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# *2021 IBB Housing Market Report*

Summary

## Foreword

The corona pandemic is entering its third year, and not leaving Berlin's housing market unaffected. For the first time in the new millennium, fewer people moved to Berlin in 2020 than left the city in the same period. Following many years of growth with interim record highs of over 50,000 new residents a year, a slight „breather“ is emerging now. I am certain that this will not stay that way. Which makes it all the more important to not let up now, and to continue driving and intensifying the efforts for easing the housing market.

One essential contribution to this is and remains the construction of more new housing. For the fourth time in a row already, the number of flats being granted approval in 2020 declined from the previous year. Completions also registered a decline. This may have been caused by corona. But we need to think about the time after the pandemic now. We need to get the city ready to face the future. This primarily also includes easing the market. Which means that we need to expand the number of affordable homes available throughout the city. That is a joint task. It is for this reason that the Berlin Senate established the Alliance for Residential Construction and Affordable Housing in January 2022. The alliance serves political representatives and representatives of the administration, housing and construction industries, tenants' associations, social associations and unions to discuss the topics of affordable residential construction, modernization, rent developments, tenant protection, urban construction and climate-friendly urban development.

If we want to keep housing affordable in our city, we will need to use all the instruments available to us. Even if no link can be directly established statistically, the „rent cap“ is likely to have structurally affected the conversion of rental properties into commonhold apartments. Which was up again in 2020, for the first time since 2017. Since the summer of 2021, this is countered on a federal level by the Building Land Mobilization Act, which demarkates the Land of Berlin as an area with a tense housing market. Conversions need permits throughout the city now.

Berlin has not only reached a social, but also an ecological turning point: The existing housing is to be made climate-neutral by 2045, at the latest. I am glad that this year's main topic focuses on this theme to afford an insight into the complexity while also highlighting approaches. This calls for good communication and joint efforts from all the parties involved.

For a serious public debate, we need sound information and data sets. I am very happy for the IBB Housing Market Report to serve this important function once more this year. It delivers facts that are appreciated and respected by all those involved.



**Andreas Geisel**

Senator for Urban Development,  
Construction and Housing of the  
Federal State of Berlin

## Foreword

Housing continues to be one of the key topics of our time and is also facing major challenges in a climate change context. Which is why the latest IBB Housing Market Report provides a sound analysis about the area of climate and housing in this year's main topic.

All-in-all, the situation in Berlin's housing market continues to be dynamic. The report in hand particularly shows how powerfully the corona pandemic has affected the housing market. Especially the stalling trends in migration movements, lastly with a pandemic-related population decline, take an effect on the housing market. Given the travel restrictions and containment measures, the influx from other regions and abroad dried up. And even while the pandemic is having a partly devastating effect on other walks of life, this made for a breather in the demand pressure on the housing market. Over and beyond this, 2020 and 2021 were characterised by the rent cap discussion.

The mixing of the rent cap by the Federal Constitutional Court marks another change of direction in the framework conditions on the rental housing market and leads to partly massive ruptures in central trends. While the average asking rents increased again, a „back to normal“ proved elusive in the number of rental homes advertised on the prevalent media platforms: it stagnated on a low level. Landlords may have relied on other letting channels that defy monitoring.

Although the urgently required construction of new housing continued on a high level in 2020 with 16,337 (previous year: 18,999) completed homes, it clearly remained below the previous year's value for the first time in over ten years, thus also departing from political targets. 20,459 new apartments were granted building permits in 2020 alone. The high number of apartments that have building permits, but not been completed yet, came to circa 66,000 in 2020. But most the apartments in this backlog were already in construction in 2020.

How extensively the housing market is affected by the climate crisis emerged ever more clearly. Besides stricter requirements for new residential constructions, the German capital is facing an incomparably greater challenge in the existing fabric, as that de facto needs to be rendered completely climate-friendly in the coming decades. At this moment in time, the building sector is still responsible for 44 % of the CO<sub>2</sub> emissions. To reach the set climate targets, around 80 % of the existing buildings must be energetically modernized by 2050. Which is why this year's main topic is dedicated to the adjusting screws enabling the consequential costs of this mammoth task to be kept on a tolerable level.

Where the housing market topic is concerned overall, the new senate is also bringing in new priorities for the housing policy. It could also turn out to be exciting to see how the results of the recent referendum on the expropriation of large housing companies with 3,000 or more apartments will be handled. It therefore continues to be important to keep a close eye on Berlin's housing market. We as the IBB will continue to make our contribution to this.


























We wish you an informative read with the 2021 IBB Housing Market Report, and most of all – stay healthy!



**Dr. Hinrich Holm**

Chairman of the Board of  
Investitionsbank Berlin (IBB)

## Selected data at a glance

Key figures for Berlin	Berlin 2020	Change compared to 2019	Trend arrow 2022
<b>Economic factors</b>			
Gross domestic product (GDP) (2015 = 100), price-adjusted	112.9	-3.3 %	
Unemployment rate (relating to the entire civilian working population – in %)	9.7	+1.9 % percentage points	
Consumer price index (2015 = 100)	106.0	+0.7 % percentage points	
Construction costs per sqm of living space (new) (in EUR) – residential buildings	1,703	+3.5 %	
Price index for new residential buildings (2015 = 100)	112.6	+3.1 %	
<b>Housing demand</b>			
Population (main place of residence)*	3,664,088	-0.1 %	
Number of households*	2,033,700	+0.4 %	
People per household (average household size)*	1.8	±0.0 %	
Number of one-person households (in %)*	52.9	±0.0 % percentage points	
Households requiring assistance as per Social Code II, per 100 residents	13.3	+0.63 % percentage points	
Average monthly net earnings per household (in EUR)*	2,175	+3.6 %	
<b>Housing supply</b>			
Housing stock	1,982,825	+0.7 %	
– of which leasehold flats	1,668,400	+0.6 %	
– of which council housing (pursuant to housing law)	95,520	-0.2 %	
Number of apartments completed (in total)	16,337	-14.0 %	
– of which newly built	14,719	-12.8 %	
Building permits (total)	20,459	-9.0 %	
– of which building permits for newly constructed apartments	18,077	-7.0 %	
<b>Rents and housing market</b>			
Occupancy density (residents per apartment)	1.9	±0.0 %	
Living space per residential unit (in sqm)	73.2	±0.0 %	
Living space per resident (in sqm)	38.5	+0.8 %	
Rent index, net rent without heating costs (2015 = 100)	107.9	+0.7 %	
Ancillary rent costs index (2015 = 100)	103.8	+0.4 %	
Asking rent prices (in EUR net, without heating, per sqm of living space)**	10.55	+4.0 %	
Asking purchase prices (commonhold apartments) (in EUR per sqm of living space)**	5,416	+8.9 %	

\*Evaluation period: 2019, changes from 2018, delay of the 2020 micro-census; \*\* Evaluation period: 2021, changes from 2020; data basis: VALUE Marktdatenbank  
Sources: Statistical Office Berlin-Brandenburg; Senate Administration for Urban Development, Building and Housing; VALUE Marktdatenbank

Supplementary and detailed data can be found in the list of tables for the Housing Market Report at [www.ibb.de/wohnungsmarktbericht](http://www.ibb.de/wohnungsmarktbericht)

## Housing policy in the city in 2021

The housing policy in 2021 was shaped by a great number of events.

The most important of these are listed below in chronological order:

<b>January 2021</b>	The Land of Berlin grants leaseholds for single-family plots to social partners.
	The Land of Berlin wins the nationwide "Post-Corona City" competition.
	The new planning area borders apply from 01/01/2021.
<b>February 2021</b>	Enhanced preemption rights of local authorities – the Senate decides to submit a draft law to the Federal Council
	The Land of Berlin decides further changes in the ban on change of uses as of 01/11/2021.
<b>March 2021</b>	The Senate concretizes the responsibility for statutory redistribution processes in the provision of building land.
	The Senate extends measures for better tenant protection in Berlin until the end of September.
<b>April 2021</b>	Conclusion of the negotiations on amending the cooperation agreement "Affordable new residential construction for tenants and provision of social housing". The amendment inter alia includes increasing the rent- and occupancy-controlled new building land to 50 %.
	BerlinStrategie 3.0 is published as a conceptual superstructure of the city's future development.
	<b>15/04/2021:</b> The Federal Constitutional Court finds the rent cap "incompatible with Basic Law": Secure Living Aid for Tenants is introduced to cover rent arrears demanded by landlords
<b>May 2021</b>	An implementation concept is adopted for the public involvement guidelines in urban development projects and processes.
	Senator Sebastian Scheel presents the new Berlin rent index for 2021.
	The Bundesrat approves the Building Land Mobilization Act.
<b>June 2021</b>	State-owned housing companies adopt tenant protection regulations upon the abolishment of the rent cap
	The Senate adopts new standard market ground rent rates: more attractive terms are designed to stimulate construction.
	A cooperation agreement is signed for elaborating the axis development concept Pankow-Wandlitz.
<b>July 2021</b>	Berlin adopts a strategy for integrated infrastructure planning.
<b>August 2021</b>	The conversion regulation as per Building Code § 250 demarcates the whole of Berlin as an area with tense housing market. Owners now need a permit to convert rental into commonhold apartments.
<b>September 2021</b>	The Senate decides to file a request for a Bundesrat initiative to create a Länder exception clause for rent regulation.
	The Land of Berlin plans to build company housing for civil servants.
<b>October 2021</b>	Vonovia and Deutsche Wohnen merge and sell 15,000 apartments to the Land of Berlin.
<b>November 2021</b>	The Federal Administrative Court scraps Berlin's preemption right for reasons of neighbourhood protection. As a consequence, the districts can no longer exercise preemption rights based on the assumption that buyers would displace the existing residential population otherwise.
<b>December 2021</b>	Franziska Giffey is elected new mayor on 21/12/2021. The topics of construction and housing are top priorities. A new "Alliance for Residential Construction and Affordable Housing" is to be formed, and this key issue for the social future addressed together with municipal and private partners. Key objectives include the construction of 20,000 apartments – 5,000 of them subsidised in the lower and medium price segments – and better tenant protection.

## General situation and important trends

### The corona pandemic is now affecting Berlin

Berlin has been in an extraordinary crisis situation for more than two years. Covid-19 continues to have an effect on the capital's day-to-day life and economy. With an expected economic growth of 3.0 % in 2021 and a 1 % development in real wages across the city and industries, a robust crisis management can be assumed overall. This also leads to the conclusion that the pandemic can be seen as a short breather for the housing market at most. The high demand is flanked by a continued high capacity utilization in the construction industry. Higher material costs – in combination with major material shortages – and global supply bottlenecks also had a negative effect. In the construction of new buildings, this development led to the highest price increase ever measured, of 12.3 % in the third quarter of 2021. Although the sales in the main construction trade had to suffer losses, another new peak was registered in the volume of orders.

### Demand development

The year 2020 was drastically affected by the corona pandemic, attendant containment measures, and travel restrictions. The population registered a decline of 5,400 persons, with a total population of 3,664,088. This makes the population count for 2020 the second-highest recorded since WW II, despite the pandemic-related cutbacks.

Berlin's growth in recent years was essentially based on positive external migration movements. In 2020, this development flipped over into the negative: More people left the city than moved there. This was most of all attributable to the missing influx from abroad and the western Länder. The number of people moving to the capital from these regions declined by ca. 36,800 in 2020. A lower influx was also registered from the eastern Länder and Berlin's surrounding regions. The number of people moving out of the city remained relatively stable compared to the year before. Concepts such as digital teaching, home office and the lack of job and training vacancies to be implemented in the course of the pandemic had as insistent an effect on the possibility and necessity of moving as the immigration restrictions and generally uncertain situation.

The federal capital has mostly attracted young adults aged 18 to 30 in recent years: students, trainees and young people at the start of their career. This age group was particularly

hard-hit by the pandemic-related containment measures. Which was also confirmed by a decline in the influx surplus amongst this age group from ca. 32,900 in the year 2019 to ca. 21,100 in 2020. Berlin registered an outflux surplus in all the other age groups for the very first time. In the over-30 group alone, ca. 17,600 more people left Berlin than moved there in 2020 on balance. Children under 18 also left the city along with their families.

The natural population development has also contributed to the capital's growth in the past, but only to a minor extent. The decline registered for the birth surplus in 2020 was ostensibly attributable to a higher mortality. Which was evidently also linked with the corona pandemic's effects: 1,271 persons died of or with Covid-19 in Berlin in 2020. In addition to which the number of births showed a light decline.

The regions surrounding Berlin have benefited from the capital's attractiveness for a number of years already. Given the ever tenser situation in the capital's housing market, nearby regions became possible domiciles for many in search of housing. This has not changed in the pandemic either. While the capital registered a population loss, no such results were observable in its direct environs: the surrounding municipalities grew by 4.8 % in the years 2016 – 2020. Berlin only grew by 2.5 % in the same period.

The pandemic has also affected the availability of data for the IBB Housing Market Report 2021. Due to delays, the data on households and income situations could only be shown at their 2019 status.

The number of Berlin's households grew to 2,033,700 in 2019, just under 81 % of which continue to be one- or two-person-households. Approximately 10 % of the households featured three residents, with a similar proportion including four or more. The average monthly net household income in Berlin amounted to EUR 2,175 in 2019. Median values below the average were registered in Neukölln, Lichtenberg, Mitte, Spandau and Friedrichshain-Kreuzberg. The top district in 2019 was Pankow with EUR 2,550. Around a fifth of all households in Berlin had a net household income of less than EUR 1,300 per month in 2019, while a quarter earned between EUR 1,300 and EUR 2,000.

The unemployment rate in Berlin amounted to 9.2 % in October 2021, thus registering a slight decline from the previous year (-1 percentage points). The pre-pandemic level still proved elusive, however. The geographical differences were great once more. The highest value was registered in Neukölln again with 14.2 %, followed by Mitte. Whereas below-average rates were registered in the eastern districts and Charlottenburg-Wilmersdorf. The lowest value was reported by Steglitz-Zehlendorf with 6.4 %.

### Supply development

Around 20,500 apartments were granted building permits in Berlin in 2020, falling short of the previous year's level once more. Ever fewer apartments have been granted permits from one year to the next since as long ago as 2017. 81 % of the approved homes were in apartment complexes, and one in ten is to be provided by construction measures in existing buildings. Geographically, the future construction of new buildings is concentrated in the districts of Marzahn-Hellersdorf and Treptow-Köpenick with over 3,000 apartments approved for construction.

Approximately 16,300 flats were completed in the capital in 2020, showing the first decline in completions from the preceding year in at least ten years (-2.662). Due to the containment measures (e. g. home office) and immigration restrictions attending the corona pandemic, public offices and the construction industry experienced bottlenecks. The construction industry, working at full capacity for several years now, may have had a decelerating effect here. In 2020, 13,700 and/or 83.6 % of the constructed homes were in apartment complexes, making them dominant once again. The completion rate in 2020 amounted to 4.3 apartments per 1,000 residents (2019: 5.0). Geographic focus areas emerged in the east of Berlin once more.

The Land of Berlin has been subsidising residential construction, particularly for low-income households, since 2014 again by way of interest-free loans and the IBB's residential construction fund. The subsidised flats are rent- and occupancy-controlled, thereby achieving initial rents of EUR 6.50/sqm and/or EUR 8.20/sqm (for the higher income thresholds). Funding regulations for residential construction were adjusted for this in 2019. 16,080 subsidised apartments were approved up to and including 2021. As of 31/12/2021, 7,611 subsidised flats

were ready for occupancy already. With 88.34 %, the major share of the subsidised flats (approvals) went to the municipal housing companies. Around one in ten applications for subsidised apartments came from private investors. The highest numbers of subsidised new residential apartments to be approved in the years 2014 to 2021 were found in Lichtenberg, Marzahn-Hellersdorf and Treptow-Köpenick.

Around 19,400 rental homes were turned into commonhold apartments in 2020, registering the highest value in ten years. The conversion rate across Berlin amounted to 1.16 %, with a geographical focus on Friedrichshain-Kreuzberg. The rent cap, still in force at the time, may have been co-responsible for this drastic increase. In response, the Berlin Senate considerably tightened the conversion regulations in 2021: owners can now only convert rental apartments with a permit throughout Berlin. This requirement only applied to neighbourhood protection areas before. With around 9,700 apartments sold, the previous year's figure was undercut slightly. The sales curve has been noticeably flattening since as early as 2015.

### Market for detached and semi-detached houses

Asking prices for one- and two-family homes (including land, new and existing buildings) have been dynamically rising for several years. The average purchase price for a home has increased by around EUR 261,000 and/or 65.4 % since 2017. The median price reached for the entire segment in 2021 was EUR 660,000, equalling an increase of 15.4 % and/or EUR 88,000 within a year. For the first time since 2017, the median asking price for existing buildings tangibly exceeded that for new constructions in the second half of 2021. While existing buildings had still been offered for a median price of EUR 599,000 in the 4th quarter of 2020, the average purchase price increased to EUR 698,000 by the 4th quarter of 2021 – a plus of ca. EUR 10,000 (+ 16.5 %). Whereas the median reported for new constructions in 2021 is EUR 669,900, equalling an increase of EUR 72,900 from the year before (+ 12.2 %).

**Market for commonhold apartments**

The dynamic rise of average asking prices for commonhold apartments also continued in 2021. The median amounted to EUR 5,416/sqm, an increase of 8.9 % from the previous year. The differences between existing and new properties continued to be marked. While households faced average spendings of EUR 6,678/sqm for a newly built apartment, they only had to expect an average of EUR 5,294/sqm for existing buildings in the 4th quarter of 2021. The median purchase prices in both segments have increased by over 40 % since 2017. Structurally, the highest median purchase prices were registered for apartments built from 2002. As for apartment sizes, the smallest and partly also the largest moreover stood out with high purchase prices. Geographically, the most expensive commonhold apartments were offered in Mitte and Charlottenburg-Wilmersdorf, while Spandau and Marzahn-Hellersdorf were comparably affordable. In the regions surrounding Berlin, commonhold apartments were advertised for a median price of EUR 4,352/sqm in 2021.

**Rental housing market**

Berlin registered a median asking rent of EUR 10.55/sqm in 2021, discontinuing last year's decline. The 2019 level was slightly exceeded with an increase of EUR 0.41/sqm. The temporary easing had apparently been largely attributable to the rent cap applicable in the interim (February 2020 - April 2021). When that was scrapped, an increase emerged in the asking rents for existing properties previously affected by it. The median for existing buildings thus rose from EUR 9.93/sqm in the 1st quarter of 2021 to EUR 10.16/sqm in the 2nd (+ 2.3 %). The price increase for newly built apartments was more dramatic, however. The median increased by 8.9 % to EUR 16.62/sqm in the year 2021. While the number of advertised offers behaved differently: with just about 35,000 advertisements, it only exceeded the previous year slightly in 2021.

2021 saw marked differences emerging structurally. The respectively highest rental prices were registered for the smallest and largest apartments again – irrespective of age class. Landlords asked the highest rents by far for apartments built from 2011 with less than 40 sqm of living space. The inner city stood out again geographically with above-average asking rents. The highest median was registered in Mitte with EUR 14.00/sqm, while asking rents were on their lowest level in Spandau with a median of EUR 8.22/sqm. High asking rent levels were reported in Friedrichshain-Kreuzberg, Charlottenburg-Wilmersdorf and Pankow as well. The surrounding regions were also increasingly caught up in the capital's dynamic. The median asking rents here increased to EUR 10.51/sqm in 2021, reaching the same level as Berlin. Brandenburg's capital Potsdam even exceeded the Berlin level with a median of EUR 10.87/sqm.

Approximately one apartment in four was offered for less than EUR 8.00/sqm in Berlin in 2021. The prevalence of this price segment was above average in Lichtenberg, Spandau, Marzahn-Hellersdorf, Reinickendorf and Neukölln. Around a third of the flats were advertised for EUR 8.00 to under 12.00/sqm, and around a fifth with asking rents of EUR 12.00 to under 16.00/sqm. Districts with lower rents tended to predominate had below-average proportions of higher price brackets (e. g. Spandau). Especially Treptow-Köpenick (28 %) and Steglitz-Zehlendorf (26 %) exceeded the average in these price brackets. But proportions of 25 % were also registered in Friedrichshain-Kreuzberg, Pankow and Charlottenburg-Wilmersdorf. The highest share in the price bracket of EUR 16.00/sqm and more was once again found in Mitte with 39 %, followed by Friedrichshain-Kreuzberg (35 %) and Charlottenburg-Wilmersdorf (33 %). Every fifth apartment was advertised for this price across the city, meaning that their share has grown by 4 percentage points from the previous year.



**Main topic: Climate protection and housing – approaches and examples for a climate-friendly transformation of Berlin's building sector**

The megatheme climate has a major influence on all social and economic areas – not least of all on the housing and building sector. The mission, more urgent than ever, is to reduce CO<sub>2</sub> emissions by climate protection measures. The Land of Berlin wants to be climate neutral by 2045 this way. This is attended by great challenges raising questions as to the feasibility, cost dimensions and affordability in a simultaneously tense housing market. But even if nothing gets done, substantial cost effects will be unavoidable for the housing and building sector from the rising CO<sub>2</sub>-prices alone. The implementation of climate protection measures for residential buildings while keeping rental households affordable can rely on several possible adjusting screws: the energy supply in general, a more efficient building envelope, efficiently designed building services, and not least of all the users' behaviour. If these adjusting screws run hand in hand, the existing residential stock can be transformed. The adjusting screws in turn affect the housing costs burdening user households. The intensity of this can vary depending on the approach. Our main topic serves to illustrate suitable practical examples and calculations showing that an adaption of Berlin's existing residential stock to climate protection need not necessarily lead to immense cost hikes. The promotion of energetic modernisation, realisation of more efficient building services and other measures provide the foundation for this.

**Where does Berlin's housing market stand?**

Berlin and its housing markets have been partly massively affected by various events in 2020 and 2021, especially the corona pandemic and rent cap. The former touched many walks of life: Berlin's population registered its first decline of the new millennium, triggered by a slump in the influx from abroad and the western German Länder. Travel restrictions, but also home schooling and plant closures, as well as the generally uncertain situation rendered relocations impossible or unnecessary, at least temporarily. How sustainedly

these developments will affect the future population development remains to be seen. But as the housing stock continues to grow nonetheless (+ 3.5 % since 2016), a slight breather can be assumed for the capital's housing market for the short term at least.

The second incisive event was the rent cap, in force in Berlin from February 2020 to April 2021. Its scrapping had a direct effect on the asking rents. Following the decline of 2020, a substantial increase had to be registered again in 2021. A dynamic increase in the asking rents for apartments in newly built properties also drove the prices here, however. Whereas the number of advertised offers remained low overall. The reasons for this still remain unclear for the time being. The mentioned events may have also led to changed structures in the marketing and letting of housing. This calls for critical future monitoring. Although it was only in force temporarily, the rent cap clearly shows its decelerating effect in a comparison of cities. While all other cities experienced unimpeded upswings, Berlin's asking rents fell to last place with a growth of 17.2 % in five years. Berlin used to range in the top places before.

The years 2020 and 2021 confronted the capital with major sustained challenges. With no end in sight for the corona pandemic anytime soon, the measures can be expected to affect the economy and other areas for several years to come. New developments in housing policy terms – after the end of the rent cap – are already on the horizon, e. g. what will happen with the "Expropriate Deutsche Wohnen & Co." referendum. The demand situations essentially persist. This is clearly shown by the number of urgent eligibilities for social housing, for example, up eightfold since 2011. Given the general backlog, shortages will continue to characterise Berlin's housing market in most areas – despite high completion rates. After years of massive dynamism, the overall situation looks thus rather mixed, with the outlook already implying various future challenges to come.

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The summary of the 2021 Housing Market Report is made available to the public for information purposes only. All underlying information has been carefully researched and conscientiously compiled. We do not assume any guarantee for correctness and completeness.

The 2021 IBB Housing Market Report, supplementary Table Volume for 2021, additional interactive presentations and a summary in German can be found at: [www.ibb.de/wohnungsmarktbericht](http://www.ibb.de/wohnungsmarktbericht).

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