

Germany Commercial Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany Commercial Construction Market size is estimated at USD 109.49 billion in 2024, and is expected to reach USD 113.87 billion by 2029, growing at a CAGR of 4.28% during the forecast period (2024-2029).

Key Highlights

- Germany is one of Europe's leading construction markets and home to the largest stock of buildings, whether residential skyscrapers, industrial built environments, or commercial construction. Many direct and indirect drivers are responsible for the boom in the construction industry and investment portfolio, which, keeping in mind the short-term disruption caused by the pandemic, COVID-19, are going to continue delivering progress for the sector in the foreseeable future.
- Some of these are the population growth, demographic changes, and a favourable economic development. Some of the niches like prefabricated buildings, green building technologies, green construction related building materials and components, are thriving in the industry trying to meet the 2030 Sustainable Development Goals, primarily the climate protection targets.
- Volume of Commercial construction has been growing steadily, as per Germany trade and Invest, GTAI, leading to an appreciable USD 137.48 billion in 2019 from a relatively nominal figure of USD 95.68 billion in 2010, keeping in mind the developed economy and a load more amount of initiatives required from the Government in order to boost the revenue from any sector. It is further forecasted to reach a figure of around USD150 billion by the end of 2021. A key reason for the forecast is the increasing intention of the industry to increase the efficiency by including innovative technologies like BIM into place, which would help in attaining the targets with relatively more certainty.

Germany Commercial Construction Market Trends

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Increasing Investments in Green buildings is Driving the Market Growth

The investment volume in certified green buildings will remain very high in Germany in 2022 at around EUR11.2 billion. Although the volume, like the investment market as a whole, fell slightly in absolute terms compared to the previous year, the relative share of certified assets in the investment market rose to an absolute record level of 30.6%.

DGNB (1,670) remains the market leader in the area of green building certificates, followed by BREEAM (660) and LEED (490). BREEAM further set itself apart from LEED through the existing certification.

In 2022, around 80% of the investment volume for certified Green Buildings was accounted for by A locations. In the three largest investment locations, Berlin, Frankfurt, and Munich, the share of sustainable buildings in commercial transactions totaled over 40%.

Although certificates such as BREEAM, DGNB, or LEED are not congruent with the ESG criteria of the taxonomy, they are understood as an essential indication that ESG criteria are considered, which will drive the market in the coming years. As in previous years, there was a significant increase in the number of certifications in Germany in 2022. Over 2,800 buildings in Germany have now been certified. The analysis of the certifications according to asset classes impressively shows that the relative share of retail in the nationwide certified buildings has declined for several years, while logistics has recently made relative gains.

In 2022, most of the investments in green buildings in Germany were for office space. Logistics was the end use with the second biggest share of green building investments. There were almost 1.5 billion euros of green building investments for logistics and roughly 150 million euros for hotels. In 2022, the investment in green buildings in Germany made a significant share of the overall investment.

Increasing Infrastructure Construction Activity Rising the Demand for the Market

The increased value of new orders received for civil engineering works will support the infrastructure construction sector's growth over the forecast period.

In Germany, the turnover of building construction was higher than that of any civil engineering or special construction segments as of 2022. Within the civil engineering activities, road and railway construction turnover was the largest at over 21 billion euros, followed by utility project construction at 12 billion euros.

Most significant construction project initiated in Germany in Q2 2022 is Leipzig Witznitz Energy Solar PV Park 650MW; the project involves the construction of the Witznitz Energy Solar PV Park on a 650ha land with a generating capacity of 650MW on Lake Hainer in Leipzig, Saxony, construction work started in Q2 2022 and is expected to be completed in December 2023, The project aims to meet the energy consumption of around 200,000 four-person households. It will save more than 250,000 tons of CO2 annually based on the German energy mix in 2020.

Another construction Project is the Hochmuttinger Strabe Residential Quarter. The project includes the construction of the Hochmuttinger Strasse residential quarter on an 8.4ha area in Munich-Feldmoching, Bavaria. Construction work commenced in Q2 2022 and is expected to finish in Q4 2025. The project aims to build an affordable, ecological housing quarter. The project will be built according to the Efficiency House 55 standard.

Frechen NEOBEL Mixed-Use Development: The project involves the construction of the NEOBEL Mixed-Use quarter with residential facilities on a 25,000m2 area and office and commercial facilities on a 16,400m2 area in Frechen, North Rhine-Westphalia.

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Construction work commenced in Q2 2022 and is expected to be completed in Q4 2025. The project aims to build a mix of business, living, and commercial facilities and line up between the commercial facilities and downtown Frechen.

Goldammerweg Distribution Center Expansion: The project involves the construction of a distribution center for the food delivery service in Oberhausen, North Rhine-Westphalia. Construction work started in Q2 2022 and is expected to be completed in Q4 2024; the project aims to build the most modern e-food warehouse in the world with the highest degree of automation, enable fast and reliable distribution, packaging, and delivery facilities with the help of 1,500 robots and 21km of conveyor belts, and provide delivery services to more than 200,000 customers. This project will drive the growth of the German commercial construction market in the coming years.

Germany Commercial Construction Industry Overview

The German commercial construction market is highly competitive despite the significant local and international players having created a competitive environment. Still, the market opens opportunities for small and medium players due to increasing govt investments in the industry. The German commercial construction market presents opportunities for growth during the forecast period, which is expected to drive market competition further. Prominent players competing with others for a significant share leave the German construction market with no observable levels of consolidation.

A few key players in the market include Leonhard Weiss GmbH, Koster GmbH, Klbl GmbH, BAM Deutschland, and AUG. PRIEN Bauunternehmung (GmbH & Co. KG) and Strabag AG.

Government regulations make it easy for any local, national, or multinational player to enter the market and create its share easily.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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