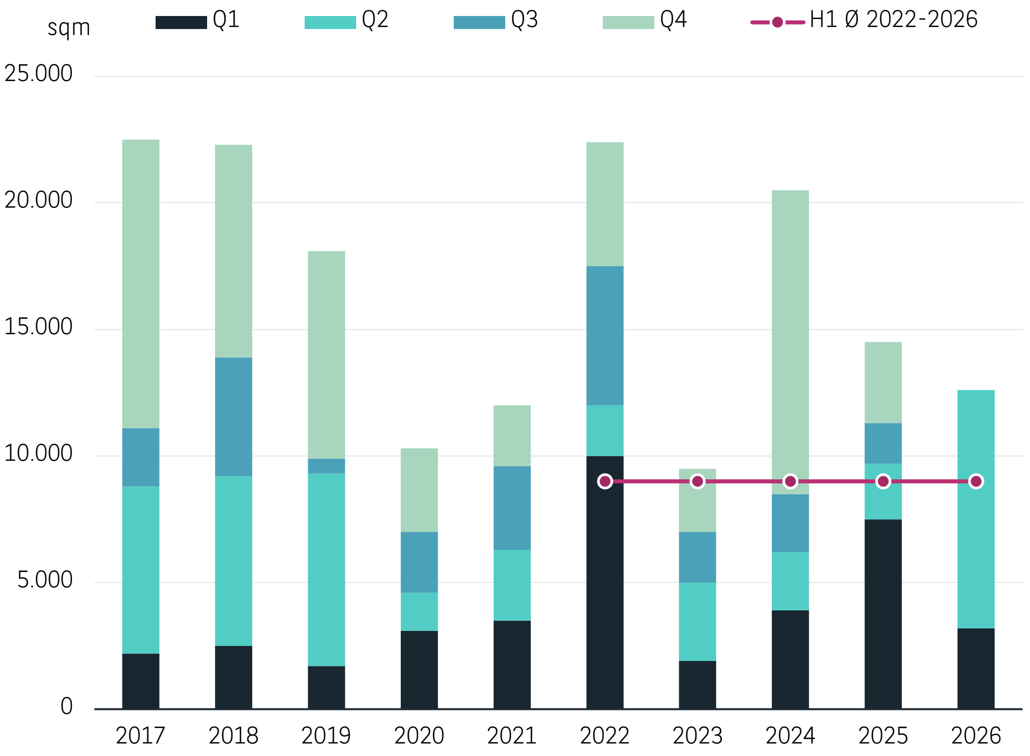
Source: BNPPRE; Hystreet.com

RETAIL MARKET

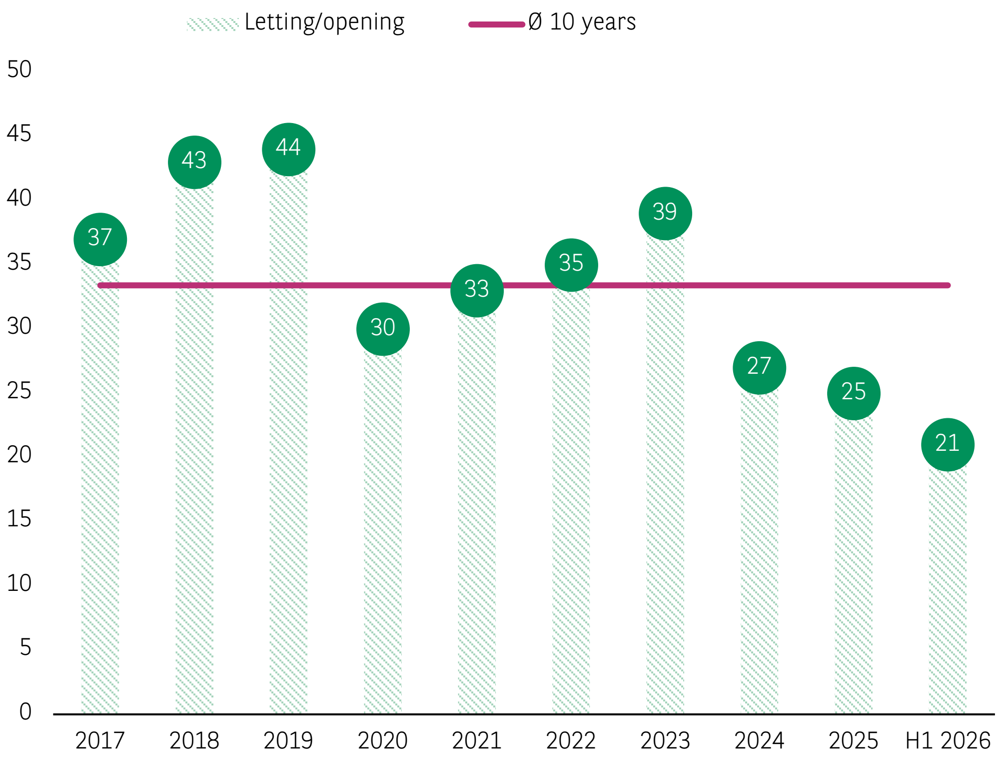
MUNICH

Take-up H1 2026: 13,000 sqm | H1 2025: 10,000 sqm | Ø 5 years 9,000 sqm

Retail take-up in city locations

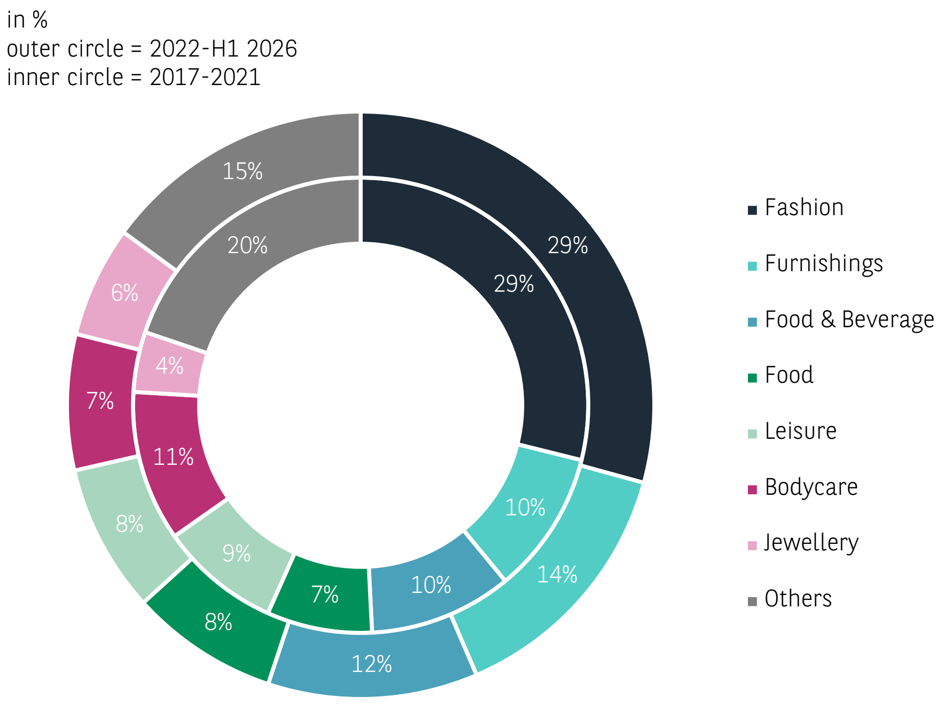


Number of lettings/openings per year

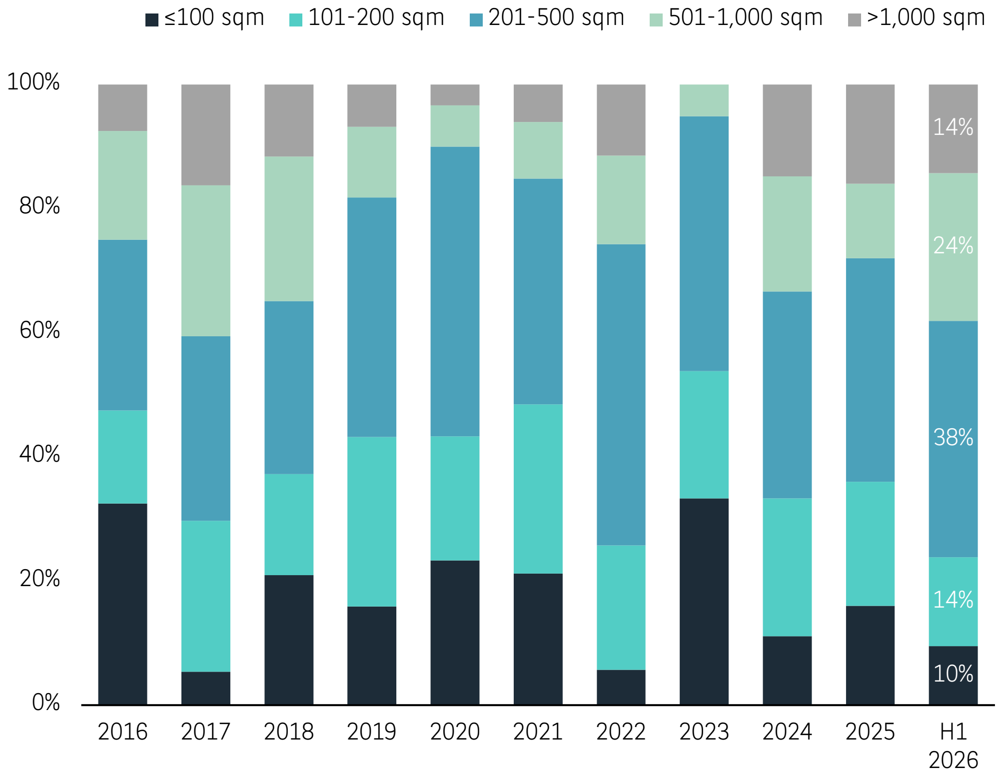


Top sectors last years: Fashion: 29% , Furnishings: 14% , Food & Beverage: 12%

Store openings by sector



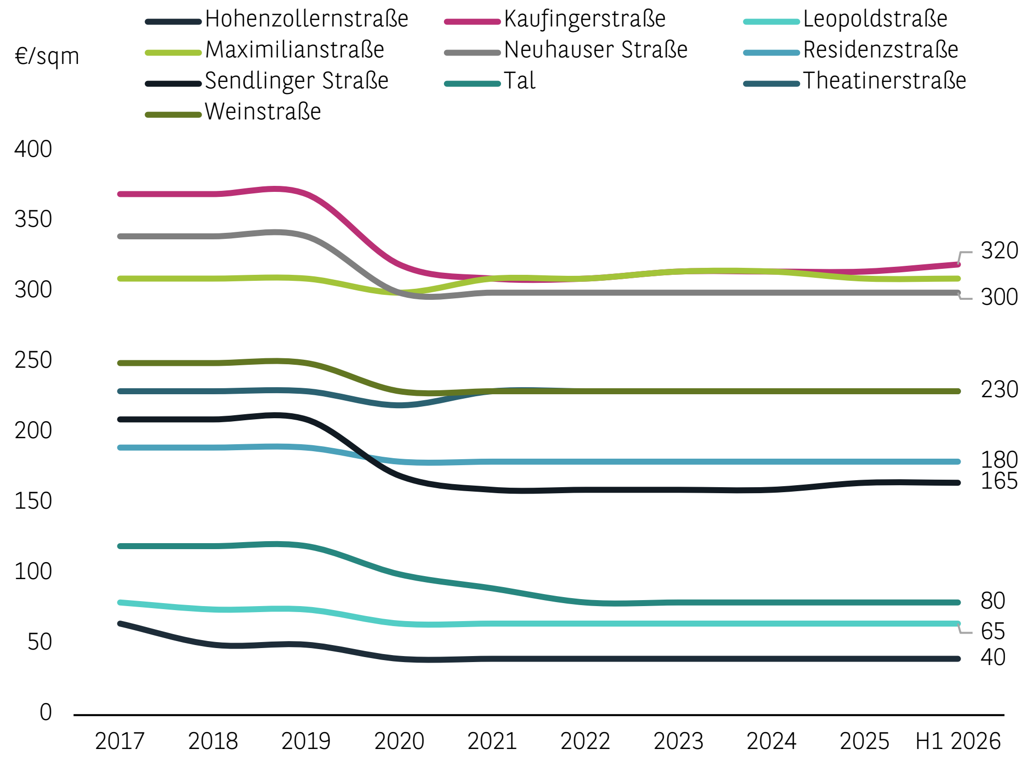
Store openings by size classes



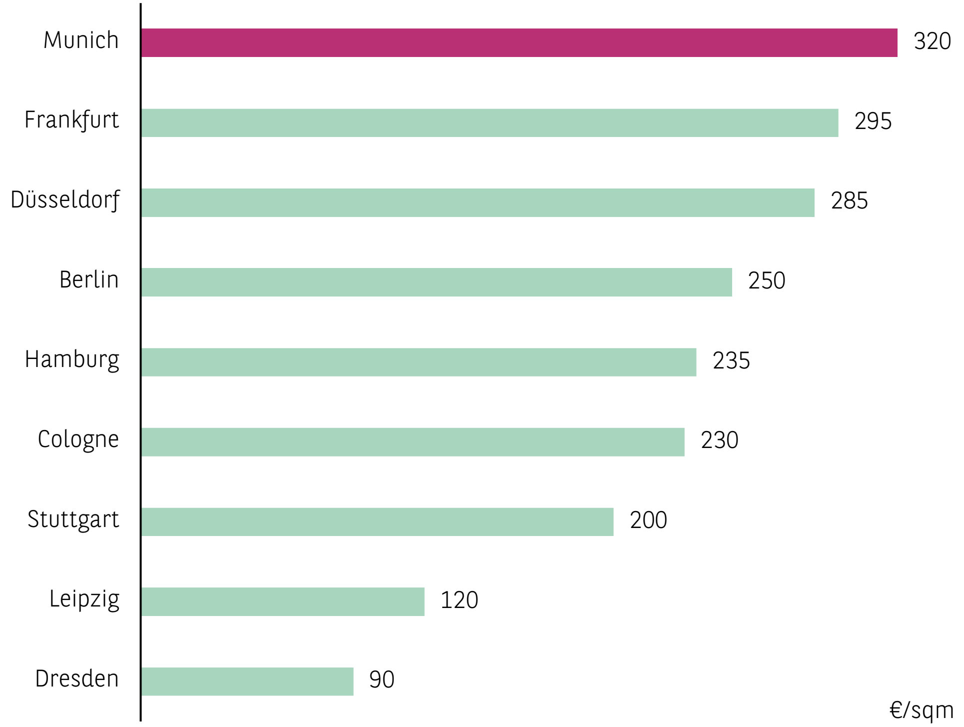
Kaufingerstraße: Prime rent currently at 320 €/sqm

MUNICH

Development of prime rents by location

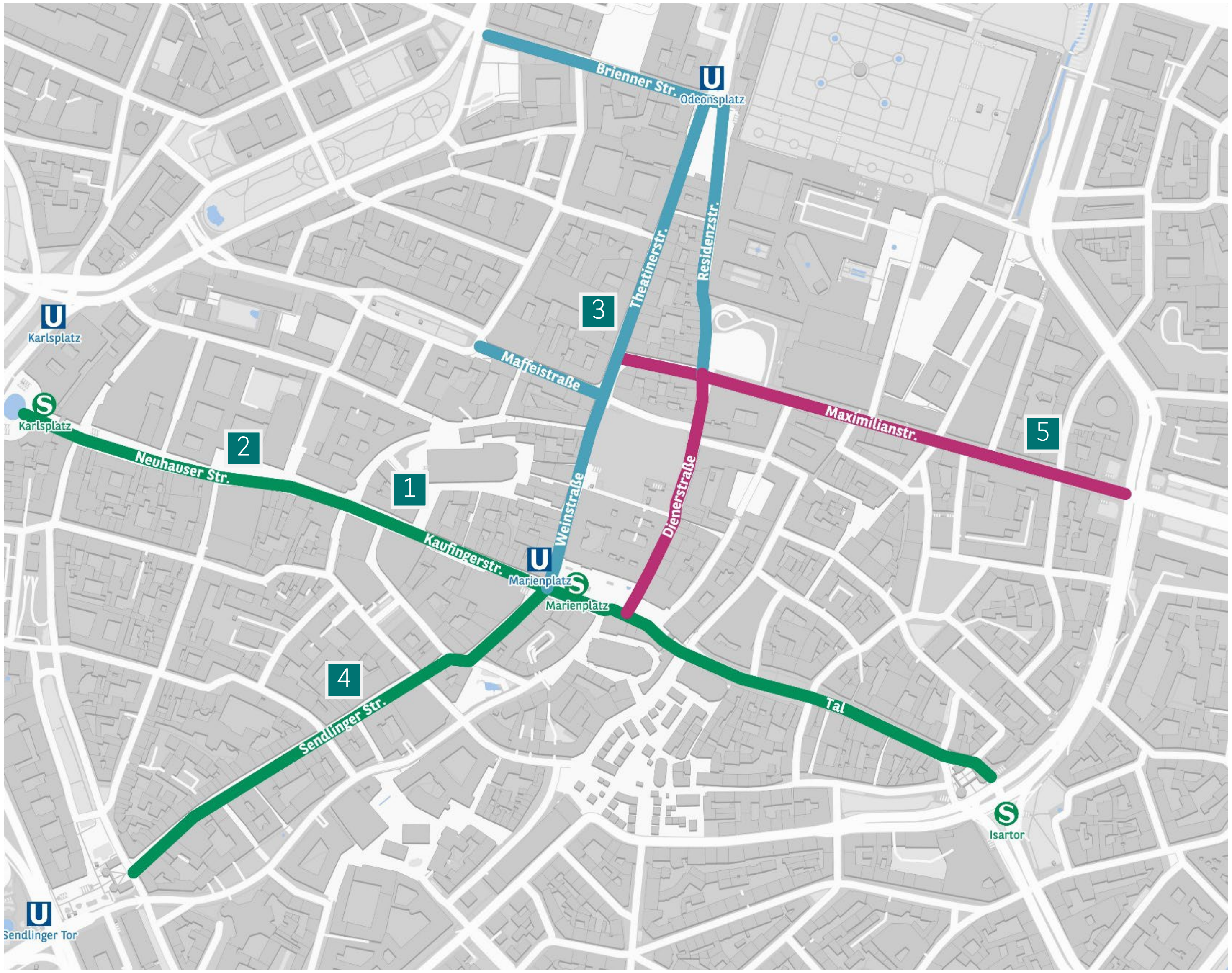


Prime rents in comparison of major cities



Retail city map

Mass-market location | Premium location | Luxury location



Pedestrians per half year

	Street	H1 2026	H1 2025
1	Kaufingerstr.	12.642.574	13.106.030
2	Neuhauser Str.	12.507.783	12.740.023
3	Theatinerstr.	8.667.904	7.909.146
4	Sendlinger Str.	5.858.942	5.555.752
5	Maximilianstr.	1.718.708	1.692.848

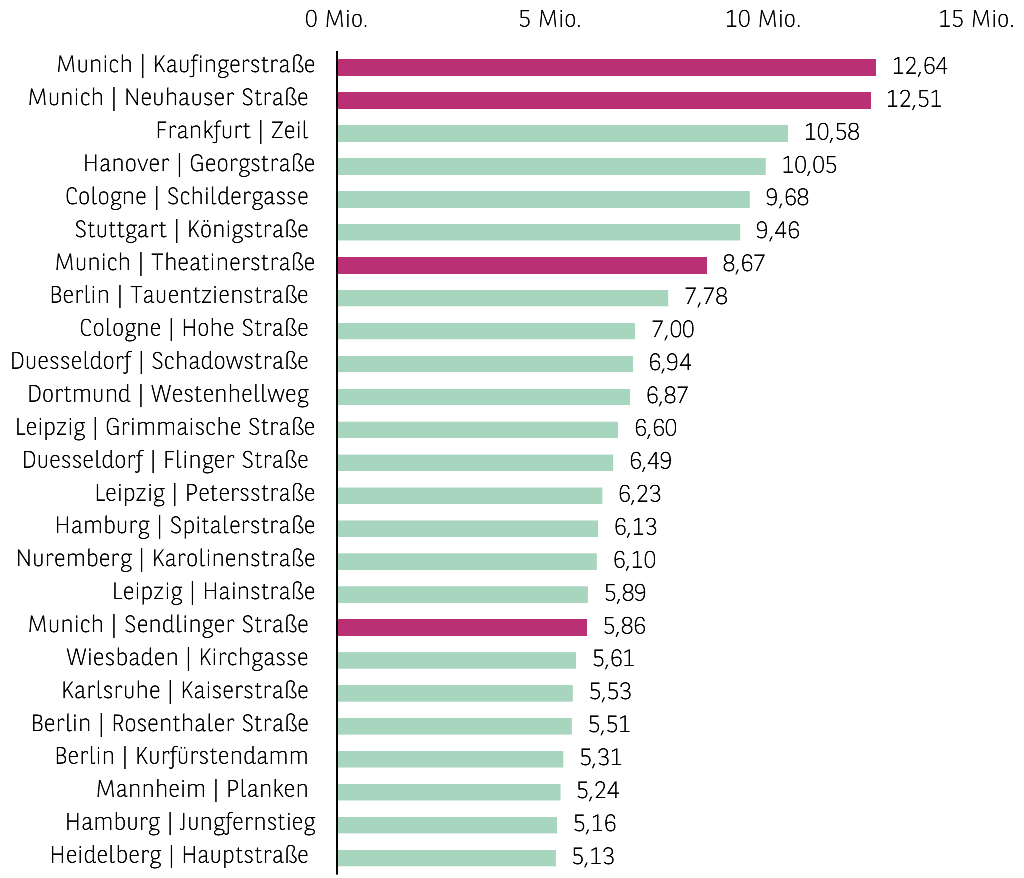
Pedestrians per year

	Street	2025
1	Kaufingerstr.	28.967.514
2	Neuhauser Str.	28.236.292
3	Theatinerstr.	17.777.651
4	Sendlinger Str.	12.354.319
5	Maximilianstr.	3.544.572

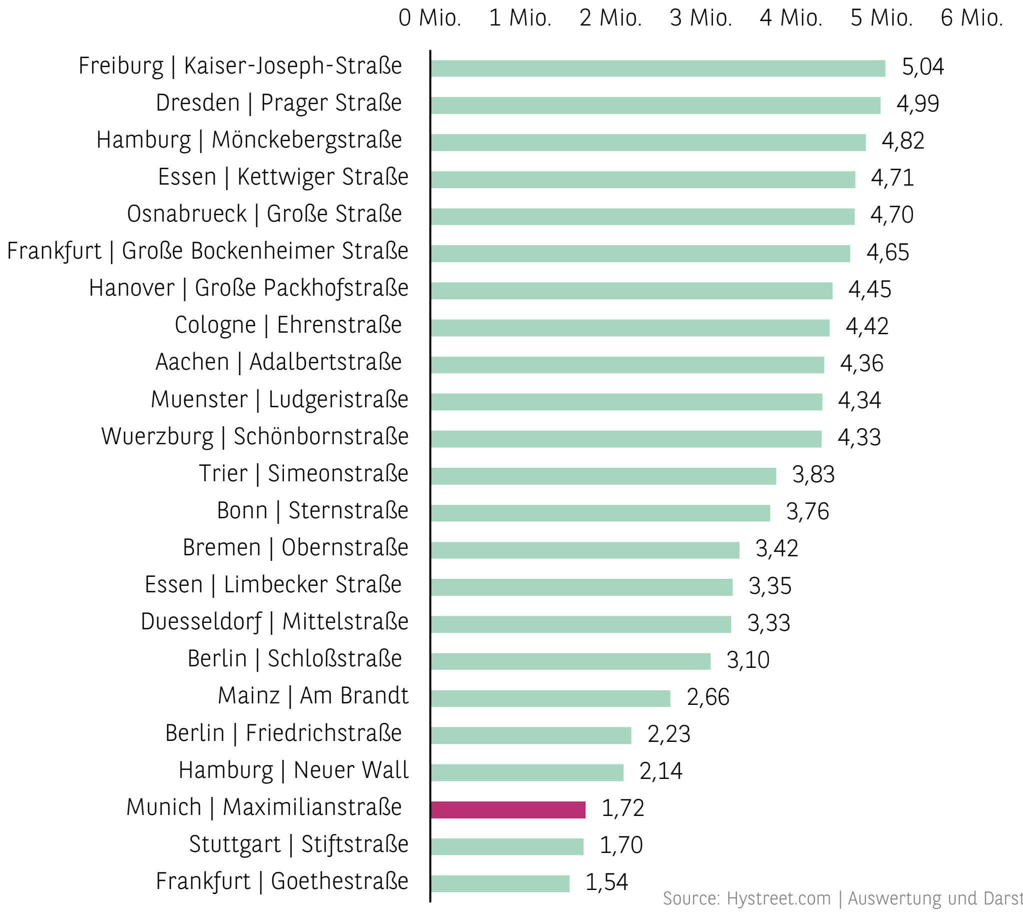
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - half year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Key Takeaways: Retail market Munich H1 2026

Take-up and openings:

Munich's city-centre retail market delivered a strong performance in H1 2026, with take-up reaching around 12,000 sqm, significantly exceeding the long-term average (H1 2020–2026: 8,000 sqm). Major lettings included Fitseveneleven (1,800 sqm), Rituals (1,800 sqm), On (1,200 sqm), Bershka (1,000 sqm) and Alo Yoga (830 sqm). Representing a broad range of retail concepts and international origins, these brands underline the continued appeal of Munich's prime retail locations for expansion-driven occupiers.

Sektor and size classes:

Fashion (24%), personal care (19%) and leisure concepts (14%) account for the largest shares of letting activity. Average deal size stands at 600 sqm.

Prime rent:

Prime rent on Kaufingerstraße increased slightly to €320/sqm

Footfall:

Munich's top locations, Kaufingerstraße (12.64 million visitors) and Neuhauser Straße (12.51 million), once again rank first and second nationwide

Source: BNPPRE; Hystreet.com

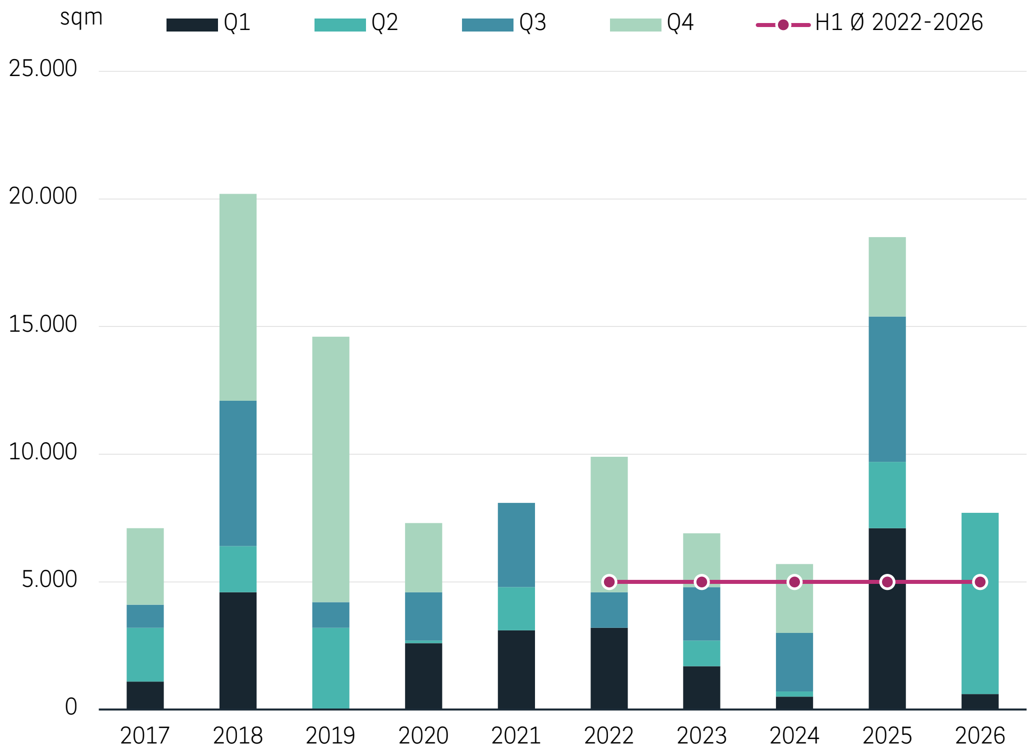
RETAILMARKT
STUTTGART

BNP PARIBAS REAL ESTATE

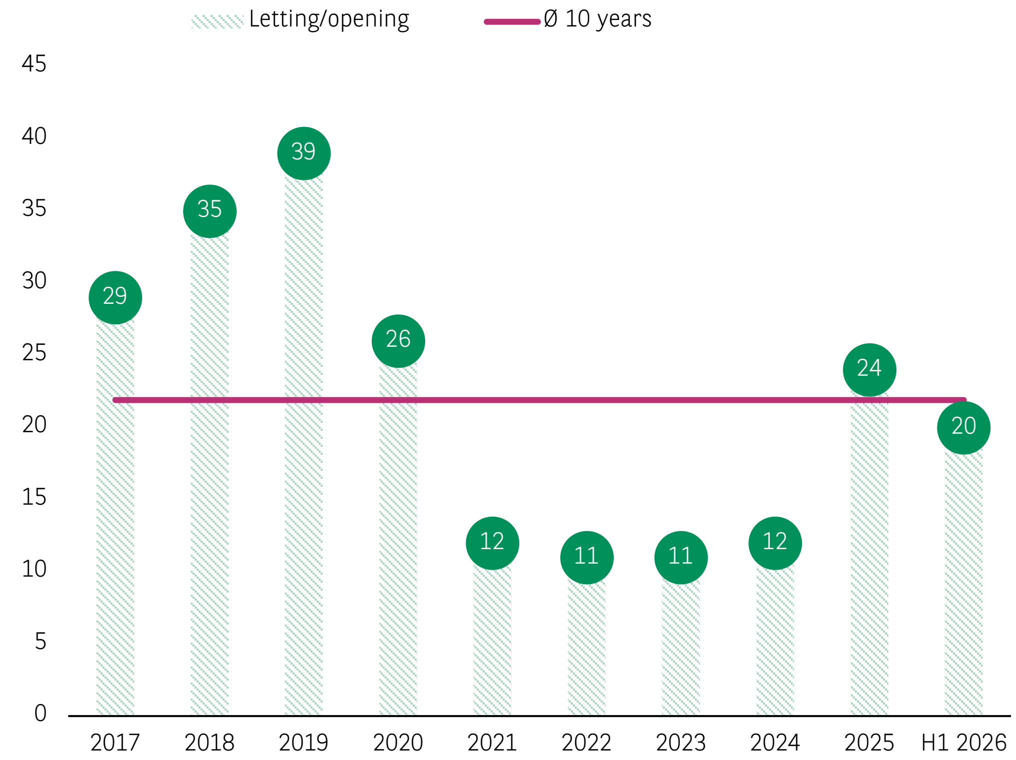
Take-up H1 2026: 8,000 sqm | H1 2025: 10,000 sqm | Ø 5 years 5,000 sqm

STUTTGART

Retail take-up in city locations



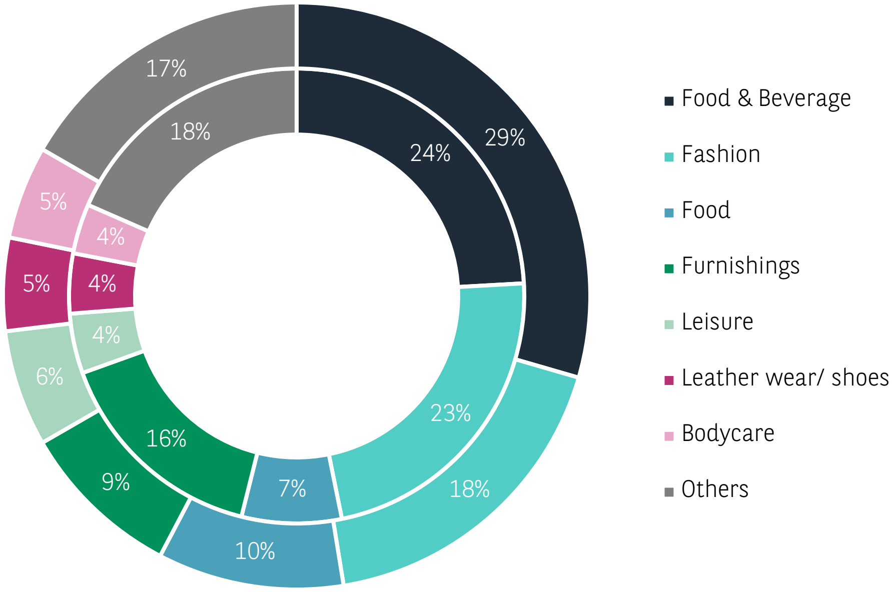
Number of lettings/openings per year



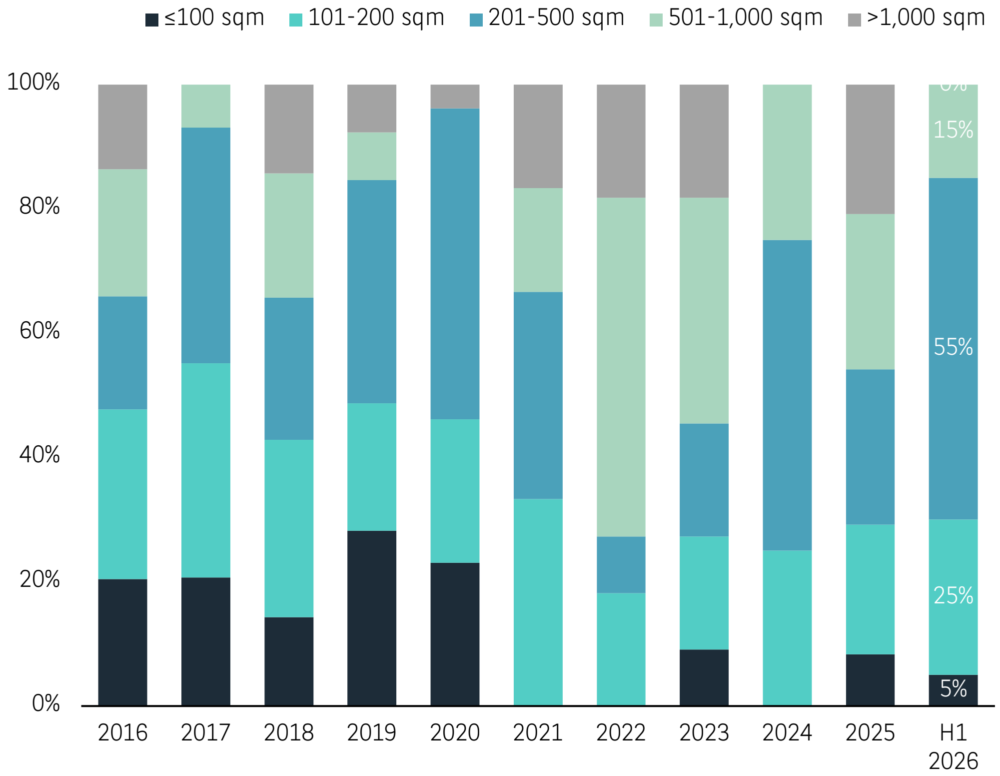
Top sectors last years: Food & Beverage: 29% , Fashion: 18% , Food: 10%

Store openings by sector

in %
outer circle = 2022-H1 2026
inner circle = 2017-2021

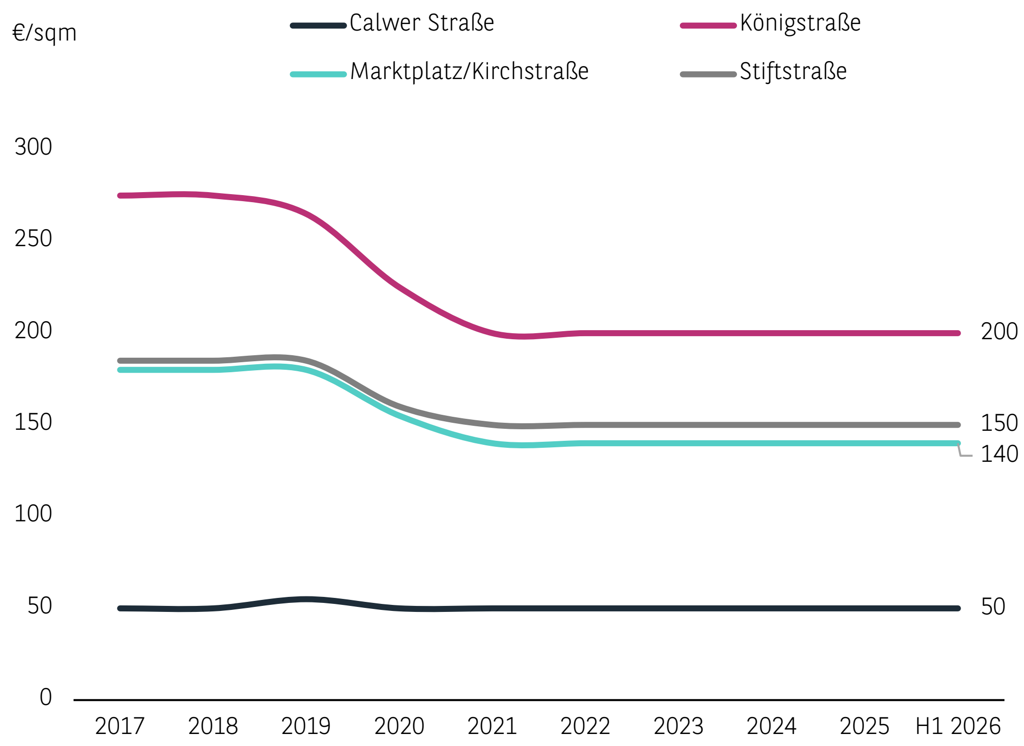


Store openings by size classes

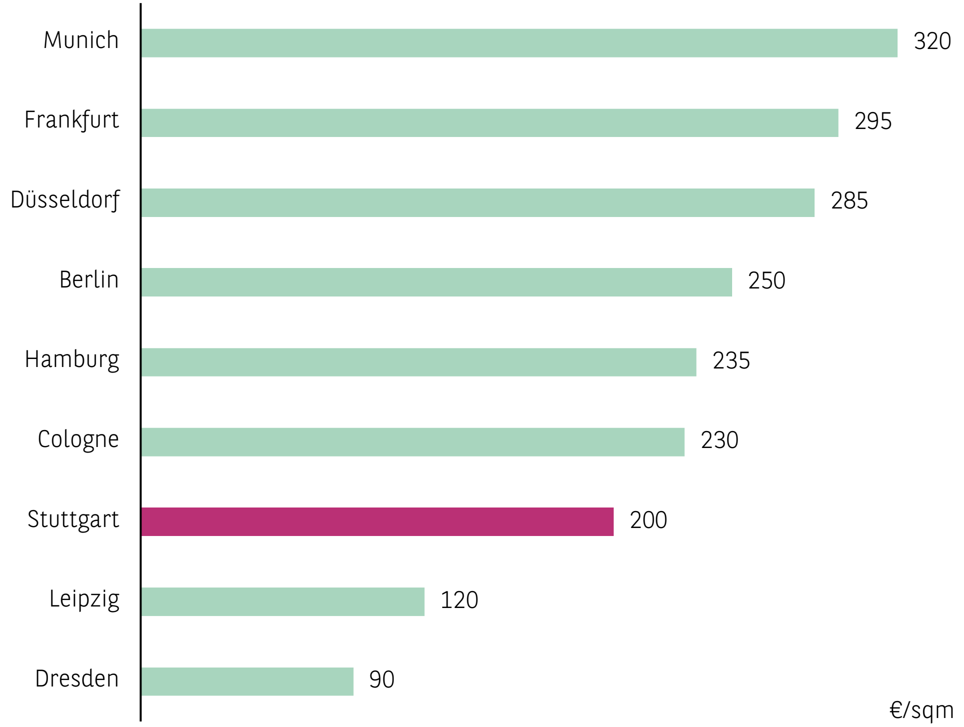


Königstraße: Prime rent currently at 200 €/sqm

Development of prime rents by location

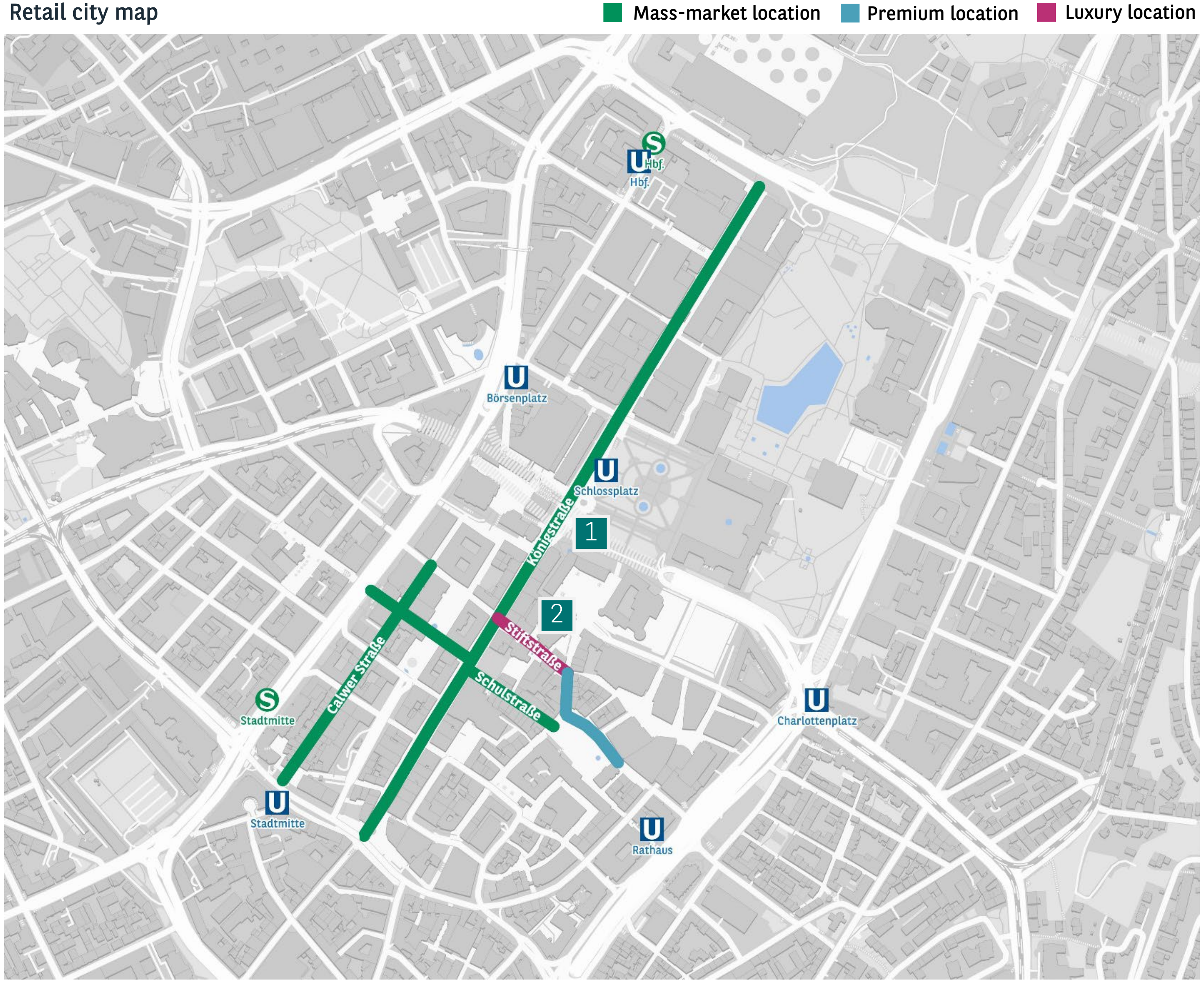


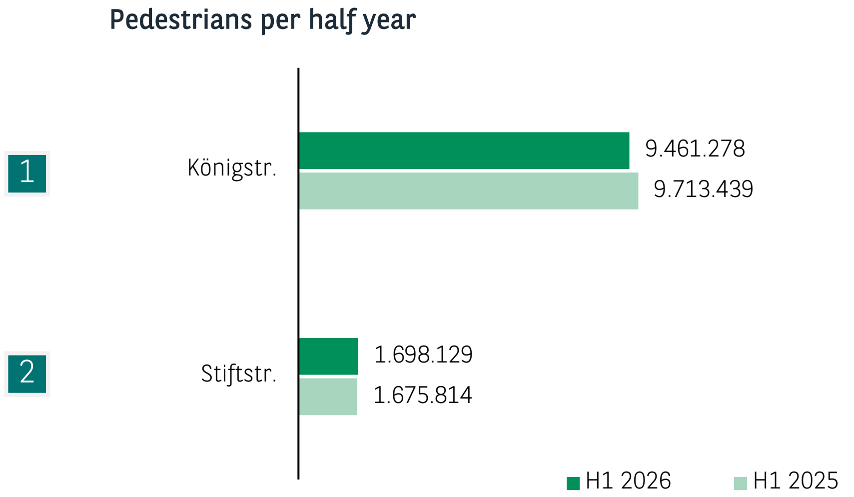
Prime rents in comparison of major cities

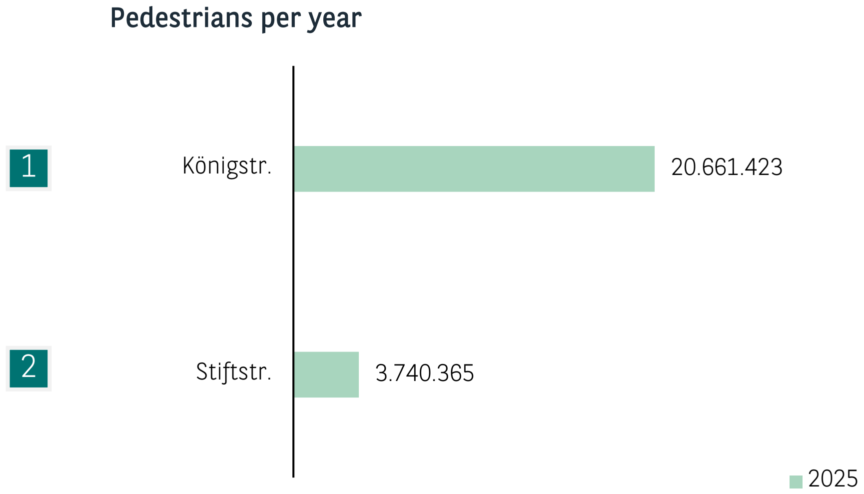


BNP PARIBAS REAL ESTATE

Retail city map



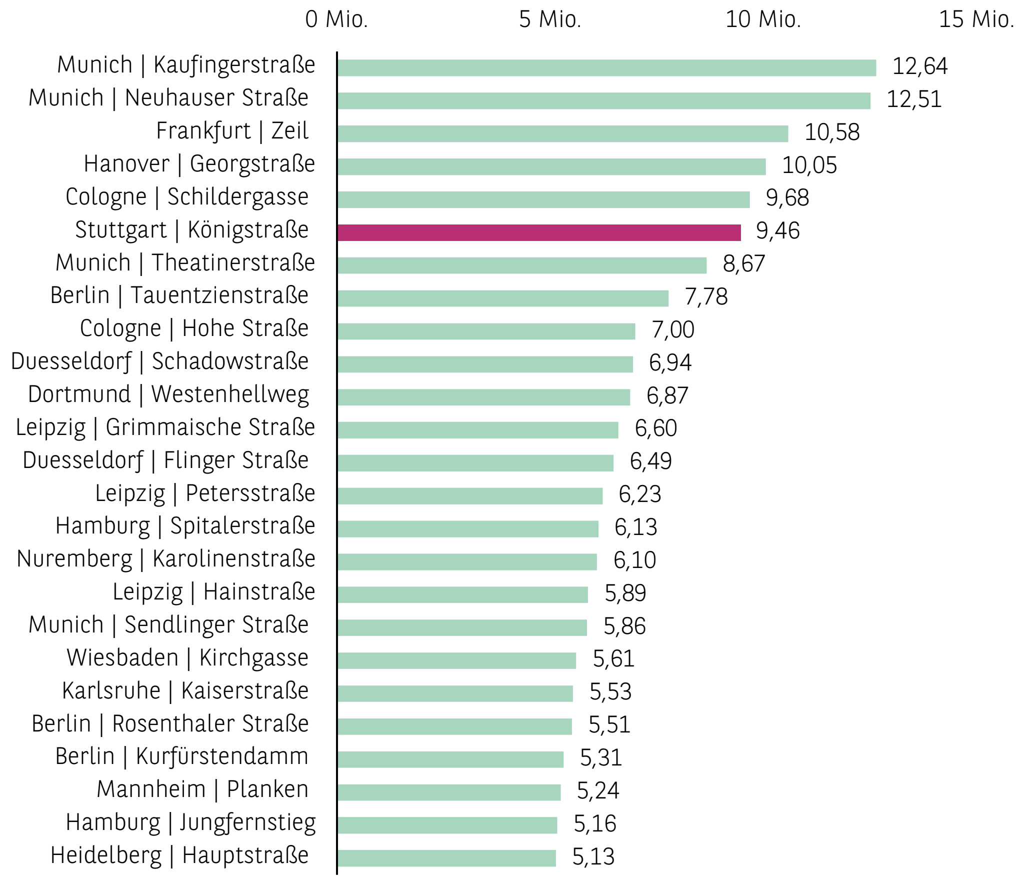




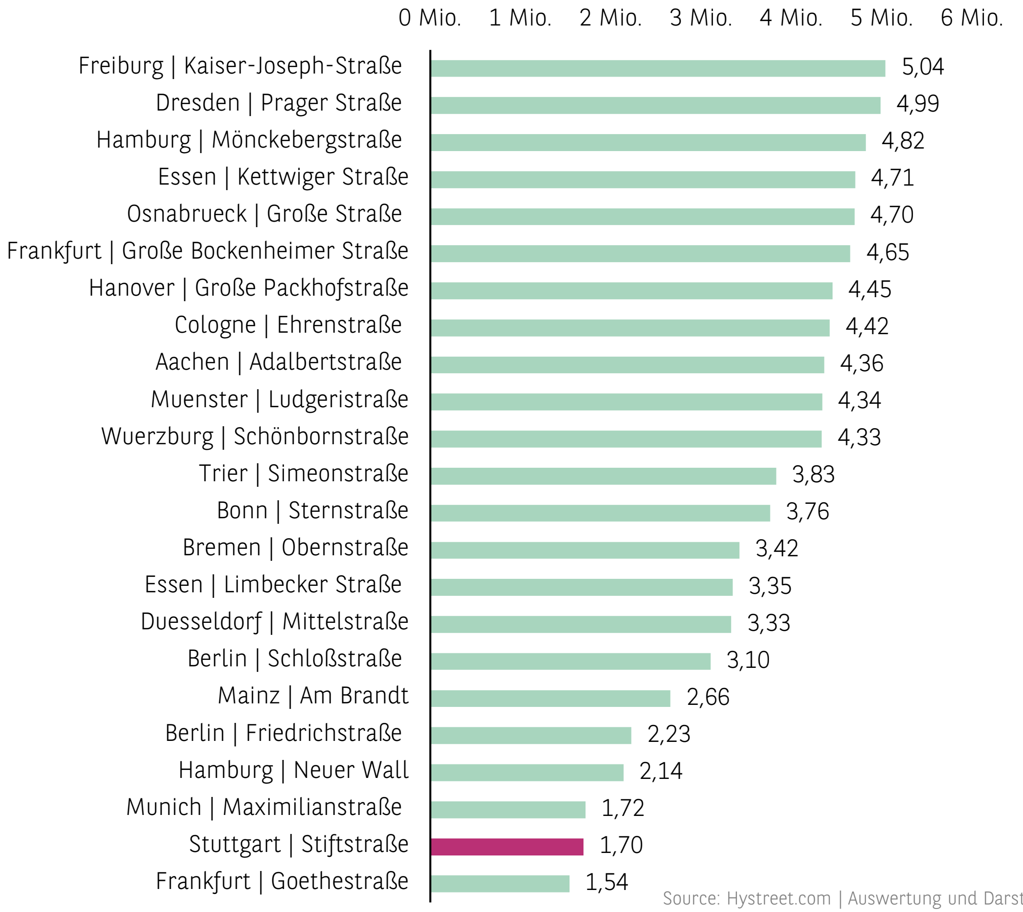
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - half year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

BNP PARIBAS REAL ESTATE

Key Takeaways: Retail market Stuttgart H1 2026

Take-up and openings:

Following a strong performance in 2025, when Stuttgart's city-centre retail market recorded take-up of more than 18,000 sqm, the market also delivered an excellent result in H1 2026, reaching around 7,600 sqm (H1 2020–2026 average: 4,500 sqm). Notable lettings and openings included Go Asia, Massimo Dutti, Apollo Optik and Snipes. Stuttgart's top location, Königstraße, once again played a key role in market activity, accounting for around 30% of all deals.

Sektor and size classes:

Fashion and food and beverage operators lead leasing activity (25% each), followed by home furnishings (15%). Average deal size stands at 380 sqm, down from 920 sqm in 2025.

Prime rent:

Prime rent on Königstraße remains stable at €200/sqm

Footfall:

Königstraße attracts 9.46 million visitors, ranking 6th among Germany's most frequented shopping streets

Bild © AdobeStock 563124107

Source: BNPPRE; Hystreet.com

SELECTED B-LOCATIONS

DRESDEN - HANOVER - LEIPZIG - NUREMBERG

BNP PARIBAS REAL ESTATE

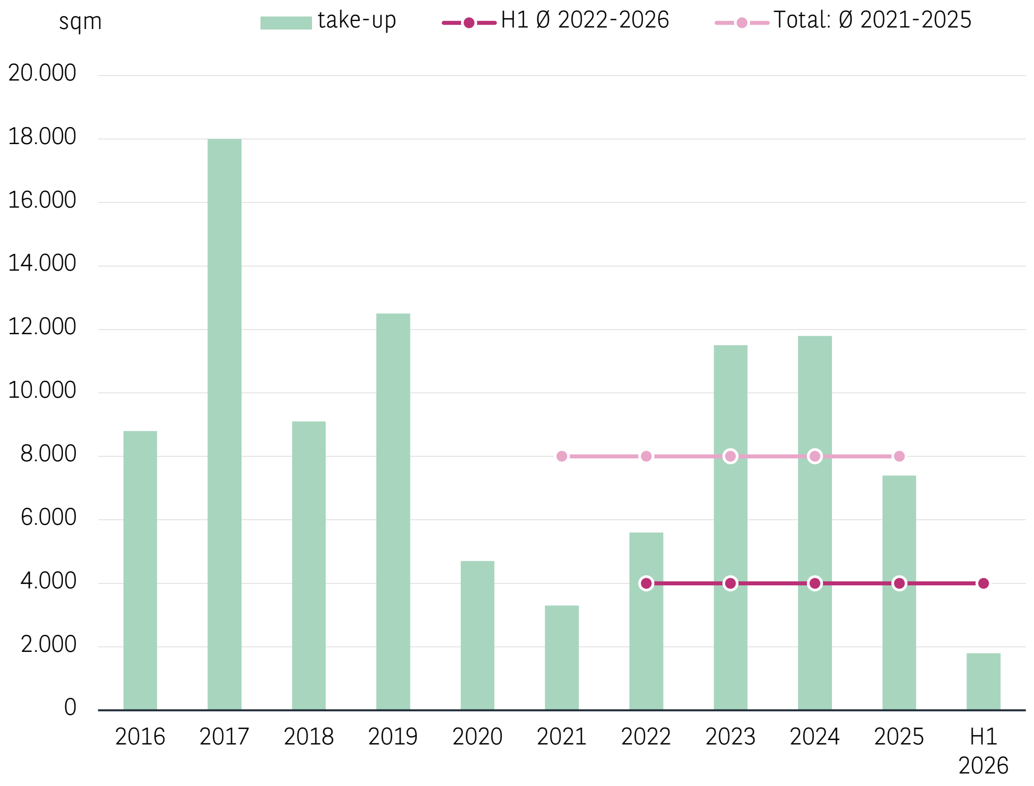
RETAIL MARKET

DRESDEN

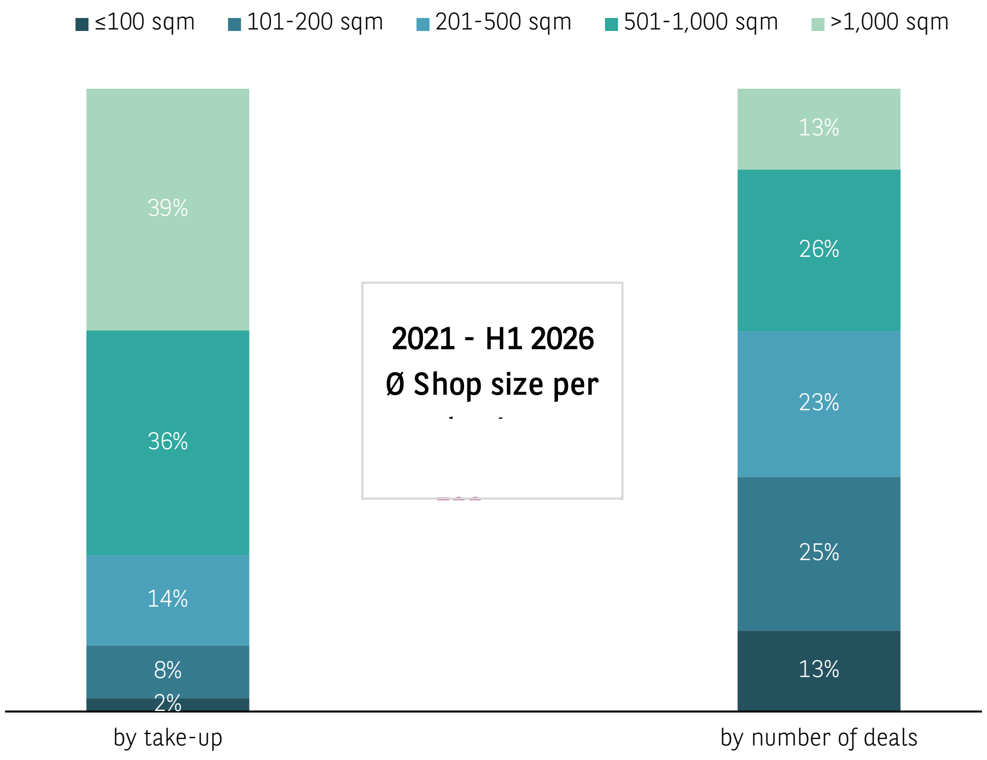
BNP PARIBAS
REAL ESTATE

Take-up H1 2026: 2,000 sqm | H1 2025: 5,000 sqm | Ø 5 years 4,000 sqm

Retail take-up in city locations

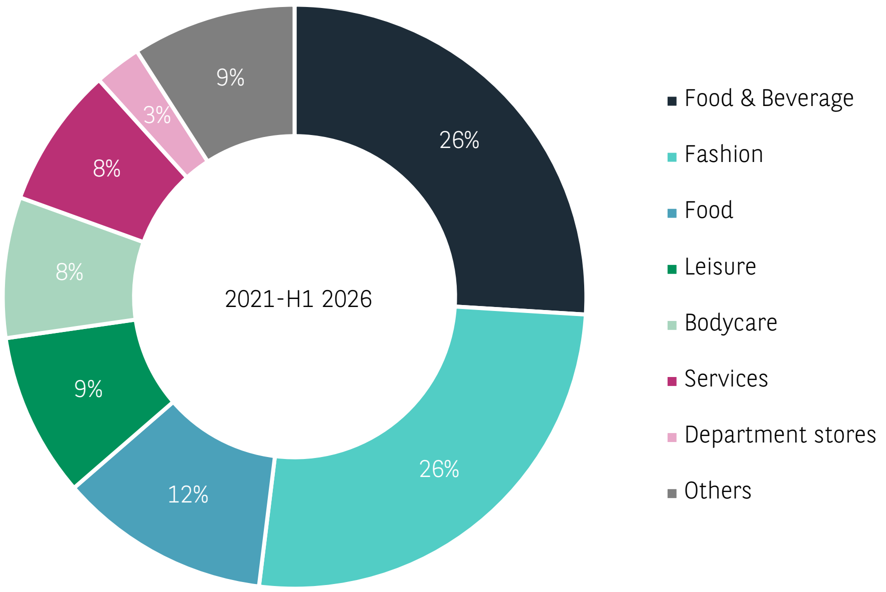


Take-up Volume & Number of Lettings/Openings by Size Category



Current top industries: Food & Beverage: 26 % , Fashion: 26 % , Food: 12 %

Store openings by sector

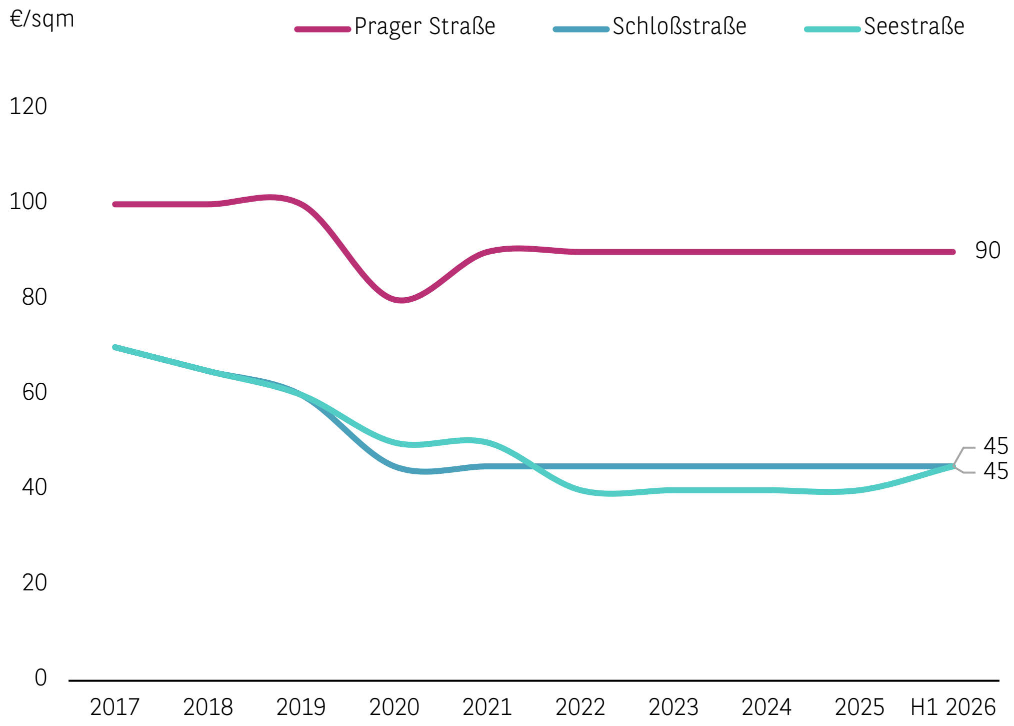


Selected lettings and store openings in recent years

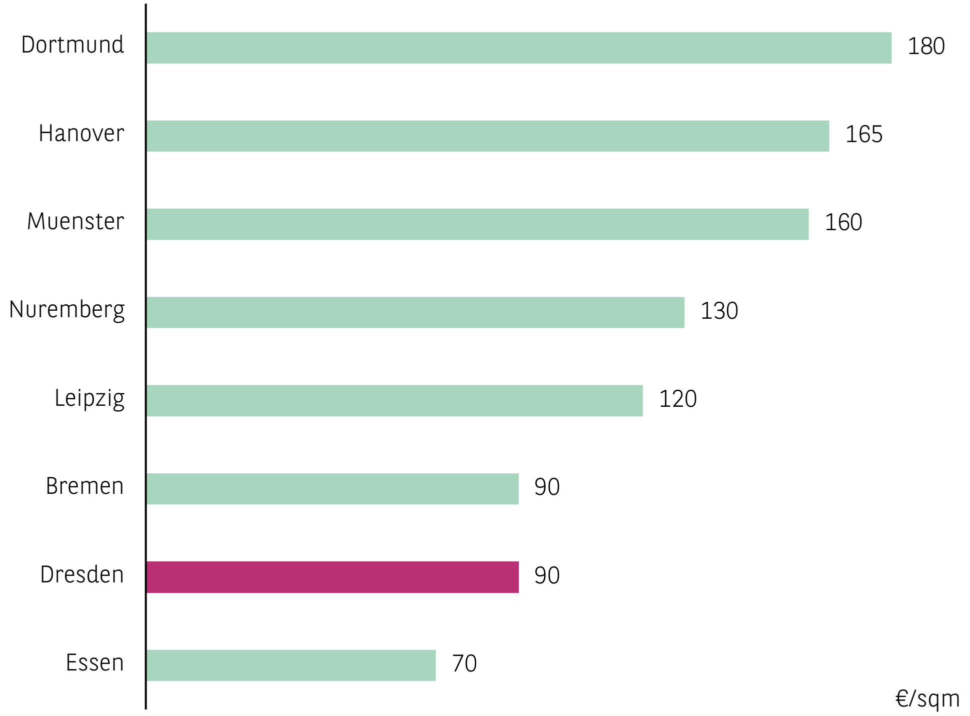
Quarter / year	Address	Retailer	Sectors	Gross lease area
2024 Q1	Prager Straße 10	C&A	Fashion	3.400 sqm
2025 Q3	Schloßstraße 1	Papenbreer	Fashion	1.800 sqm
2023 Q1	Prager Straße 3	Go Asia	Food	1.500 sqm
2024 Q1	Prager straße 8	Zalando Outlet	Fashion	1.500 sqm
2023 Q3	Prager Straße 3a	Woolworth	Department stores	1.400 sqm
2026 Q1	Prager Straße	Coolblue	Electronics	1.400 sqm
2025 Q2	Altmarkt 10 a-d	60 seconds to Napoli	Food & Beverage	1.040 sqm
2025 Q2	Altmarkt-Galerie	Adidas	Fashion	920 sqm
2023 Q2	Centrum Galerie	Stradivarius	Fashion	890 sqm
2024 Q3	Prager Straße 17	Mango	Fashion	800 sqm

Prager Straße: Prime rent currently at 90 €/sqm

Development of prime rents by location

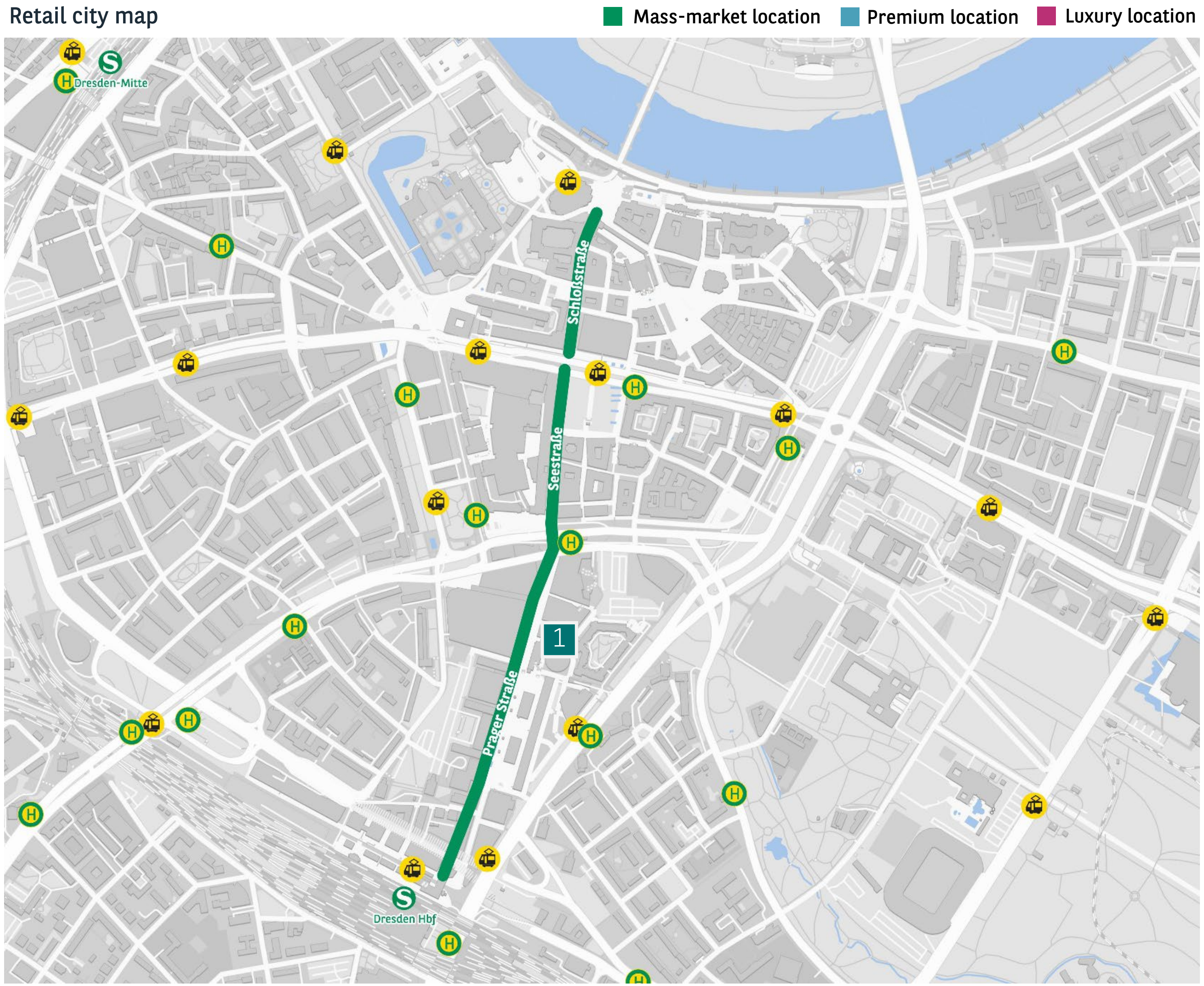


Comparison of prime rents across B-Cities

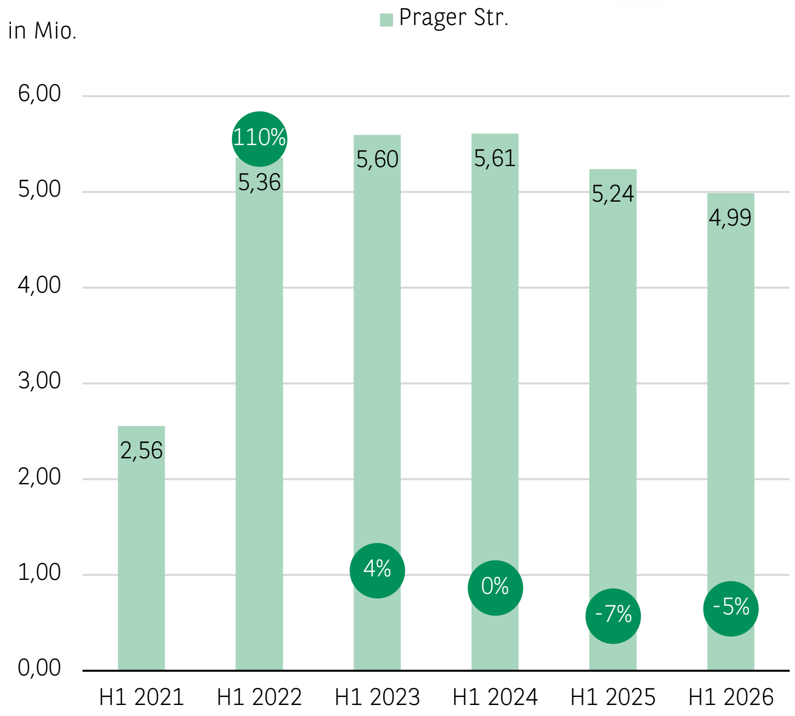


BNP PARIBAS REAL ESTATE

Retail city map



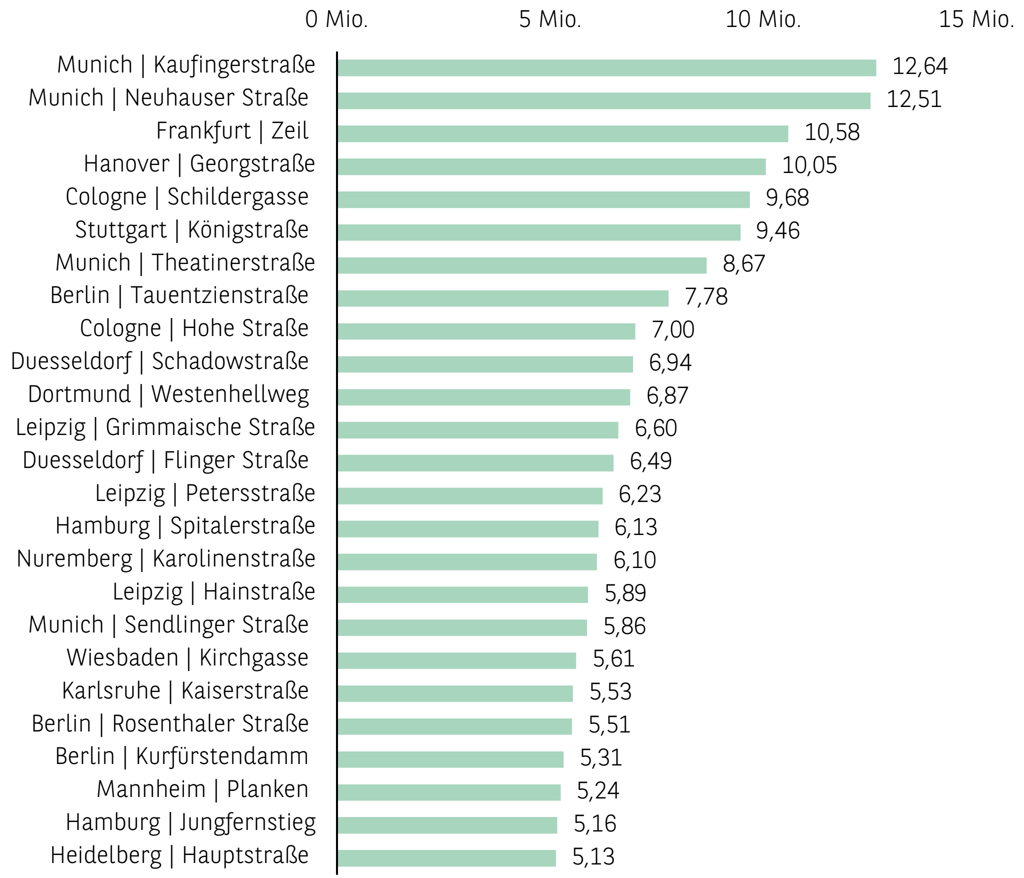
Pedestrians per half year



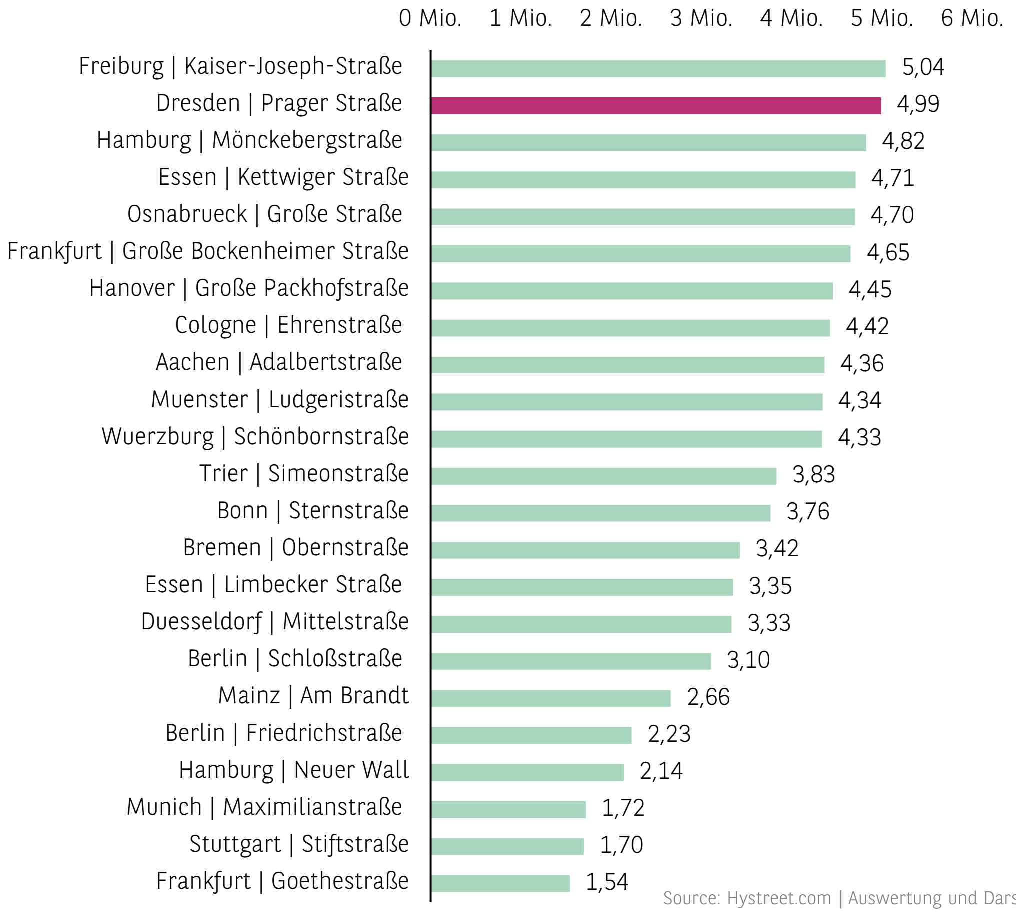
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison

Top 25 most visited German shopping streets - full year



Rank 26-50 of the most visited German shopping streets - full year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Key Takeaways: Retail market Dresden H1 2026

Take-up and openings:

After delivering a strong performance with nearly 7,500 sqm of take-up in 2025, Dresden's retail market continues to attract new occupiers to the prime city-centre locations in 2026. Notable recent openings include Burgermeister and Dutch consumer electronics specialist Coolblue. The expansion activities of these highly active retailers underline Dresden's position as an attractive secondary city, typically following the major German retail hubs in retailers' expansion strategies.

Sektor and size classes:

Food & beverage operators and fashion retailers have been the key drivers of leasing activity over the past 18 months. Since the beginning of 2025, F&B concepts have accounted for 33% of all lettings and openings, followed by fashion brands with a 20% share. The average transaction size currently amounts to approximately 420 sqm.

Prime rent:

Prime rents on Prager Strasse remain stable at €90/sqm.

Footfall:

With around 5.0 million visitors, Prager Strasse currently ranks among Germany’s top 30 shopping streets.


Bild © AdobeStock 307133072

Source: BNPPRE; Hystreet.com

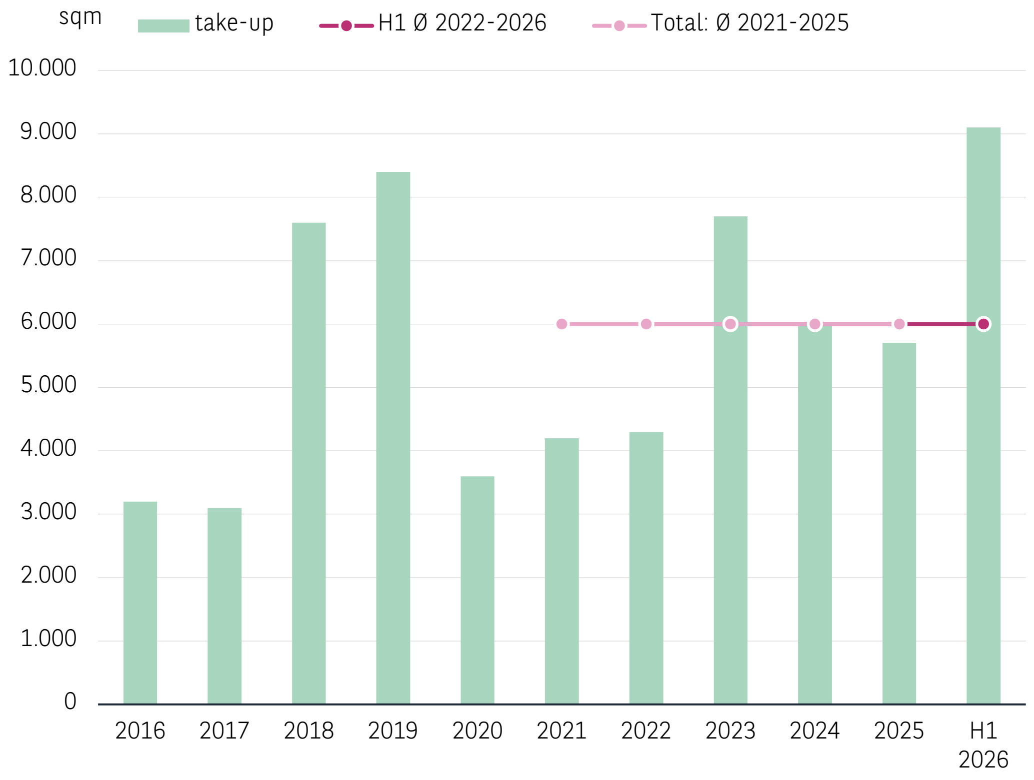
RETAIL MARKET

HANOVER

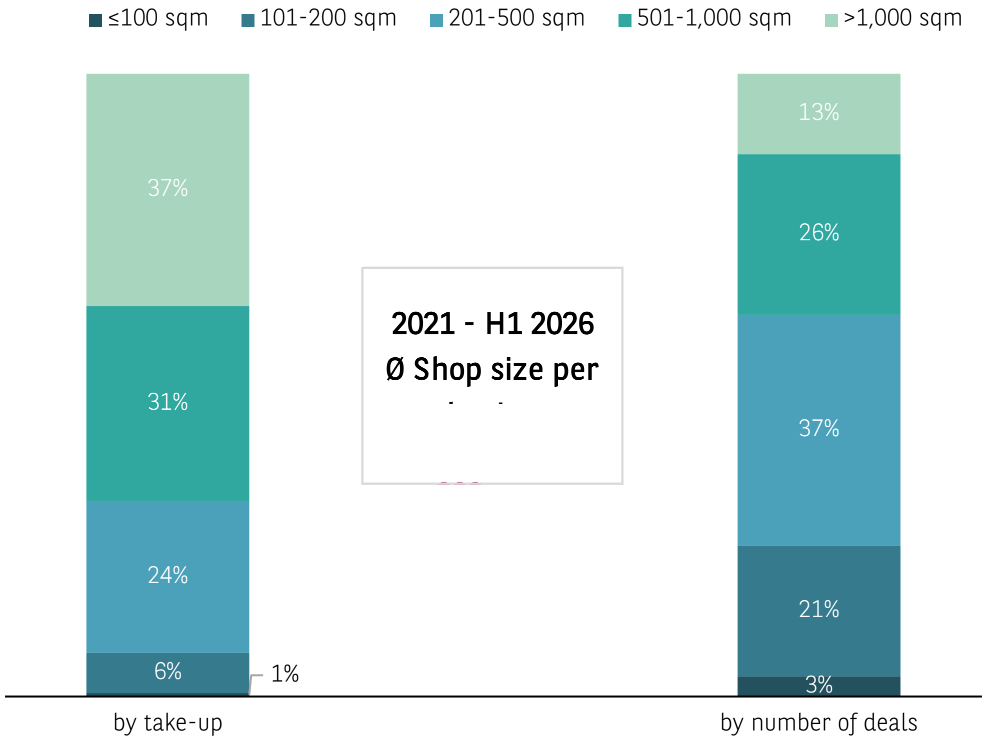
Take-up H1 2026: 9,000 sqm | H1 2025: 5,000 sqm | Ø 5 years 6,000 sqm

HANOVER

Retail take-up in city locations



Take-up Volume & Number of Lettings/Openings by Size Category

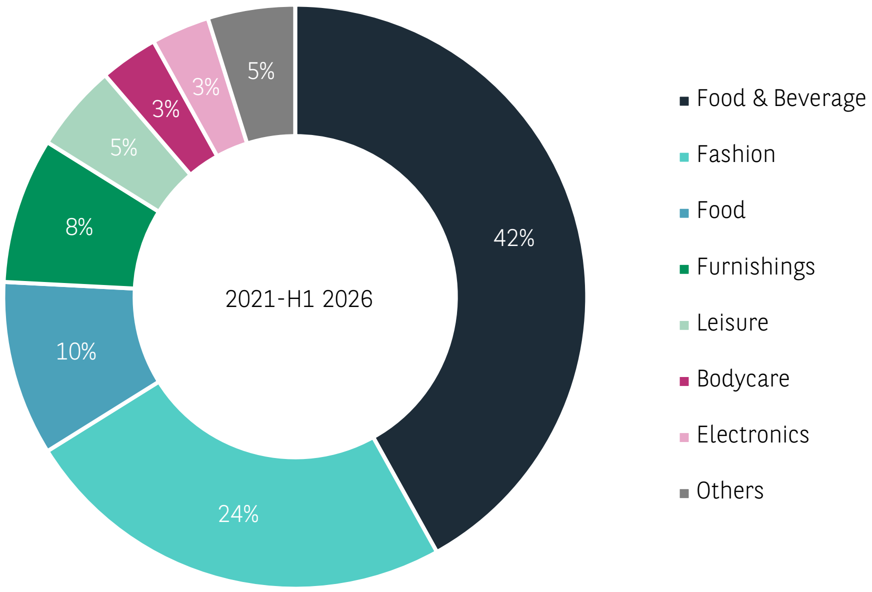


BNP PARIBAS REAL ESTATE

Current top industries: Food & Beverage: 42 % , Fashion: 24 % , Food: 10 %

HANOVER

Store openings by sector



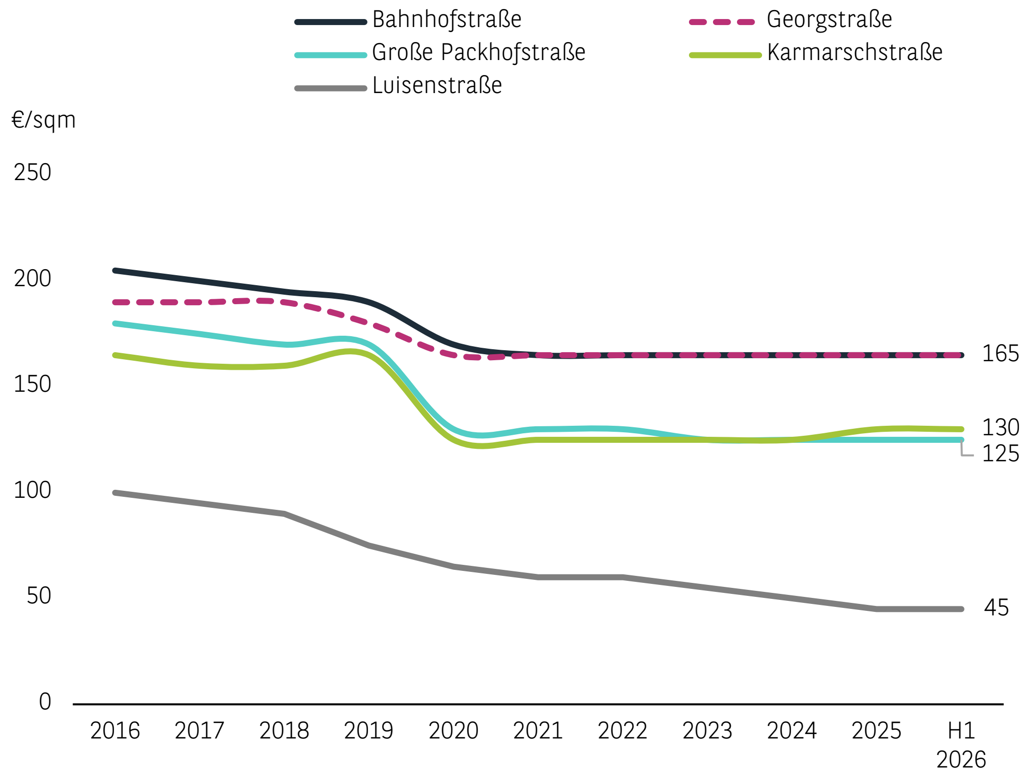
Selected lettings and store openings in recent years

Quarter / year	Address	Retailer	Sectors	Gross lease area
Q2 2026	Ernst-August-Galerie	Lager 157	Fashion	2.500 sqm
Q1 2025	Georgstraße 14	SportScheck	Fashion	1.500 sqm
Q1 2023	Georgstraße 17	Urban Outfitters	Fashion	1.500 sqm
Q2 2025	Bahnhofsstraße 8	Coolblue	Electronics	1.300 sqm
Q2 2024	Georgstraße 14	P&C Outlet	Fashion	1.200 sqm
Q1 2025	Bahnhofstraße 8	P&C Outlet (new)	Fashion	1.200 sqm
Q3 2023	Große Packhofstraße 39	Mystyle	Fashion	1.000 sqm
Q4 2023	Ernst-August-Galerie	Go Asia	Food	900 sqm
Q1 2024	Georgstraße 17	Urban Outfitters	Fashion	900 sqm
Q1 2024	Große Packhofstraße 36	Only	Fashion	800 sqm

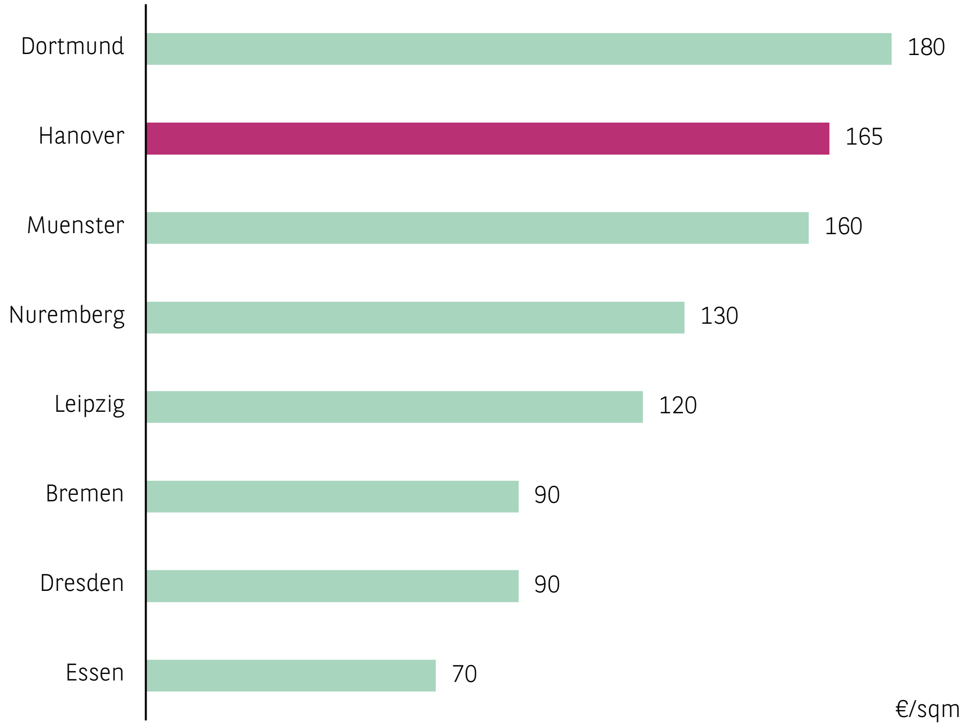
Georg-/Bahnhofstraße: Prime rent currently at 165 €/sqm

HANOVER

Development of prime rents by location

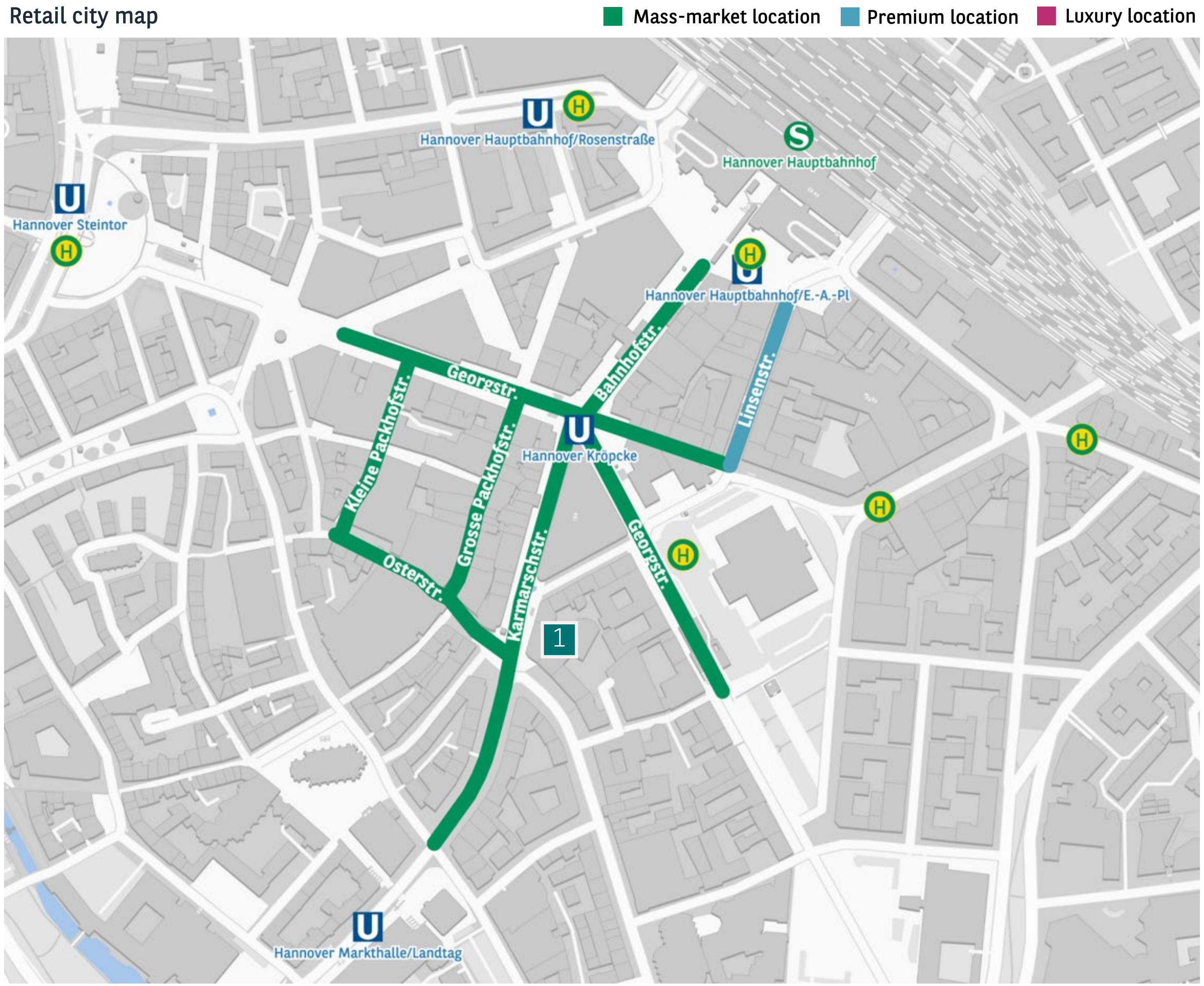


Comparison of prime rents across B-Cities

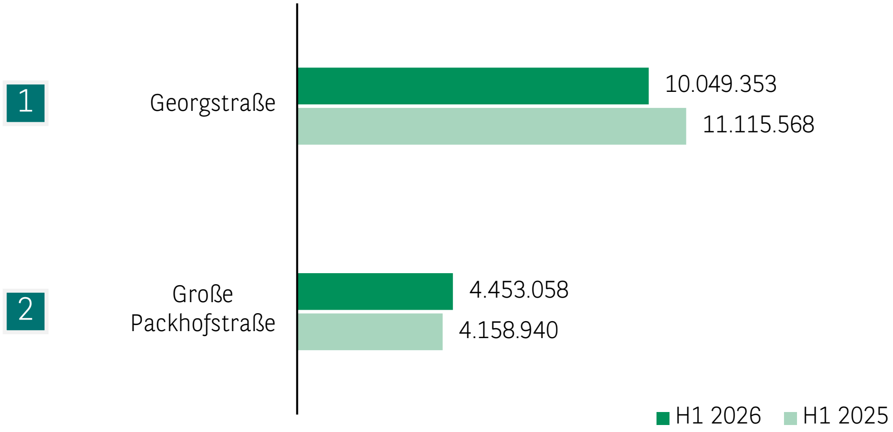


BNP PARIBAS REAL ESTATE

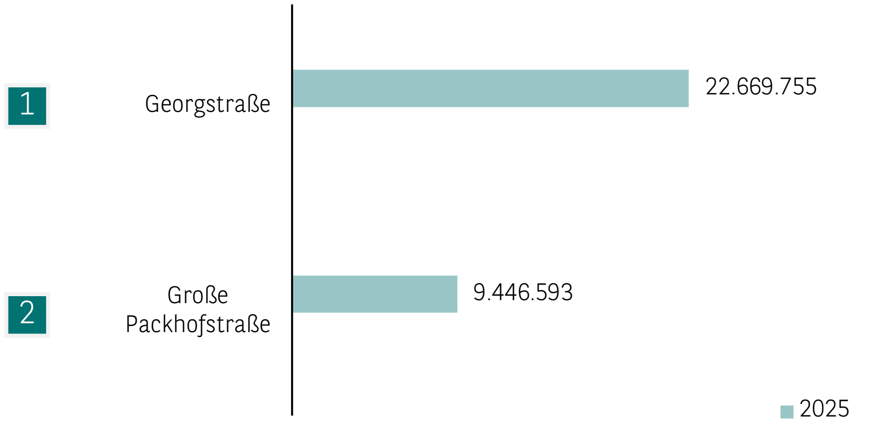
Retail city map



Pedestrians per half year



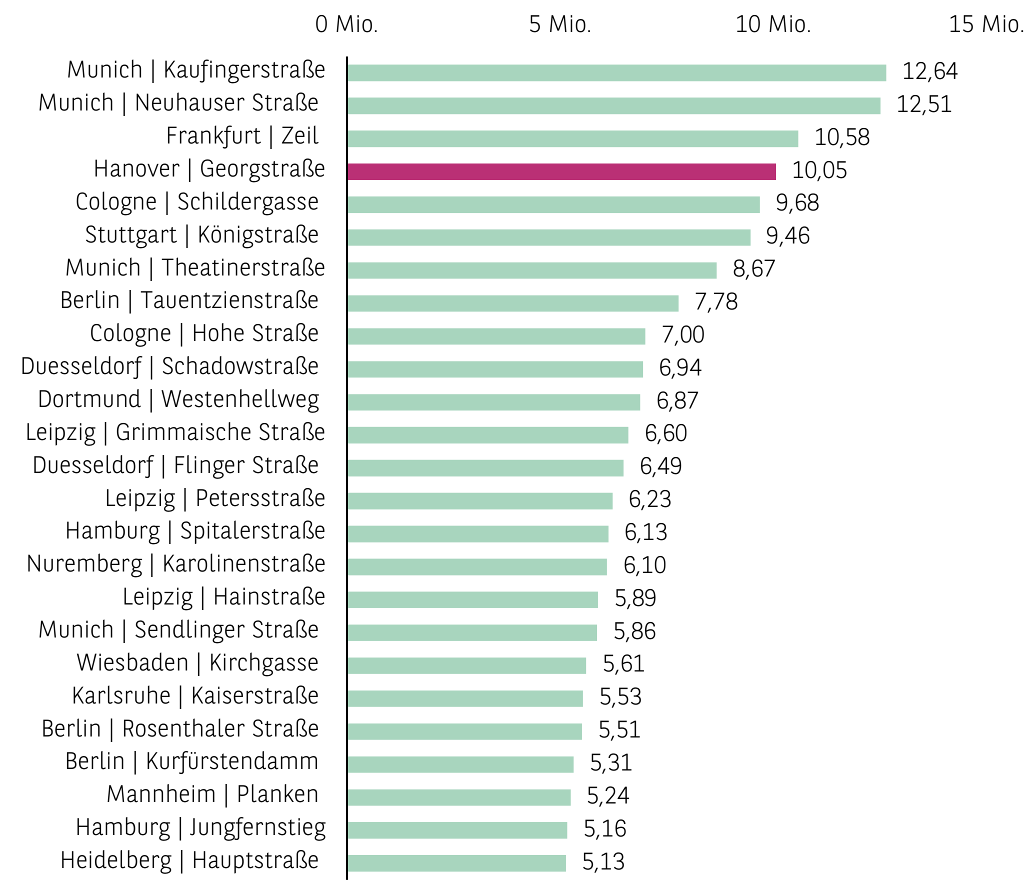
Pedestrians per year



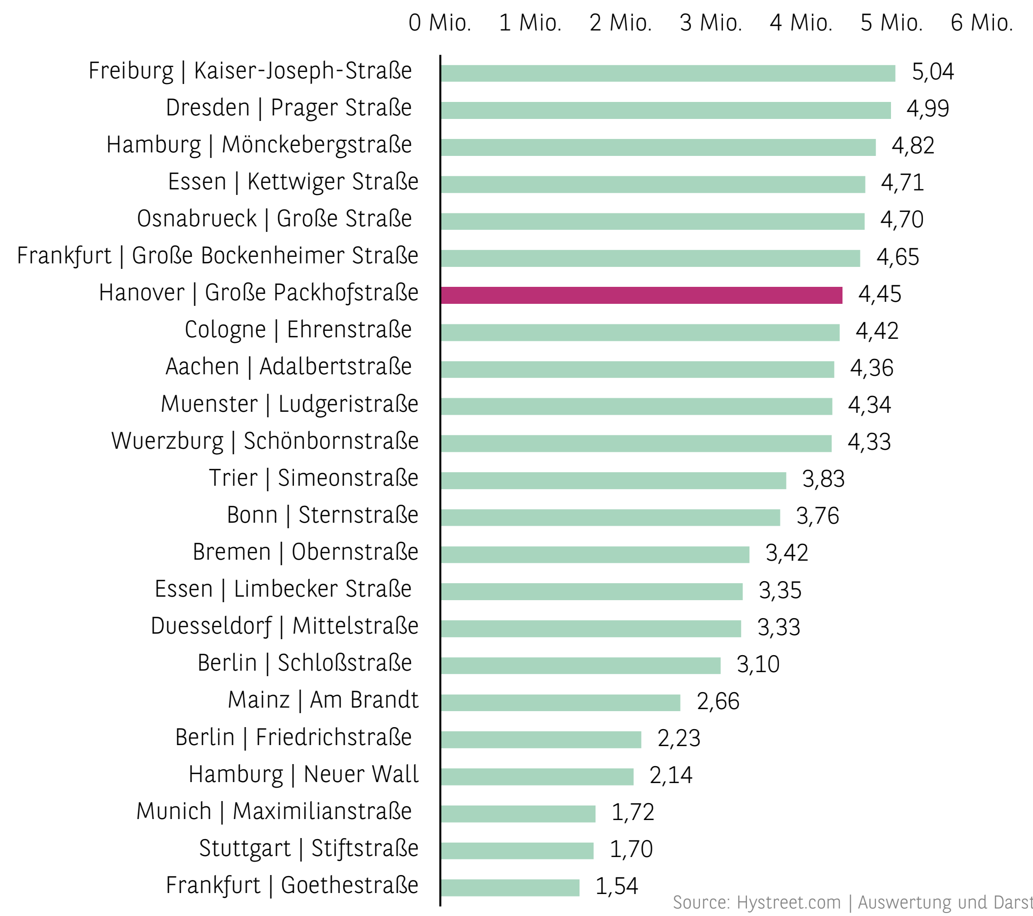
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison

Top 25 most visited German shopping streets - full year



Rank 26-50 of the most visited German shopping streets - full year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

BNP PARIBAS REAL ESTATE

Key Takeaways: Retail market Hanover H1 2026

HANOVER

Take-up and openings:

High-profile retailers such as Lager 157, SportScheck, Coolblue, Peek & Cloppenburg and idee.creativmarkt have contributed to a vibrant leasing market in Hanover since early 2025. After recording approximately 6,000 sqm of take-up in 2025, the market has already surpassed this level in the first half of 2026, with take-up reaching almost 9,100 sqm by mid-year.

Sektor and size classes:

Food & beverage operators, fashion retailers and grocery concepts have been the key drivers of leasing activity, collectively accounting for around 78% of all lettings since 2020. Further momentum has come from occupiers in the home furnishings, leisure and consumer electronics sectors.

Prime rent:

Prime rents on Bahnhofstrasse remain stable at €165/sqm.

Footfall:

Georgstrasse once again secured a strong fourth-place ranking, attracting around 10.05 million visitors and reaffirming its position among Germany's leading high streets.

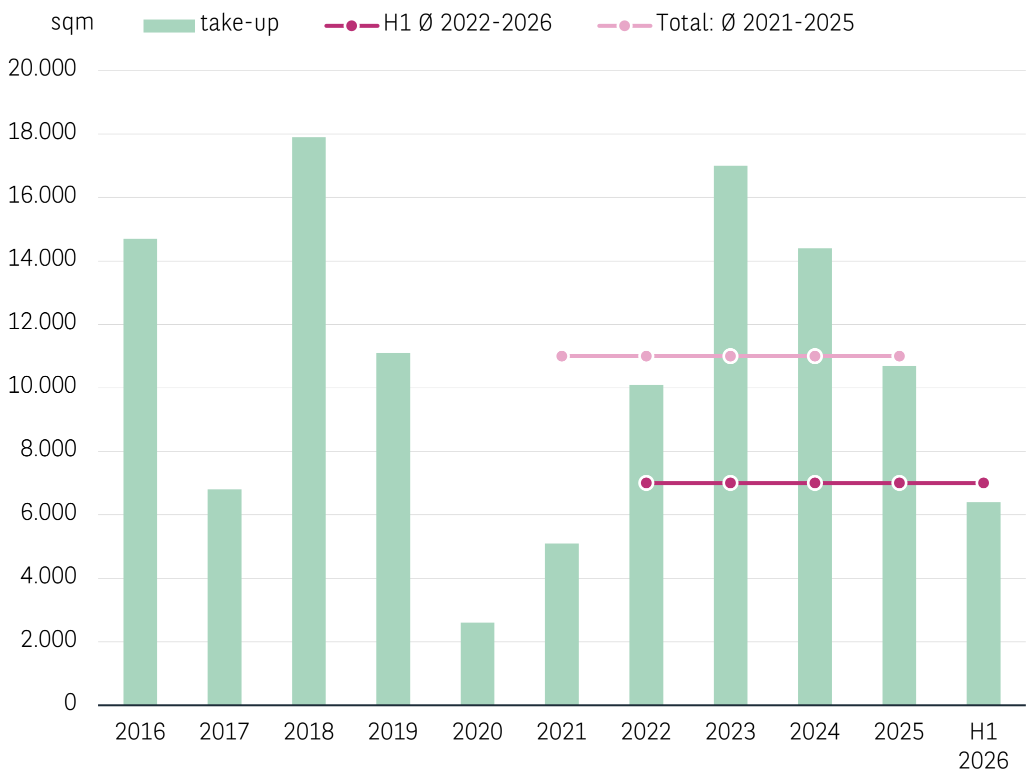

Hannover_Rathaus_Fotolia_104438783_L©Mapics

Source: BNPPRE; Hystreet.com

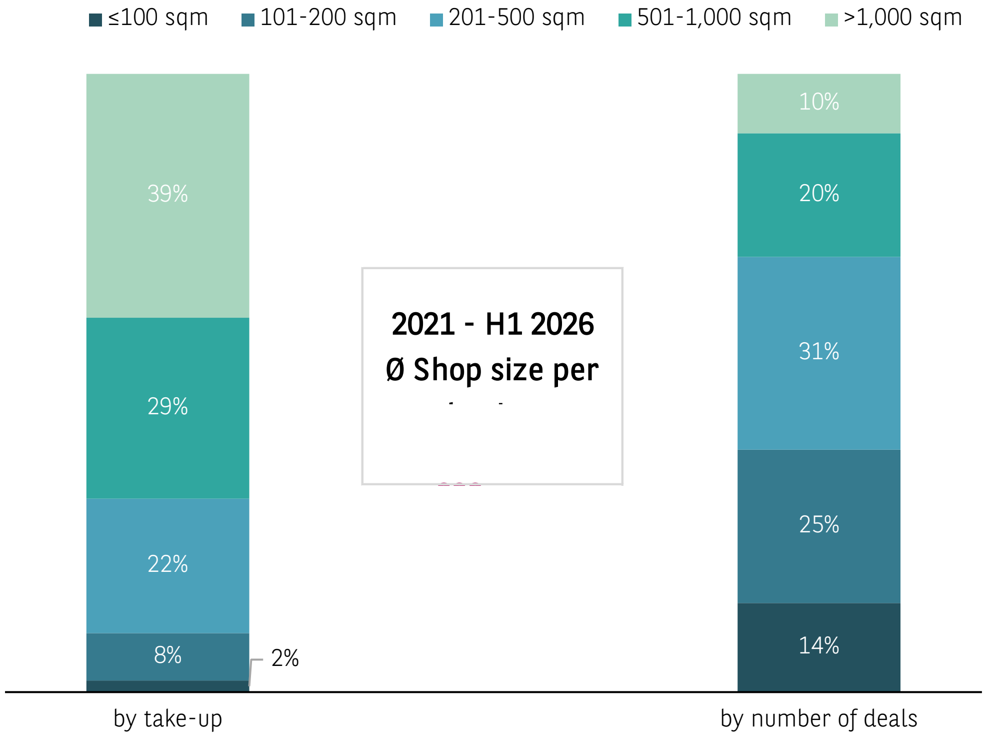
RETAIL MARKET
LEIPZIG

Take-up H1 2026: 6,000 sqm | H1 2025: 8,000 sqm | Ø 5 years 7,000 sqm

Retail take-up in city locations

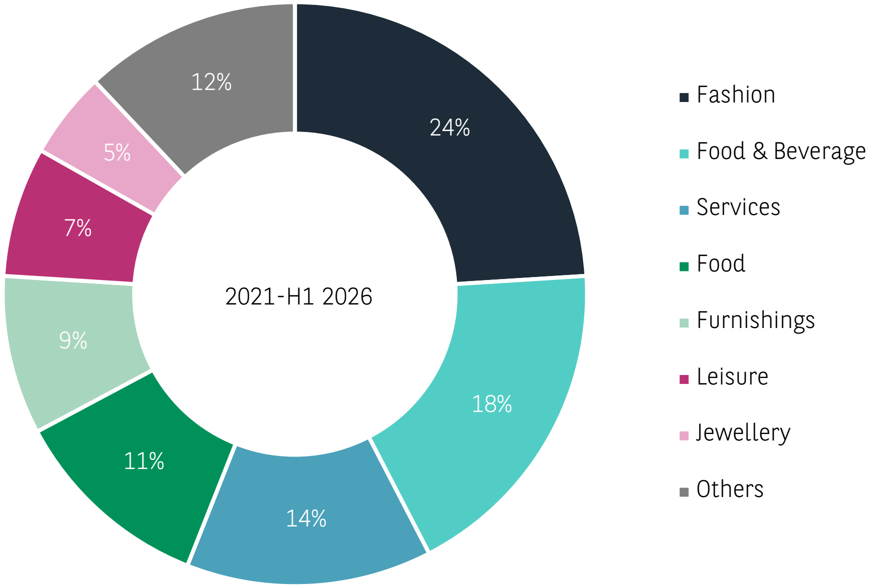


Take-up Volume & Number of Lettings/Openings by Size Category



Current top industries: Fashion: 24 % , Food & Beverage: 18 % , Services: 14 %

Store openings by sector



Selected lettings and store openings in recent years

Quarter / year	Address	Retailer	Sectors	Gross lease area
2023 Q1	Grimmaische Str. 6-8	Zara	Fashion	4.500 sqm
2023 Q1	Petersstr. 15-17	C&A	Fashion	3.000 sqm
2023 Q3	Hainstr. 21	SportScheck	Fashion	2.085 sqm
2026 Q2	Petersstraße 1	Uniqlo	Fashion	1.500 sqm
2026 Q1	Grimmaische Str. 10	Coolblue	Electronics	1.100 sqm
2024 Q2	Höfe am Brühl	Pull&Bear	Fashion	1.000 sqm
2024 Q2	Höfe am Brühl	Bershka	Fashion	1.000 sqm
2026 Q2	Petersstr. 25-37	Nike	Fashion	1.000 sqm
2025 Q1	Petersstr. 16	Mango	Fashion	1.000 sqm
2023 Q3	Grimmaische Str. 1-7	Rüschenbeck	Jewellery	820 sqm

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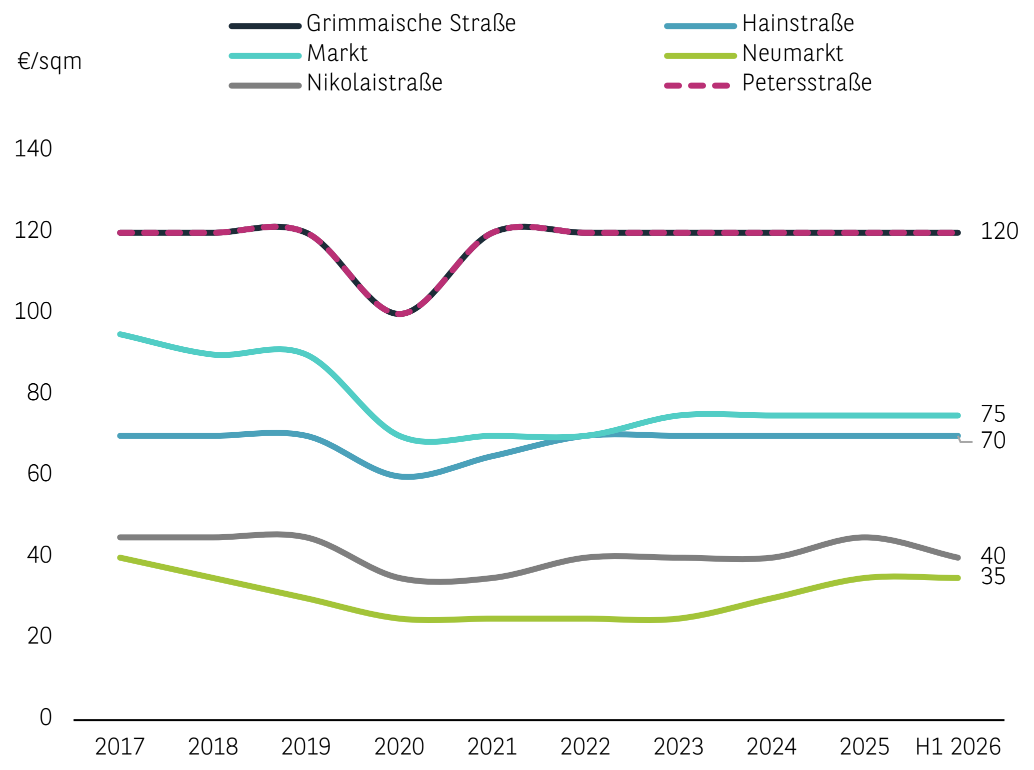
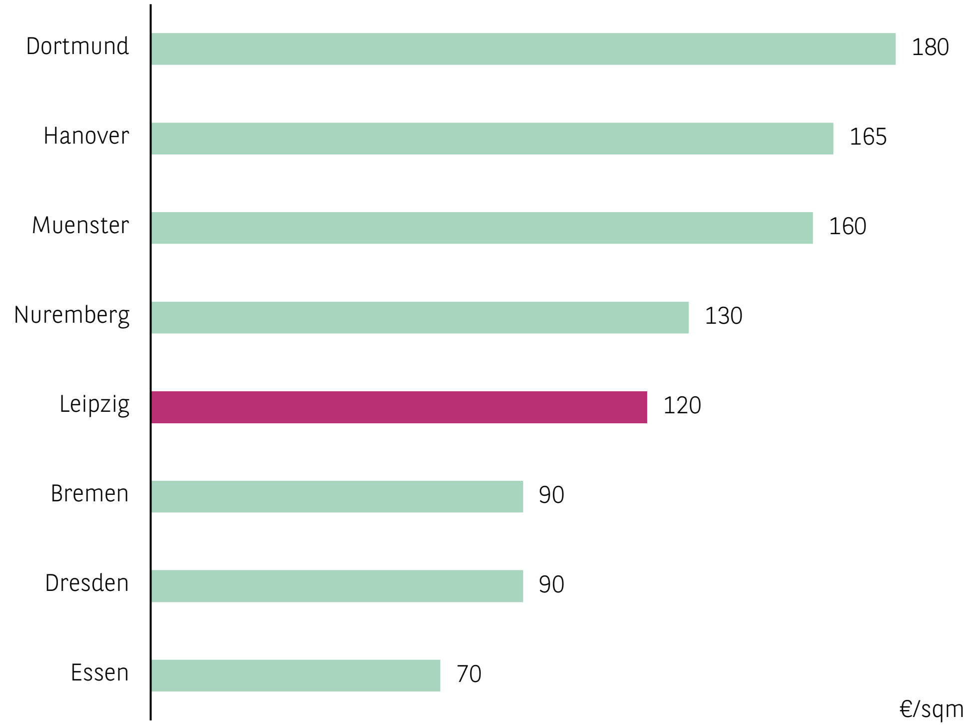
Grimmaische-/Petersstraße: Prime rent currently at 120 €/sqm

Development of prime rents by location

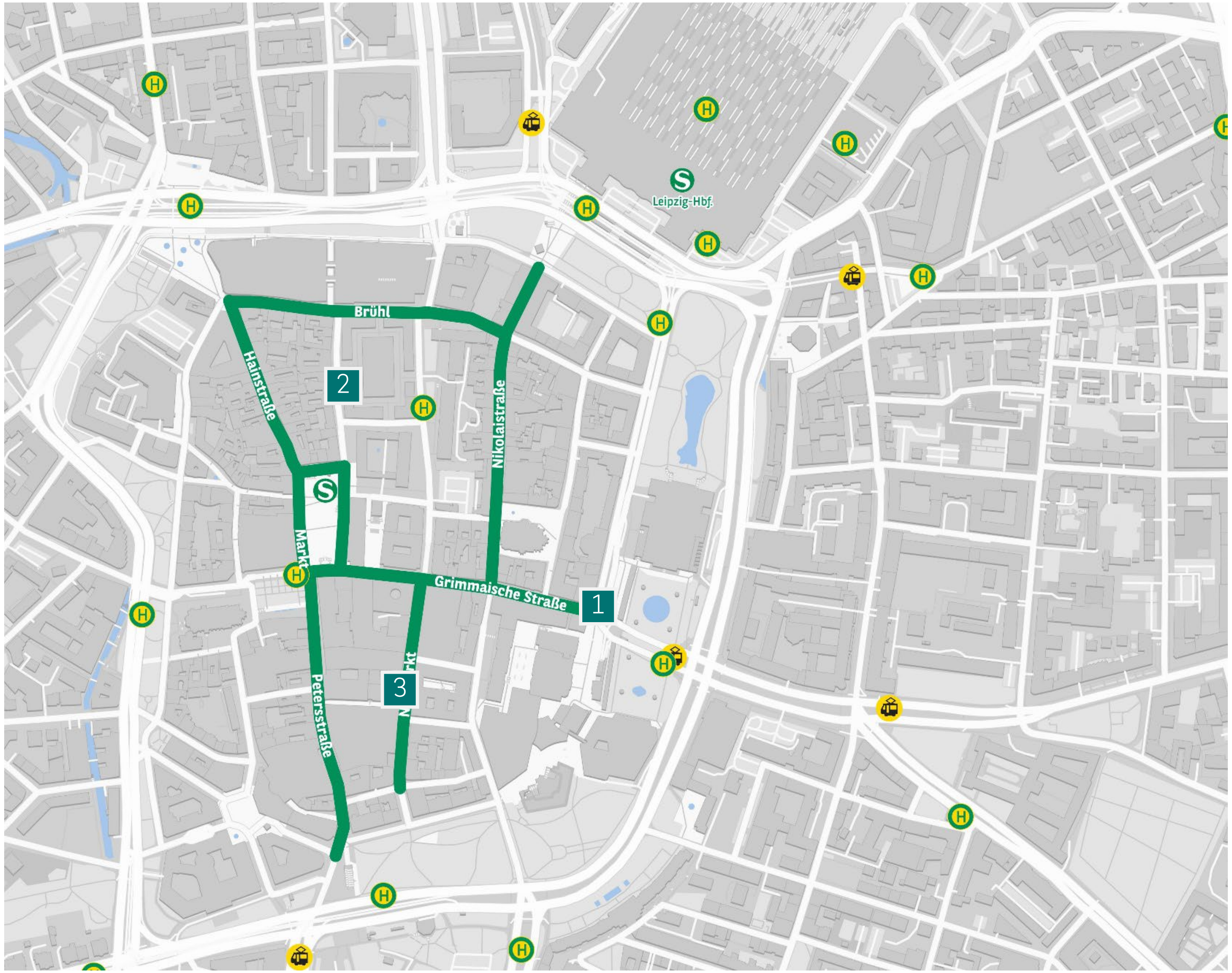


Comparison of prime rents across B-Cities

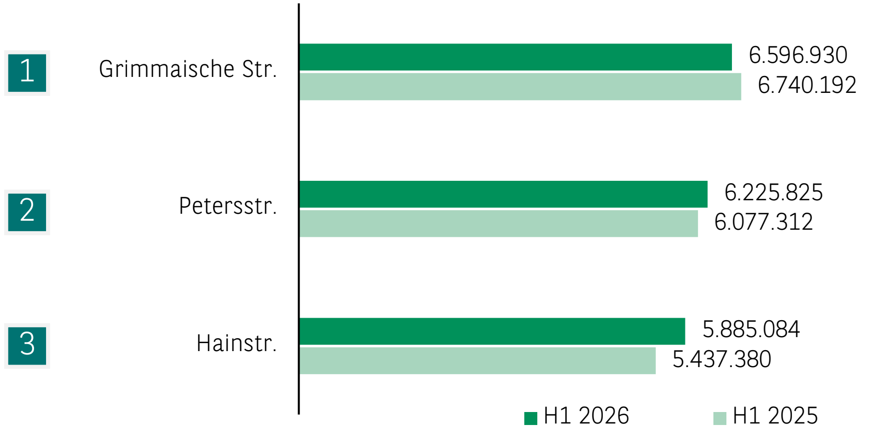


Retail city map

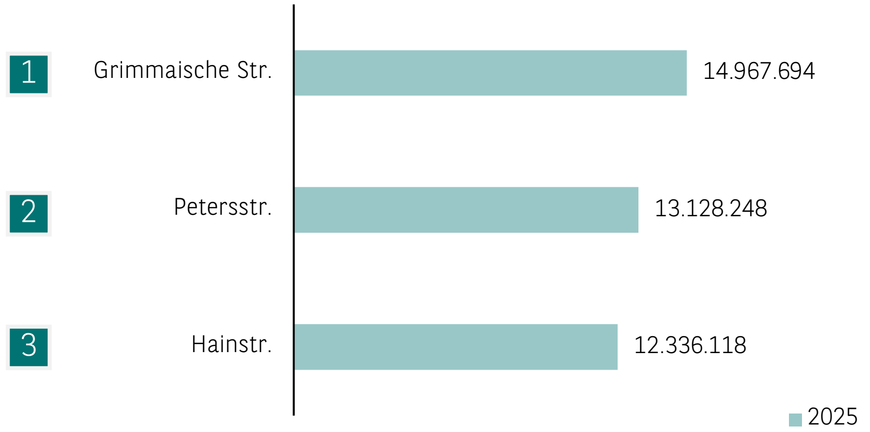
Mass-market location | Premium location | Luxury location



Pedestrians per half year



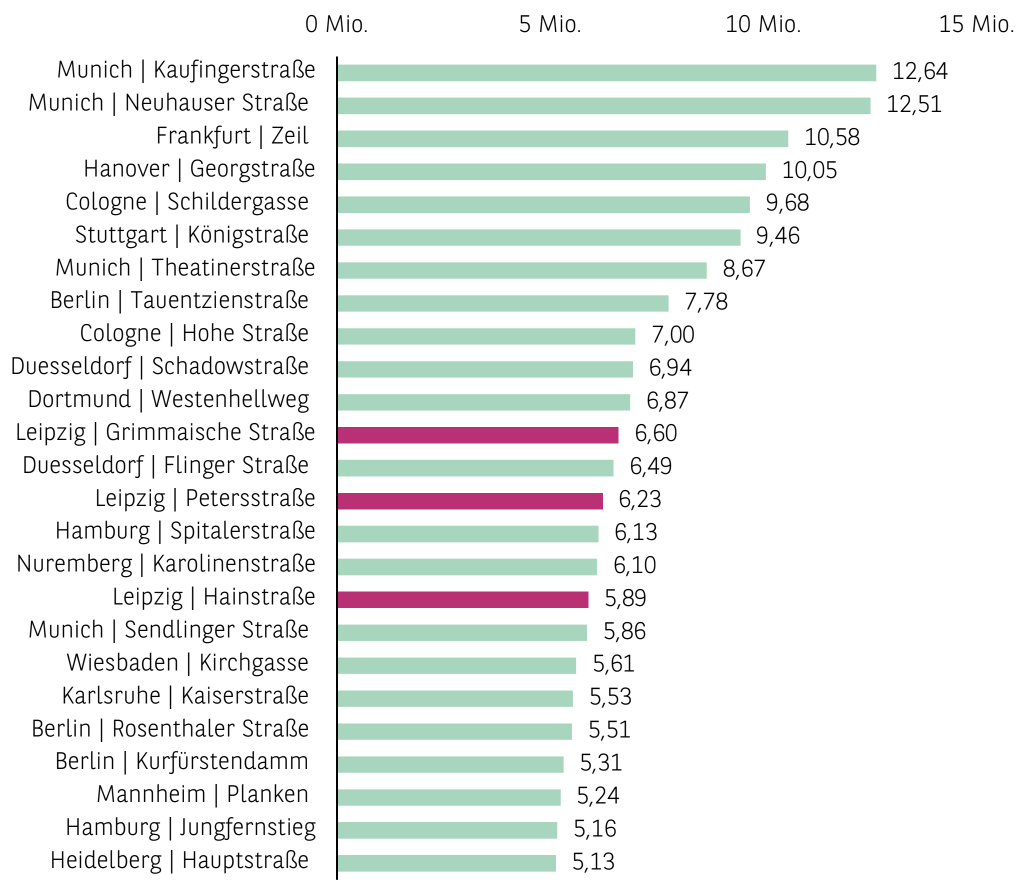
Pedestrians per year



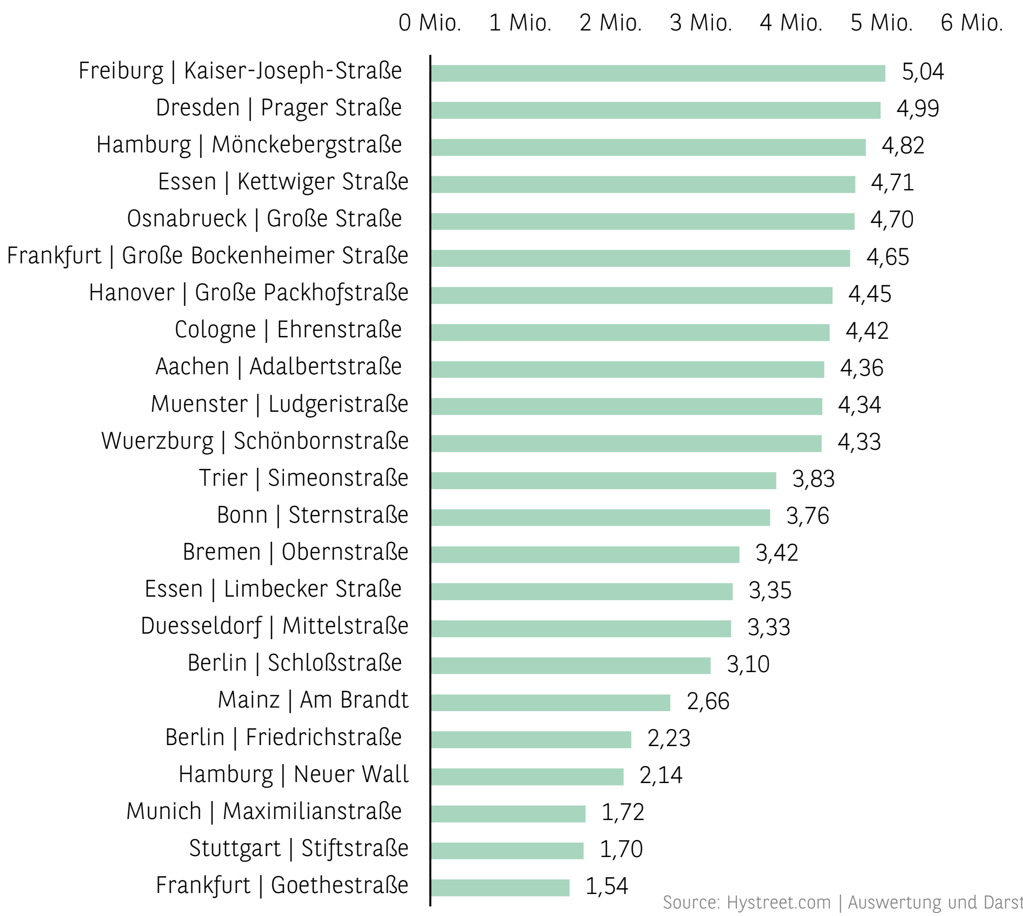
Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Footfall frequencies in a nationwide comparison – H1 2026

Top 25 most visited German shopping streets - half year



Rank 26-50 of the most visited German shopping streets - half year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

Key Takeaways: Retail market Leipzig H1 2026

Take-up and openings:

Following a strong performance in 2025, Leipzig's retail market maintained its momentum in the first half of 2026, generating around 6,500 sqm of take-up, well above the long-term average. High-profile lettings to Nike and Uniqlo highlight the city's growing attractiveness as a secondary retail destination and demonstrate its ability to attract international market leaders beyond Germany's traditional A-cities.

Sektor and size classes:

The leasing market has been strongly driven by fashion retailers since early 2025, with the sector accounting for roughly 43% of all transactions. Food & beverage concepts have also played a significant role, contributing a further 17% of recorded deals in Leipzig's prime retail locations. The average transaction size currently amounts to around 480 sqm.

Prime rent:

Prime rents on Grimmaische Strasse and Petersstrasse continue to stand at €120/sqm.

Footfall:

With 6.60 million visitors on Grimmaische Strasse, 6.23 million on Petersstrasse and 5.90 million on Hainstrasse, Leipzig is home to three of Germany's top 20 shopping streets.

Bild © AdobeStock 128073299

Source: BNPPRE; Hystreet.com

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Take-up H1 2026: 3,000 sqm | H1 2025: 3,000 sqm | Ø 5 years 2,000 sqm

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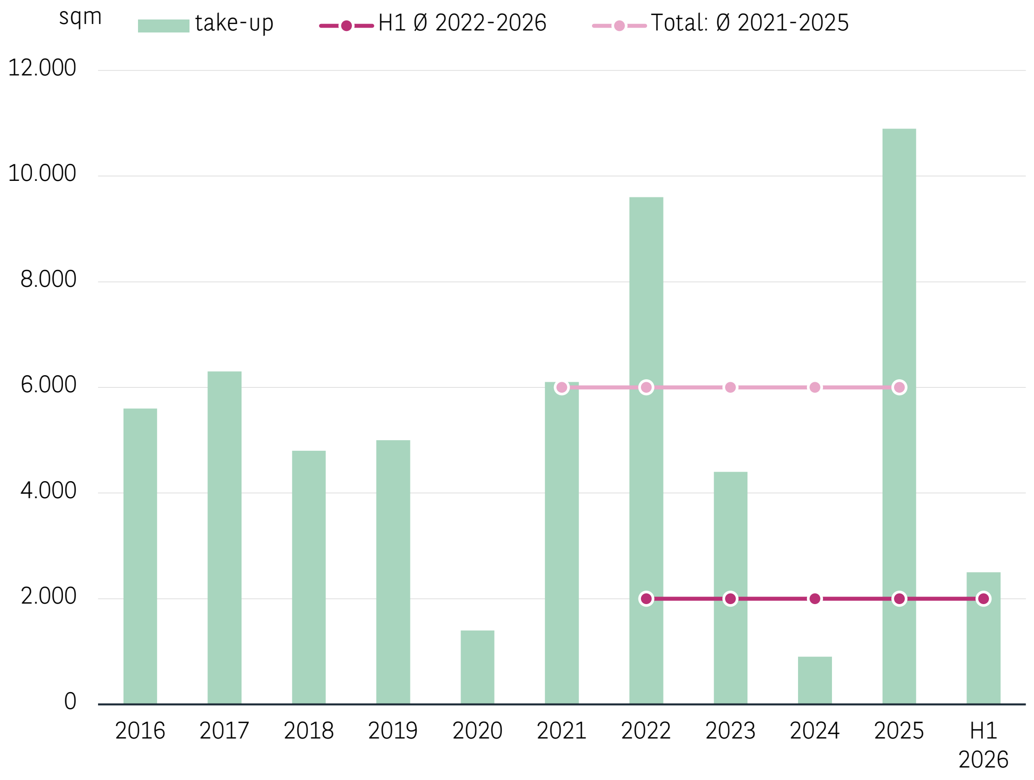
Retail take-up in city locations



Take-up Volume & Number of Lettings/Openings by Size Category

Current top industries: Fashion: 34 % , Food & Beverage: 26 % , Bodycare: 11 %

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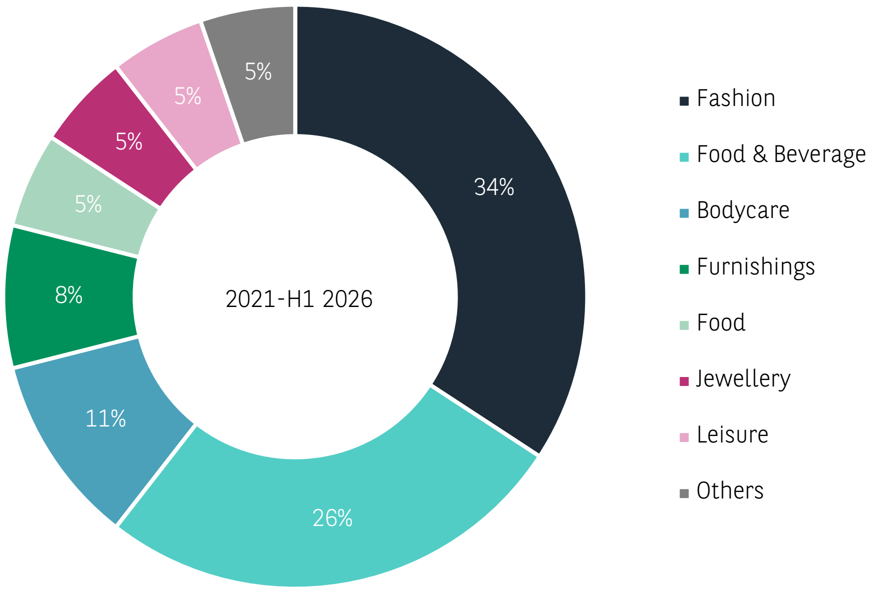
Store openings by sector



Selected lettings and store openings in recent years

Quarter / year	Address	Retailer	Sectors	Gross lease area
2025 Q3	Ludwigsplatz 25	TK Maxx	Fashion	3,600 sqm
2025 Q2	Königstraße 14	Wöhrl (Outlet)	Fashion	3,000 sqm
2025 Q3	Ludwigsplatz 24	Decathlon	Leisure	2,900 sqm
2023 Q2	Karolinenstraße 7	H&M	Fashion	2,800 sqm
2026 Q2	Bahnhofsplatz 1a	Woolworth	Department stores	1,000 sqm
2026 Q2	Karolinenstraße 45	dm	Bodycare	860 sqm
2024 Q3	Königstraße 83	Wilma Wunder	Food & Beverage	640 sqm
2025 Q3	Breite Gasse 85-87	LIL	Fashion	550 sqm
2023 Q3	Breite Gasse 59-61	Hugendubel	Bookstores and	510 sqm
2023 Q3	Kaiserstraße 6	The North Face	Fashion	420 sqm

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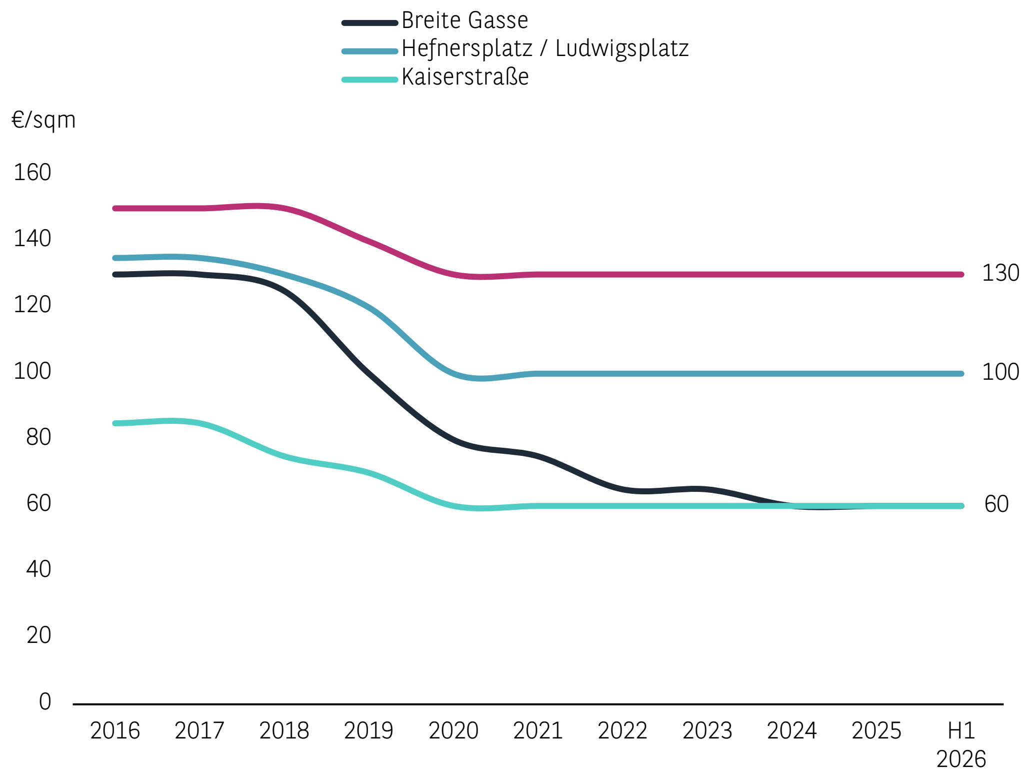
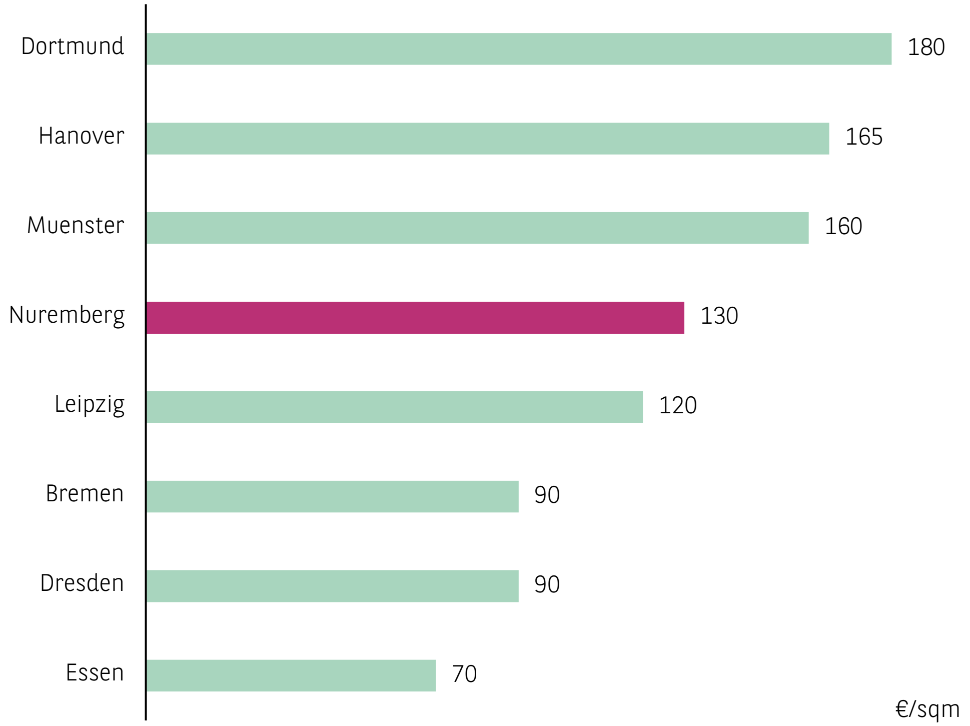
Karolinenstraße: Prime rent currently at 130 €/sqm

NUREMBERG

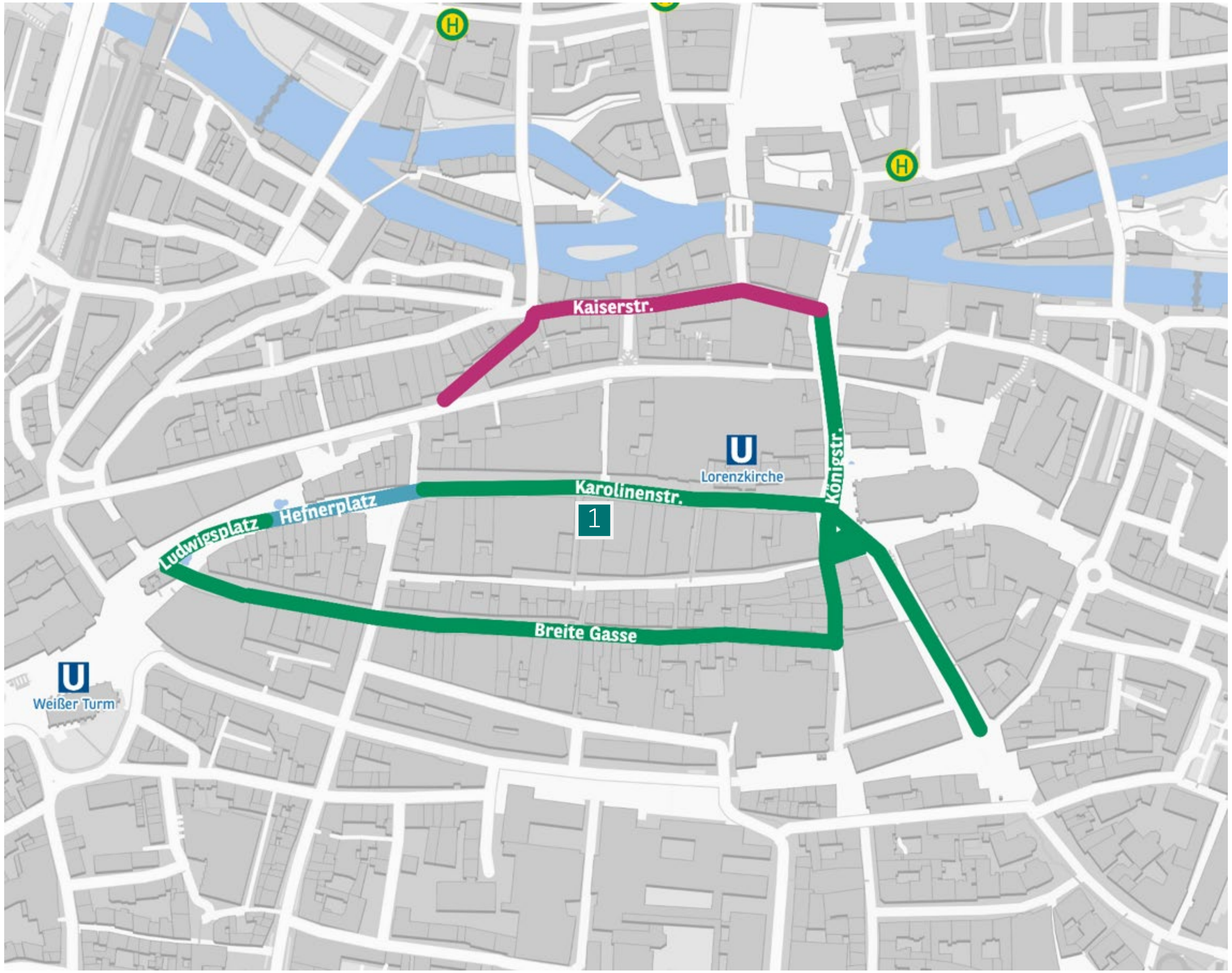
Development of prime rents by location



Comparison of prime rents across B-Cities



Retail city map



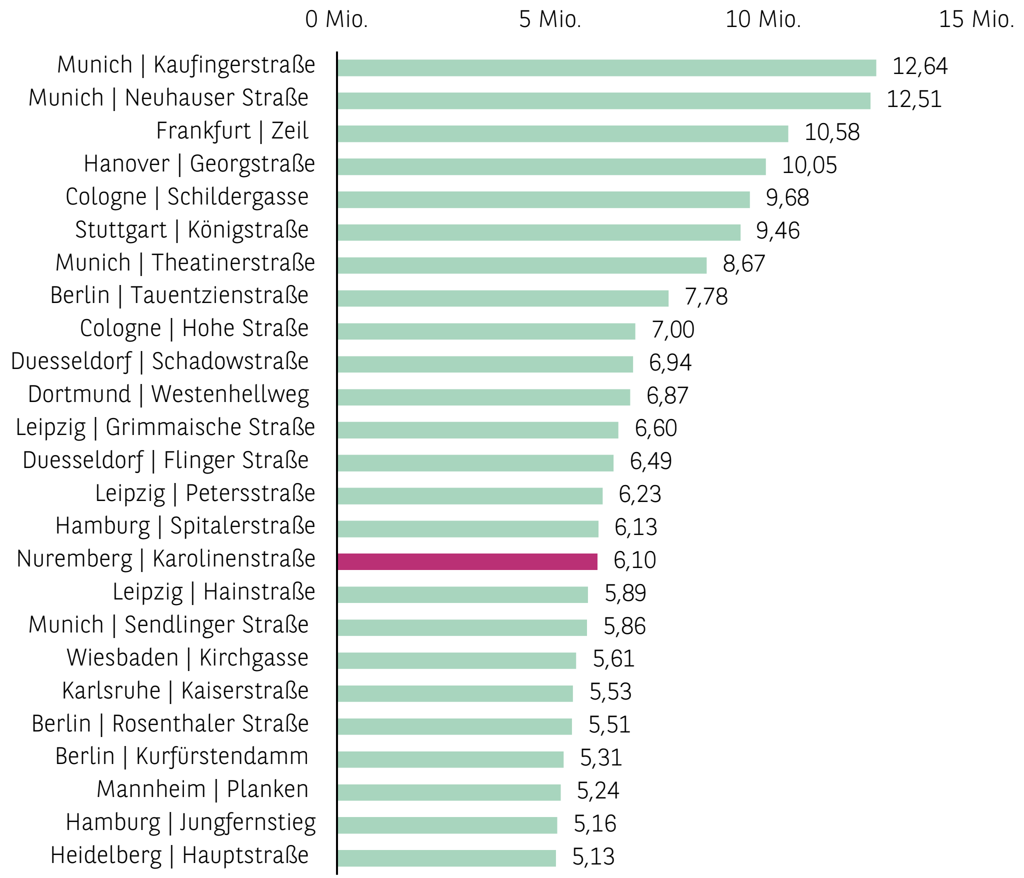
Pedestrians per half year

Source: Hystreet.com | Auswertung und Darstellung BNPPRE

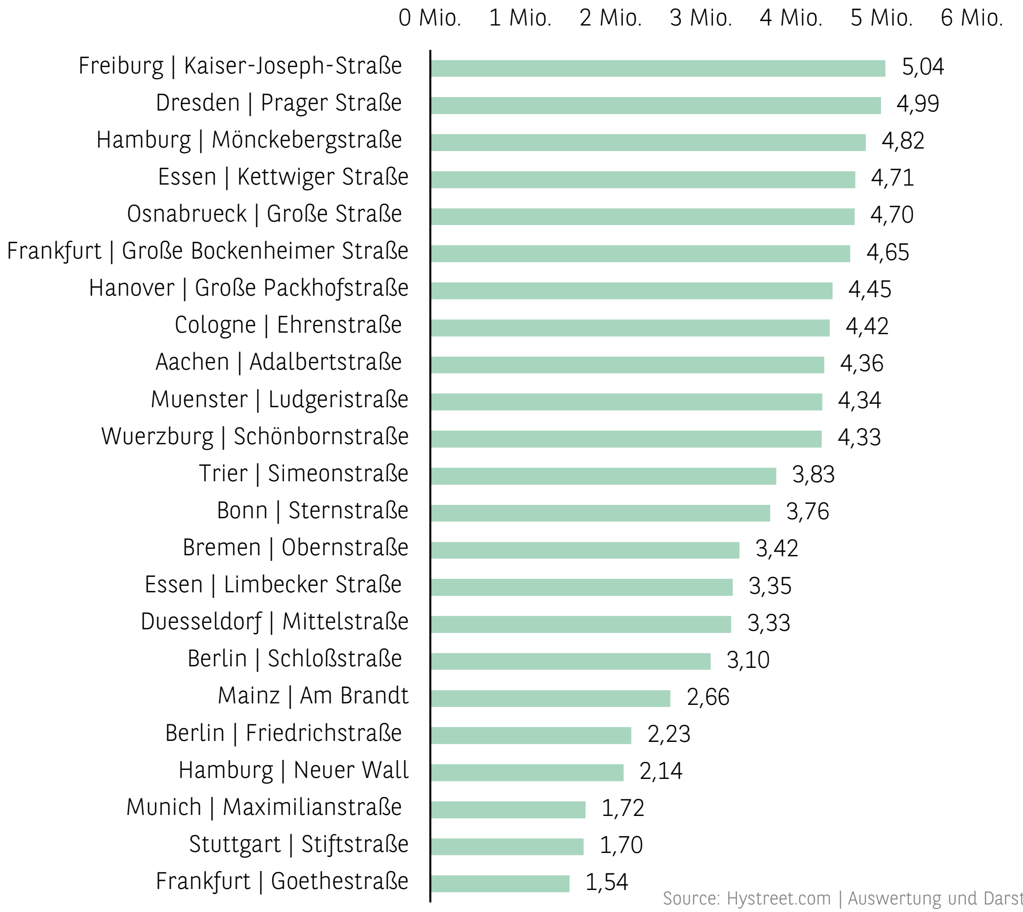
Footfall frequencies in a nationwide comparison

NUREMBERG

Top 25 most visited German shopping streets - full year



Rank 26-50 of the most visited German shopping streets - full year



Source: Hystreet.com | Auswertung und Darstellung BNPPRE

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Key Takeaways: Retail market Nuremberg H1 2026

NUREMBERG

Take-up and openings:

Since early 2025, Nuremberg's retail market has benefited from a particularly strong leasing momentum, largely supported by large-format re-lettings in the department store segment. These transactions alone accounted for almost 11,000 sqm of take-up. Key deals include TK Maxx (3,600 sqm) in the former C&A unit, the Wöhrl Outlet (3,000 sqm) in the former Galeria department store, and a new Decathlon store (2,900 sqm) in the lower ground floor of Wöhrl's flagship property.

Sektor and size classes:

Driven in part by several large-format transactions, units above 1,000 sqm have accounted for roughly two-thirds of total take-up since 2020. In terms of occupier demand, fashion retailers currently lead the market with a 30% share, ahead of food & beverage operators (28%) and home furnishings concepts (12%).

Prime rent:

Prime rents on Karolinenstrasse remain stable at €130/sqm.

Footfall:

Attracting approximately 6.10 million visitors, Karolinenstrasse secures 16th place in Germany's ranking of leading shopping streets, highlighting its strong regional and national appeal.

Source: BNPPRE; Hystreet.com

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