



Private rental housing in Luxembourg

Evidence and policy insights from recent Housing Observatory research

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LE GOUVERNEMENT
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Luxembourg's private rental sector is becoming increasingly central to the country's housing system. As access to home ownership has become more difficult and international mobility continues to drive housing demand, rental housing plays a key role in enabling workers and families to settle in the country and in supporting Luxembourg's capacity to attract and retain workers from abroad. Yet the sector is under growing pressure: rents are rising continuously and geographically uneven, regulation is difficult to enforce, and new forms of rental housing are expanding faster than the public capacity to govern these housing types, including through their definition in the planning and regulatory frameworks. Drawing on recent Housing Observatory research, this brief examines these changes and highlights where better data, greater transparency and more effective regulations could help improve affordability, fairness and the functioning of the rental market.

The growing importance and diversification of the rental sector

This policy brief presents key findings from recent studies conducted by the Housing Observatory on the challenges facing Luxembourg's private rental housing sector. This tenure plays a strategic role in Luxembourg's housing system and contributes significantly to the country's attractiveness as a place to live. In the context of the Luxembourg's long-standing housing crisis, ensuring access to adequate and affordable rental is considered by the State as particularly important for attracting and retaining international talents, thereby supporting the country's continued economic development.

Over the years, Luxembourg's economic growth has been accompanied by sustained international migration, which has contributed to increasing housing demand. According to national statistics, Luxembourg's population increased by 25% between 2011 and 2021 (STATEC, 2023). More recently, the population grew by 1% between 1 January 2025 and 1 January 2026, representing an increase of almost 10,000 residents. International migration accounted for around 8,000 of these new residents (STATEC, 2026). Although demographic growth has recently slowed down, population projections indicate that Luxembourg could reach one million residents by 2070 (STATEC, 2026).

At the same time, although population has increased a lot, the annual number of newly completed dwellings has remained relatively stable since the 1970s (STATEC, 2026). The persistent supply deficit places additional pressure on the rental market, where demand is particularly sensitive to population growth and international migration.

In this context, Luxembourg continues to face a structural housing crisis that has major implications for access to affordable housing and tenure security for a large share of the population. Over the past decade, house prices have increased by around 60% in real terms. Following a decline of approximately 13% between 2023 and 2024, prices stabilised in 2025, but remained at very high levels, averaging around €7,700 per square metre for existing apartments and approaching €10,000 per square metre for new dwellings sold off-plan (VEFA) (Licheron & Ferring, 2026).

Housing segments in Luxembourg

Luxembourg's housing system can be divided into four internally differentiated segments corresponding to the housing continuum (Górczyńska-Angiulli, et al. 2020):

- private home ownership is currently the largest tenure segment and accounts for around 64% including affordable¹ home ownership (Eurostat, 2026). It primarily comprises houses and apartments constructed by individuals or private developers and purchased on the private market, with or without individual public subsidies;
- affordable home ownership is developed by public actors receiving subsidies for the construction, and sold to eligible households, typically with long-term land leases and restrictions on resale. These restrictions regulate the resale price and grant public actors pre-emption rights, ensuring that the dwellings remain accessible to eligible households over time. The exact number or share of affordable home ownership dwellings is unavailable in public statistics;
- rental housing accounts for around 36% (Eurostat, 2026) and consists mainly of privately owned dwellings rented out on the market, with rents subject to the legal framework governing rent setting, which is currently under reform. The maximum annual rent is capped at the 5% of the invested capital. The 2024 reform extended the 5% cap to the total rent collected under shared or multi-tenancy contracts, while also introducing a biennial limit on rent increases, capping them at 10% of the current rent. This segment is particularly concentrated in Luxembourg City and Esch-sur-Alzette, reflecting the spatial concentration of employment and economic activity;
- affordable rental housing is provided by public developers, municipalities or non-profit organisations, receiving subsidies for the construction, and rented to eligible households. These dwellings are generally offered through open-ended leases, with rents determined according to household income. This tenure includes a sub-segment of privately owned dwellings made available to eligible households through social rental schemes, typically involving three-year rental agreements and rent levels negotiated between private landlords and a social rental agency involved in the scheme. Although the exact number of affordable rental dwellings is unavailable in Eurostat statistics, its share is estimated at around 2% of the total housing stock in the latest available national statistics.

Despite a housing regime that has traditionally placed strong emphasis on supporting home ownership (Leduc et al. 2024), the share of homeowners in Luxembourg has been on a downward trend. Since 2015, the home ownership rate has fallen by approximately

¹ The term 'affordable housing' was introduced to the Luxembourgish nomenclature by the Affordable Housing Law of 07 August 2023.

10 percentage points, reaching around 64% in 2025 (Eurostat, 2026). This shift suggests that an increasing share of both new and existing housing stock is being occupied by tenants rather than homeowners, further increasing the importance of the rental sector within Luxembourg's housing system.

At the same time, high house prices and increasingly constrained access to mortgage have reduced the capacity of many middle-income households to enter home ownership. While affordable home ownership schemes have existed in Luxembourg since the beginning of the twentieth century, their overall impact remains marginal, and they have so far been unable to provide a large-scale alternative to market-based home ownership².

As access to home ownership becomes increasingly difficult for certain population groups, such as young adults, low- and middle-income households, or single-parent families, demand for rental housing continues to grow, placing additional pressure on the rental sector. This pressure is reflected, among other factors, in continued rent increases and substantial territorial disparities. Over the past 12 months, advertised monthly rents have increased by 5.8% nationally³, while the ongoing monthly rents have increased by 1% (Licheron & Ferring, 2026). At the same time, monthly rental prices vary considerably across the country: in 2025, the median advertised monthly rent reached €45.20 per square metre in Luxembourg City, compared with €19.15 per square metre in the northern part of the country (Licheron, et al. 2026).

Although Luxembourg has a regulatory framework governing private rents, its enforcement, effectiveness and fairness remain the subject of active debate among both landlords and tenants, albeit for different reasons. Under the current system, the annual rent that can be charged is capped at 5% of the invested capital in the property. This mechanism can result in substantially different rents for otherwise comparable dwellings, depending on when and at what price the property was acquired (Licheron, 2026). For properties purchased more recently, particularly at today's high market prices, the 5% invested-capital ceiling may allow relatively high

rents to be charged, regardless of the age or physical characteristics of the dwelling. Conversely, landlords who acquired their properties several decades ago may face a lower rent ceiling because it is based on the historical invested capital⁴.

From the tenants' perspective, the current regulatory framework does not necessarily translate into lower housing costs. Tenants may face difficulties in assessing whether the rent requested by a landlord complies with the applicable rules, as there is no simple, user-friendly mechanism allowing them to independently verify the legality of an advertised or requested rent. This creates an important information asymmetry between landlords and tenants and limits the practical effectiveness of rent regulation.

Finally, the number and the changing structure of incoming population, with approximately 30% of new arrivals leaving the country within a year, and roughly half of all newcomers within five years (Machado et al., 2026), has been coupled with the diversification of

Affordable housing for rent in Luxembourg

Affordable (social) rental housing remains a marginal segment of Luxembourg's housing stock, accounting for around 2% of the total stock, or approximately 4,200 dwellings in 2025 (Fonds Spécial, 2025). This remains the case despite growing attention from the State in recent years to accelerating the development of affordable housing. Between 2021 and 2024, the stock of affordable housing for rent increased by around 600 dwellings (Fonds Spécial, 2025). This limited expansion of supply is particularly salient given the growing number of households seeking affordable rental housing. The number of households registered on waiting lists increased from around 5,500 in 2023 (Górczyńska-Angiulli & Paccoud, 2023) to approximately 8,900 households registered in National Register of Affordable Housing (RENLA) in April 2026 (MLOGAT, 2026). The widening gap between the available stock of affordable rental housing and the number of households seeking access to it highlights the persistent shortage of affordable rental options and the pressure placed on the sector.

² Due to lack of public data on the number of such dwellings, the exact size of this segment cannot be indicated.

³ Inflation was at 2.4% during the same period.

⁴ Even though the calculation takes into account certain forms of reevaluation of invested capital and renovation costs over time.

private rental offer and the emergence of new, flexible forms of rental housing targeting young professionals (Uyttebrouck et al., 2024) that challenge existing regulatory frameworks (Uyttebrouck, 2025).

Drawing on evidence from recent Housing Observatory reports, this policy brief identifies three key messages regarding Luxembourg's private rental housing sector:

1. residents strongly support policies that improve housing affordability, including house price and rent caps, although opinions differ substantially across socio-economic groups which have different levels of influence and representation in the public debate;
2. effective rent regulation requires more than legal rent caps: enforcement mechanisms, transparency, and reliable market information infrastructure are equally important;
3. the rapid diversification of the private rental sector, including through emerging segments such as co-living, short-term rentals, and informal⁵ room rentals, requires updated regulatory and monitoring tools.

Residents support rent regulation as priority orientation for housing policy

Results from the 2023 Affordable Housing Survey in Luxembourg reveal broad public support for several orientations of the housing policy aiming to improve the access to housing (Górczyńska-Angiulli & Buscicchio, 2025). More than half of respondents support the three main policy directions examined:

- expanding affordable housing construction by public developers;
- regulating the private housing market;
- providing direct support to vulnerable households and resident-led housing initiatives.

Among specific measures, rent and housing price caps receive particularly strong support and are placed among top three measures supported by residents. Approximately 60% of residents support introducing caps on housing prices and rents, while only 13% express opposition. However, support is not evenly

distributed across society. The strongest support of house price and rent caps comes from tenants, young adults (aged 19–35), lower-income households (monthly disposable income below €4,000) and residents with non-EU nationality.

Housing tenure emerges as the most important explanatory factor. Nearly three-quarters of tenants support rent caps, compared with roughly half of homeowners. These differences reflect contrasting positions within the housing system. Households facing greater affordability constraints are generally more supportive of stronger market regulation, whereas homeowners (including potential individual landlords) tend to express greater reservations, as stricter rent regulation could potentially limit their economic interests. The question remains, to what extent the voice of these groups will be heard in a public debate considering that or they don't have formal rights to vote in national elections (residents without Luxembourgish nationality) or constitute relatively smaller groups compared to others.

Rent regulation in Europe: lessons for Luxembourg

Comparative analysis across the 27 EU Member States demonstrates that rent regulation has become an increasingly important policy instrument since the COVID-19 pandemic. European countries use a wide range of approaches, but several common patterns emerge (Montalbano, 2026).

Broadly speaking, a Europe-wide trend toward the adoption or reinforcement of 'second-generation' rent controls may be observed targeting both in-tenancy increases and initial rents. Recent reforms across countries including Spain, Portugal, the Netherlands, Ireland, and Germany show such a shared tendency, although regulatory and institutional arrangements are heterogeneous. While annual increase caps are relatively widespread and converging around indexation, initial rent caps remain fragmented in design, scope, and duration. Most countries restrict controls to designated 'tense market areas' with fixed-term validity, framing them as provisional emergency measures.

⁵ Informal housing generally refers to housing provided beyond formal regulations governing housing supply and the housing market. It is usually associated with lower regulatory compliance levels as well as lower tenure security.

Critical weaknesses generally persist: extensive exceptions – notably for renovation and new construction – create loopholes enabling landlords to circumvent caps. Effectiveness ultimately depends on transparency, robust enforcement, and independent oversight with binding powers – features uneven across jurisdictions.

Policy issues for consideration in Luxembourg

Luxembourg's rent control model suffers from fundamental design flaws and enforcement gaps: the excessively divergent effects of the invested capital rule between old and new dwellings, the absence of mandatory disclosure of invested capital, the lack of official data on the private rental stock, and weak implementation instruments. Despite considerable diversity, a comparison of European regulations yields relevant insights for the current debate on rent control reform in Luxembourg:

1. the centrality of transparent disclosure measures on the invested capital justifying rent increases;
2. establishing an independent oversight body with binding authority to verify compliance;
3. reviewing the narrow capital-only scope, considering alternative models like market reference rents or points-based systems;
4. limiting broad renovation exceptions to prevent undermining affordability, displacing middle-income tenants, or conflicting with energy transition goals;
5. adopting targeted experimentation, by testing time-limited, geographically or sectoral targeted arrangements, with rigorous monitoring and evaluation before broader implementation.

Expert perspectives on rent regulation reform in Luxembourg

A Delphi consultation conducted with more than twenty housing experts in 2025 sought to gather critical perspectives on rent regulation and contribute to the ongoing debate on the potential reform of Luxembourg's rent regulation framework (Górczyńska-Angiulli et al., 2026). The consultation identified substantial consensus regarding goals, rent cap criteria and the reinforcement of complementary measures.

Experts broadly agree on the need to reform the regulatory framework improving tenant-landlord relations via several possible measures:

- improvement of the access to information for tenants and landlords;
- strengthening monitoring and enforcement mechanisms;
- increase sanctions for violations of housing standards;
- improvement of transparency regarding rent-setting practices.

There is also significant agreement on several basic dwelling characteristics that could potentially determine permissible rents, including: floor area and number of rooms as well as housing quality defined by energy performance. There was a lack of consensus among the experts regarding the importance of location, despite this criterion being identified as a critical factor in many studies. Therefore, the subsequent studies of the Housing Observatory have further explored its impact on rents and confirmed it plays a central role in practice.

More controversial issues remain politically sensitive. One of the strongest disagreements concerned the role of invested capital in rent cap calculations. Moreover, an important number of experts neither supported nor opposed this solution, which may reflect concerns about its lack of clarity, transparency and verifiability.

The report suggests a gradual reform strategy combining immediate operational improvements with respect to complementary measures, allowing to regulate the landlord-tenant relations. This needs to be followed by further examination of identified dwelling characteristics as relevant for rent regulation in Luxembourgish context.

New evidence from a survey of multi-property owners in Luxembourg

One of the most significant recent developments is the creation of Luxembourg's first large-scale survey on rents. The survey collected information from nearly 5,800 landlords and provides new insight into actual rents paid by sitting tenants. Combined with information on dwelling characteristics and tenancy duration, these data offer an unprecedented perspective on rents actually paid by sitting tenants, complementing existing sources that mainly capture rents advertised for newly available dwellings. The survey also provides new evidence on who owns rental housing in Luxembourg (Paccoud et al., 2026) and shows that

private landlords are predominantly older, male and Luxembourgish residents, and rental ownership is often associated with long-term investment rather than a fully professionalised activity.

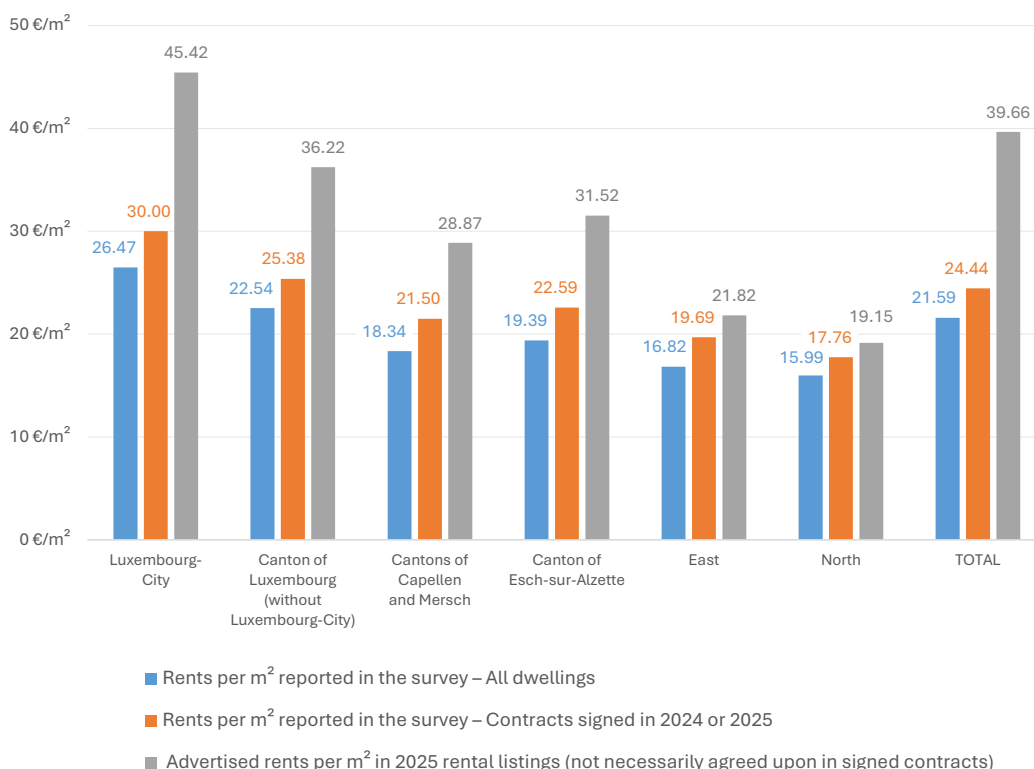
In terms of rental market characteristics, the results highlight substantial heterogeneity across market (Licheron et al., 2026). Among apartments, more than half of rented dwellings have monthly rents between €1,000 and €1,750, while approximately one in six exceeds €2,000. Rental levels vary substantially depending on location, dwelling size, housing quality and building type. Territorial differences are particularly pronounced. Luxembourg City has by far the highest rents, with a median rent of €25.56 per square metre, followed by the rest of Luxembourg canton and the canton of Esch-sur-Alzette, while rents are considerably lower in the eastern and northern parts of the country. The private rental market should therefore not

be understood as a single national market, but rather as a set of geographically differentiated markets exposed to different levels of housing demand.

The most significant finding concerns the relationship between rents and the duration of tenancies. Rents paid by tenants who entered their dwellings in 2024–2025 were almost 75% higher than those paid by tenants who had moved in before 2010 (Figure 1). This large gap illustrates the strong temporal stratification of Luxembourg’s rental market. It means that households occupying comparable dwellings can face very different housing costs depending on when they entered their tenancy. The difference reflects not only changes in market conditions over time but also the fact that rents for sitting tenants evolve differently from rents established when a dwelling is newly let.

This finding is particularly relevant to the debate on rent regulation. Existing measures primarily regulate rent increases during an ongoing tenancy, while market

Figure 1 – Average rents per m² issued from the survey and rental listings (2025)



Sources: survey of multi-property owners (2025), Ministry of Housing – Housing Observatory, for rents derived from the survey; Ministry of Housing – Housing Observatory, in partnership with Immotop.lu, for advertised rents.

Notes: the 'East' area comprises the cantons of Echternach, Grevenmacher and Remich. The 'North' area comprises the cantons of Clervaux, Diekirch, Redange, Vianden and Wiltz.

pressures are especially visible when a dwelling is re-let. The coexistence of substantially different rents for similar dwellings therefore raises questions about both affordability and equity between tenants. It also highlights the limitations of relying exclusively on advertised rents to assess rental-market conditions: advertised rents describe the cost of accessing a dwelling today, whereas the rent cadastre reveals the very different housing costs faced by households already living in the private rental sector. Both dimensions are necessary to understand the distributional effects of rent regulation.

Taken together, these findings strengthen the case for improving transparency in Luxembourg's rental market. The substantial differences between rents paid by sitting tenants and those established for new tenancies make it particularly important to monitor both dimensions systematically. The rent cadastre provides a valuable foundation for this effort by making it possible to analyse effective rents according to location, dwelling characteristics and tenancy duration.

The evidence also points to a broader principle for rent regulation: effective regulation requires not only a legal ceiling, but a reliable information infrastructure capable of establishing what rents are actually being paid and how they vary across comparable dwellings. The rent cadastre represents an important first step towards such an infrastructure and could become a central tool for making Luxembourg's rental market more transparent, accountable and responsive to affordability concerns.

Emerging rental segments and their regulatory challenges

Luxembourg's private rental market is becoming increasingly diverse, with:

- the emergence of new, flexible segments catering primarily to young, mobile workers of the knowledge and creative economic sectors, such as co-living and short-term rentals;
- the expansion of furnished rooms rented out separately to different tenants (this market segment currently represents 14% of all residential rental adverts) as well as dwelling sharing (designated in Luxembourg as co-location), with all tenants of the different rooms being related by a single lease;
- and a specific form of informal shared housing that was historically designated

in Luxembourg as *Kaffiszëmmeren* or *Chambres à café* (literally, 'bar rooms') and corresponding to furnished rooms rented out on top of bars, historically to labour migrants from the steel industry.

While co-living is an institutionalised form of shared housing – with co-living operators offering furnished rooms with shared spaces and services – positioning as a quality alternative to informal room rentals, corporate short-term rentals are mostly self-contained units rented out for a night or more to workers on business travel or relocating to Luxembourg (see Uyttebrouck et al., 2024 for a typology of these products based on an initial database of 1,109 scraped adverts, knowing that this reports estimated the total of the real portfolios of the studied companies at least twice as high as the collected advertisements). Both segments are framed by their instigators as a threefold response to (i) the difficulties of international employers to attract and retain young, mobile workers from abroad, (ii) the challenges of these workers to access affordable rental housing, and (iii) reduced profitability for real estate actors. However, these segments raise several concerns regarding, among others, affordability, tenure security, and the risk of worsening the shortage of long-term housing. They also present planning and regulatory challenges related to the absence of specific criteria for co-living – including planning-wise, which makes it possible to artificially lower housing density levels in new developments – and the broader positioning of these tenures at the housing-hospitality interface (Uyttebrouck, 2025)

Furthermore, the Housing Observatory has so far conducted a first, exploratory inquiry into the methodological issues related to the identification and analysis of informal shared housing, a rental housing segment that tends to accommodate vulnerable households, in the absence of a substantial non-profit, affordable housing sector (see Uyttebrouck et al., 2026, where we tentatively identified 114 addresses in Esch-sur-Alzette, 195 addresses in Luxembourg and 30 addresses in Diekirch, the three municipalities used for the exploratory study). While some municipalities have built registers of these rooms, significant knowledge gaps remain regarding the scale, nature and geography of this sector, especially in the absence of a national registry of dwellings and buildings. And yet, the research effort required to identify and characterise informal shared housing is a necessary step to understand the actual typology and

composition of Luxembourg's housing stock and to better apprehend situations of households experiencing unsuitable living conditions.

Conclusions and avenues for policy development

Luxembourg's private rental sector is under increasing pressure as a result of growing and diversifying demand, while the emergence of new housing actors is contributing to the development of distinct sub-segments within a weak regulatory framework. Recent research shows that residents support stronger action to regulate the private rental market, while housing experts emphasise the need for greater transparency, effective enforcement, and evidence-based private rental market regulation. The insights from a survey of multi-property owners reveal substantial territorial disparities within the private rental market and high-light significant inequalities between newly established and long-standing tenants, particularly in terms of paid rent. The current rent regulation system seems inefficient and tends to create deeper power imbalances between tenants and landlords, as well as inequalities within both groups. However, replacing the existing system with a completely new set of regulations might not fully address all the current challenges and could potentially be associated with new adverse effects. The rapid introduction of a rent cadastre could drastically increase rents for long-standing tenants, hike their housing costs and even result in eviction if they cannot afford the new rent. Therefore, gradual modifications to the regulatory system seem a better prospect for the near future. Addressing these challenges requires a comprehensive strategy combining enhanced monitoring of the private rental sector, a greater market transparency, and effective regulation of standard and emerging rental models. Drawing on the combined findings of recent research conducted by the Housing Observatory, five avenues emerge for further housing policy development in Luxembourg.

1. Strengthen rental market transparency

- establish clear criteria for developing a national rent cadastre;
- reintroduce a register of rental agreements;
- improve access to information on practiced rents on the private market.

2. Improve enforcement of existing regulations

- strengthen inspection capacity;
- increase compliance monitoring;
- enhance sanctions where housing standards are violated.

3. Develop evidence-based rent regulation

- use rent cadastre data to support policy design;
- consider housing characteristics when establishing reference rents;
- avoid excessive exemptions that weaken effectiveness.

4. Clarify regulation of emerging rental housing segments

- establish clear definitions for co-living and other types of shared housing;
- harmonise regulatory practices across municipalities;
- clarify the distinction between housing and temporary accommodation.

5. Improve data integration

- accelerate the implementation of the National Register of Buildings and Dwellings;
- integration of housing, building, and population registers;
- support evidence-based policymaking through enhanced access to new administrative data related to housing.

The role of the Housing Observatory in supporting public policy to address these challenges remains even more crucial, following the adoption of the Law on the Housing Observatory on 24 July 2026. The new legal framework strengthens the Observatory's institutional independence with regard to the methods it employs, the findings it produces, and the proposals it formulates. It also provides a legal basis for accessing administrative data and collecting new data which is key for developing new studies and adopting new methodological approaches.

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