



Ceramic tiles in Germany 2023

DE



1. Sales ceramic tiles in Germany

- Residential Buildings (RB)
 - New construction
 - Renovation
- Non-Residential Buildings (NRB)
 - New construction
 - Renovation
- Application
 - Floor application
 - Wall application



2. Distribution channels

- Ceramics



3. Competitive landscape ceramic tiles 2022

- German Production
- Imports
- Exports

Data collection and generation:

- Trade statistics from UN Comtrade *
- Production statistics from Destatis/Genesis
- Expert Interviews (verification of production and trade figures and sales development)
 - Ceramic tile producers
 - Trade (ceramic tiles)

** UN Comtrade receives trade data from EUROSTAT, which in turn receives its data from the statistical offices of the individual member states (for DE it is Destatis). Since the sources of data of all individual EU countries are the national authorities of each of the member states, and since the source of EU data is Eurostat, there can be differences between reconstructed EU from individual country data in UN Comtrade and the combined EU from EUROSTAT.*

For the import and export statistics, the following HS codes were taken into account for the B+L market calculation:

Included HS Codes (Import and Export)

- **HTS Code: 6907.21** - Ceramic Flags And Paving, Hearth Or Wall Tiles Of A Water Absorption Coefficient By Weight Not Exceeding 0,5 Percent
- **HTS Code: 6907.22** - Ceramic Flags And Paving, Hearth Or Wall Tiles, Of A Water Absorption Coefficient By Weight Exceeding 0,5 But Not Exceeding 10%
- **HTS Code: 6907.22** - Ceramic Flags And Paving, Hearth Or Wall Tiles, Of A Water Absorption Coefficient By Weight Exceeding 10 %

Not included HS Codes (Import and Export)

- **HTS Code: 6907.10** - Ceramic Tiles, cubes and similar articles, whether or not rectangular, the largest surface area of which is capable of being enclosed in a square the side of which is less than 7 cm
- **HTS Code: 6908.10** - Glazed Ceramic Tiles, Cubes And Similar Articles, Largest Surface Area Of Which Can Be Enclosed In A Square With Sides Less Than 7 Cm

In addition to the main data sources mentioned, further sources of information are used by B+L to validate the statistics and forecasts.

- B+L target group surveys: planners, installers (utilisation quotes flooring materials in new construction/renovation, residential building/non residential building, wall/floor etc.)
- B+L end-consumer surveys (mainly on renovation and substitution trends)
- Expert surveys (primarily industrial)
- Official statistics and publications of various media (information from associations, company reports, editorial departments, newspapers, etc.)
- Calculated test values for determined quantity structure from random samples at the trade level (in comparison to the distribution model)
- Calculations by applications on the basis of construction and secondary statistics, i.e. B+L Global Building Monitor and B+L product database (interior walls, floors)
- Sales volumes by manufacturers
- Plausibility check (flow of goods – production/import/export – overall context)

Our data quality is guaranteed by:

- Specialized industry analysts with more than 15 years' experience lead our projects
- Interviews conducted by qualified and experienced native speakers with long-standing connection to B+L
- Central research centre in Bonn: all research (desk research and telephone interviews) are conducted at the Bonn headquarters (no outsourcing, no subcontractors)
- All results are meticulously double checked

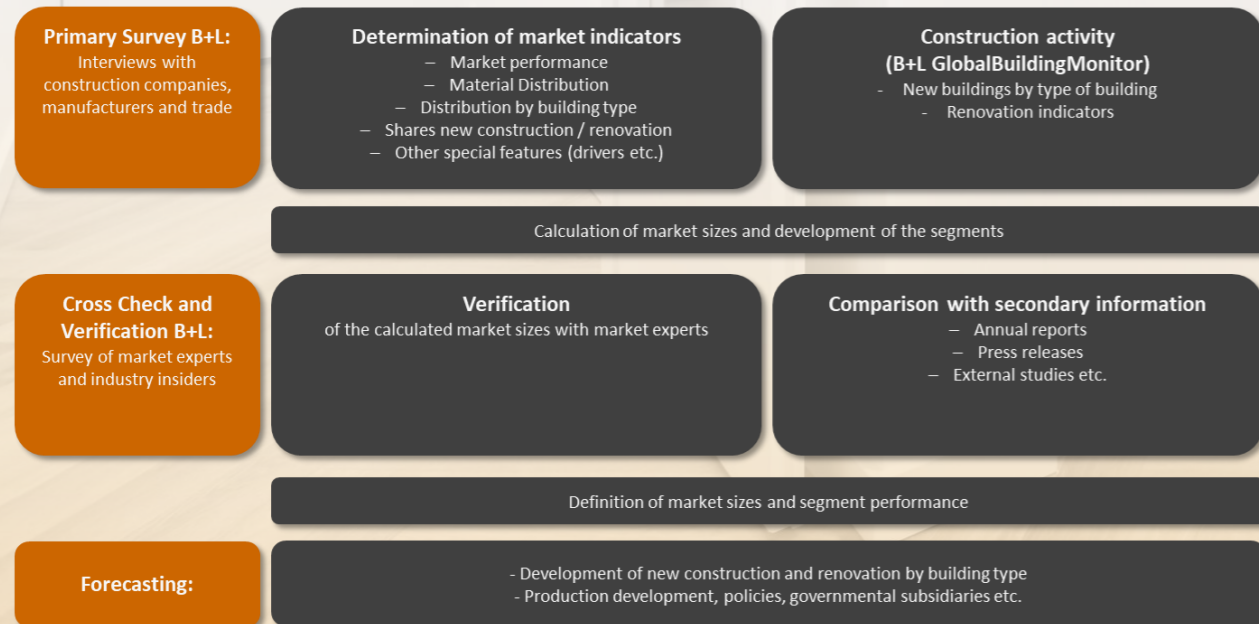
The prognoses are based on assumptions regarding the underlying market conditions (for example, political conditions). Even if these are assessed with the utmost care and expertise, not all variations can be predicted.

The data made available for the countries will be comprehensively comparable due to the targeted surveys and consistent methodology. Implausibility's in the official production and trade statistics are critically examined; subjective dissemination of knowledge from a publication by a market participant is likewise inspected. In this regard, we pursue our claim to make actual market conditions transparent.

The volume trends include the annual sales volume. The sales volume is calculated as the domestic production plus import minus export. The quantity structure for the reference year and the forecasts is based on various collection levels which are dependent on one another.

The forecasts arise from the assessment of the construction and renovation segments (determined through regularly conducted end-consumer and target group surveys), as well as the development of relevant conditions, e.g. political or economic). At the same time, diverse subsidy programs are considered. The results of the research are then discussed with manufacturers, tradesmen, and branch experts in the particular market and adjusted accordingly.

B+L Method of determining market volume

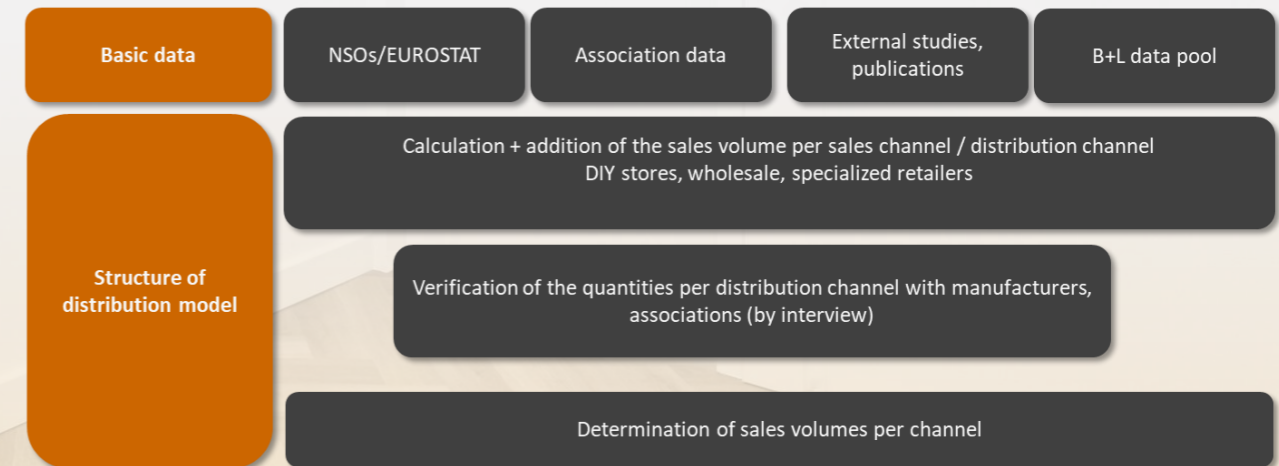


B+L Distribution model

The shares of the distribution channels are analysed according to their volumes. This, in addition to the assessment of the traders, requires an analysis of the trade structure. The following distribution channels are investigated:

- DIY
- Wholesale
- Specialist trade
- Direct sales

B+L evaluation model distribution channels:



Sales of ceramic tiles in Germany

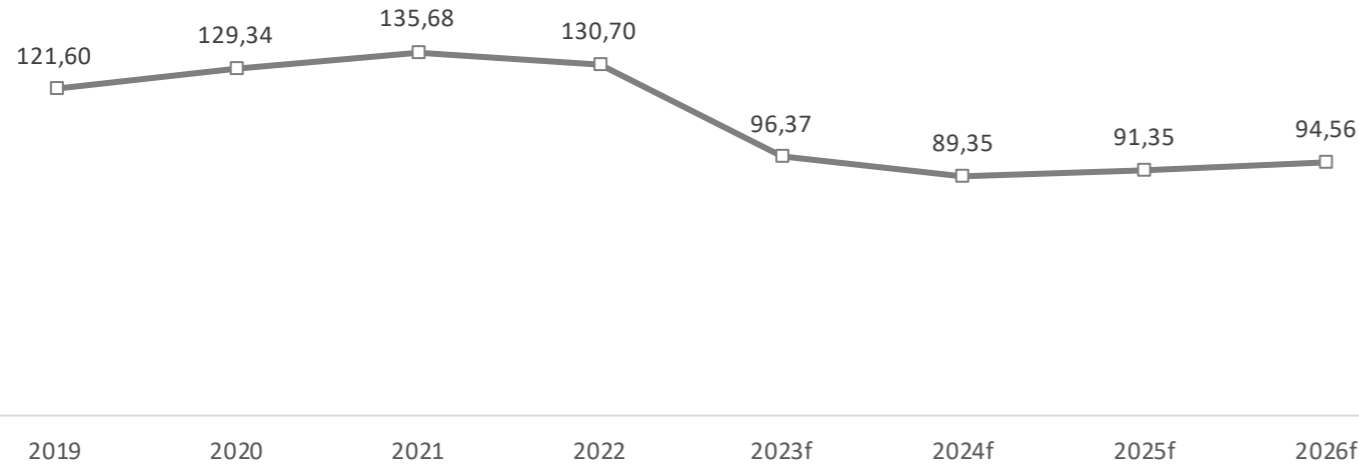
2019-2026



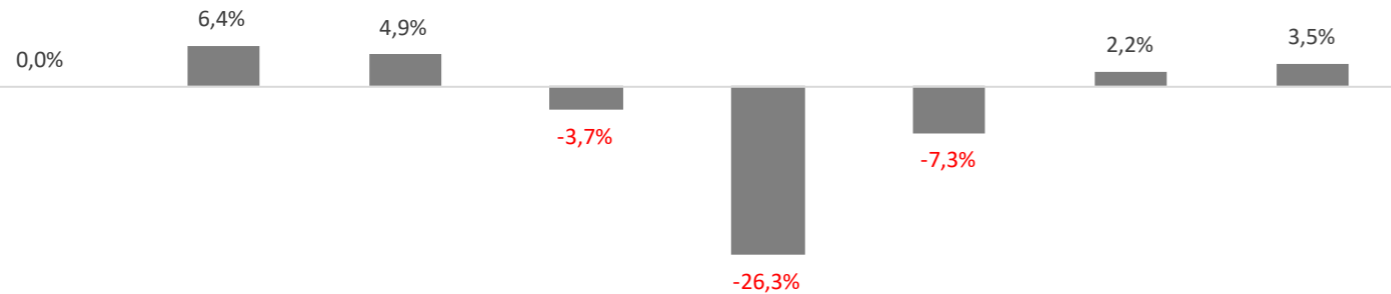
Development of ceramic tiles in Germany until 2026

[in million m²] / [change to previous year %]

Sales ceramic tiles in Germany 2019-2026 [in million m²]



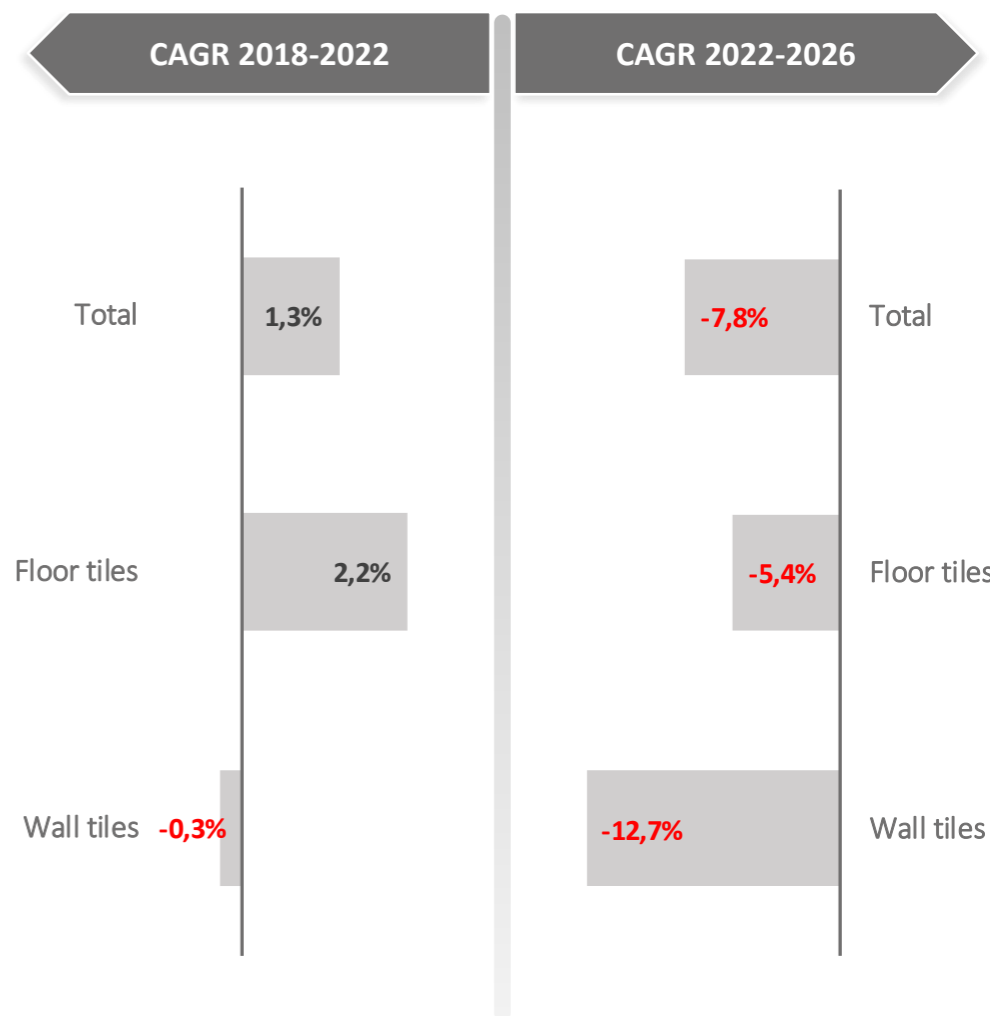
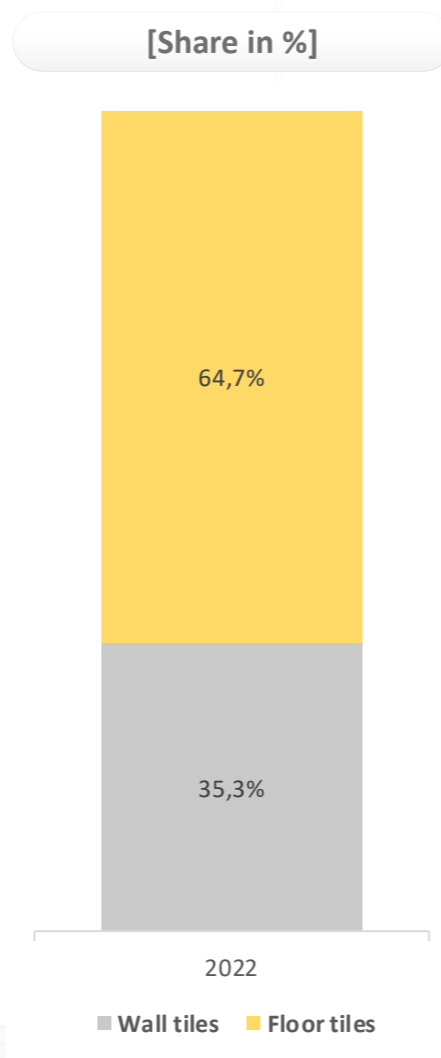
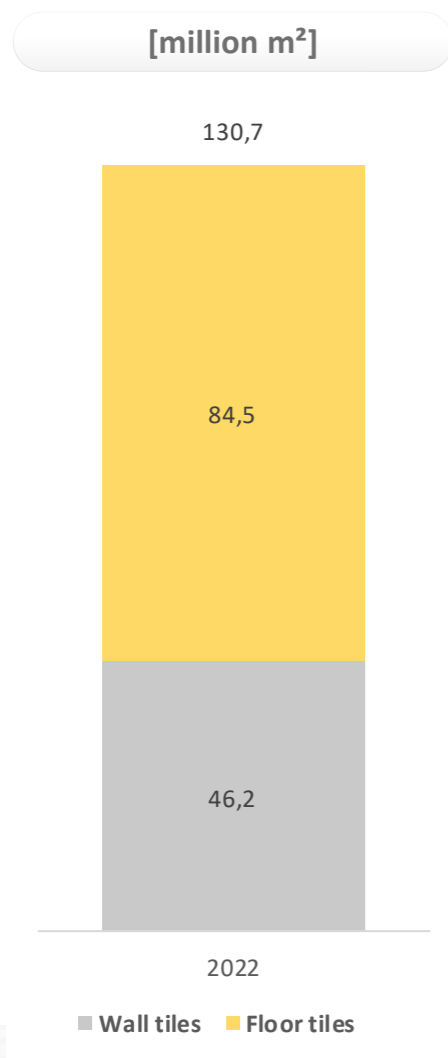
Growth 2019 – 2026f [change to previous year %]



- Sales of ceramic tiles in Germany developed very positively until 2021, reaching 135,68 million m².
- Since the end of 2022 at the latest, however, sales have slumped significantly, so that a decline of 3,7% was recorded for the year as a whole, which still began positively.
- The current year 2023 is expected to close with a decline of 26,2%. For the time being, no increase in sales is expected next year either. Increasing sales can be expected again at the end of 2024 and 2025 at the earliest.
- The reasons for the declines since the end of 2022 are manifold:
 - **Increased energy costs** for German and European manufacturers due to the war in Ukraine, leading to rising production costs
 - **High inflation and high interest rates on loans**, which is causing a reluctance to invest in renovation projects in the non-energy sector
 - **Sharp drop in new construction** (completions and permits), especially in the single-family house sector

Sales ceramic tiles by Wall- and Floor tiles 2022

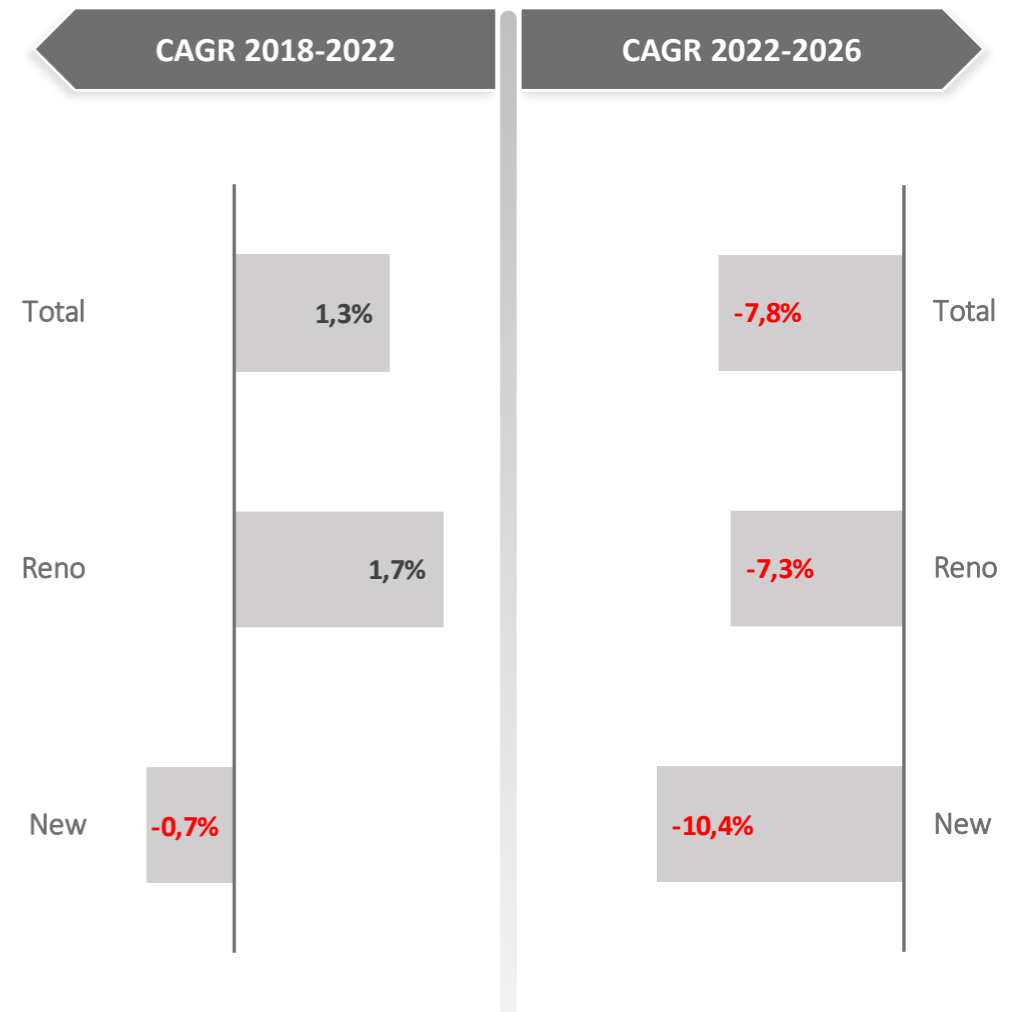
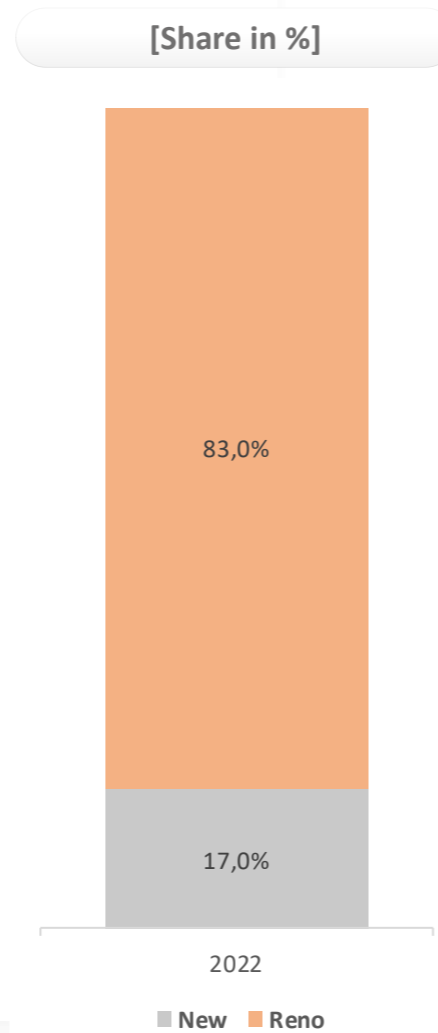
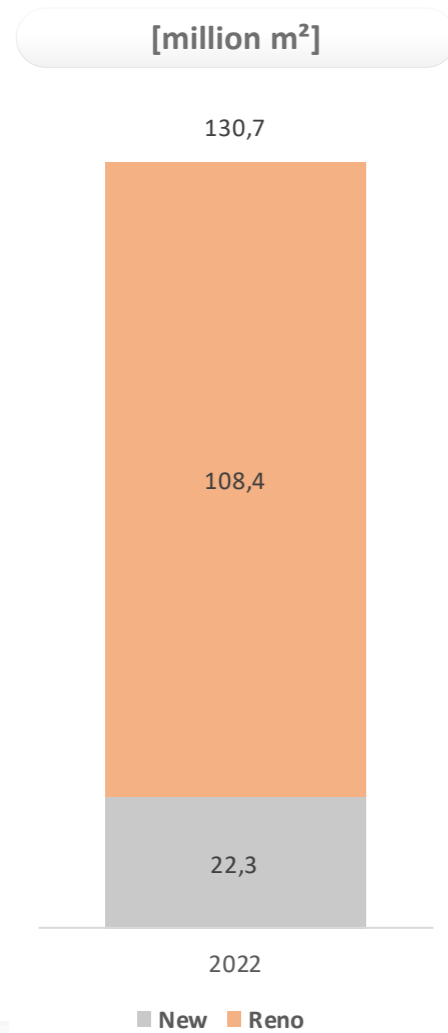
[in million m²] / [share in %]



Source: B+L; f = Forecast; Status 10/2023

Sales ceramic tiles by New / Renovation 2022

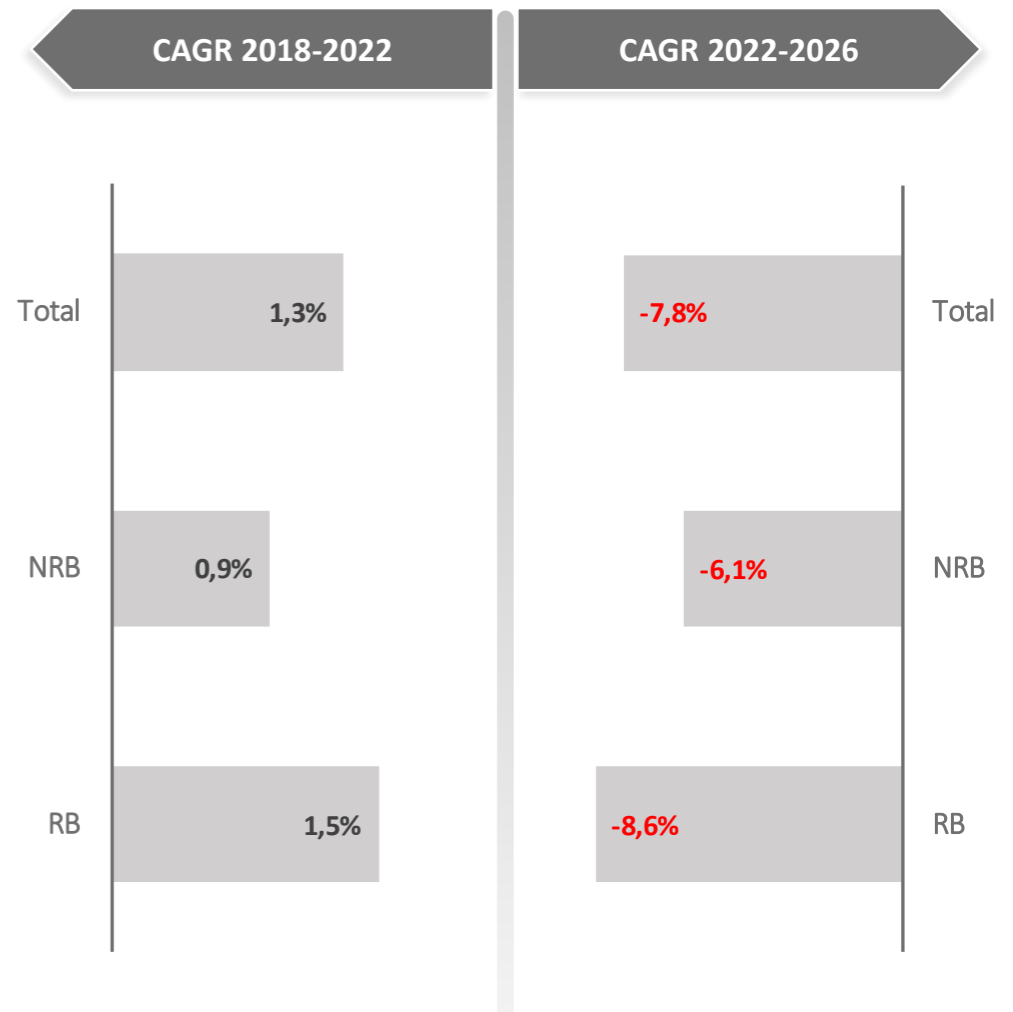
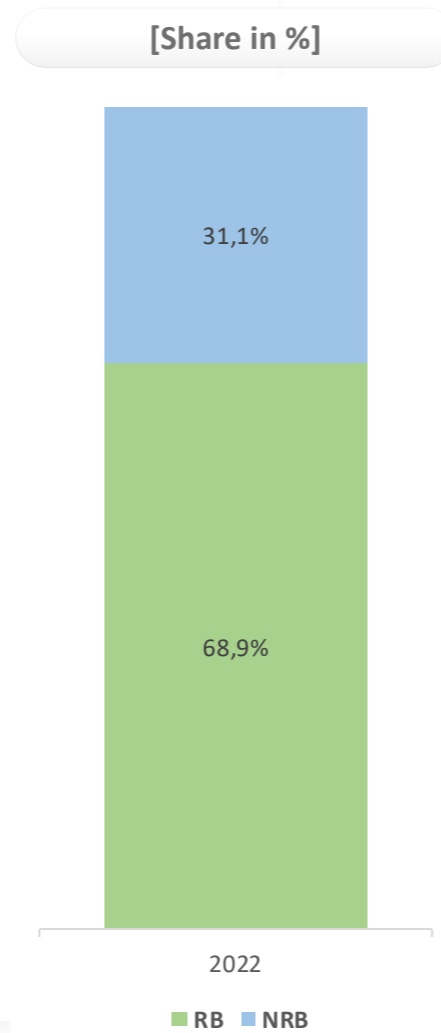
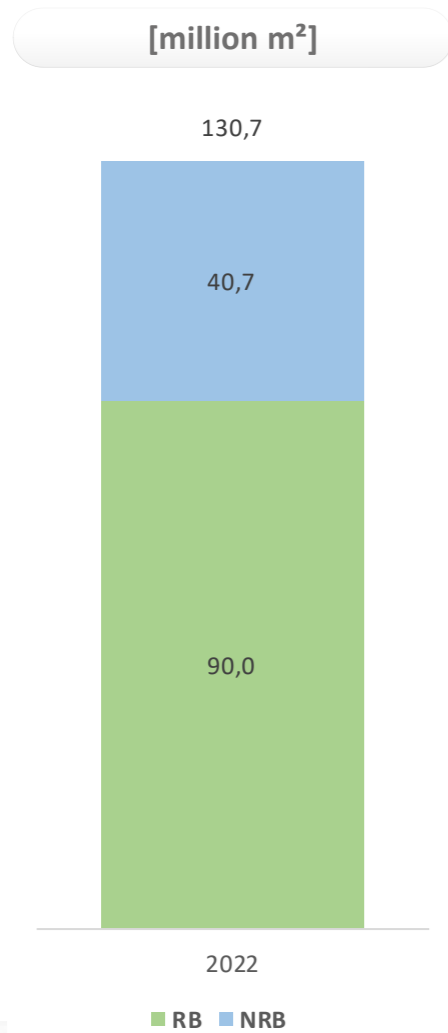
[in million m²] / [share in %]



Source: B+L; f = Forecast; Status 10/2023

Sales ceramic tiles by Residential / Non-Residential 2022

[in million m²] / [share in %]



Source: B+L; f = Forecast; Status 10/2023

Distribution of ceramic tiles in Germany

2022



Method B+L distribution model

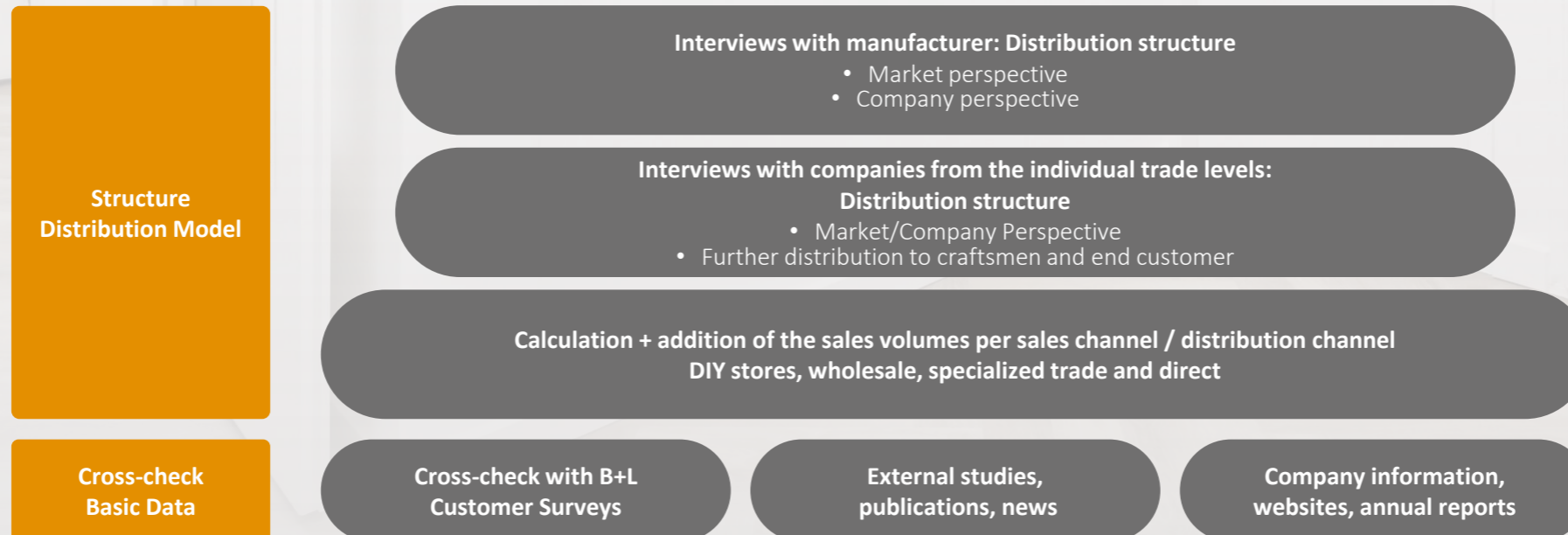
- B+L follows a bottom-up approach. In detail, this means that the manufacturers of the individual products are asked for their assessment of the structure of distribution. This is done on the one hand from the perspective of the market and on the other hand from the perspective of the company. Both views are analysed and evaluated in a first step.
- In a second step, the important companies of the individual trade levels are interviewed and the results are compared with those of the manufacturers. Then the companies of the different trade levels are asked about the further distribution up to the end customer or craftsman.

- Finally, the data obtained is compared with results from end-customer surveys. These end customer surveys originate from various projects of B+L Marktdaten GmbH, such as the renovation study, in which end customers were surveyed on a large scale about their purchasing behaviour for various product groups.

Online sales method

- Online sales are analysed in an additional survey. For this purpose, the most important manufacturers, but also companies of the individual trade levels, are asked about the shares in the various distribution levels including pure online trade and their future development.

- In the second step, the sales of the largest online shops of the individual distribution channels are determined. These are requested during the interviews and / or calculated through targeted research in various sources (Bundesanzeiger, website, studies, reports, etc.). The results of the research are compared with the results of the survey and finally tied into the distribution model, which is checked for plausibility.
- The following topics are additionally queried with manufacturers and retailers:
 - Customer group (B2B / B2C)
 - General correlations and special features



Definition of distribution levels

Definition of distribution levels

The distribution model shows the distribution channels for the flooring market in Germany. The distribution structures for the relevant product groups are differentiated according to the type of operation of the trading companies. Data is collected in the individual distribution channels and projected onto national distribution. The results are discussed and verified with market participants. In order to make distribution models comparable, individual companies are grouped into the following groups:

Direct sales:

- In many product group areas, the direct supply of the industry to bulk buyers on the processing and assembly side has increased in recent years.
- The direct supply segment also includes the craftsmen's building element assembly companies, which have pro forma registered a trading company, but in fact only buy for their own assembly and thus hardly take on a trading function.

Großhandel / Import:

- In this study we define wholesale trade essentially by the existing customer structure. The delivery of goods to craft enterprises, assembly companies, companies in the building

trade and construction industry as well as other industrial and commercial customers is the prerequisite for the classification as wholesale trade.

DIY:

- Within the definition of DIY stores, a floor space limit of 1.000 m² sales area has become established. In the context of this study, it makes sense to distinguish between chains managed as a branch system and purchasing centrally on the one hand and independent or franchise-managed, decentralised purchasing chains on the other. From the supplier's point of view, the pure branch systems offer a certain degree of planning security after successfully negotiated listing, since the store and department managers on site have relatively little scope for decision-making and the advertising and sales promotion measures are planned centrally.
- The cooperation or franchise operations require a higher degree of regional sales effort, as the central listing decision does not automatically result in the order of the affiliated locations.

Examples:

- OBI
- Bauhaus
- Hornbach

Retail trade (B2C):

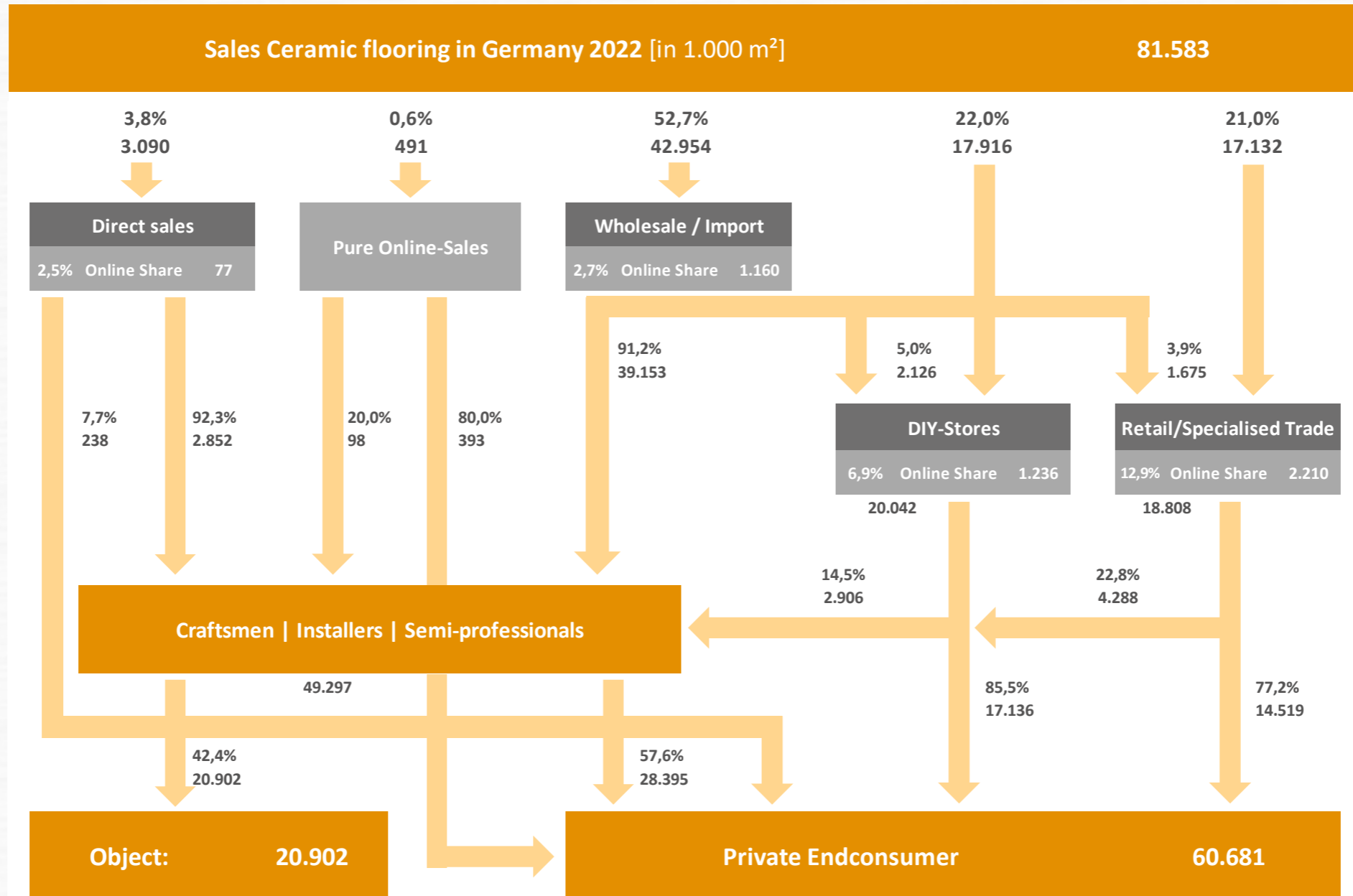
- In the context of the distribution structure, the retail sector of the timber and building materials trade as well as the building elements trade is referred to as specialist trade. These can be companies that supply 100% to private end consumers or companies that run a distinct retail sector in addition to their wholesale function.
- When observing the trading landscape, it is noticeable that the tendency towards spatial and organisational separation of the wholesale and retail sectors is more pronounced in the timber trade than in the building materials trade.

Definition Online Trade

- B+L Marktdaten defines online trade as ordering via a freely accessible online shop on the internet, which is accessible to everyone or a specific customer group (e.g. companies) after registration.
- Software ordering solutions through which the existing corporate customer can place exclusive orders and which are not publicly accessible are not taken into account.
- However, professional sales via sales platforms such as Amazon or Ebay are included.

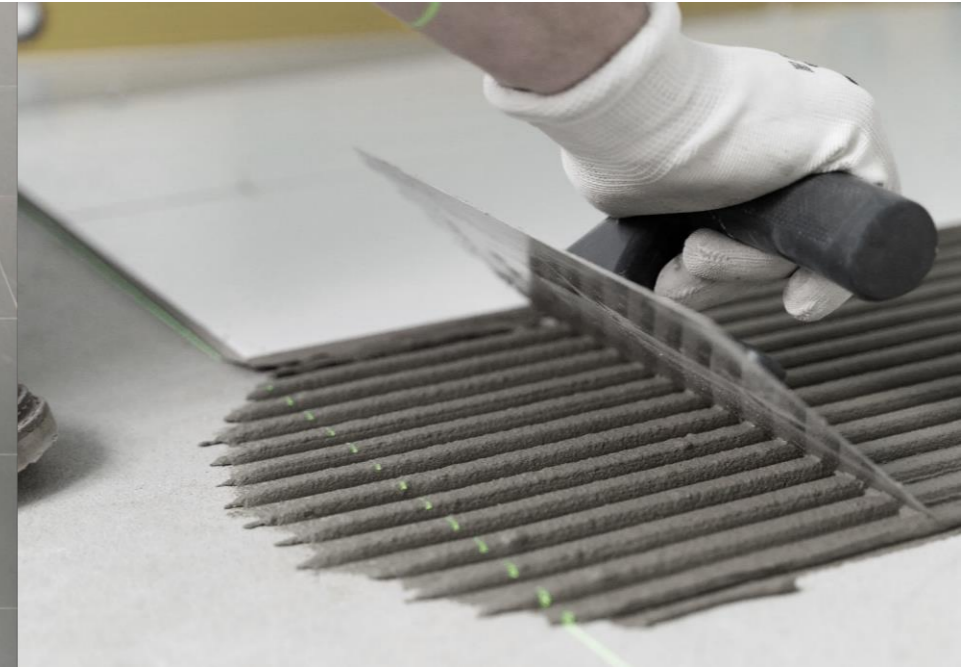
Distribution ceramic flooring 2022 – incl. online-shares

[in 1.000 m²]



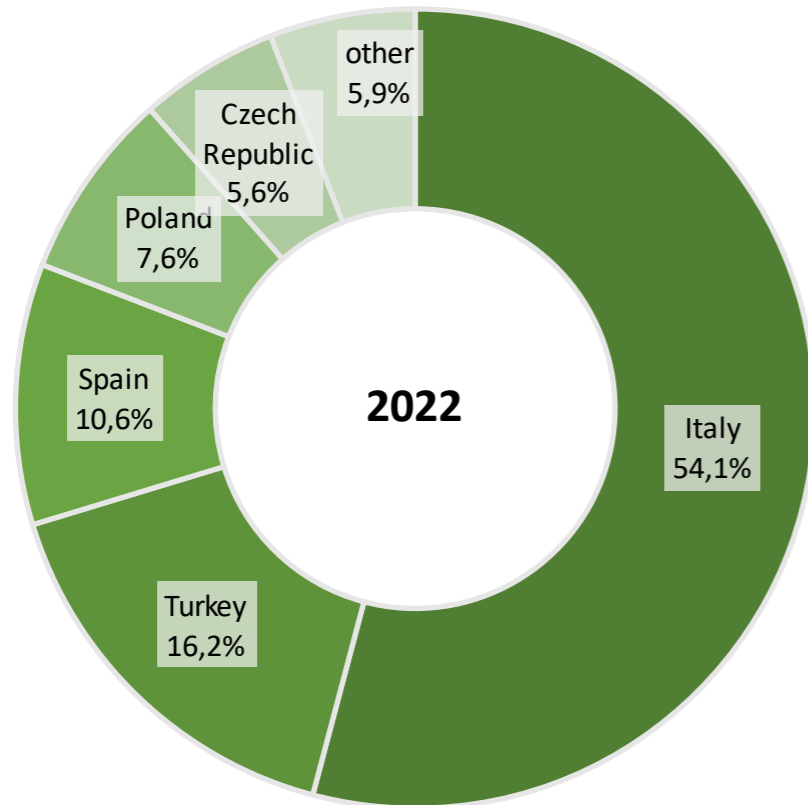
Source: B+L; Status 10/2023

Competitive landscape ceramic tiles 2022



Ceramic tiles imports 2022

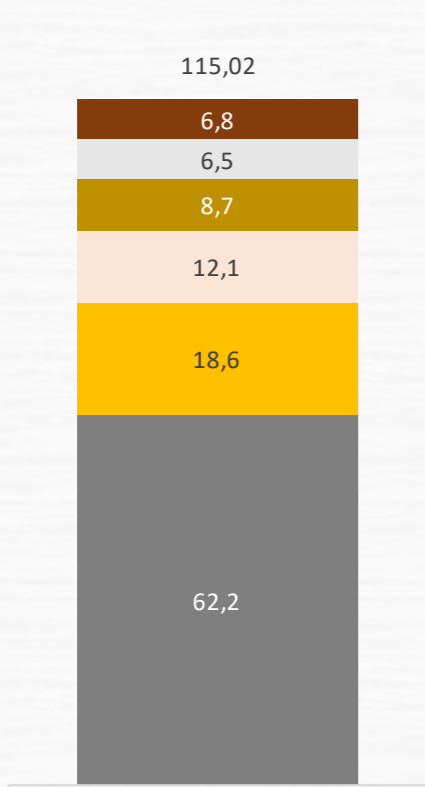
[share in %]



Ceramic tiles imports 2018-2026

[in million m²]

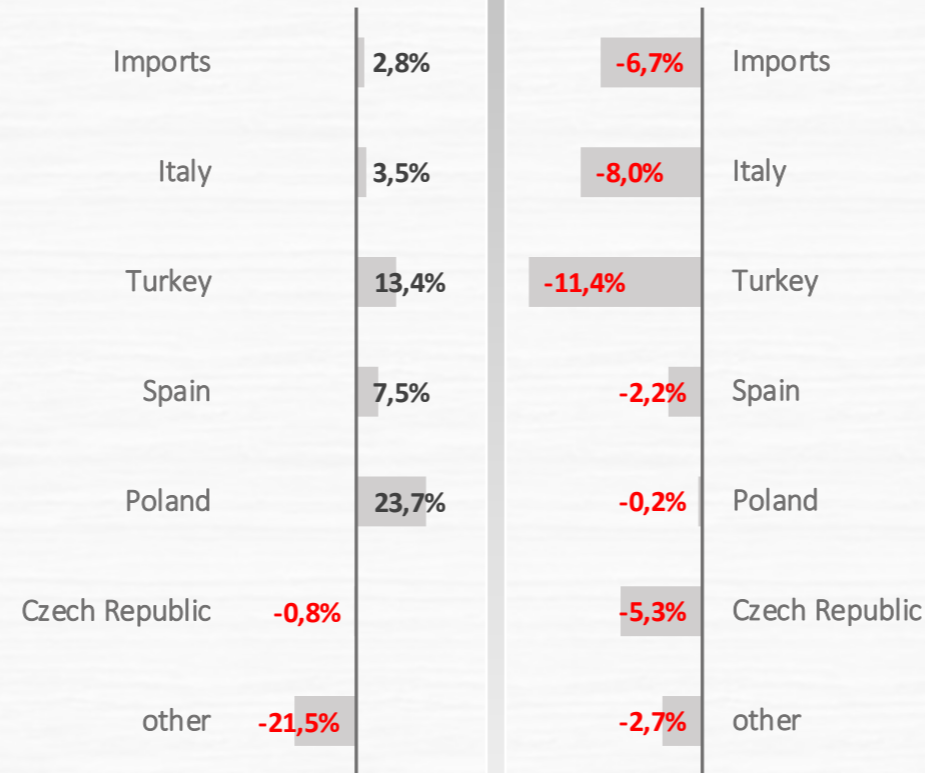
[million m²]



2022

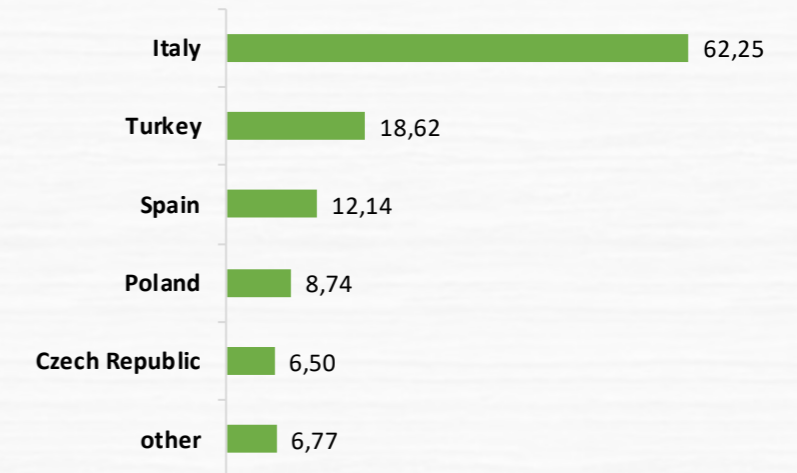
- Italy
- Turkey
- Spain
- Poland
- Czech Republic
- other countries

CAGR 2018-2022 CAGR 2022-2026



- Overall, a decline in tile imports in Germany of -23,9% is expected for 2023. The manufacturers and traders surveyed are also pessimistic for 2024 and expect a further decline of 4,5%.
- High energy costs and the restructuring of supply chains due to the war in Ukraine led to a decline in tile production in many European countries as early as 2022. Falling demand in Germany additionally caused imports to Germany to fall.
- After strong gains in recent years with a CAGR of 13,4% (2018-2022), Turkey will see a sharp decline in exports to Germany in 2023. This is due to EU anti-dumping measures on ceramic tiles originating in Turkey and India since 11 February 2023.

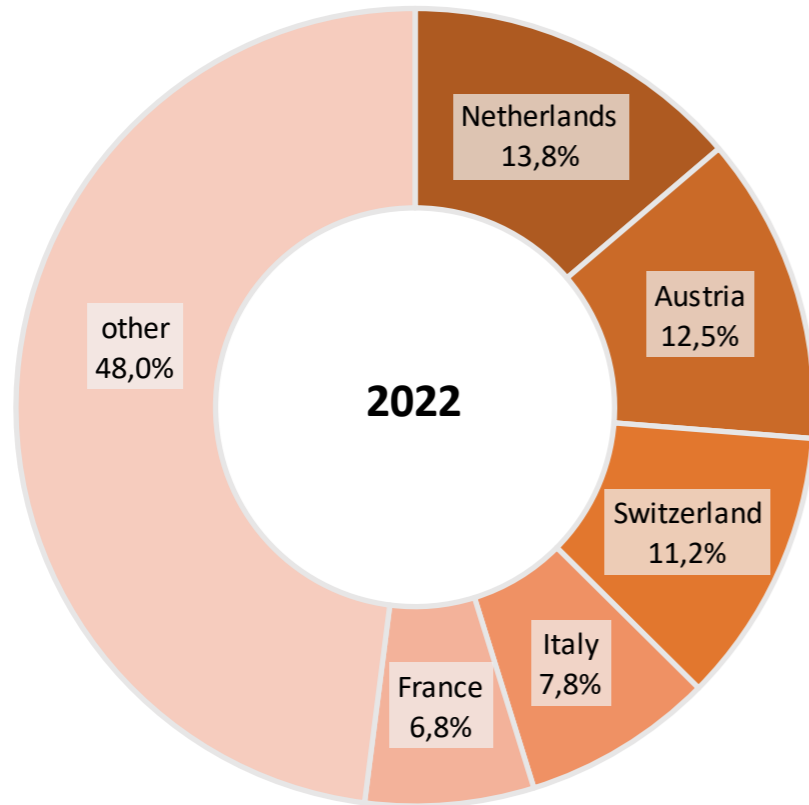
Imported ceramic tiles [in million m²]



Source: B+L; f = Forecast; Status 10/2023

Ceramic tiles exports 2022

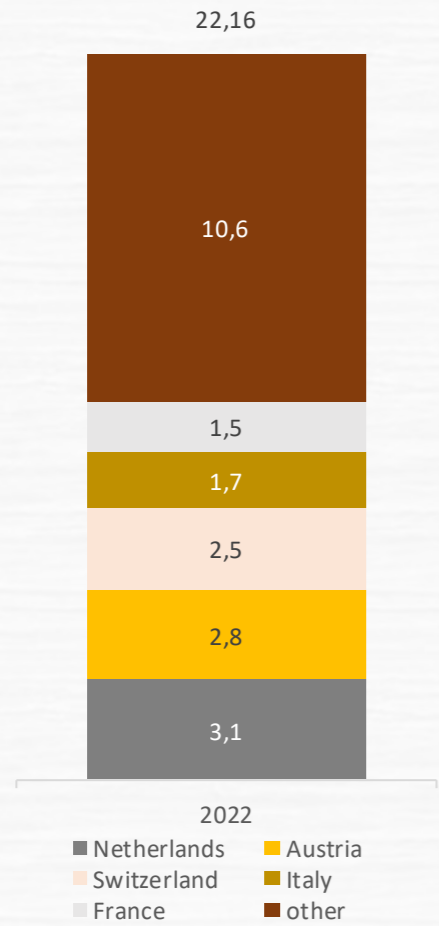
[share in %]



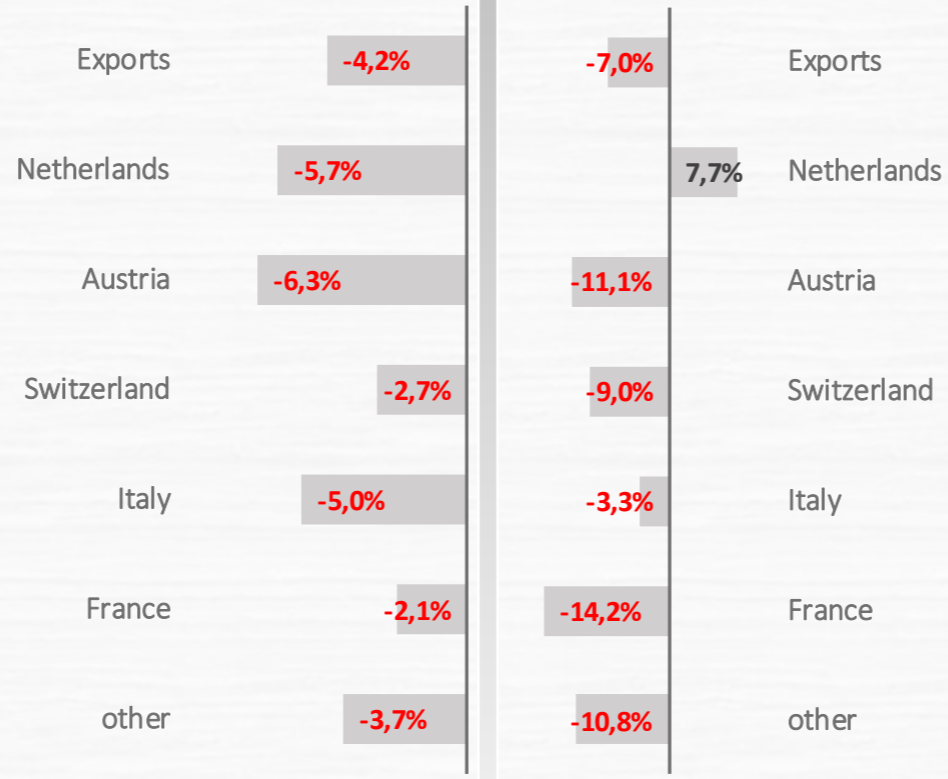
Ceramic tiles exports 2018-2026

[in million m²]

[million m²]

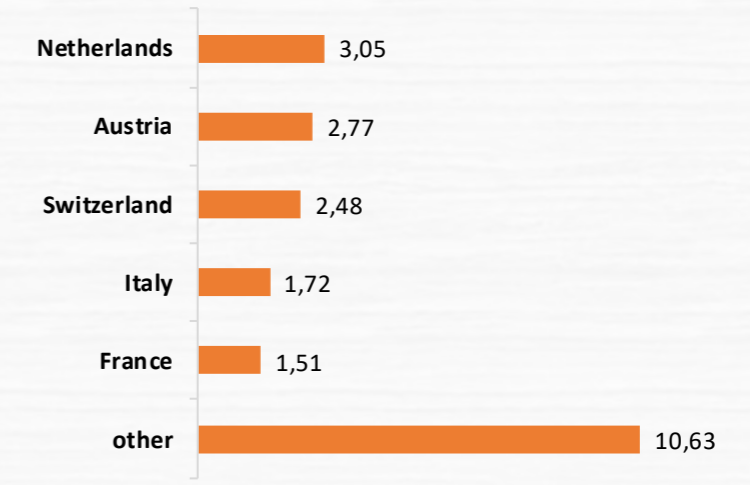


CAGR 2018-2022 | CAGR 2022-2026



- Overall, exports continue to decline in 2023 with -24,4%. High production costs, higher prices and lower production in Germany are the main reasons for this decline.
- In the medium term, exports are expected to stabilise.
- Exports to the Netherlands increased strongly in 2023, while most other export destinations recorded declines. Austria and France will record particularly strong declines in 2023.

Exported ceramic tiles [in million m²]

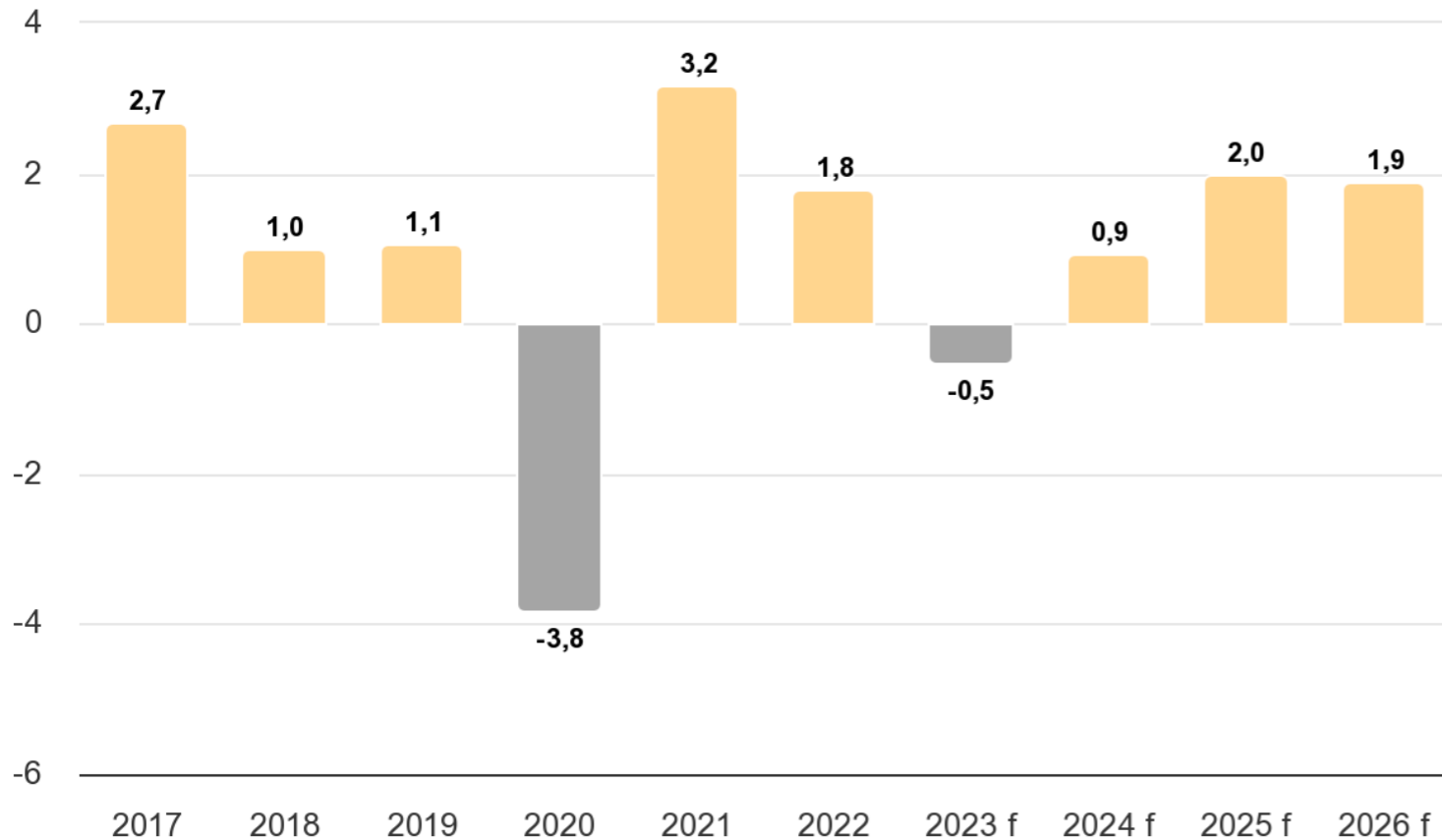


Source: B+L; f = Forecast; Status 10/2023

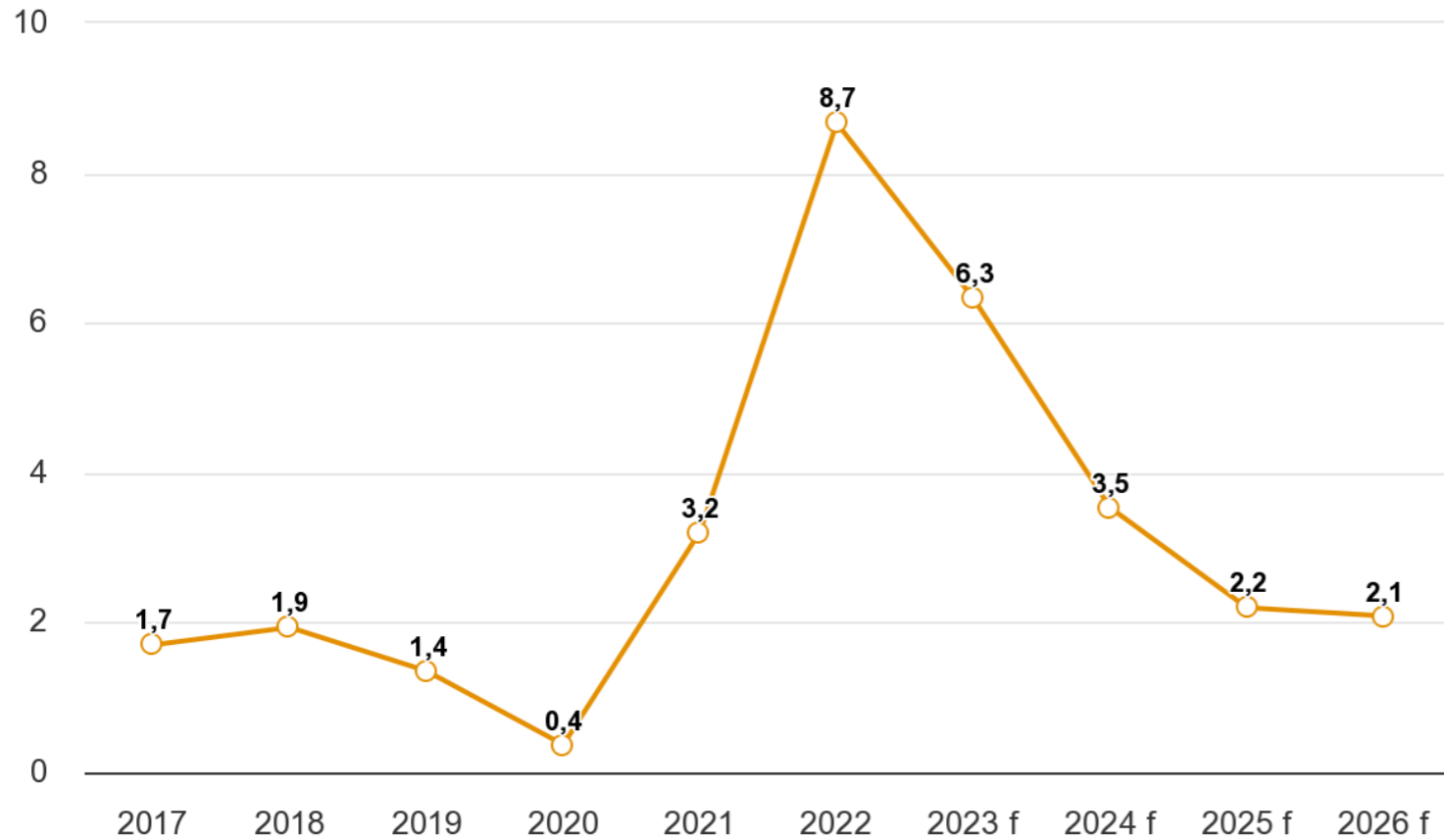
B+L Construction Market in Germany

2019-2026



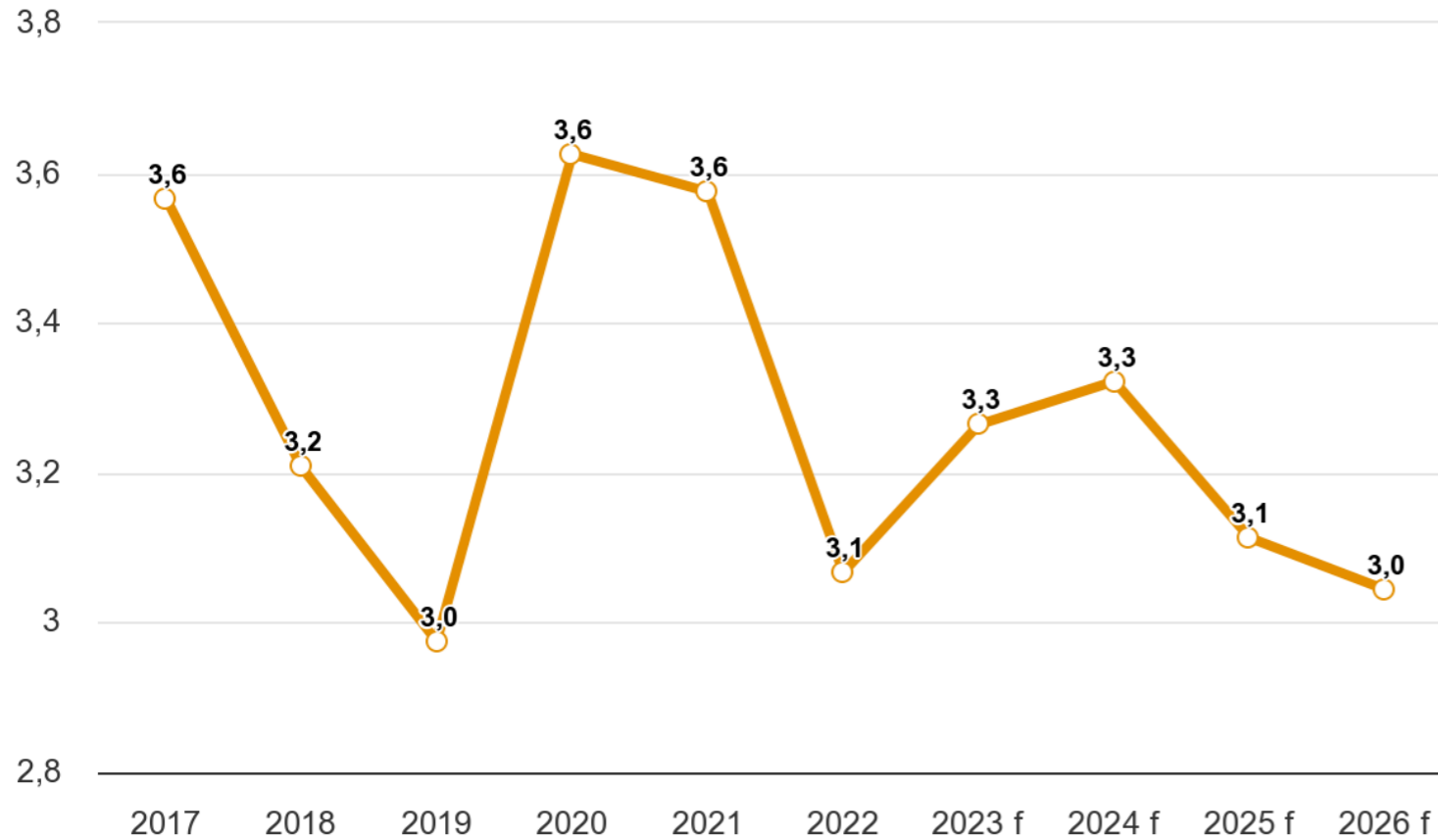


- Despite inflation, the energy crisis, the war in Ukraine and ongoing supply problems, the German economy grew in 2022. Gross domestic product rose by 1,8 per cent. However, due to the energy crisis, the economy was unable to match 2021, when it grew by 3,2 per cent - despite supply problems and the coronavirus pandemic. A significant proportion of growth in 2022 is attributable to the first quarter, i.e. before the war in Ukraine.
- The reasons for the positive development in 2022 are still catch-up effects after the coronavirus pandemic and easing supply bottlenecks.
- A slight recession is expected for the current year 2023. However, the severe economic slump feared at times is unlikely to materialise. High inflation and rising interest rates will cause private consumption and construction output to fall at the start of the year. This will improve over the course of the year, but B+L still expects GDP to fall by 0,5%.
- The recovery will accelerate by the end of the year and lead to forecast growth of 0,9% in the German economy in 2024.

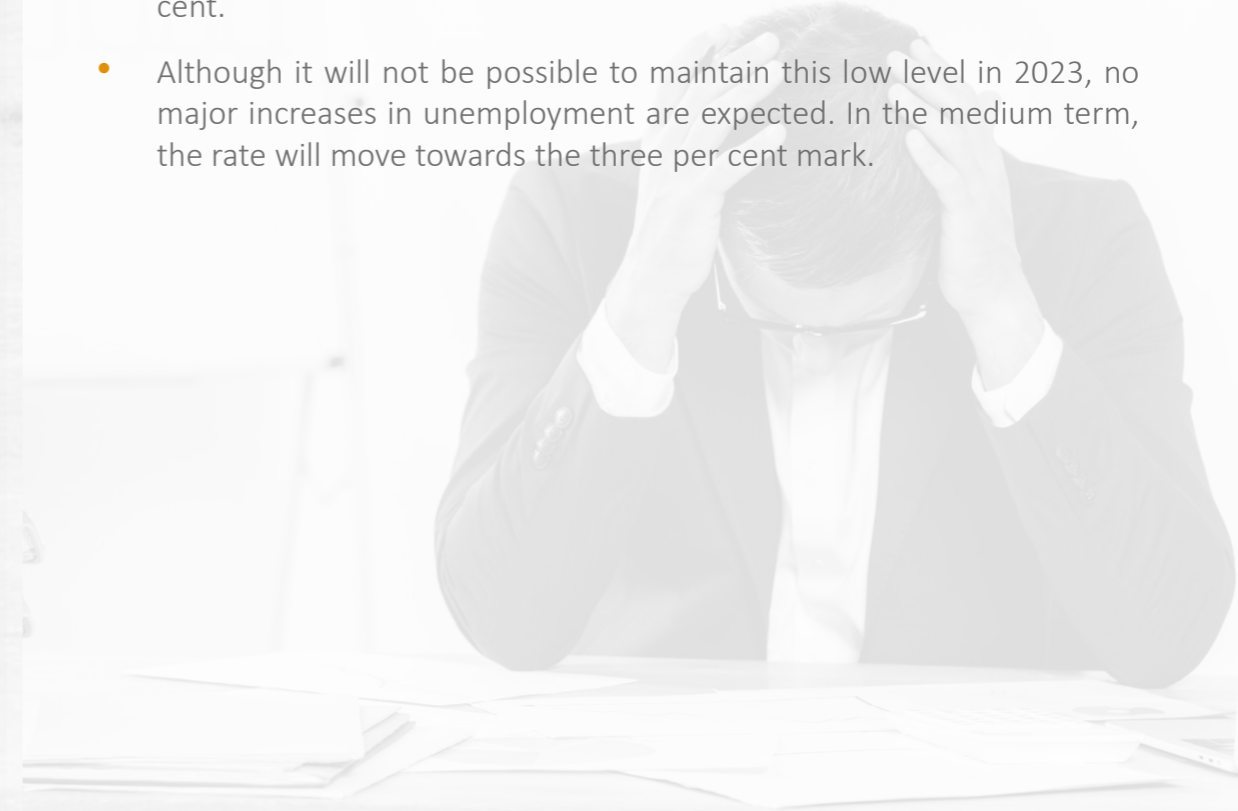


- The COVID-19 pandemic had an impact on consumption patterns and resulted in changes in the weights of the CPI consumption basket, affecting the inflation bias and resulted in a low inflation rate of 0.4% in 2020.
- The high inflation rate of 8,7% in Germany in 2022 was primarily driven by significant increases in energy and food prices. The prices of goods, particularly energy products and groceries, surged due to the start of the war in Ukraine, leading to an unprecedented rise in the inflation rate
- The IMF expects inflation to continue falling amid softening energy prices and tightening fiscal policy, but with core inflation declining more slowly than headline due to rising nominal wage pressures and lagged passthrough of lower global commodity prices to core inflation.

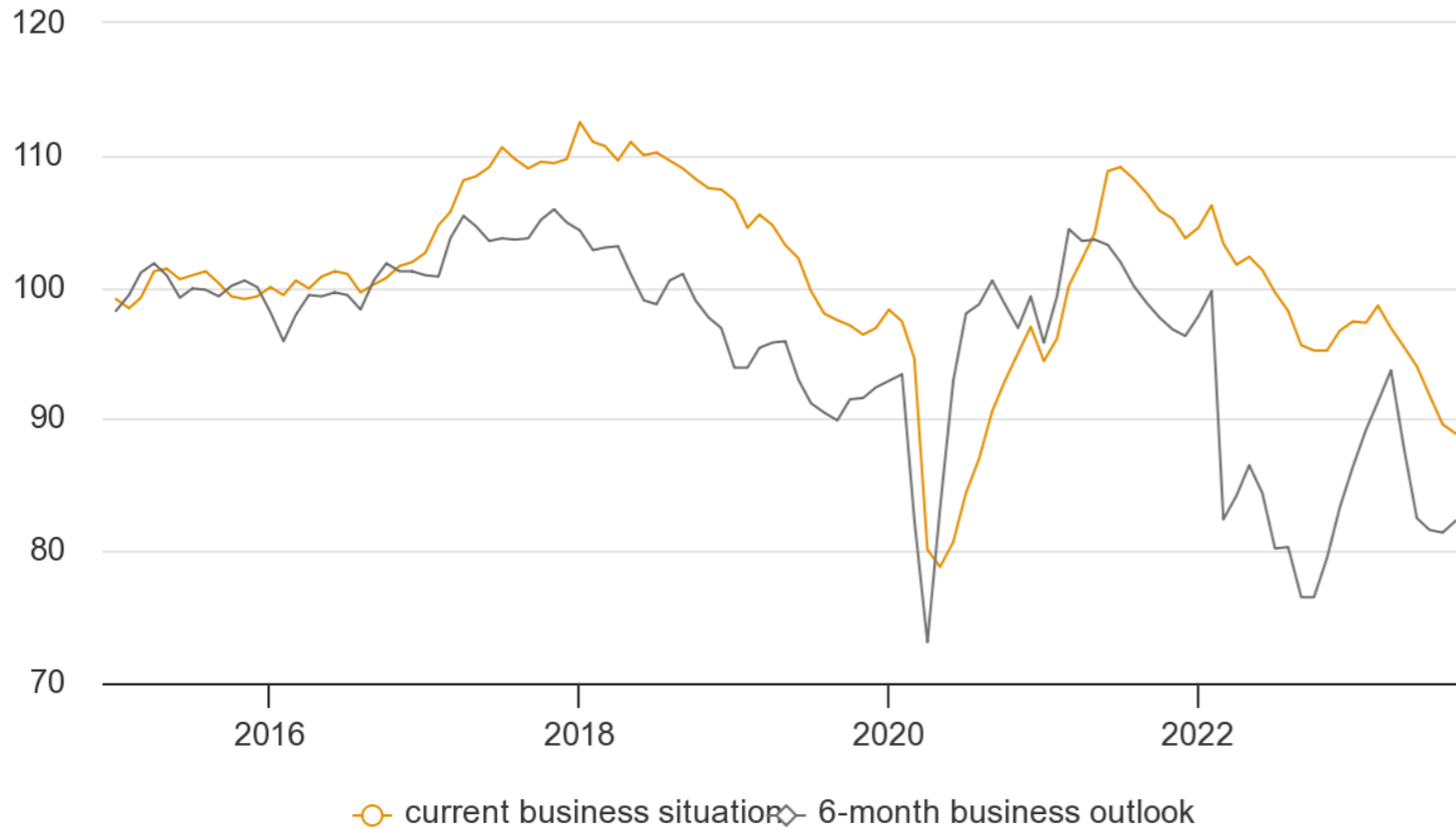
Source: IMF, B+L; Status 10/2023



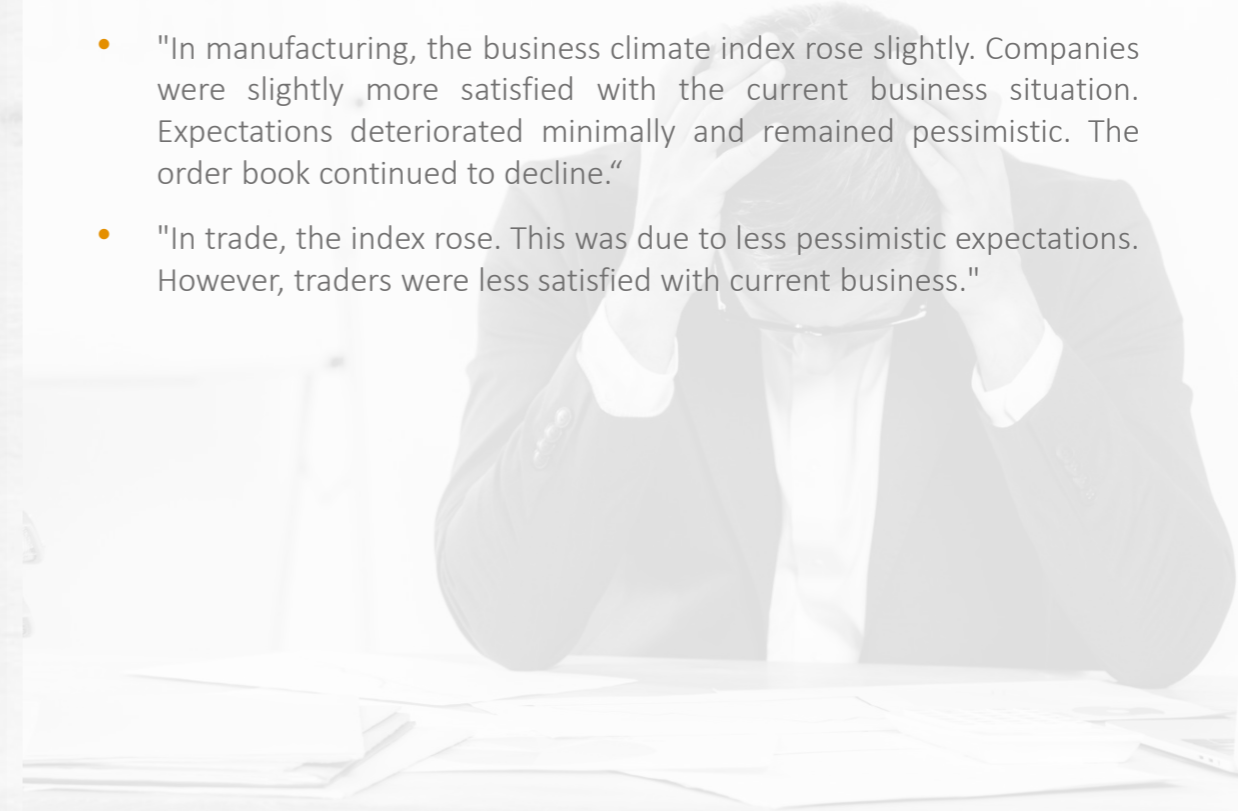
- Unemployment in the European Union's largest economy is low by European standards.
- After rising to around 3,6 per cent due to the pandemic, employment reached a record high in 2022. The unemployment rate falls to 3,1 per cent.
- Although it will not be possible to maintain this low level in 2023, no major increases in unemployment are expected. In the medium term, the rate will move towards the three per cent mark.

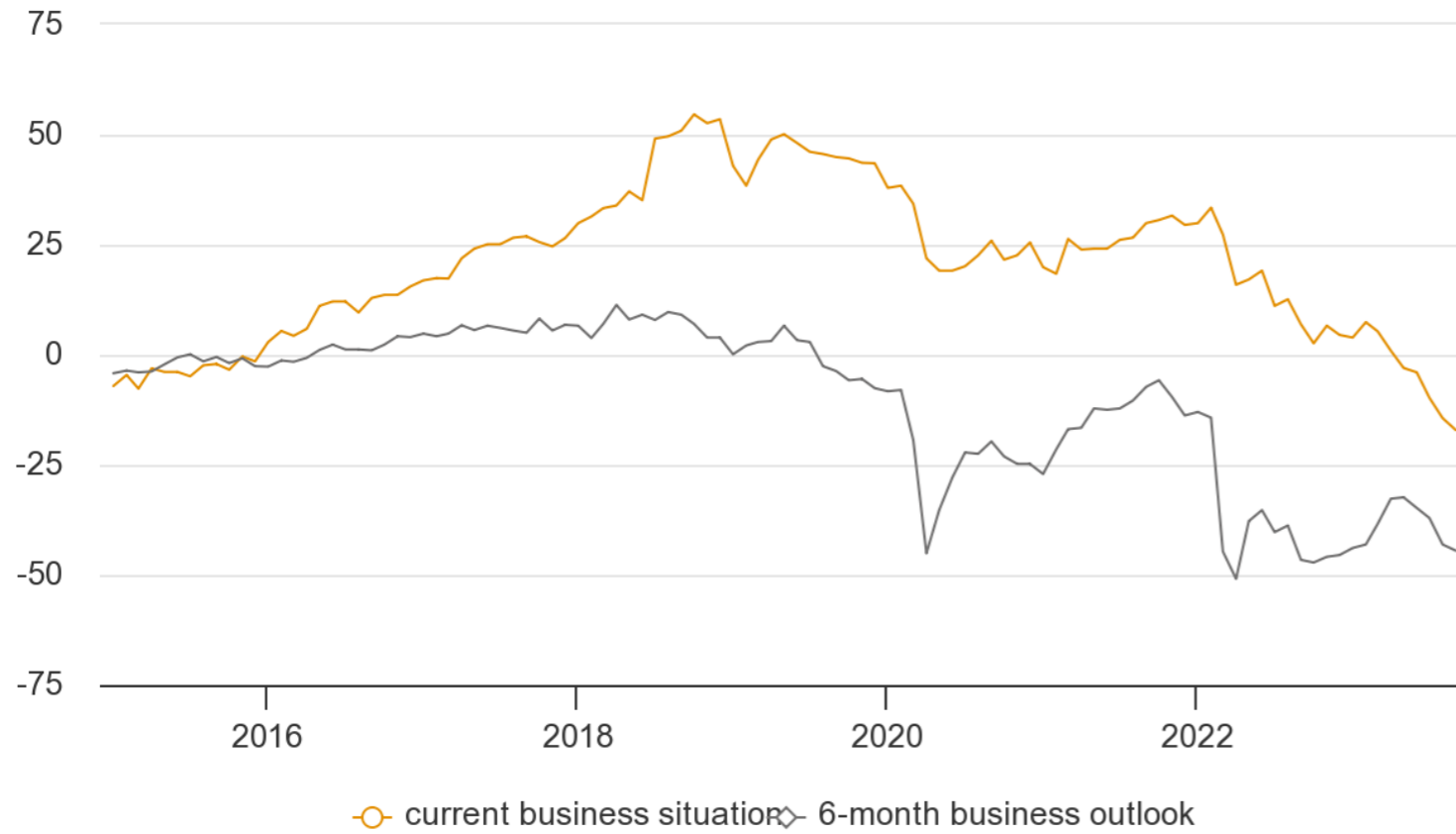


Source: IMF, B+L; Status 10/2023

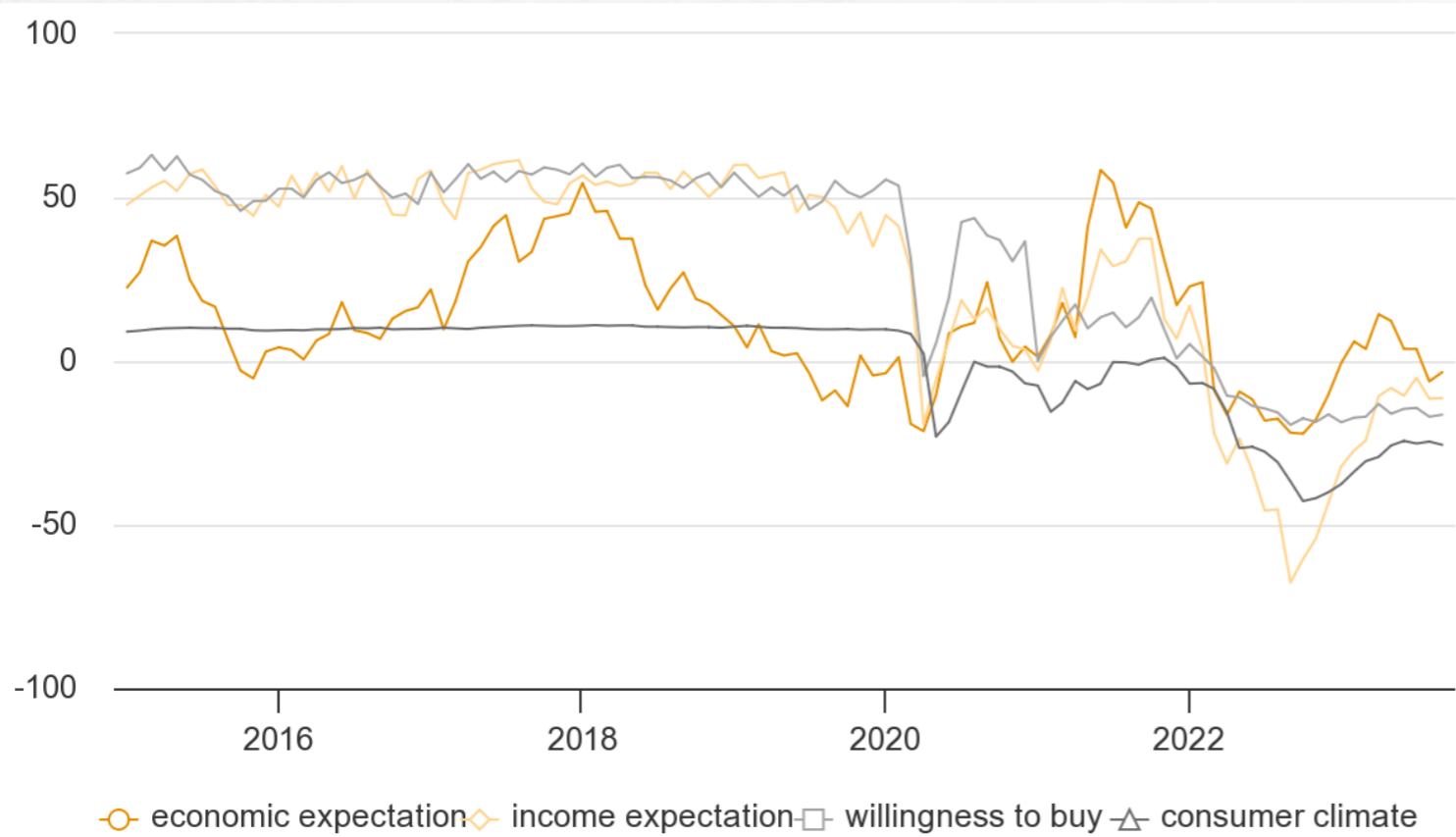


- "The mood in the German economy remains poor. The Ifo Business Climate Index fell to 85,7 points in September, after 85,8 points (seasonally adjusted) in August. Companies were again less satisfied with current business. However, pessimism for the coming months decreased slightly. The German economy is treading water."
- "In manufacturing, the business climate index rose slightly. Companies were slightly more satisfied with the current business situation. Expectations deteriorated minimally and remained pessimistic. The order book continued to decline."
- "In trade, the index rose. This was due to less pessimistic expectations. However, traders were less satisfied with current business."





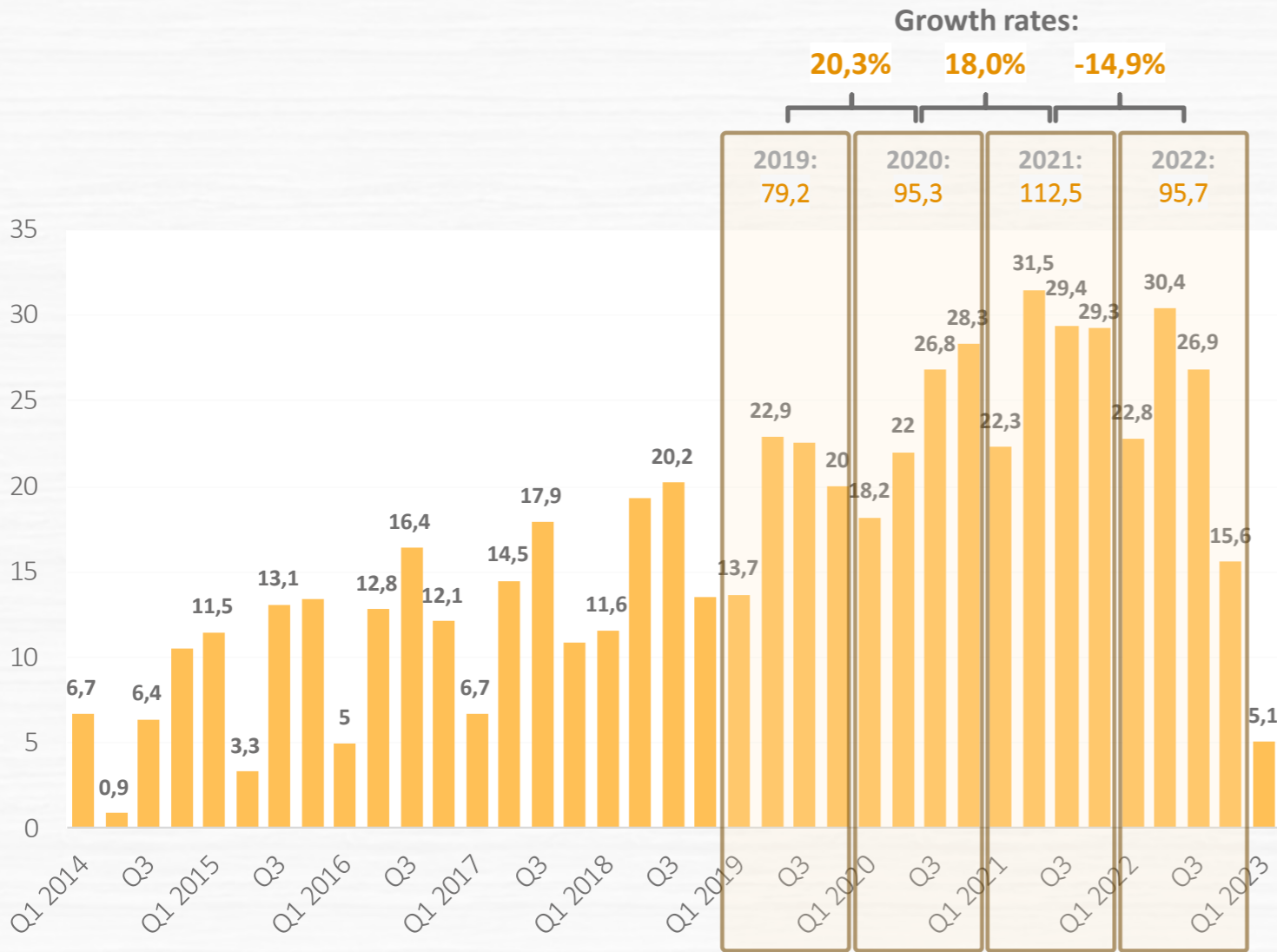
- "In the construction industry, the business climate indicator fell to its lowest level since January 2009.
- Companies assessed their current business situation as worse once again. The outlook for the coming months remains extremely pessimistic."



- "After hardly changing in the previous month, economic expectations declined moderately in March. The indicator lost 2,9 points and now stands at 0,5 points. This means that it can still remain just in positive territory, i.e. above its long-term average of 0 points. Compared to the corresponding value of the previous year, the indicator is currently down by 36 points."
- "In the wake of declining income expectations, the propensity to buy also suffered slight losses in March. However, at 2,7 points, the decline is much smaller than for the income indicator. The consumption indicator thus stands at exactly 50 points. Despite the slight losses, consumer sentiment has remained unbroken so far."

DE – Credit changes RB (residential building)

Change from previous quarter [Mrd. EUR]



- The low interest rates of recent years have caused a massive swelling of the housing loan portfolio. For more than 12 years, housing loan portfolios have been rising steadily, reaching record levels for the entire year almost every year.
- While EUR 11,8 billion of new housing loans were taken out in 2011, the figure was more than EUR 95 billion in 2020 and as much as EUR 112,5 billion in 2021. Private households have increased their debt to an unprecedented extent - by almost EUR 600 billion since 2011.
- In 2022, the volume of new housing loans has increased again, this time by EUR 95,7 bn. In Q4 2022, the volume of new loans taken out has slowed down significantly.
- The first quarter of 2023 has fallen back to the level of Q1 2016 with only EUR 5,1m.
- Initial projections indicate that the full year 2023 will show a significant reduction in new housing loan volume. This is due to rising construction interest rates.

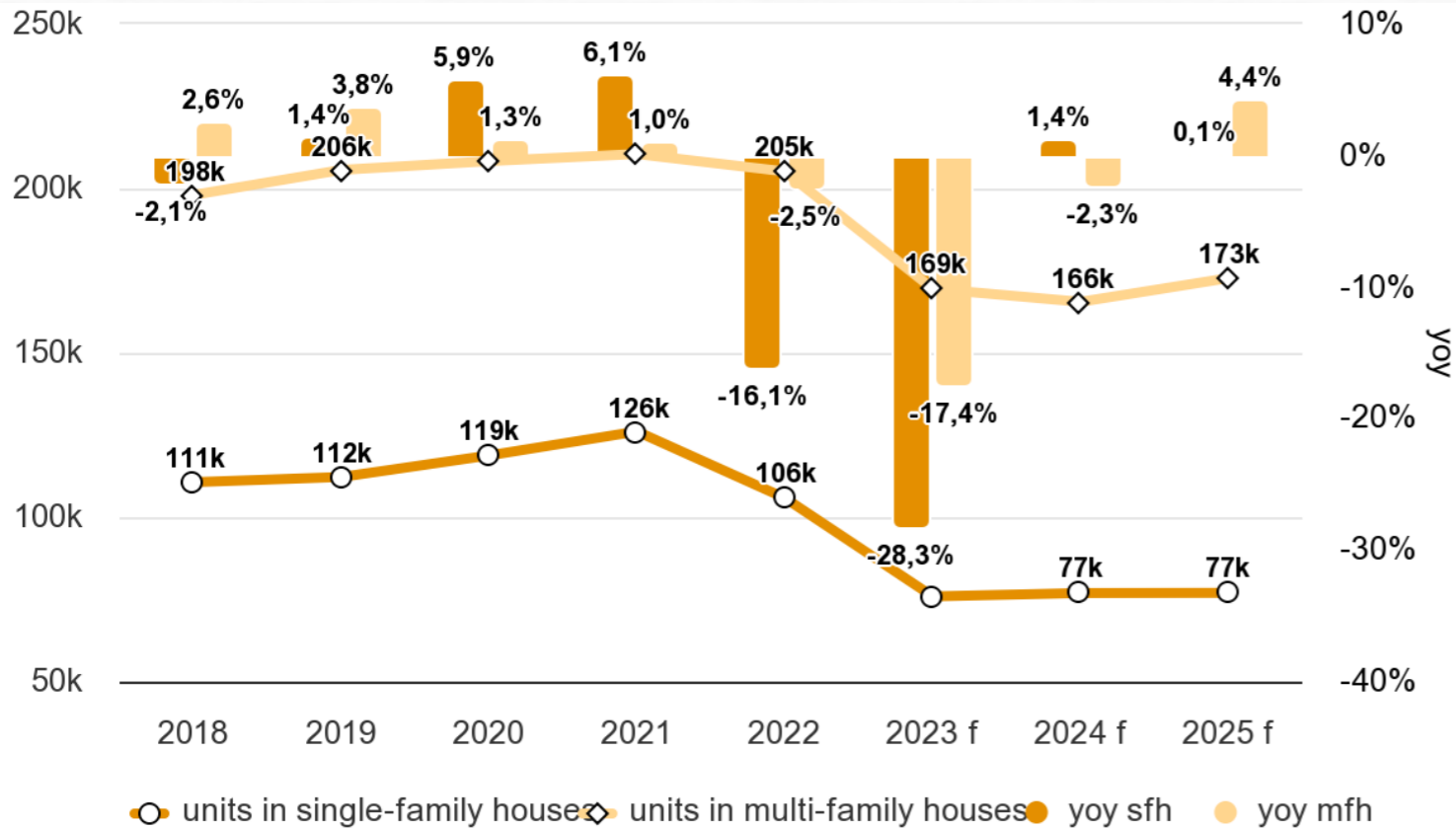
Residential - Dwelling permits monthly

[number of dwellings] / compared to previous year [%]

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
dwelling permits - total													
2021	24.351	26.829	34.050	26.043	29.027	28.004	27.358	27.567	26.378	26.129	24.903	35.939	336.578
2022	26.507	24.941	30.857	27.636	28.060	26.622	26.781	24.538	23.726	21.811	20.808	28.732	311.019
2023	19.023	19.192	20.757	18.092	19.594	17.936	17.315						131.909
2021 to 2022	8,9	-7,0	-9,4	6,1	-3,3	-4,9	-2,1	-11,0	-10,1	-16,5	-16,4	-20,1	-7,6
2022 to 2023	-28,2	-23,1	-32,7	-34,5	-30,2	-32,6	-35,3						-31,1
dwelling permits - single-family houses													
2021	9.720	10.721	16.432	9.692	9.542	10.609	10.342	10.364	9.472	9.354	9.061	10.778	126.087
2022	9.090	9.437	10.677	9.472	10.209	9.502	9.326	8.723	8.197	7.008	7.028	7.169	105.838
2023	6.186	5.763	6.424	5.259	5.498	5.593	5.066						39.789
2021 to 2022	-6,5	-12,0	-35,0	-2,3	7,0	-10,4	-9,8	-15,8	-13,5	-25,1	-22,4	-33,5	-16,1
2022 to 2023	-31,9	-38,9	-39,8	-44,5	-46,1	-41,1	-45,7						-41,2
dwelling permits - multi-family houses													
2021	13.618	14.745	15.785	15.099	17.141	16.188	15.858	15.858	15.757	15.475	14.293	23.830	193.647
2022	16.097	14.732	18.859	16.419	17.201	15.756	16.341	14.650	14.445	13.577	13.143	19.222	190.442
2023	11.500	12.245	13.443	11.025	13.022	11.130	11.248						83.613
2021 to 2022	18,2	-0,1	19,5	8,7	0,4	-2,7	3,0	-7,6	-8,3	-12,3	-8,0	-19,3	-1,7
2022 to 2023	-28,6	-16,9	-28,7	-32,9	-24,3	-29,4	-31,2						-27,5
Community houses and other dwellings in RB													
2021	484	924	1.122	658	1.516	606	566	668	403	636	727	592	8.902
2022	881	139	691	1.013	216	786	717	702	570	615	255	1.725	8.310
2023	964	817	345	915	572	839	463						4.915
2021 to 2022	82,0	-85,0	-38,4	54,0	-85,8	29,7	26,7	5,1	41,4	-3,3	-64,9	191,4	-6,7
2022 to 2023	9,4	487,8	-50,1	-9,7	164,8	6,7	-35,4						10,6

Residential - Dwelling permits 2017 - 2025

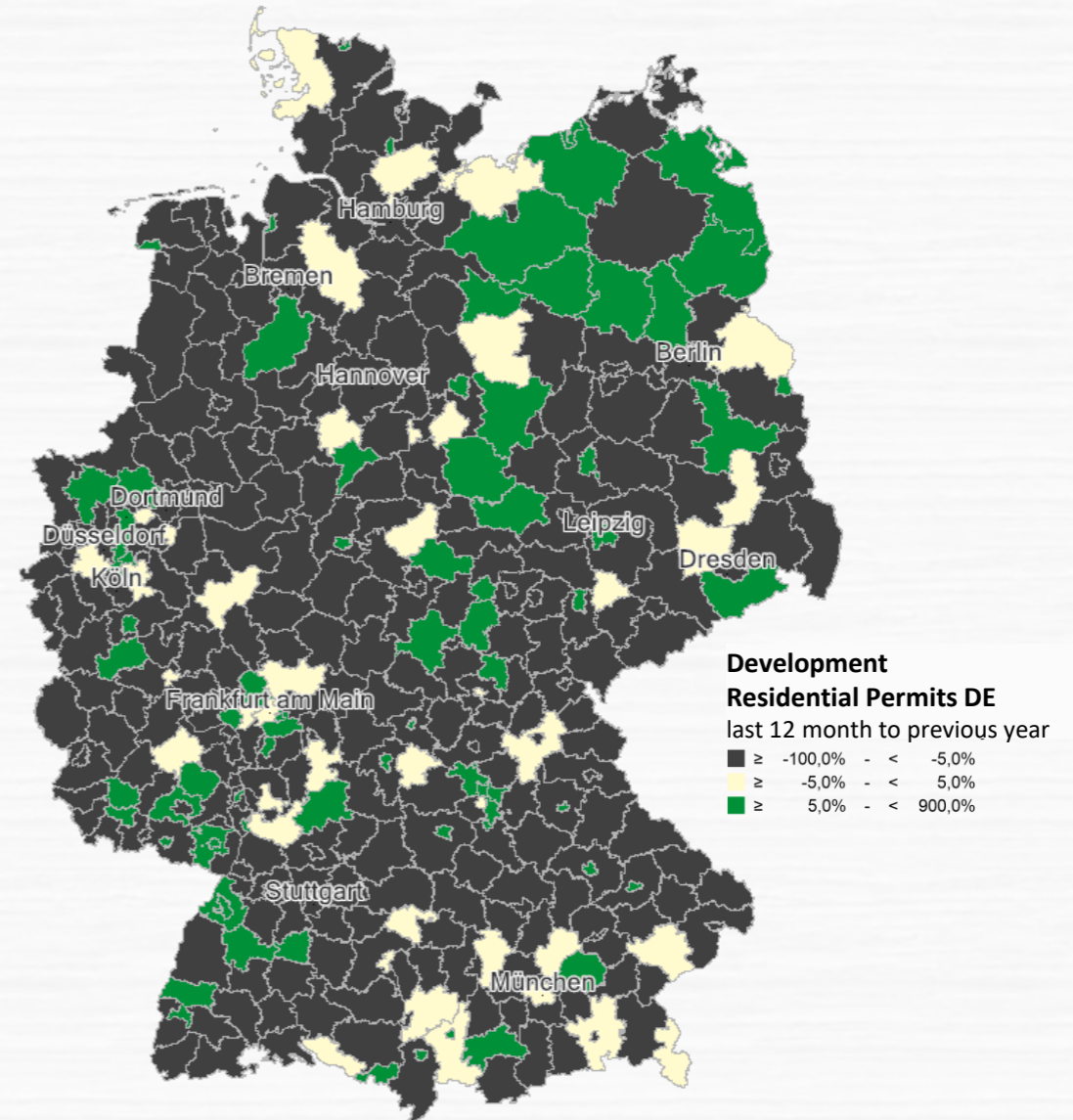
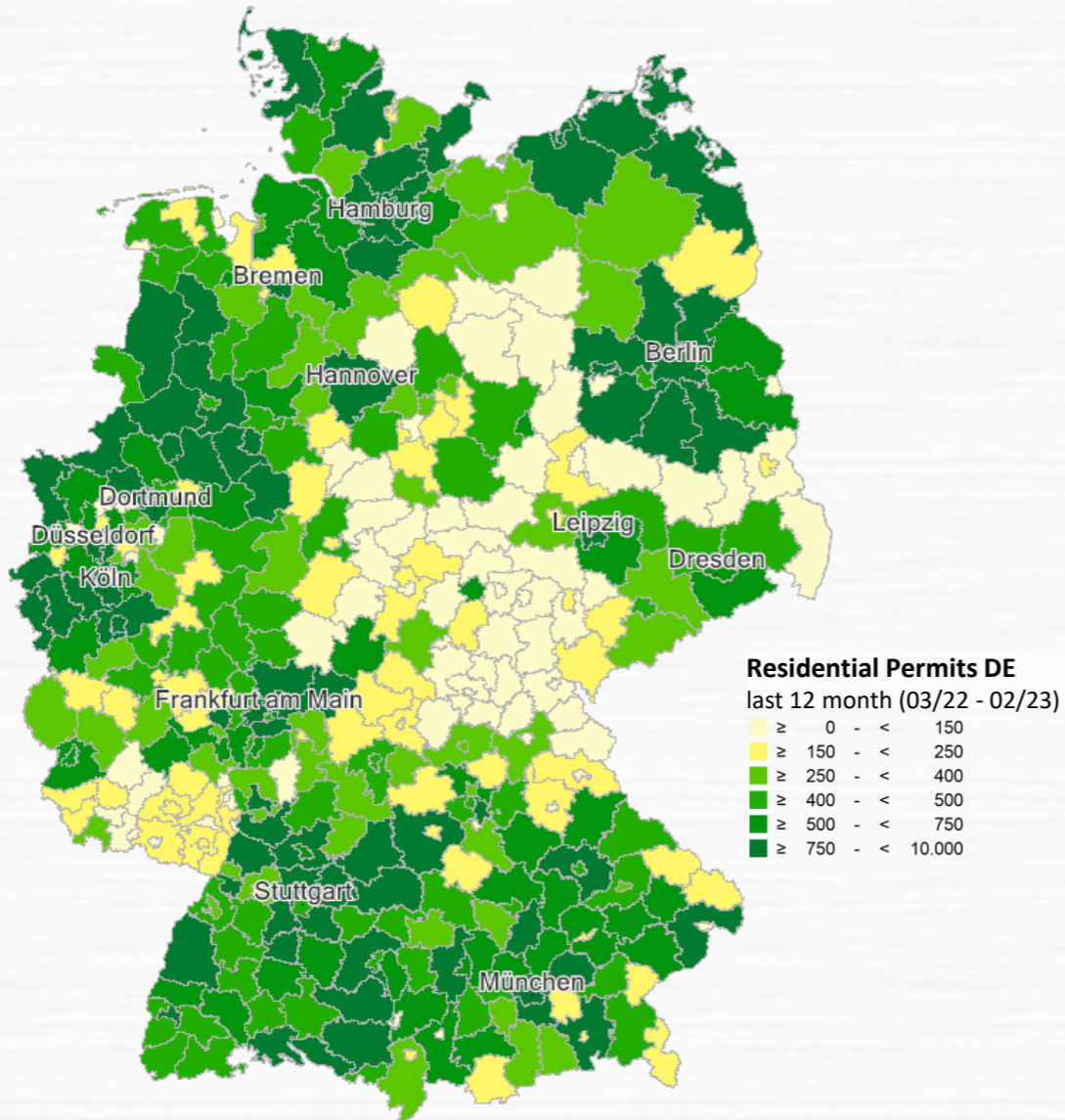
[Anzahl Wohnungen] nach Gebäudetypen / Veränderung zum Vorjahr [%]



- Looking at the building types, there is a clear difference and also a strong contrast to the developments of the last few years.
- While in the last ten years there has been an almost continuous trend towards multi-family house construction, the Covid-19 situation has reversed this trend. In 2020, 5,9% more single-family houses were permitted, whereas the number of flats in multi-family houses increased only slightly. This is directly derived from the changed needs of people due to Covid-19 and the high prices in urban areas. The consequence is a move away from the city to the outskirts or to surrounding urban and rural districts.
- In 2021, this development continued even more clearly with an increase in single-family house permits of +6,1%. For multi-family houses, it was only +1,0%.
- The year 2022 was very negative in terms of building permits. Due to the strongly rising construction as well as financing costs, -16,1% fewer single-family houses were permitted. Permits for multi-family houses also decreased by -2,5%.
- These drivers continue to have a significant impact in 2023. Also 2024 is expected to be weak, despite the high demand due to immigration.

Residential - Dwelling permits March 2022 – February 2023

absolut [number of dwellings] / compared to previous year [%]



Source: Destatis; B+L; Status 10/2023

Residential - Dwelling permits monthly

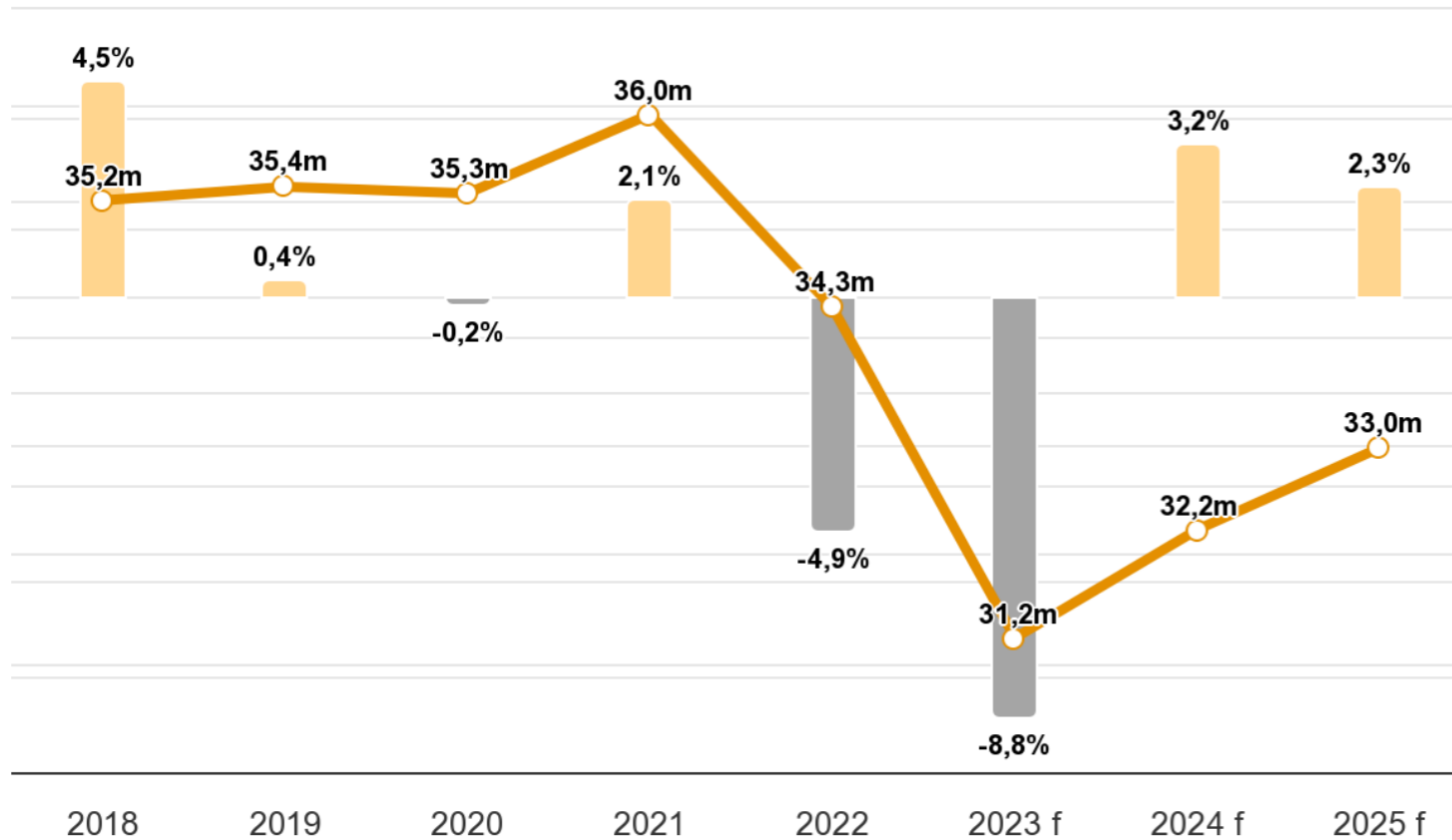
[number of dwellings] / compared to previous year [%]

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
non-residential buildings - permitted 1.000 m²													
2021	2.637	2.904	3.122	2.581	2.946	3.150	3.101	3.333	3.157	3.033	2.863	3.210	36.037
2022	2.367	2.447	3.371	2.828	3.444	2.954	2.872	2.876	2.791	2.494	2.732	3.088	34.264
2023	2.134	2.496	2.200	1.943	2.608	2.199	2.893						16.473
2021 to 2022	-10,2	-15,7	8,0	9,6	16,9	-6,2	-7,4	-13,7	-11,6	-17,8	-4,6	-3,8	-4,9
2022 to 2023	-9,8	2,0	-34,7	-31,3	-24,3	-25,6	0,7						-18,8
industrial buildings - permitted 1.000 m²													
2021	329	307	493	440	421	461	500	496	395	473	369	551	5.235
2022	311	442	386	365	541	394	396	412	498	500	527	418	5.190
2023	415	397	408	281	458	432	509						2.900
2021 to 2022	-5,5	44,0	-21,7	-17,0	28,5	-14,5	-20,8	-16,9	26,1	5,7	42,8	-24,1	-0,9
2022 to 2023	33,4	-10,2	5,7	-23,0	-15,3	9,6	28,5						2,3
commercial and storage buildings - permitted 1.000 m²													
2021	926	1.269	970	770	844	897	978	1.001	900	1.091	1.066	1.173	11.885
2022	603	757	1.493	1.250	1.432	1.248	1.155	1.019	883	852	964	1.034	12.690
2023	602	1.006	715	671	801	748	1.152						5.695
2021 to 2022	-34,9	-40,3	53,9	62,3	69,7	39,1	18,1	1,8	-1,9	-21,9	-9,6	-11,8	6,8
2022 to 2023	-0,2	32,9	-52,1	-46,3	-44,1	-40,1	-0,3						-28,3
office buildings - permitted 1.000 m²													
2021	429	273	378	322	412	469	421	581	464	421	530	445	5.145
2022	329	268	336	322	277	396	401	340	272	272	381	576	4.170
2023	323	274	218	211	277	194	284						1.781
2021 to 2022	-23,3	-1,8	-11,1	0,0	-32,8	-15,6	-4,8	-41,5	-41,4	-35,4	-28,1	29,4	-19,0
2022 to 2023	-1,8	2,2	-35,1	-34,5	0,0	-51,0	-29,2						-23,5

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
public buildings - permitted 1.000 m²													
2021	105	96	123	88	161	69	126	150	144	128	136	148	1.474
2022	79	104	116	46	76	59	86	83	115	97	77	158	1.096
2023	55	104	55	57	145	63	78						557
2021 to 2022	-24,8	8,3	-5,7	-47,7	-52,8	-14,5	-31,7	-44,7	-20,1	-24,2	-43,4	6,8	-25,6
2022 to 2023	-30,4	0,0	-52,6	23,9	90,8	6,8	-9,3						-1,6
hotel buildings - permitted 1.000 m²													
2021	111	78	80	99	86	101	91	76	95	54	76	76	1.023
2022	90	94	48	56	263	56	65	72	65	68	50	55	982
2023	38	29	58	56	58	43	68						350
2021 to 2022	-18,9	20,5	-40,0	-43,4	205,8	-44,6	-28,6	-5,3	-31,6	25,9	-34,2	-27,6	-4,0
2022 to 2023	-57,8	-69,1	20,8	0,0	-77,9	-23,2	4,6						-47,9
agricultural buildings - permitted 1.000 m²													
2021	284	357	419	316	426	593	336	353	452	347	252	228	4.363
2022	306	297	340	244	352	277	256	309	385	257	265	230	3.518
2023	228	216	302	208	303	271	276						1.804
2021 to 2022	7,7	-16,8	-18,9	-22,8	-17,4	-53,3	-23,8	-12,5	-14,8	-25,9	5,2	0,9	-19,4
2022 to 2023	-25,5	-27,3	-11,2	-14,8	-13,9	-2,2	7,8						-12,9
other buildings - permitted 1.000 m²													
2021	453	524	659	546	596	560	649	676	707	519	434	589	6.912
2022	649	485	652	545	503	524	513	641	573	448	468	617	6.618
2023	473	470	444	459	566	448	526						3.386
2021 to 2022	43,3	-7,4	-1,1	-0,2	-15,6	-6,4	-21,0	-5,2	-19,0	-13,7	7,8	4,8	-4,3
2022 to 2023	-27,1	-3,1	-31,9	-15,8	12,5	-14,5	2,5						-12,5

Non-residential building permits 2017 - 2025

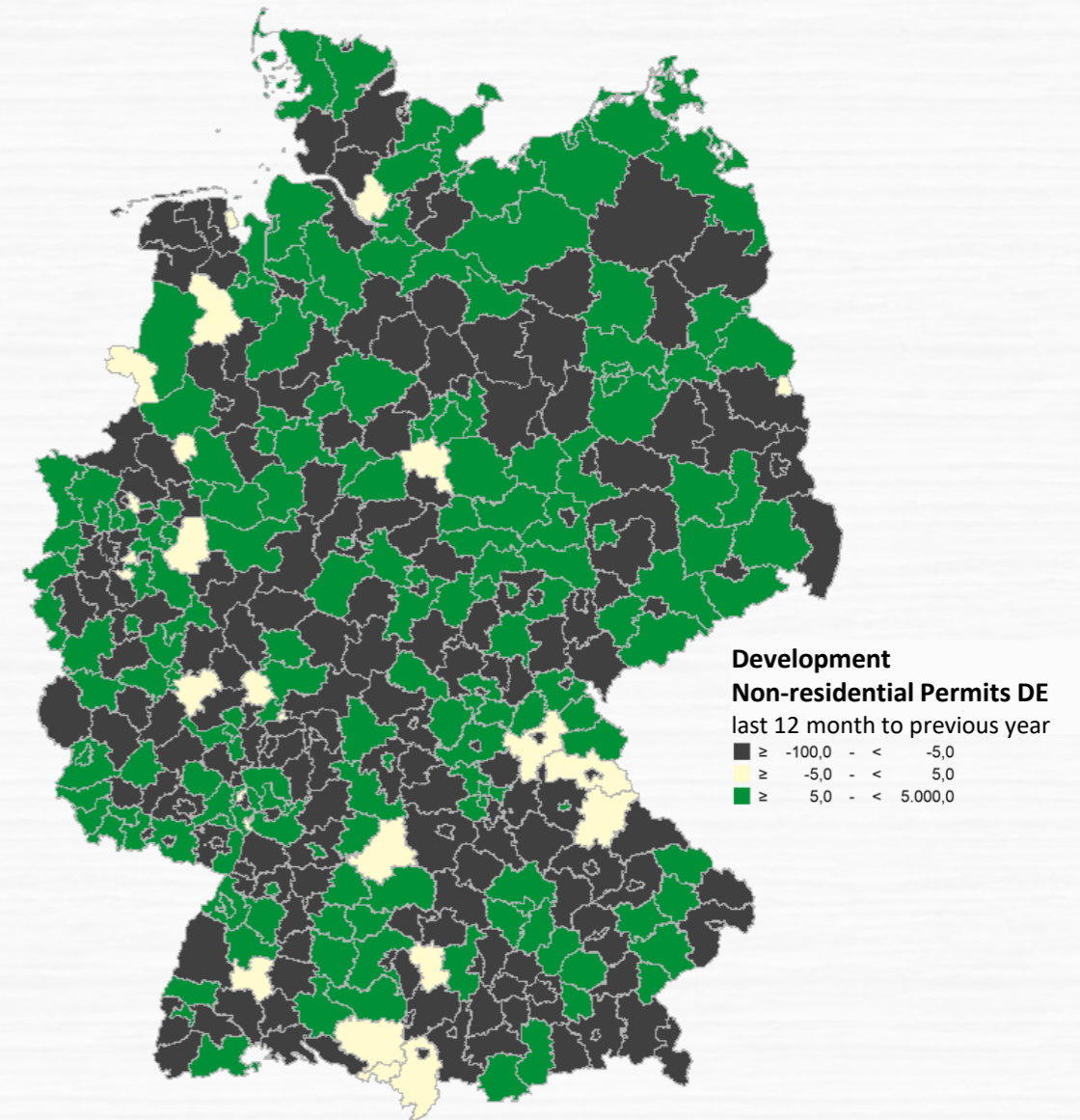
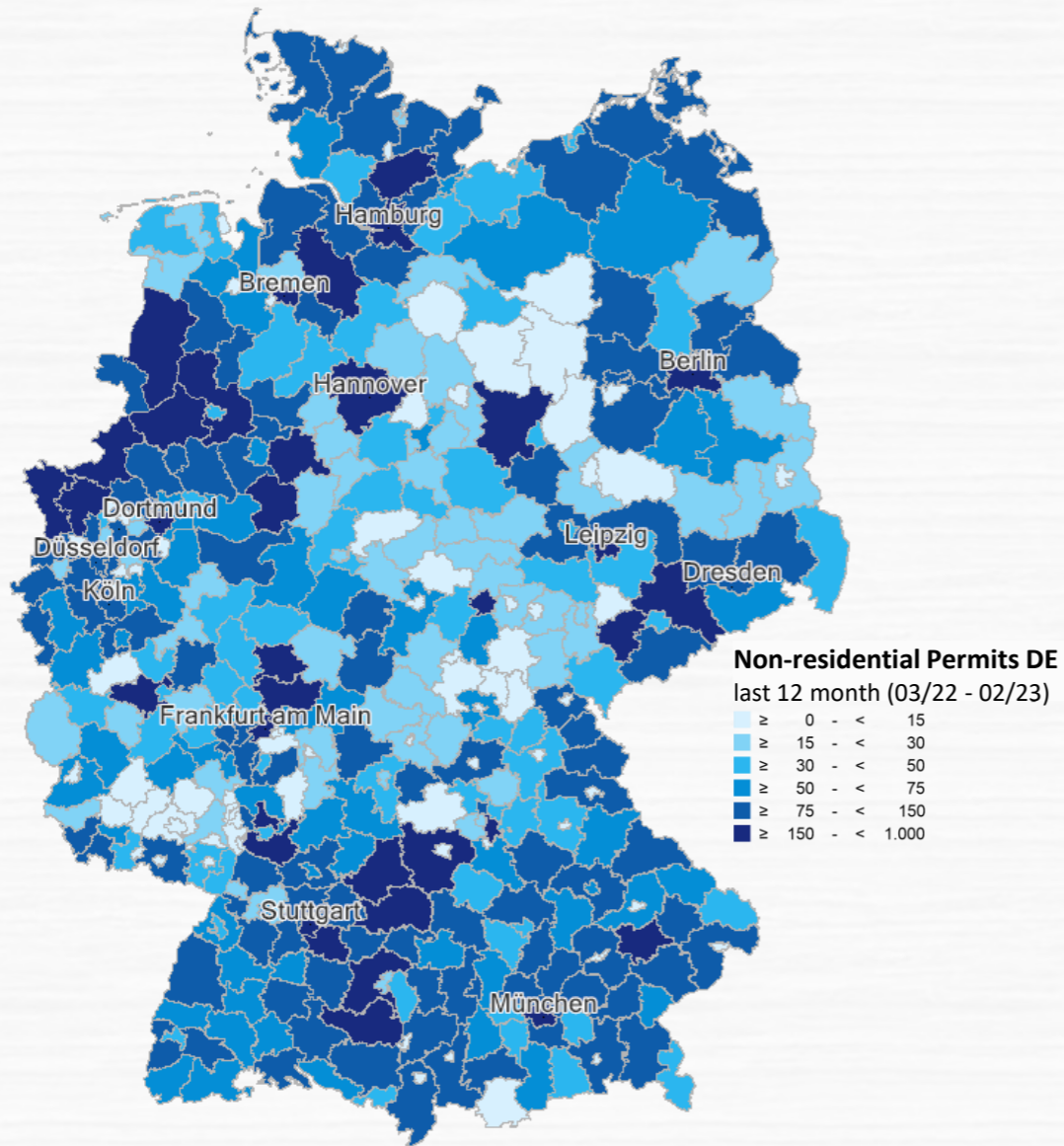
[in 1.000 m²] / compared to previous year [%]



- After a slight decline in 2020, there was a much more positive development in permitted non-residential building space in 2021 with an increase of 2,1%. Building permits for offices developed surprisingly well with an increase of 12,6%. An important reason for this was the increasing importance of the EU's ESG guidelines. These oblige all companies to have their real estate inspected for sustainability and energy efficiency, among other things. In short, companies with better ESG ratings will get cheaper financing in the future. Since it is much easier and safer for a company to invest in a new building or to move in order to improve its rating, this step will be taken increasingly in the coming years. This effect will also have a positive impact on new office construction in the coming years.
- The year 2022 was tense for non-residential construction projects. The uncertain financing situation and rising construction prices were making investors hesitate. As a result, permitted square metres decline by around 5%. In 2023, larger investors do not return to the market either, permitted square metres fall by -8,8% compared to the previous year. From 2024 onwards, the picture is more positive.

Non-Residential - Permits March 2022 – February 2023

absolut [in 1.000 m²] / compared to previous year [%]



Source: Destatis; B+L; Status 10/2023

Dwelling permits- and non-residential permits March 2022 – February 2023

[number of dwellings / 1.000 m²] / compared to previous year [%]

Kreis	Genehmigte Wohnungen Mrz. 22 bis Feb. 23	Veränderung (Absolut)	Veränderung (%)	Kreis	Genehmigter Nichtwohnbau Mrz. 22 bis Feb. 23 [in m ²]	Veränderung absolut	Veränderung (%)
SK Berlin	15.797	-1.220	-7,2	SK Berlin	935.000	55.000	6,3
SK Hamburg	8.479	-1.309	-13,4	LK Region Hannover	637.000	174.000	37,6
SK München	7.709	144	1,9	SK München	626.000	-62.000	-9,0
SK Frankfurt am Main	3.940	84	2,2	LK Steinfurt	442.000	182.000	70,0
LK Region Hannover	3.567	-1.478	-29,3	LK Mittelsachsen	442.000	321.000	265,3
SK Leipzig	3.383	750	28,5	LK Emsland	432.000	36.000	9,1
SK Nürnberg	3.075	552	21,9	SK Hamburg	422.000	194.000	85,1
LK Emsland	2.249	-765	-25,4	SK Frankfurt am Main	390.000	72.000	22,6
LK Steinfurt	2.191	-468	-17,6	SK Dortmund	368.000	117.000	46,6
SK Köln	2.110	-1.033	-32,9	SK Erfurt	341.000	294.000	625,5
LK Dahme-Spreewald	1.949	484	33,0	LK Gießen	262.000	185.000	240,3
LK Rhein-Neckar-Kreis	1.875	-90	-4,6	LK Osnabrück	249.000	-34.000	-12,0
SK Düsseldorf	1.838	-212	-10,3	SK Leipzig	248.000	33.000	15,3
LK Heilbronn	1.808	-220	-10,8	LK Kleve	233.000	35.000	17,7
LK Rhein-Sieg-Kreis	1.805	-518	-22,3	LK Lippe	228.000	162.000	245,5
LK Rosenheim	1.789	35	2,0	LK Dingolfing-Landau	226.000	149.000	193,5
LK Segeberg	1.783	75	4,4	SK Nürnberg	219.000	-72.000	-24,7
SK Wiesbaden	1.759	334	23,4	LK Wetteraukreis	210.000	118.000	128,3
LK Böblingen	1.689	-101	-5,6	LK Ostalbkreis	206.000	94.000	83,9
LK Ortenaukreis	1.689	-516	-23,4	LK Biberach	196.000	75.000	62,0

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Your Contacts:



Jens Wehenkel
JW@bl2020.com



Robin Huth
RH@bl2020.com

B+L Marktdaten GmbH



Markt 26
53111 Bonn (Germany)



www.BL2020.com



B+L

B+L Marktdaten GmbH

Markt 26

53111 Bonn (Germany)

www.BL2020.com

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