



# Development of European Ecolabel Criteria for Buildings

## Market Analysis

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## Introduction

The purpose of this section is to provide a market snapshot of the buildings in UE.

### Building

A building is any independent structure comprising one or more rooms or other spaces, covered by a roof, enclosed with external walls or dividing walls, which extend from the foundations to the roof, and intended for residential, agricultural, industrial, commercial, cultural, etc., purposes.



#### residential

dwelling purposes.

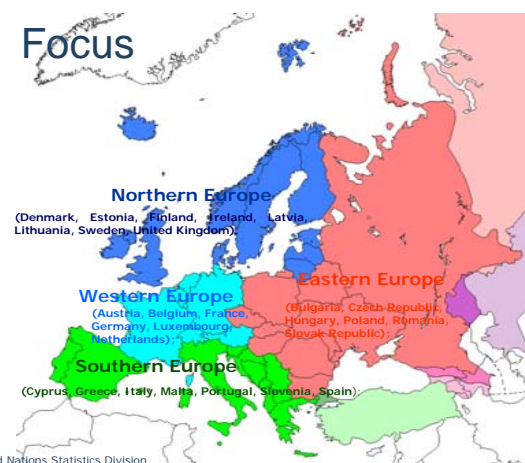


#### non-residential

other buildings



## Focus

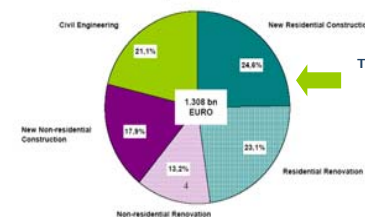


Source: United Nations Statistics Division



## European Construction Market

Total Construction Output in Europe by Sectors in 2005



The focus of construction is residential sector  
 642 billion € (47.7 %)

Source: Extracted from "Press Conference" made by Euroconstruct, Munich, 30 November 2006



## European Construction Market



Extracted from "State of the European Construction Equipment Industry" made by CECE Naples, 12 Novembre 2007  
Source: Euroconstruct

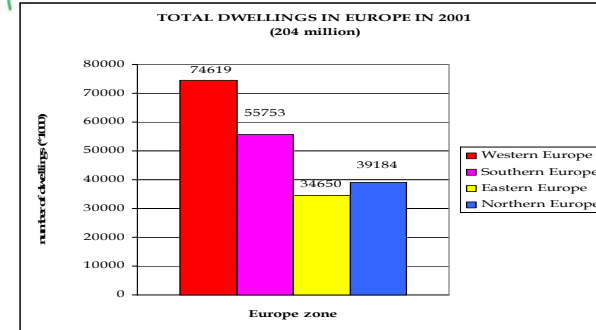
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## Existing housing stock



Source: Own elaboration. Data extracted from "Regular National Report on Housing developments in European Countries" made by The Housing Unit - IE, November 2004

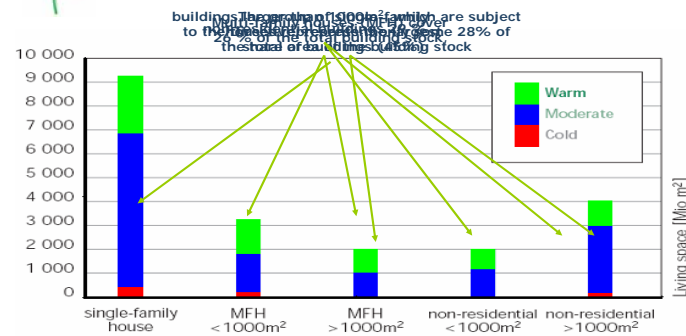
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## Existing housing stock



Extracted from "Mitigation of CO<sub>2</sub> Emission from the Buildings stocks" made by ECOFYS for EURIMA & EuroACE, 02.2004  
Source: Euroconstruct

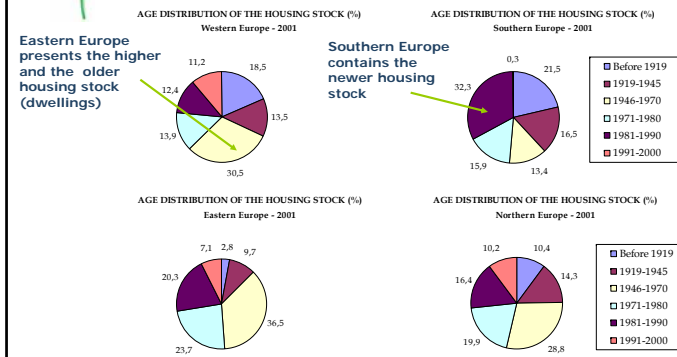
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## Age Distribution of the Housing



Source: own elaboration. Data extracted from UNECE (United Nations Economic Commission for Europe)

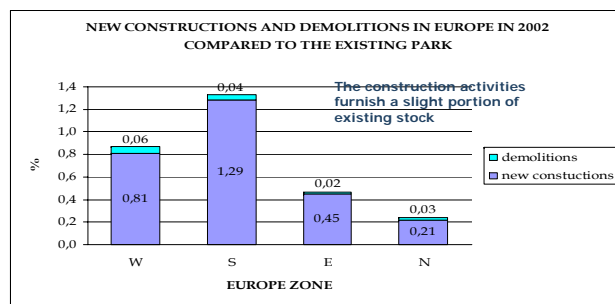
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## New construction and demolition

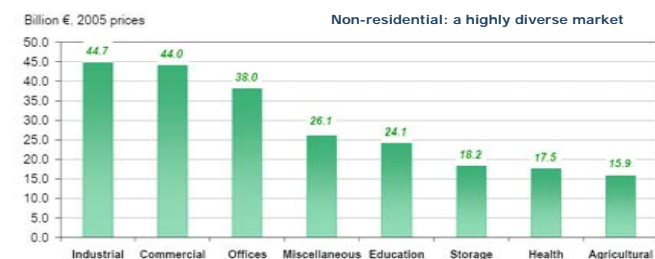


Source: own elaboration. Data extracted from UNECE (United Nations Economic Commission for Europe)



## New non-residential buildings

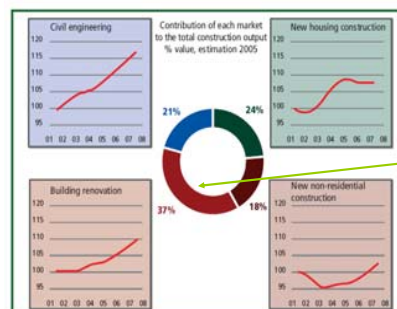
### New Non-residential market (19 Euroconstruct countries): 2005



Extracted from "European construction markets" made by CECE, Cannes, 5 October 2006  
Source: Euroconstruct



## Renovation works



Excluding civil engineering, the renovation market in Europe accounts for nearly half the renovation market. The renovation market is becoming the main driver of the construction industry, due to the increasing importance of the renovation market in Germany, France, Italy, and United Kingdom.



## Renovation works

In the renovation market,

total renovation (buildings completely renovated)  
accounts for 15 to 20%;

partial renovation (a functional portion of a building renovated)  
account for 33%;

smaller renovations, primarily by private individuals,  
account for the remainder

Long-term prospects are good, as 150 million European dwellings  
are at least 25 years old



## Summary

The construction sector represents a strategically important sector for the European Union, providing building and infrastructure on which all sectors of the economy depend.

The economic relevance of the EU-27 construction market is estimated at about 10% of GDP (1305 billion €) and 7,3% of total workforce (13,2 million people).

Buildings account for the largest share of the total EU final energy consumption (42%) and produce about 35% of all greenhouse emissions

Its impact is not just limited to economic issues, in fact the quality of buildings and building activities reflect the environmental and social requirements of citizens.



## Summary

the result of the analysis:

The residential buildings play an important role in the construction sector with a total output over 40% (47,7 % in 2005); however the non-residential buildings constitute a significant portion of output (31,1% in 2005)

The new construction and demolition constitute a slight portion of existing stock (around 1-2%)

Non-residential is a highly diverse market in several sub-categories:

- industrial,
- commercial,
- offices,
- education,
- miscellaneous,
- storage,
- health,
- agricultural



## Thank you for your consideration