

Der Markt für Projektentwicklungen in den deutschen A-Städten 2021

Real Estate Developers Study for the German A-Cities 2021 – Method

» Which developments are included in the study?

- All developments which are located in the A-Cities¹.
- Developments need to have a total usable space from 1,000 sqm (retail trade from 2,000 sqm).
- Developments have to be realistic, i.e. start of construction within 2 years should be very probably.
- Mainly analyzed segments are residential, office, retail, hotels.
- Other segments are subsumed under „others“ (for logistics, we do have an other more detailed study); public infrastructure developments are excluded (schools, hospitals, etc.).
- Developments have to be completed between 2018 to 2025 (this timeline changes for every year of the study), big developments with a planned completion later than 2025 sometimes are partially included.

» What evaluations do you find in the study?

- Statements on trading and investor development market structure per A-City¹.
- Developments, market shares and trends.
- Statements per city and per segment².
- Top 10 rankings of all segments of the entire development market (Trading plus Investor Development).
- Top 10 ranking Trading Development, Top 10 ranking Investor Development.

» Which parameters are analyzed in the study?

- Project name and address (locatable).
- Development company and (if different) investor company.
- Start and completion of construction.
- Project type (new construction, renovation, demolition, ...).

¹ Hamburg, Berlin, Duesseldorf, Cologne, Frankfurt, Stuttgart, Munich

² Office, residential, retail, hotel

- Area per segment, not BGF, but ...

Office → MFG according to gif

Living → Living space according to WoFIV

Retail → MFG according to gif (int: GLA)

Hotel → Usable area according to DIN 277-1

Miscellaneous → Usable area according to DIN 277-1

- Statement on current development strategy: „Trading Development“ or „Investor Development“?

» What are so called „Trading Developments“?

- Development company is intermediate investor, owns the land.
- Development company plans to sell the development.
- Development company develops at its own risk and on own account.

» What are so called „Investor Developments“?

- There is an investor, who is fully in charge of the development and already owns the land (before development starts).
- The investor plans to hold the development after completion.
- If a development company is involved, then only as a so-called service development company on behalf of the investor.

» What else could be of interest?

Around 50 % of the analyzed development space is based on a data exchange directly with the development companies. The other 50 % are based on a detailed regular desktop research.

The study is only available in german language. If you are interested in some of the charts we may review these into english for an additional fee.

For further questions, please do not hesitate to contact us.

Contact

Ellen Heinrich

heinrich@bulwiengesa.de

bulwiengesa AG

Nymphenburger Straße 5, 80335 München

Tel. +49 89 23 23 76-33

www.bulwiengesa.de