

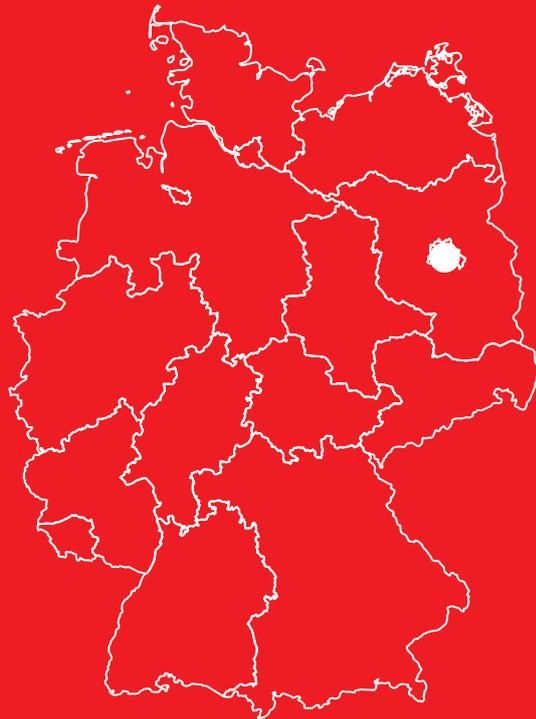
Why Berlin?



Investment potential and market insights

Spring 2019





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Berlin - Europe's megalopolis

Open minds, open markets: Architecture, a vibrant art and gallery scene, a diverse media and publishing sector, film and television, restaurants, bars and nightlife that never closes – Berlin has it all. This diversity is a huge attraction for creative minds and workers, as well as companies and investors. As a result, Germany's capital has once again been voted Europe's top location for real estate investments. Rapid economic and population growth over the past few years have driven constant increases in rents and property prices. At the same time, prices in Berlin are still well below those of other major cities, making it especially attractive to foreign investors looking for attractive and stable investment opportunities.





10 good reasons for investing in Germany's capital

Berlin is known as a cosmopolitan city of culture, politics, media and science.



Political Centre of Germany
 Seat of the Bundestag and other German government bodies



Affordable investments
 Comparatively low prices compared to other major German cities



Multicultural
 People from more than 190 nations



This is where the world meets
 World's no. 1 conference city



Shopping Hotspot
 One of the top revenue locations for stationary retailers in Europe



Major media hub
 One of the world's highest-revenue media centers



Start-up stronghold
 Extremely vibrant start-up scene



Science hub
 More students than any other German city



Green City
 5,500 hectares of greenery and parks



Art and culture center
 Status of a European metropolis

*Berlin - City with
a colourful history*





The German Capital with various possibilities

“Berlin is not a city, it’s a way of life,” is a famous saying. Berlin has everything that makes life beautiful: countless restaurants, a huge cultural offer, interesting companies and a host of leisure opportunities. It is also the first choice for investors in terms of overall potential.



Area

892 km²

Germany’s largest city –
8 times the size of Paris



Airport

34.7 million passengers in 2018
(airports Tegel & Schönefeld)



Train station

approx. 300,000 passengers at
Berlin’s main railway station
every day, Europe’s largest in-
ternational railway station





Cultural metropolis

1,500 events every day
8 symphony orchestras
440 galleries – top location for galleries in Europe
3 opera houses
180 museums & commemorative sites
21 Michelin starred restaurants,
80 Christmas markets – more than in any other European metropolis

Tourism

12 million visitors in 2017



Population

3.7 million inhabitants
+61,000 people per year



Political Centre

Berlin has been the capital of Germany since 1991

Seat of the Bundestag, Federal Government and Bundesrat

12,600 ministry employees work in Berlin

158 Embassies

Seat of party headquarters, trade unions and foundations

Economic upturn

+ 48% growth in GDP between 2005 and 2016

40,000 companies founded every year

Largest urban economy in Germany

Important economic sectors: e.g. creative and cultural industries, tourism, medical technology



Education

187,000 students

47 universities and technical colleges

*Well established
companies and a vibrant
start-up scene*





Berlin's top employers

Berlin's economy is shaped especially by the service sector. The city is particularly strong in this area, where industrial SMEs, the start-up scene and research meet in high concentration. In 2019, for example, the Berlin-based direct bank N26 was rated the most valuable German financial start-up with a market cap of €2.3 billion.

SIEMENS

Coca-Cola

DAIMLER

Google

 **Spotify®**

 **zalando**



Leading in medical technology and pharmaceutical industry

The medical technology market in Berlin has been experiencing startling growth for many years. Berlin is also the capital of the pharmaceutical industry – pharmaceutical companies in Berlin generate around 13 percent of the overall turnover in pharmaceuticals in Germany.

300
companies

*Medical
technology*

13,500
employees

€1.2 billion
annual turnover



30
companies

*Pharmaceutical
industry*

10,000
employees

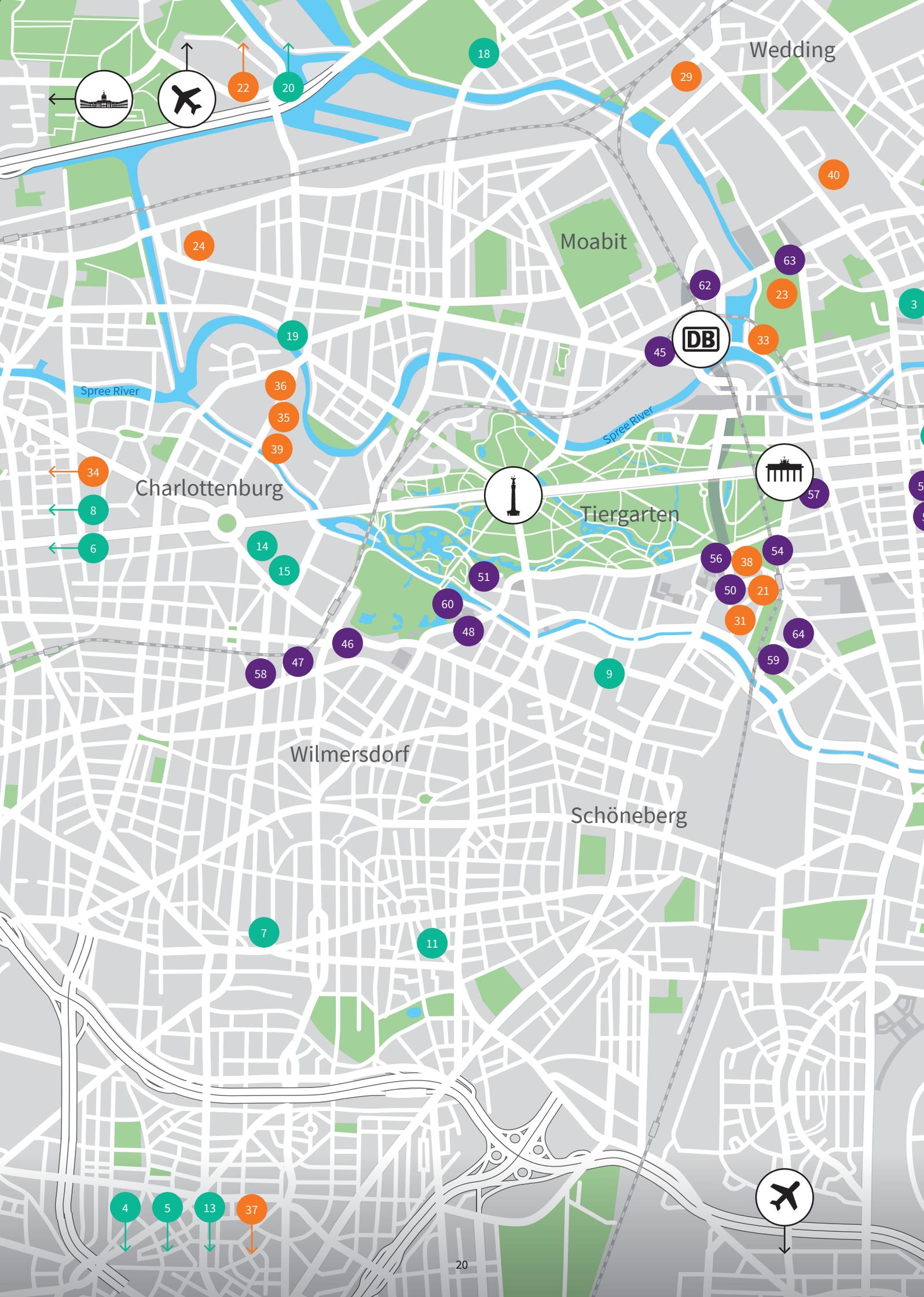
11%
of all investments
in the manufacturing sector

Highly advanced center of education and research

Berlin's schools and universities occupy top positions in international rankings. A large number of internationally-oriented scientific institutions are also concentrated in the research sector. The German education system is regarded as one of the best in the world. Berlin in particular offers excellent educational opportunities. The Free University of Berlin, for example, is one of the eleven universities of excellence in Germany and one of the top international universities in the world. Together with the Technical University (TU) and Humboldt University, it receives special financial support from the federal and state governments in 2019 as a cluster of excellence. According to the Times Higher Education World University Ranking, the TU is one of the 100 best universities in the world.







Wedding

Moabit

Charlottenburg

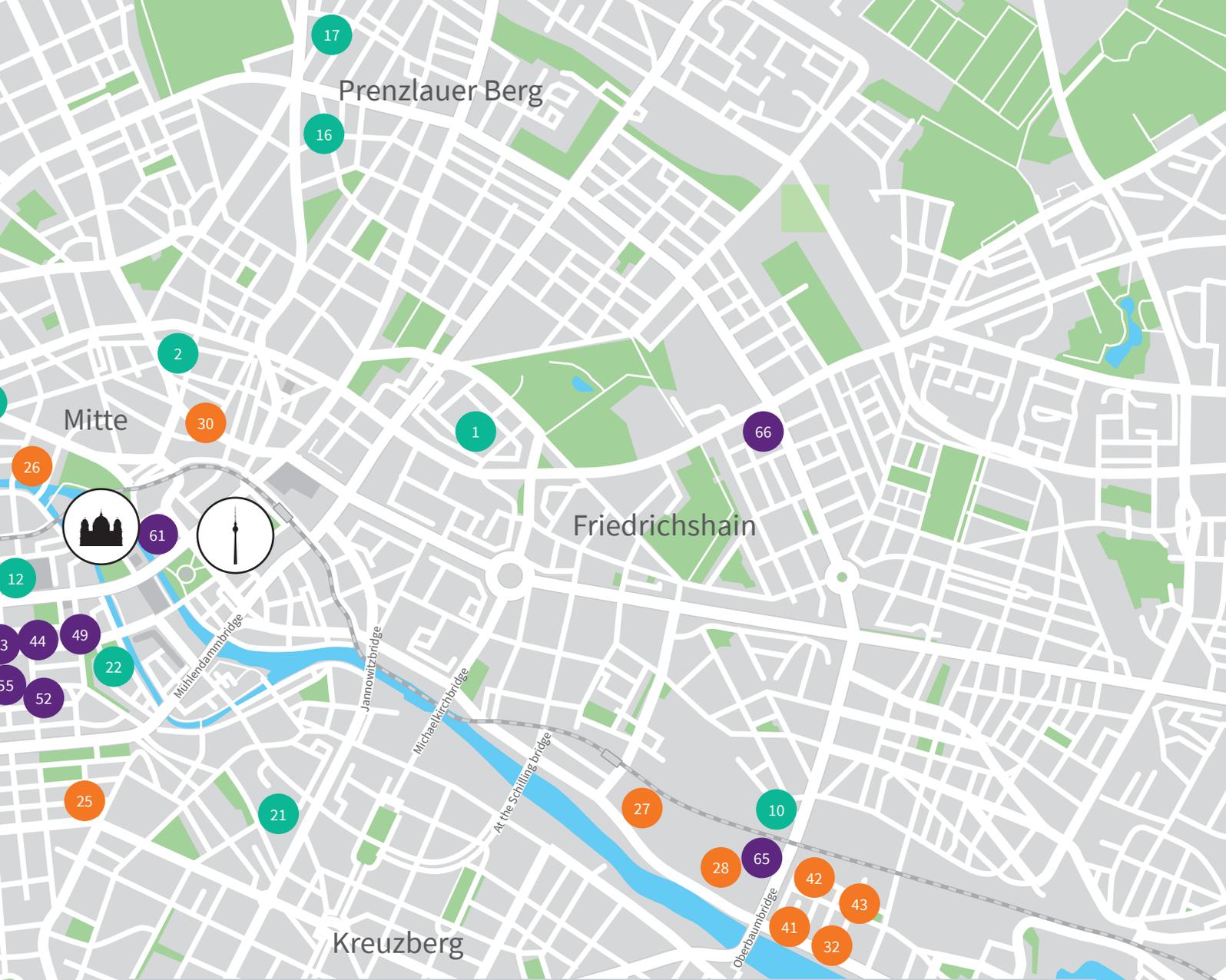
Tiergarten

Wilmersdorf

Schöneberg

Spree River

Spree River



Education

1. Berlin Bilingual School
2. Berlin Cosmopolitan School
3. Berlin Metropolitan School
4. John F. Kennedy School
5. Berlin International School
6. Berlin British School
7. Nelson Mandela School
8. SIS Swiss International School
9. Collège Voltaire de Berlin
10. BIC Berlin International College
11. ACTivity acting School for kids
12. Humboldt University
13. Free University of Berlin
14. Technical University of Berlin
15. Berlin University of the Arts
16. New York University
17. AMD Akademie Mode & Design
18. Berlin-Brandenburg School for Regenerative Therapies
19. Berlin School of Creative Leadership
20. Charité Gesundheitsakademie
21. Free Waldorf School
22. Academy for music „Hanns Eisler“

Businesses

21. Deutsche Bahn
22. Vivantes
23. Charité
24. Siemens
25. Axel Springer
26. Google
27. Mercedes Benz
28. Zalando
29. Bayer
30. SAP
31. KPMG
32. Coca Cola
33. PWC
34. Messe Berlin
35. Volkswagen Automobile
36. Porsche
38. Toshiba Medical Systems
38. Sanofi Deutschland
39. Beiersdorf
40. DB Engineering & Consulting
41. Universal Music
42. BASF Services Europe
43. Meltwater Deutschland

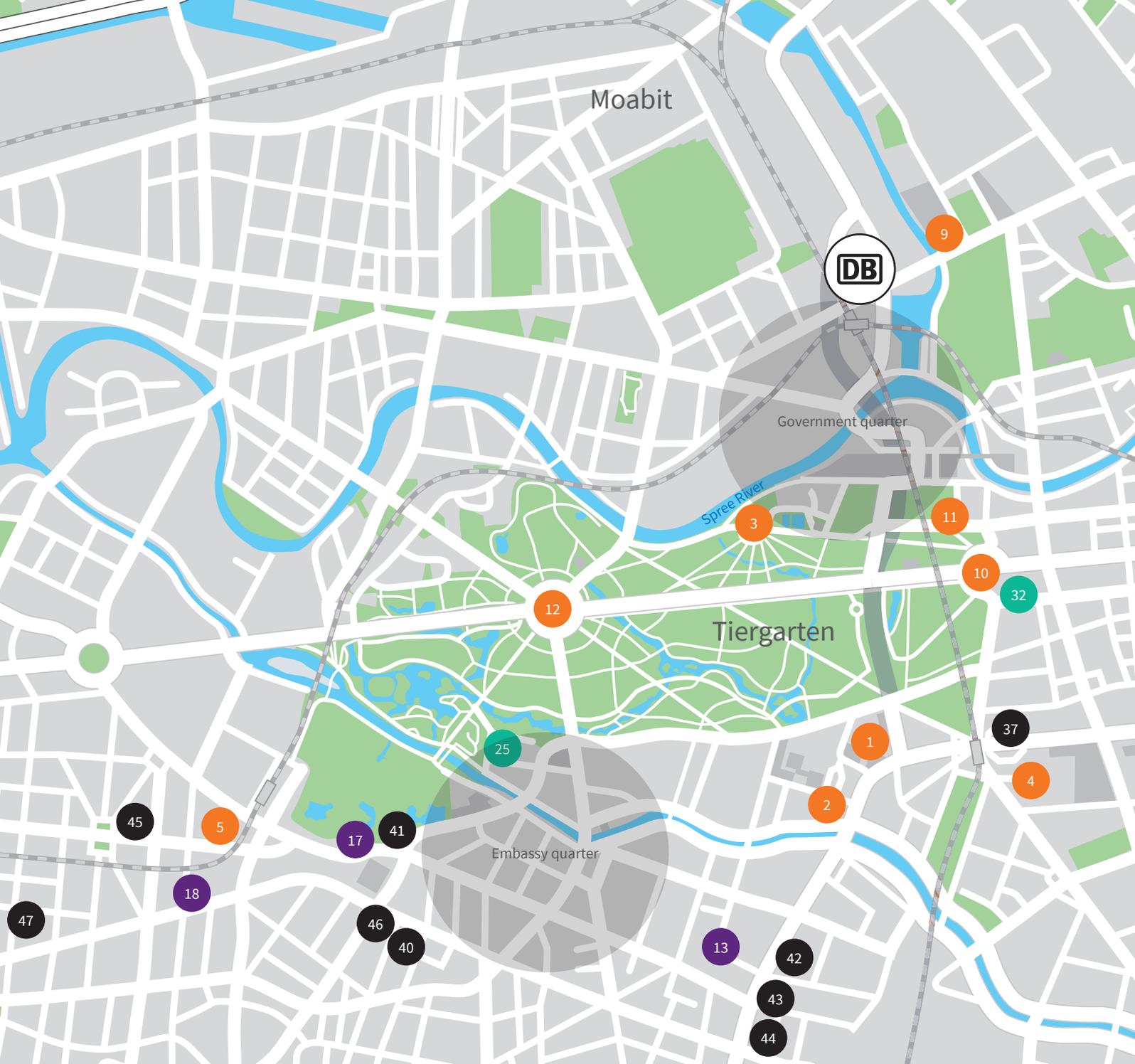
Hotels

44. Titanic Gendarmenmarkt Berlin
45. Steigenberger Hotel
46. Waldorf Astoria
47. Hotel Zoo Berlin
48. Pullman Berlin Schweizerhof
49. Hotel de Rome
50. Grand Hyatt
51. Das Stuee
52. Hilton
53. Sofitel Gendarmenmarkt
54. The Ritz-Carlton
55. Regent
56. The Mandala Hotel
57. Adlon
58. Hotel Bristol Berlin
59. Scandic Berlin Potsdamer Platz
60. InterContinental Berlin
61. Radisson Blu
62. Ibis Hauptbahnhof
63. Adina Apartment Hotel
64. Mövenpick
65. Michelsberger
66. Vienna House Andel's

*City of culinary delights,
art & culture*







Art & Culture

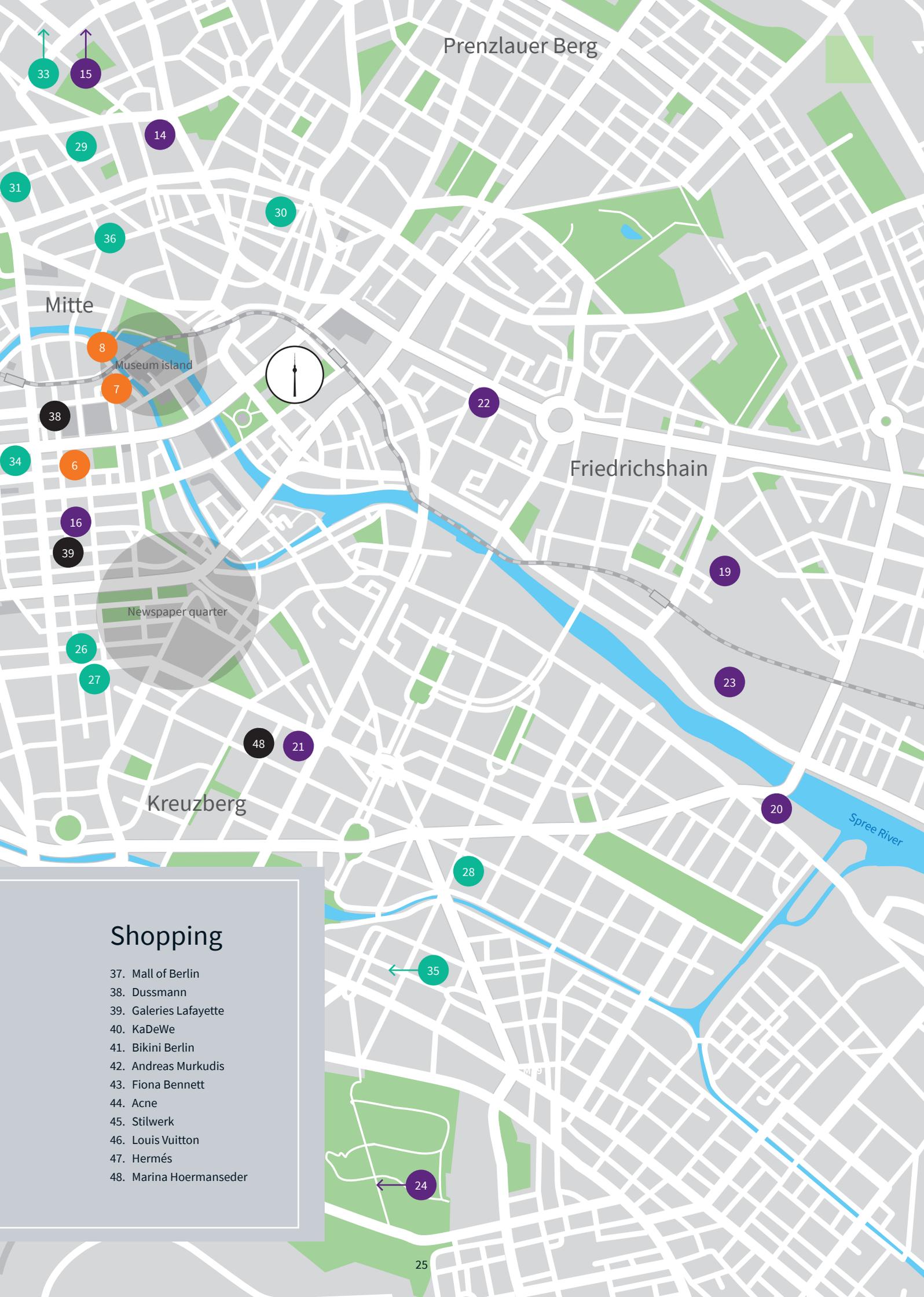
1. Philharmonic concert hall
2. New national gallery
3. House of cultures of the world (HKW)
4. Martin Gropius museum
5. C/O Berlin
6. Concert House Berlin
7. Pergamon museum
8. Bode museum
9. Hamburger Bahnhof
10. Brandenburg Gate
11. Reichstag Building
12. Victory Column

Nightlife

13. Viktoria Bar
14. Buck and Breck
15. Beckett's Kopf
16. Newton Bar
17. Monkey Bar
18. Grace Bar
19. Berghain
20. Watergate
21. Prince Charles
22. Avenue
23. Mercedes-Benz Arena
24. Columbiahalle

Restaurants

25. Cinco by Paco Pérez
26. Nobelhart & Schmutzig
27. Tim Raue
28. Horváth
29. Reinstoff
30. Bandol sur mer
31. Rutz
32. Lorenz Adlon Esszimmer
33. Katz Orange
34. Cookies Cream
35. Tulus Lotrek
36. Pauly Saal



Prenzlauer Berg

Mitte

Friedrichshain

Kreuzberg

Spree River

Shopping

- 37. Mall of Berlin
- 38. Dussmann
- 39. Galeries Lafayette
- 40. KaDeWe
- 41. Bikini Berlin
- 42. Andreas Murkudis
- 43. Fiona Bennett
- 44. Acne
- 45. Stilwerk
- 46. Louis Vuitton
- 47. Hermés
- 48. Marina Hoermanseder

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Nightlife in Berlin

Berlin's nightlife is well known and notorious. Clubs like Berghain and Watergate are famous all over the world. Every weekend, about 40,000 people make the pilgrimage to the capital's dance temples. For many, the biggest challenge is getting past the doorman.

Berlin's nightlife became internationally famous as early as the Golden Twenties. And Berlin's clubs even receive official support from the city's politicians: Berlin's Senate is supporting noise reduction measures in the capital's clubs with €1 million in order to reconcile the interests of residents and club owners.

Clubs by U-Bahn

Latin

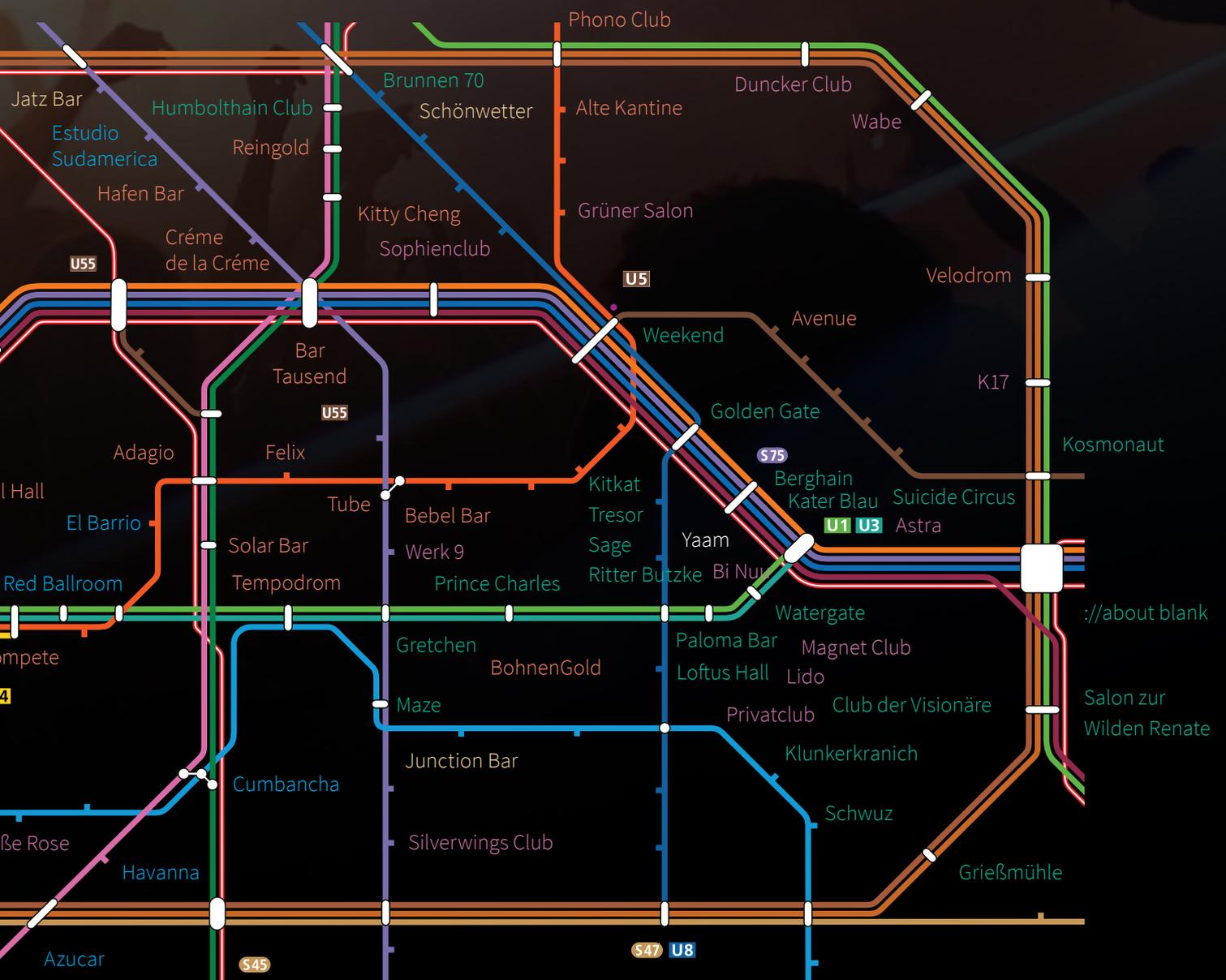
Jazz/Swing

Techno/Electro

House/Hip-Hop/R&B

Alternative/Indie/Rock





Neighborhoods

Berlin is more than just Berlin. What counts is the “Kiez” or neighborhood: it’s what creates a sense of identity and feeling of home. Prenzlauer Berg is especially popular among families; Friedrichshain attracts the young and hip.



Public transportation

Berlin's metro and suburban rail network is one of the ten largest urban transport systems in the world in terms of route length.





*Boo
real
ma*



*arming
estate
arket*

Demand is driving prices

For years, Berlin's population has been growing rapidly, gaining around 40,000-60,000 new inhabitants per years, mainly due to inward migration. As a result of this long-term trend and demand outstripping supply by around 70,000 new apartments in recent years, Berlin's city planners anticipate a need for around 194,000 new apartments by 2030. Although the completion figures are expected to rise in the near future, once again the volume of actual completions this year is likely to fall short of the Berlin Senate's target of 20,000 new apartments per annum by 2021.

12,6%
capital appreciation

15 years
of steady rent increases

17%
home ownership rate

approx. *50,000*
annual population
growth

264,000
new apartments
needed



Development of rents and purchase prices for owner-occupied indexed units*

Stable market: Even during the financial crisis, prices remained stable. In comparison to most major metropolises around the world, Berlin's housing market was only minimally affected. Berlin is the seventh most populous urban area in the European Union.

Index (H1 2010=100)



*Offer price, Date: January 2018, Sources: IDM Immodaten, JLL



The capital's architectural highlights

From the Middle Ages to the modern age:
Berlin's cityscape is anything but boring.

Kollhoff-Tower

Hans Kollhoff

Berliner Hauptbahnhof

Meinhard von Gerkan

Neues Museum

David Chipperfield

Upper West

Christoph Langhof

Jüdisches Museum

Daniel Libeskind



Bundeskanzleramt

Axel Schultes, Charlotte Frank

Ludwig-Erhard-Haus

Nicholas Grimshaw

BahnTower

Helmut Jahn

Philharmonie

Hans Scharoun

Haus der Kulturen der Welt

Hugh A. Stubbins, Werner Düttmann, Franz Mocken

DZ-Bank

Frank Gehry

Sony Center

Helmut Jahn

Neue Nationalgalerie

Ludwig Mies van der Rohe



Parks, green spaces and lakes

It is easy to escape the hustle and bustle of the big city in Berlin: The numerous lakes and parks offer a variety of relaxation possibilities.

5,000
hectares of green

2,500
parks and green spaces

440,000
trees

The most famous parks: Tiergarten, Lustgarten, Botanischer Garten, Volkspark Friedrichshain

Source: City of Berlin, 2018



79
lakes



6.6%
of the city is water

The most famous lakes: Wannsee, Tegeler See, Schlachtensee, Weißer See, Müggelsee



Helsinki

1,104 km / 110 min

Moscow

1,608 km / 160 min

Warsaw

516 km / 70 min

Direct flights to international destinations:

Connection times and distances

Direct flights to international destinations:

Beijing

7,358 km / 9 h

Singapore

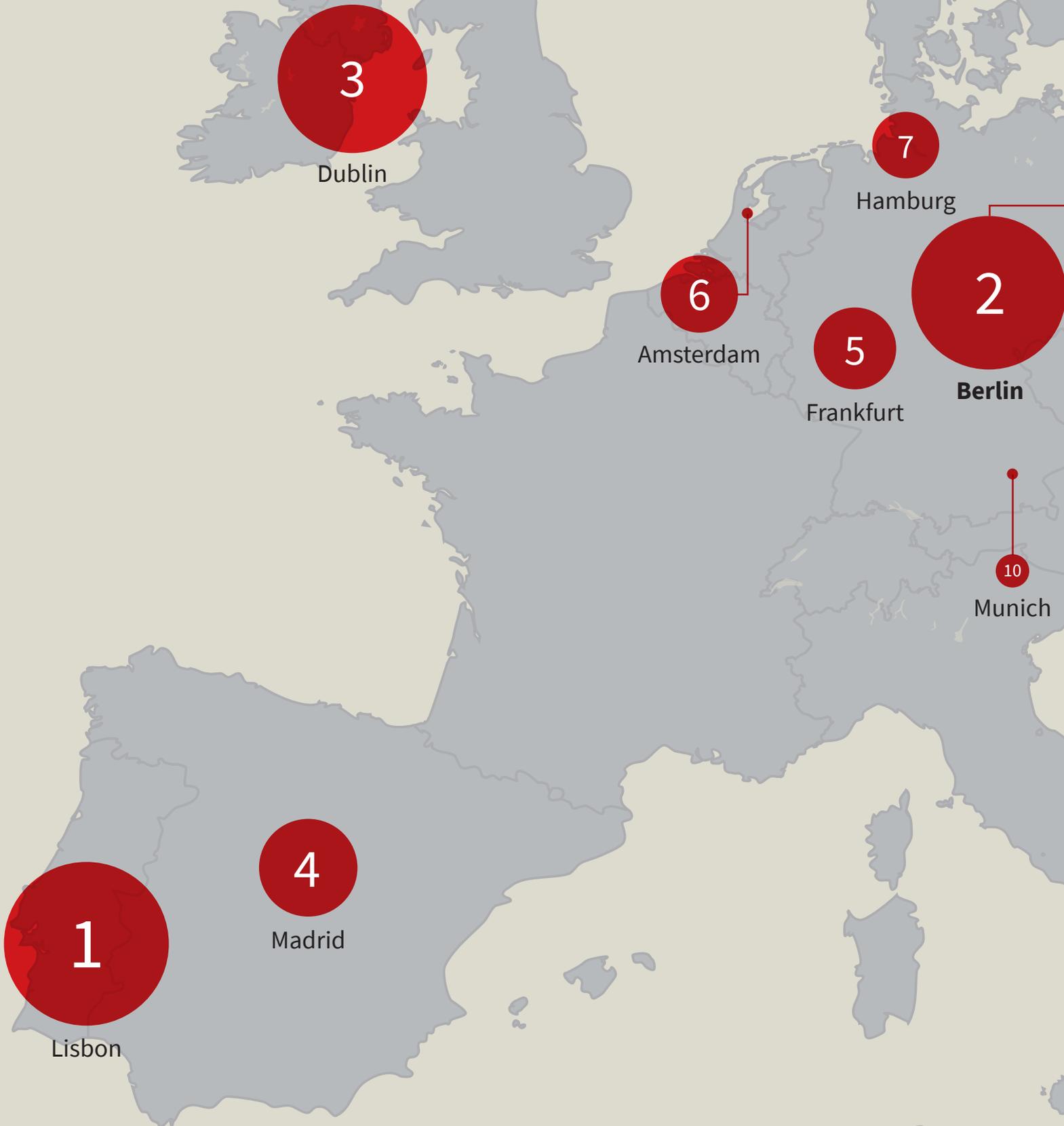
9,916 km / 12 h

Doha

4,388 km / 7 h

Istanbul

736 km / 165 min



Source: Emerging Trends in Real Estate®, Europe 2019, PWC

A stylized map of Europe in shades of grey and beige. Two red circular markers with white numbers are placed on the map. Marker '8' is located in the northern part of Europe, pointing to Helsinki. Marker '9' is located in the southern part of Europe, pointing to Vienna. The text 'Helsinki' and 'Vienna' are written below their respective markers.

8

Helsinki

Top investment location

For five years in a row, Berlin was the leading City for Overall Development Prospects (2015-2018) in Europe according to PWC's Emerging Trends in Real Estate study. In terms of investment and development prospects, the city is outstanding, even if Lisbon pushed Berlin to second place for the first time in 2019.

9

Vienna

Open minded, multicultural and heart of political culture



190
different nationalities

49%
single households

12,600
ministry employees work
in Berlin



1,500
(political) unions

158
Embassies

250
different religions and philosophies

Fun facts about Berlin

1,700

bridges, that's more than Venice

180

more museums than rainy days per year

50%

of Berliners are single

18

moves per hour from one district to another

45,000

people dance in night clubs every weekend

70 million

sausages with curry sauce eaten every year



Vienna was here

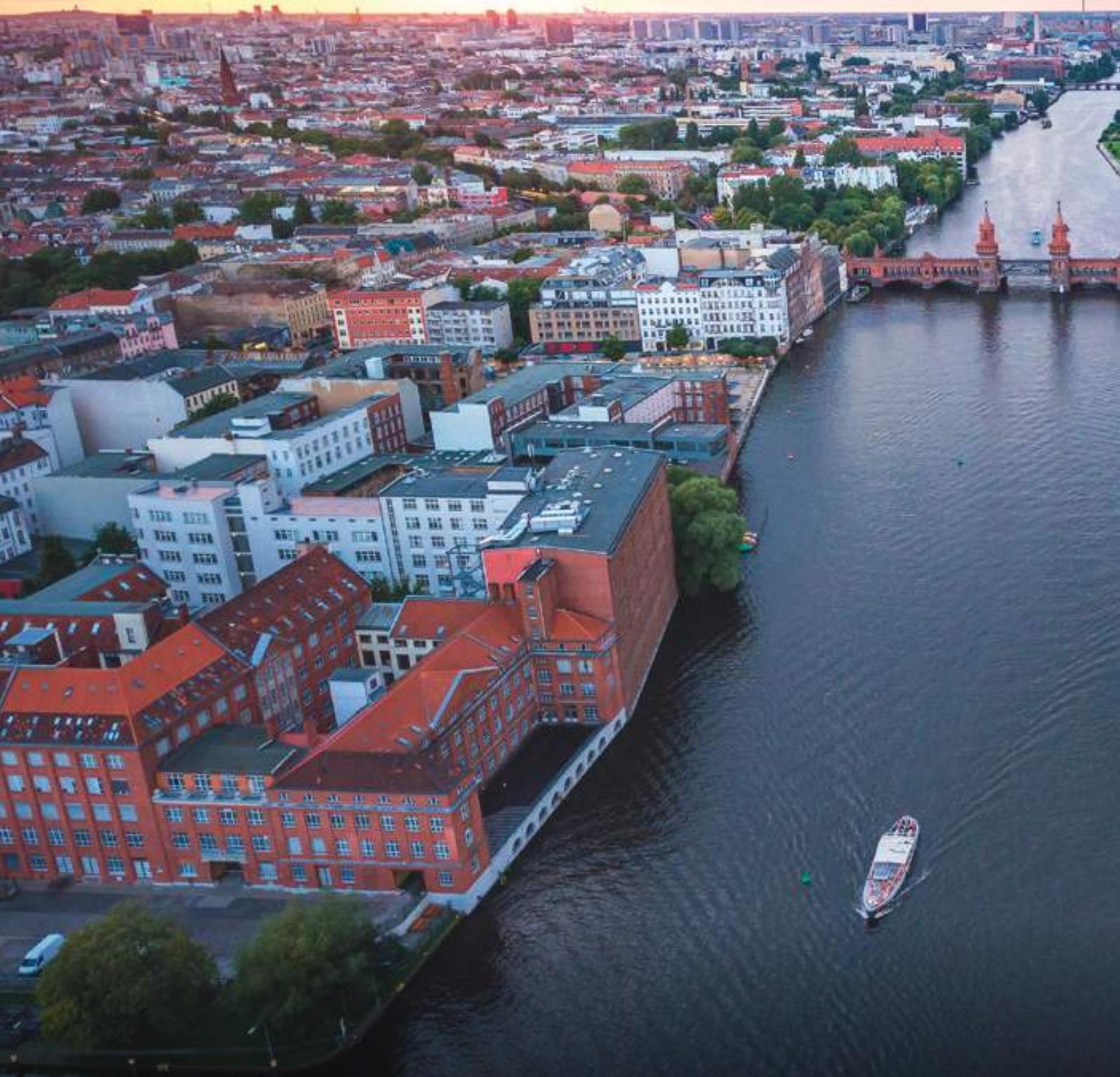
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Riez

CAN
BE
HERE

Berlinwa

Berlin, city of water





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