

# FIGURES DATA FACTS

More about the leading umbrella organisation.

# THE TOP 3 REASONS

Why you should become a member of the **German Property Federation (ZIA)**.

**1.** As an umbrella organisation, ZIA represents the interests of the entire real estate industry.

**2.** More than 20 committees and association bodies are involved in developing requests, positions and solutions for politics and ZIA members.

**3.** It is the big issues that move us: sustainability, innovation, digitization. Because it is really all about shaping the future of the real estate industry.

More good reasons to join?  
Find them on our website.



10 good reasons why you should join ZIA (in German):  
[www.zia-deutschland.de/project/10-gute-gruende-fuer-die-zia-mitgliedschaft/](http://www.zia-deutschland.de/project/10-gute-gruende-fuer-die-zia-mitgliedschaft/)

# WELCOME

**Dear Sir or Madam,**

The real estate industry in Germany represents 20 percent of total value added, ten percent of all employees and over 800,000 companies. Our industry is both a driver and a stable foundation for the national economy of the Federal Republic of Germany. It is this economy, which creates, manages, and finances the spaces in which people live, work and thrive.

Not only does our industry drive the development of cities and municipalities, it is also a crucial player in climate protection – after all, the industry contributes 40 percent to CO<sub>2</sub> emissions. Therefore, we are particularly focused on helping to achieve the climate neutrality goals in Germany and Europe. Digitization has also been a key issue in the industry for a long time now. Our PropTech platform represents the innovative strength of our companies and the new paths that ZIA is always embarking on.

It is due to these reasons that we call for a suitable environment for the real estate industry, which means, in particular, regulation on the federal level. As the central federation of the real estate industry, ZIA is committed to ensuring that legal framework conditions are long-term, reliable and in line with both the topic and the market. In partnership with our member companies and federations, we represent around 37,000 companies in the industry. Setting the path for a holistic and comprehensive approach, ZIA represents the diverse real estate industry and its stakeholders along the entire value chain, both domestically and on the European level through our membership in the Federation of German Industries (BDI) and through our offices in Brussels, Vienna and Zurich.

We look forward to your support.

Yours sincerely,

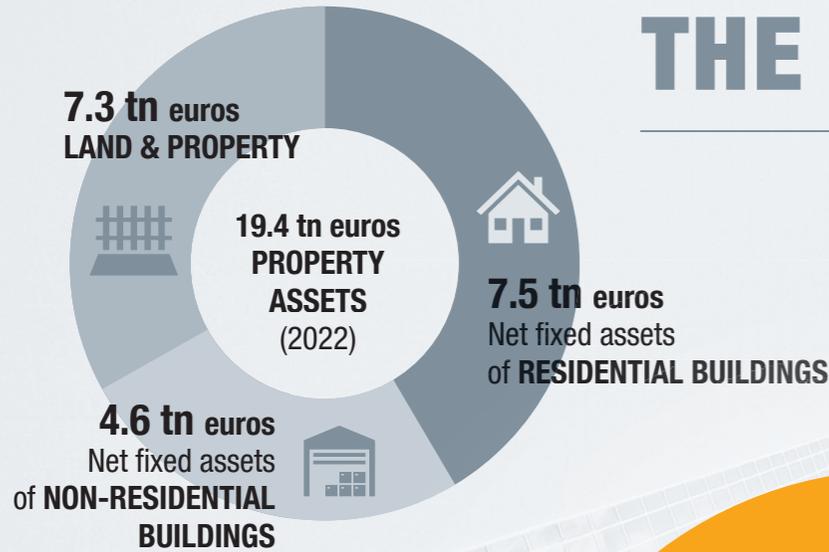
Dr. Andreas Mattner  
President of the German Property Federation (ZIA)



picture: Axel Griesch

# THE IMPORTANCE

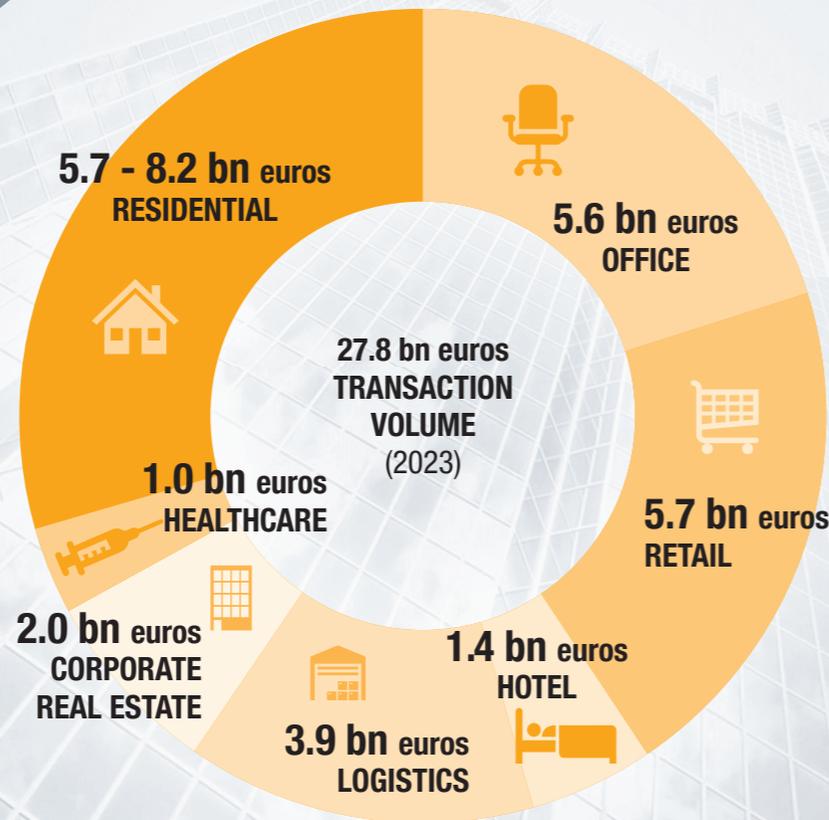
# OF THE REAL ESTATE SECTOR



Find more information on the importance of the real estate industry on our website (in German): [www.zia-deutschland.de/marktdaten/bedeutung-der-immobilienbranche/](http://www.zia-deutschland.de/marktdaten/bedeutung-der-immobilienbranche/)



Real estate is undoubtedly the most important real asset class in Germany. Of the total net fixed assets in terms of buildings, namely 12.1 trillion euros at the end of 2022, 62 percent were residential buildings and 38 percent were non-residential buildings. The investment volume on the German real estate market in 2021 was almost 105 billion euros. In the crisis year 2022, marked by the war in Ukraine, the volume was around 65 billion euros, falling then, due to the construction crisis, to only around 28 billion euros in 2023.



**730 bn euros** gross added value created (2023)

19% share of total value added



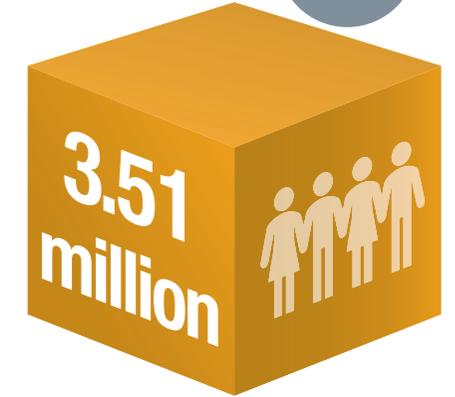
**811,000 companies** (2022)

26% share of total companies



**3.51 m employees** subject to social security contributions created (2023)

10% share of total employees



<sup>1</sup> commercial property | <sup>2</sup> residential property

**Commercial rent (without utilities): 130 bn euros (2019)<sup>1</sup>**

**Residential rent (without utilities): 122 bn euros (2019)<sup>2</sup>**



**Construction work on existing buildings**

in bn euros (2023)



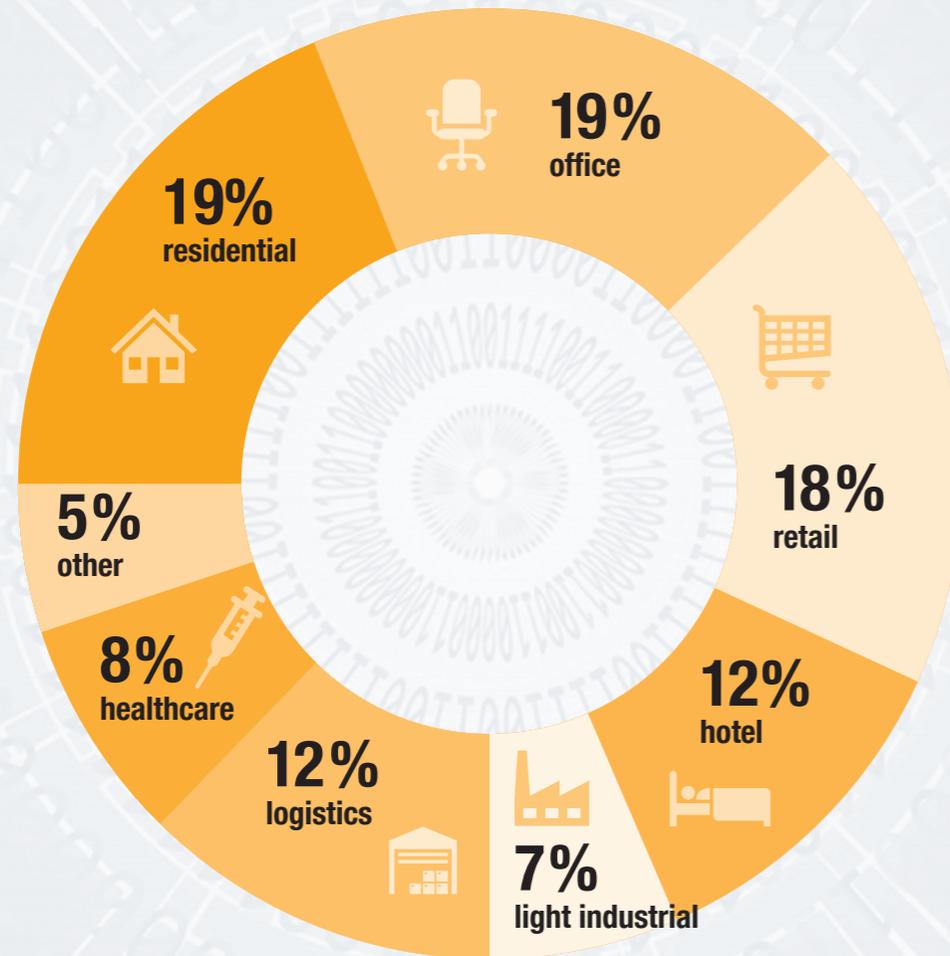
**New building volume**

in bn euros (2023)



# ZIA IN NUMBERS

The member companies and federations of ZIA represent the entire value chain of the real estate industry. With its more than 400 members, including 33 federations, ZIA speaks for around 37,000 companies in the industry.



ZIA members are active in all asset classes.

ZIA members cover all business areas in the real estate industry.

**Real estate companies: 11%**

**Real estate debt financier: 4%**

**Institutional real estate investor: 8%**

**Real estate user / corporate: 4%**

**Property / asset management: 12%**

**Project developer: 12%**

**Facility management, energy: 9%**

**Real estate agents: 3%**

**Law firm / auditor: 6%**

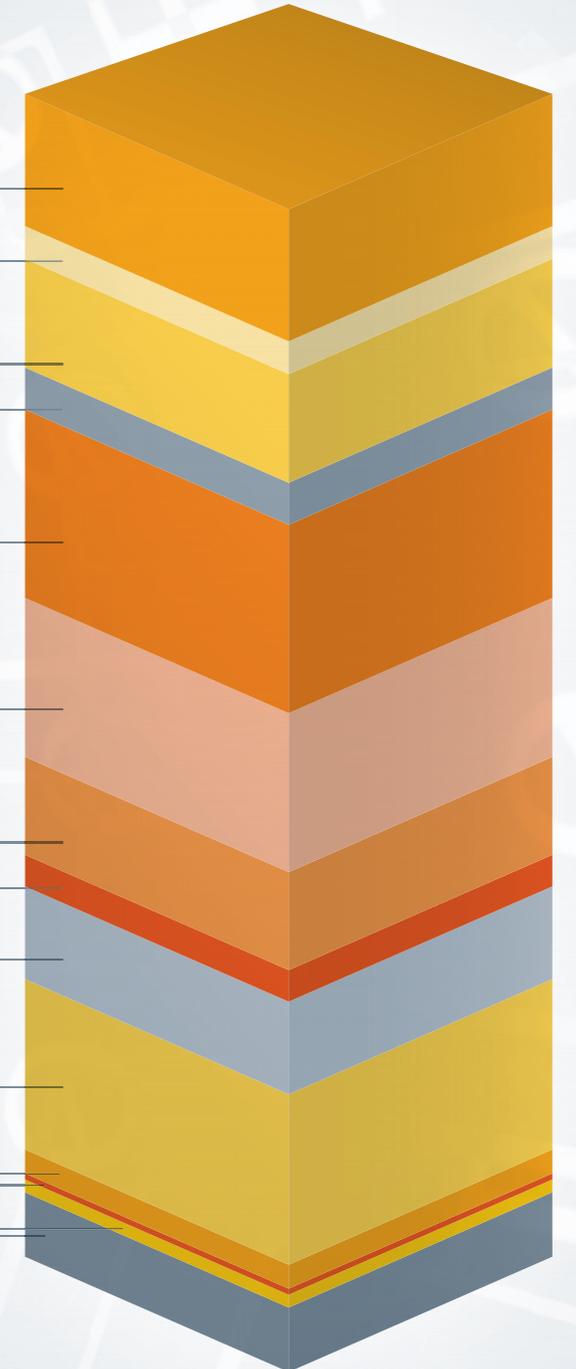
**Consulting, professional services: 18%**

**Architecture, engineering company: 1%**

**Construction firms: 3%**

**Association: 6%**

**Public sector: 2%**



Version: April 2024

Including a steadily increasing number of PropTechs (>17%) more at <https://zia-deutschland.de/prop-tech-plattform/>

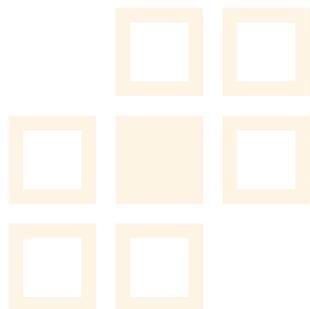


# THE STRUCTURE OF ZIA

Find more information on the structure of ZIA on our website (in German): [www.zia-deutschland.de/struktur/](http://www.zia-deutschland.de/struktur/)

## Executive Board

The Executive Board is responsible for the management of the association. The Executive Board works on a voluntary basis and has the option of appointing a management team. The members of the Executive Board are also members of the Presidium.



**Jan-Hendrick Goldbeck**  
Vice-President  
(Goldbeck GmbH)



**Ulrich Höller**  
Vice-President  
(ABG Real Estate Group)



**Dr. Jochen Keysberg**  
Vice-President  
(Apleona GmbH)



**Annette Kröger**  
Vice-President  
(Europe PIMCO Prime Real Estate GmbH)



**Jochen Schenk**  
Vice-President and Treasurer  
(Real I.S.AG)



**Iris Schöberl**  
Vice-President and Chairperson of the Retail Property Committee (CT Real Estate Partners GmbH & Co. KG)



**Dr. Eckart John von Freyend**  
Honorary Chairperson  
(John von Freyend Holding GmbH)



**Dr. Andreas Mattner**  
ZIA President (Chairman of the Supervisory Board of Hamborner REIT AG and EUREF AG)



**Rolf Buch**  
Vice-President and Chairperson of the Housing Property Committee (Vonovia SE)

## Presidium

The Executive Committee controls the content-related work of ZIA and initiates committees and working groups on individual topics.

- Brigitte Adam** (ENA Experts GmbH & Co. KG)
- Malte Andes** (HanseMerkur Grundvermögen AG)
- Dr. Hans-Joachim Barkmann**
- Sabine Barthauer** (DZ Hyp AG)
- Klaus Beine** (ADVANT Beiten | BEITEN BURKHARDT Rechtsanwaltsgesellschaft mbH)
- Nicholas Brinckmann**
- Michael Busch** (Thalia Bücher GmbH)
- Dr. Michael Bütter** (Union Investment Real Estate GmbH)
- Isabella Chacón Troidl** (BNP Paribas Real Estate Investment Management)
- Dr. Johannes Conradi** (Blacklake GmbH)
- Kruno Crepulja** (Instone Real Estate Group SE)
- Andreas Engelhardt** (Schüco International KG)
- Paul Johannes Fietz** (Bundesanstalt für Immobilienaufgaben)
- Dr. Nicole Haft-Zboril** (BMW Group)
- Dr. Nicole Handschuer** (LHI Leasing GmbH)
- Andreas Heibroock** (PATRIZIA GrundInvest Kapitalverwaltungsgesellschaft mbH)
- Andreas Hohlmann** (Unibail-Rodamco-Westfield Germany GmbH)
- Dr. Matthias Jacob** (Implenia Hochbau GmbH)
- Lukas Jeckel** (Generali Real Estate S.p.A.)
- Sascha Klaus** (Berlin Hyp AG)
- Barbara Knoflach**
- Dr. Rainer Krütten**

- Matthias Leube**
- Oschrie Massatschi** (Aroundtown SA)
- Kathrin Möller** (GAG Immobilien AG)
- Dr. Andreas Muschter** (EDGE Technologies GmbH)
- Rupprecht Rittweger** (Investa Holding GmbH)
- Martin Rodeck** (Blacklake GmbH | Management Partner)
- Christian Schmid** (Helaba)
- Sandra Scholz** (Quantum Immobilien AG)
- Christian Schulz-Wulkow** (Blacklake GmbH | Management Partner)
- Jürgen Schwarze** (METRO PROPERTIES GmbH & Co. KG)
- Erwin Soravia** (Soravia Investment Holding GmbH)
- Ulrich Steinmetz** (DWS Grundbesitz GmbH)
- Steffen Szeidl** (Drees & Sommer SE)
- Dirk Tönges** (MVG M Property Management Deutschland GmbH)
- Prof. Dr. Alexander von Erdély**
- Lars von Lackum** (LEG Immobilien SE)
- Gert Waltenbauer**
- Sonja Wärntges** (Branicks Group AG)
- Dr. Marc Weinstock** (BIG BAU Investitionsgesellschaft mbH)
- Dr. Constantin Westphal** (Nassauische Heimstätte Wohnungs- und Entwicklungsgesellschaft mbH)
- Ludger Wibbeke** (HANSAINVEST Hanseatische Investment-GmbH)
- Martina Williams** (Jones Lang LaSalle SE)
- Oliver Wilm** (WOLFF & MÜLLER Holding GmbH & Co. KG)
- Michael C. Wisser** (WISAG Facility Service Holding SE)

## Office

Around 45 employees work in the ZIA offices. They prepare the committee work and the resolutions.



**Aygül Özkan**  
General Manager



**Gunther Adler**  
Deputy General Manager



**Dr. Joachim Lohse**  
Managing Director



Find all ZIA members on our website (in German): [www.zia-deutschland.de/mitglieder/](http://www.zia-deutschland.de/mitglieder/)

# ZIA MEMBERS

ZIA comprises a number of companies and associations. The latest overview of all ZIA members can be found on our website:

[www.zia-deutschland.de/mitglieder/](http://www.zia-deutschland.de/mitglieder/)

## Further information on ZIA membership

As a ZIA member, you benefit directly from all of the association's services. You are part of the network and lend the umbrella association of the real estate industry additional weight in the political representation of interests and in the public through your cooperation.

Further information on membership is available from us on the Internet at:

[www.zia-deutschland.de/der-zia/mitglieder-mitgliedschaften/mitgliedschaft/](http://www.zia-deutschland.de/der-zia/mitglieder-mitgliedschaften/mitgliedschaft/)



Find information on ZIA memberships on our website (in German): [www.zia-deutschland.de/der-zia/mitglieder-mitgliedschaften/mitgliedschaft/](http://www.zia-deutschland.de/der-zia/mitglieder-mitgliedschaften/mitgliedschaft/)

## PropTechs at ZIA

The PropTech scene has grown strongly in recent years and has become an important driver and component of the real estate industry. Numerous young companies are now firmly anchored within the industry. They wish for a stronger representation towards politics, and they want to be perceived by politics.

ZIA – as the umbrella organisation of the real estate industry – also represents their interests via its PropTech-Plattform. It enables PropTechs to work together with established companies at eye level and gives them the opportunity to feed their interests into the political process.

More at: [www.zia-deutschland.de/proptech-plattform/](http://www.zia-deutschland.de/proptech-plattform/)



Information on ZIA PropTech platform on the Internet: [www.zia-deutschland.de/proptech-plattform/](http://www.zia-deutschland.de/proptech-plattform/)



The committees of ZIA currently on the Internet (German): [www.zia-deutschland.de/ausschuesse/](http://www.zia-deutschland.de/ausschuesse/)

# THE COMMITTEES OF ZIA

The content-related work of ZIA takes place in committees made up of over 500 voluntary representatives of the ZIA members. The decisions and recommendations of the committees form the basis of the association's work.

More details on our website at: [www.zia-deutschland.de/ausschuesse/](http://www.zia-deutschland.de/ausschuesse/)

Committees	Working Groups	Task Forces
Accounting and Valuation		Energy
Building		
Corporate Real Estate		Other ZIA bodies
Corporate Social Responsibility		ESG Council
Digitization	Data standards and management	Innovation Think Tank
Energy and Building Technology		Municipal Council
Facility Management		PropTech-Plattform
Financing		Working Group Sustainable Finance
Healthcare Property		
Hotel Property		
Human Resources		
Investment Capital	Investment Assets	
Legal Affairs		
Logistics Property		
Marketing & Public Relations		
Office Property		
Residential Property	Proprietors	
Retail Property		
Tax Law	Investment Tax Law   Value Added Tax	
Transparency and Benchmarking		
Urban Development	Project Development	





# ZIA EVENTS

More information on ZIA events on our website (in German): [www.zia-deutschland.de/termine/](http://www.zia-deutschland.de/termine/)

As the leading umbrella association of the real estate industry, ZIA fully represents the interests of one of Germany's most important sectors. ZIA not only is a sought-after expert and discussion partner in the Bundestag, Chancellery and state parliaments – constantly in a lively exchange with politicians, but also brings together relevant stakeholders at numerous events.

## Retail Real Estate Day



Retail properties form an integral component of any attractive and lively city centre. This event has over 300 participants. The focus lies on the challenges after Corona and the future mix of uses.

## Office Real Estate Day



At the most important national congress of its kind, over 300 high-ranking decision-makers discuss the current and future role of office real estate in light of ongoing structural changes. An ideal space for diverse conversation regarding value creation, innovation and utility within workspaces and offices of many kind.

## Healthcare Real Estate Day

The industry event of the healthcare real estate asset class is the largest German platform event. It takes a comprehensive look at the future of healthcare, emphasizing the extraordinary role played by the real estate industry.

## Real Estate Industry Day (TDI)

The No. 1 industry event with over 2,000 guests from politics, economy and society. Once a year, the who's who of the real estate industry meet and talk with politicians directly. Whether it be digital, real or hybrid – ZIA sets the standard.

# TDI

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## Innovation congress

Innovative strength has become a critical factor when it comes to sustainable corporate success. The most innovative ideas of the real estate and construction industry are presented in this format. Over 400 participants share technological and methodological knowledge in various deep dive sessions, workshops and interactive discussion formats.

## ZIA Finance Day

Over 300 decision-makers from the finance and real estate industry and key people from politics and science meet at this industry congress. Trending topics, market developments and regulatory challenges in the industry are discussed in expert lectures and panels.

## Autumn real estate industry conference

The largest national platform event on the future of corporate real estate management in Germany brings together over 300 participants. Real estate CEOs from a number of large and medium-sized companies meet with the most relevant contacts from the real estate industry, politics and management.

## MIPIM & EXPO REAL

ZIA has its own roadshow with stands at the major real estate fairs in various German and international cities.



# ZIA ACADEMY

More information on the ZIA Academy on our website (in German): [www.zia-akademie.de](http://www.zia-akademie.de)

## ZIA Academy: More knowledge. More value.

The ZIA Academy offers high-quality advanced training events (workshops, seminars, webinars and specialist conferences) on current topics in the real estate industry as well as relevant sub-areas, including financial market regulation, investment capital and capital markets.



picture: goenzcom berlin



picture: goenzcom berlin

As your partner for qualified advanced training, ZIA identifies topics on the basis of political and economic processes early, and then provides information on developments in the market. Our lecturers are experts in their fields and are eager to share their practical experience – from basic to specialist knowledge. As a result, the ZIA Academy offers further training along the entire value chain of the real estate industry.

picture: goenzcom berlin



picture: Laurence Chaparon

**Aygül Özkan**  
Chairwoman of the Executive Board of ZIA Service GmbH



**Fabian Boeck**  
Managing Director of ZIA Service GmbH

Further information & registration for events:  
[www.zia-akademie.de](http://www.zia-akademie.de)

Registration for the academy newsletter "ZIA-Akademie Inside":  
[www.zia-deutschland.de/newsletter/](http://www.zia-deutschland.de/newsletter/)



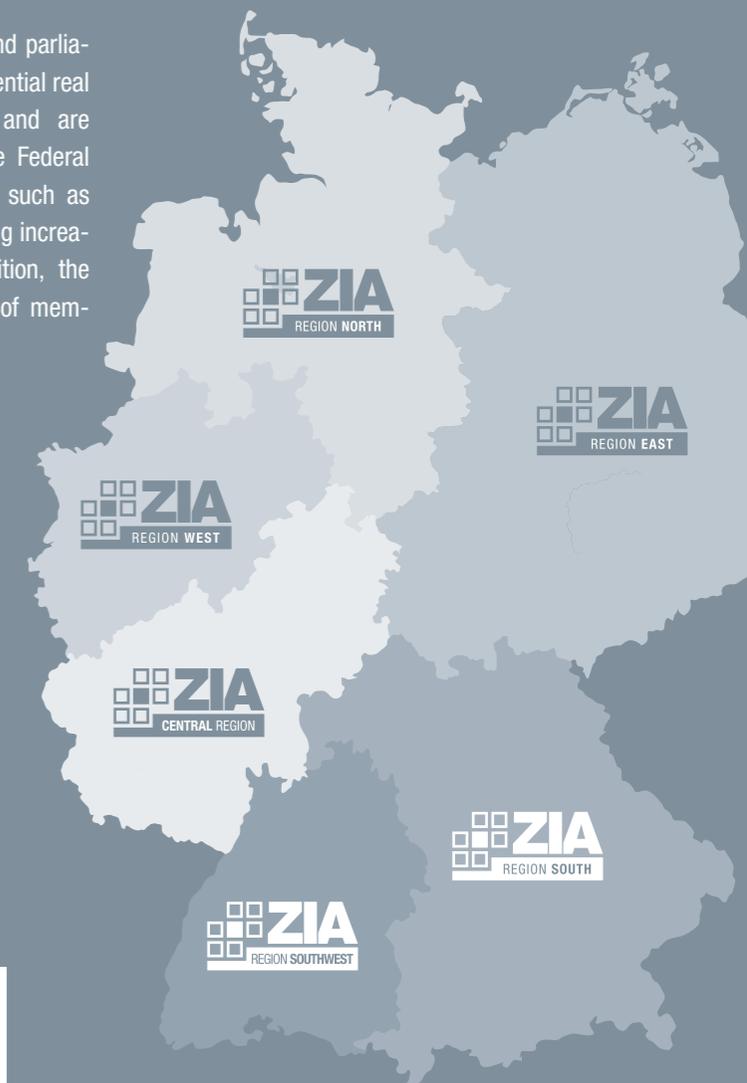
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## ZIA IN THE REGIONS

The state governments and parliaments are involved in essential real estate-related activities and are in close contact with the Federal Council. Regional issues, such as PPP projects, are becoming increasingly important. In addition, the recruitment and support of members in close proximity and through personal contacts is more effective than over a greater distance. For this reason, ZIA has appointed regional boards for the most important economic regions in Germany as well as in Austria and Switzerland.



ZIA in the regions currently on the Internet (German):  
[www.zia-deutschland.de/regionalvorstaende/](http://www.zia-deutschland.de/regionalvorstaende/)



**National Office Switzerland** (Zurich)



**National Office Austria** (Vienna)



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