

Felix Leiss, Thomas Licht und Klaus Wohlrabe

Zur aktuellen Lage im Wohnungsbau

IN KÜRZE

Die Wohnungsbauwirtschaft steckt in einer tiefen Krise. Nach Jahren des Booms brechen die Baugenehmigungen ein und die Stimmung ist auf dem Tiefpunkt. Einer der Hauptgründe sind die Zinserhöhungen der Europäischen Zentralbank, die die Finanzierungskosten nach oben treiben. Zudem gab es deutliche Baupreissteigerungen, auch infolge von Materialengpässen und gestiegenen Energiepreisen. Die Unternehmen sehen sich einer nie dagewesenen Anzahl von Stornierungen gegenüber. Zudem wird immer häufiger von Auftragsmangel gesprochen. Der Artikel gibt einen Überblick über die aktuell sehr schwierige Lage im Wohnungsbau.

In den Jahren vor dem Beginn der Pandemie erlebte die deutsche Wohnungsbauwirtschaft eine Phase des Booms. Niedrige Zinsen und der akute Wohnraumbemangel

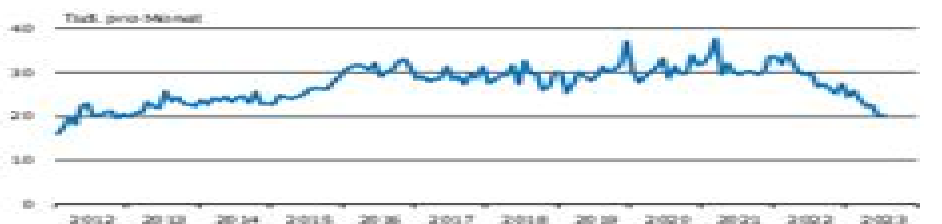
darf in den großen deutschen Ballungszentren sorgen für eine florierende Nachfrage. Institutionelle Investoren wie auch Familien träumten vom deutschen Bortongold. Die Preise für Wohnimmobilien stiegen von Monat zu Monat. Für den Wohnungsbau bedeutete dies goldene Zeiten. Die Unternehmen kamen kaum hinterher, ihre Aufträge abzuwickeln. Die Zahl der Baugenehmigungen (vgl. Abb. 1) und der Auftragseingänge (vgl. Abb. 2) stiegen im Trend kontinuierlich an. Die Geschäfte liefen rund. Dies zeigte sich auch in den monatlichen Ifo-Konjunkturumfragen. 2018 und 2019 verzeichnete der Klima-Indikator für den Wohnungsbau entsprechende Höchststände: In der Spitze lag er oberhalb der 30-Punkte-Marke – erstmals seit Beginn der Zeitreihe 1991 (vgl. Abb. 3). Wenige Jahre später ist die Stimmung im Wohnungsbau am Tiefpunkt. Die Genehmigungszahlen für neue Wohneinheiten lagen im ersten Halbjahr 2023 27,2% unter dem Vorjahresniveau (vgl. Abb. 1). Bauherren stornieren ihre Projekte und die Branche klagt immer lauter über Auftragsmangel. Im September 2023 markierte der Klima-Indikator mit -54,8 Punkten einen neuen Tiefststand seit Beginn der Erhebung.

Gründe für die dramatische Eintrübung

Bereits im Frühjahr 2021 traten infolge des Corona-schocks erhebliche Engpässe beim Baumaterial auf. Durch die Maßnahmen im Kampf gegen die Pandemie war es entlang der Wertschöpfungsketten zu Produktionsausfällen gekommen. Zudem führte die große Unsicherheit hinsichtlich der weiteren Entwicklung dazu, dass die Produzenten konservative Investitions- und Produktionsprogramme fuhren, wodurch sich das Angebot weiter verknüppelte. Die Bauwirtschaft erwies sich indes als robust und trotz Pandemie ging es auf den deutschen Baustellen voran. Es kam zu einer Überschussnachfrage nach Baumaterial. Schnittholz, Dämmstoffe, Stahl, Bitumen und andere Produkte waren nicht mehr ausreichend verfügbar. Im Juni 2021 war ein vorläufiger Höhepunkt erreicht: 53,2% der teilnehmenden Unternehmen im Wohnungsbau klagten über Lieferengpässe (vgl. Abb. 4).¹ Dies war eine beispiellose Entwicklung: In den drei vorherigen Jahrzehnten waren nur sehr vereinzelte Werte oberhalb von 5,0% ermittelt worden, zweistellige Prozentwerte waren unbekannt. Nun konzentrierte sich die Situation langsam zu entspannen. Insbesondere

¹ Siehe auch Leiss und Wohlrabe (2021) für eine Analyse des Lage in der Zeit 2011–2021.

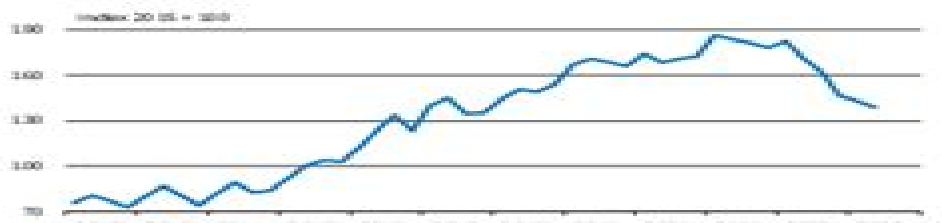
Abb. 1
Baugenehmigungen für Wohnungen



Quelle: Statistisches Bundesamt.

in Prozent

Abb. 2
Auftragseingänge im Wohnungsbau



Quelle: Statistisches Bundesamt.

in Prozent

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Table of Contents Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten

1. Understanding the eBook Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - The Rise of Digital Reading Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Advantages of eBooks Over Traditional Books
2. Identifying Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - User-Friendly Interface

4. Exploring eBook Recommendations from Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Personalized Recommendations
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten User Reviews and Ratings
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten and Bestseller Lists
5. Accessing Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten Free and Paid eBooks
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten Public Domain eBooks
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten eBook Subscription Services
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten Budget-Friendly Options
6. Navigating Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten eBook Formats
 - ePub, PDF, MOBI, and More
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten Compatibility with Devices
 - Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten Enhanced eBook Features
7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Highlighting and Note-Taking Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Interactive Elements Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
8. Staying Engaged with Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
9. Balancing eBooks and Physical Books Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
11. Cultivating a Reading Routine Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Setting Reading Goals Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Carving Out Dedicated Reading Time

12. Sourcing Reliable Information of Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Fact-Checking eBook Content of Aufsatz Aktuellen Wirtschaftspolitischen Au Enhandel Konfliktzeiten
 - Distinguishing Credible Sources
13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
14. Embracing eBook Trends
 - Integration of Multimedia Elements
 - Interactive and Gamified eBooks

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