SZndzirko Constructi Construction in the Szndzirko o Tr. z Movember 2021, Verona, Italia o Tr. z Movember 20

92nd EUROCONSTRUCT Summary Report Winter 2021





European Construction: Market Trends until 2024

ORGANISER



CONFERENCE PARTNERS







UNDER THE PATRONAGE OF





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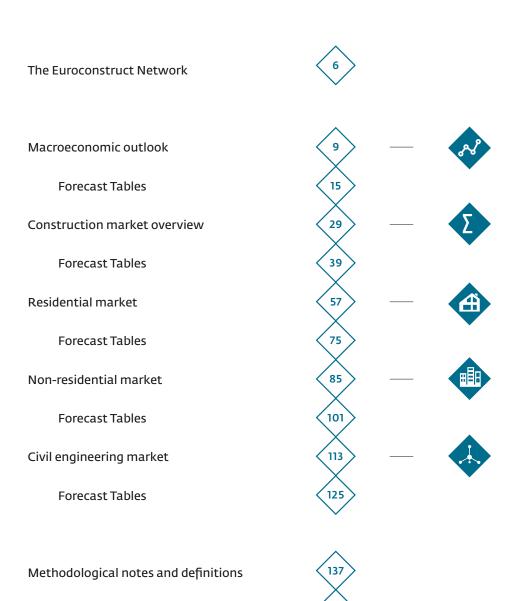
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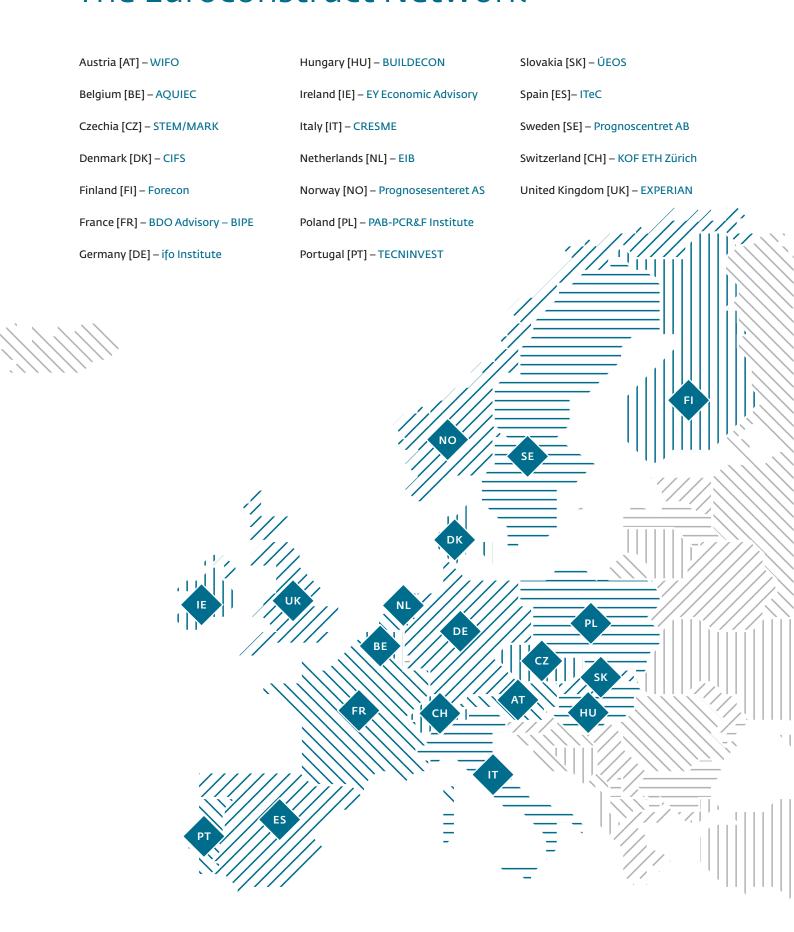
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Member Institutes

The Euroconstruct Network



European Construction Business Research And Forecasting Group

www.euroconstruct.org

EUROCONSTRUCT ® is a registered trademark.

EUROCONSTRUCT was set up in 1974 by specialised research organisations from Belgium, France, Germany, Italy, the Netherlands and United Kingdom as a study group for construction analysis and forecasting. It has since expanded from the core group to include almost all Western European countries, as well as 4 Central Eastern European countries. At present, EUROCONSTRUCT has member institutes in 19 European countries.

EUROCONSTRUCT's objective is to provide decision makers in the construction sector and other to the construction industry related markets with information, analyses and forecasts to enable them to plan their business better and more effectively. Furthermore, the activities of the EUROCONSTRUCT network addresses to official institutions like ministries or agencies and to national and international associations.

Construction markets are regional or even local. It is, therefore, a great advantage that the analyses and forecasts for these markets are prepared within the EUROCONSTRUCT network by competent national institutes for their respective home markets.

EUROCONSTRUCT's research and advice focuses on:

- Short and medium-term macro-economic forecasts and construction trends in Europe;
- Analyses of structural changes, business strategies and competition in the construction industry;
- Market studies for industrial goods and services used by the building and infrastructure sectors.
- EUROCONSTRUCT's research and forecasts are designed to meet the needs of many types of business including:
- Construction contractors and developers; housing associations;
- Manufacturers and traders supplying construction materials, products, equipment and machines; architects and other construction professionals;

- Insurances, banks, financial and credit institutions; fund managers and other investors; government departments and national agencies; industry associations;
- The Commission of the European Community and other European organisations.

Each country member of EUROCONSTRUCT has the project management resources to offer their customers turnkey studies of pan-European scope.

They can quarantee:

- Specific know-how and experience in database research and consulting;
- A consistent multinational approach;
- Expertise in project co-ordination and quality control;
- Reports in the languages of the customer's choice.
- Twice a year, EUROCONSTRUCT organises an international conference on:
 - Forecasts for the main market segments (housing, non-residential construction, infrastructure and civil engineering, all sub-sectors with a breakdown in new work and renovation/ modernisation activities) in the EUROCONSTRUCT member countries;
 - A special issue selected for its impact on the construction industry (e.g. demographics, privatisation, lifestyles, technological change, internationalisation of strategies, changes in the demand and supply structure).

Recent and forthcoming conference venues:

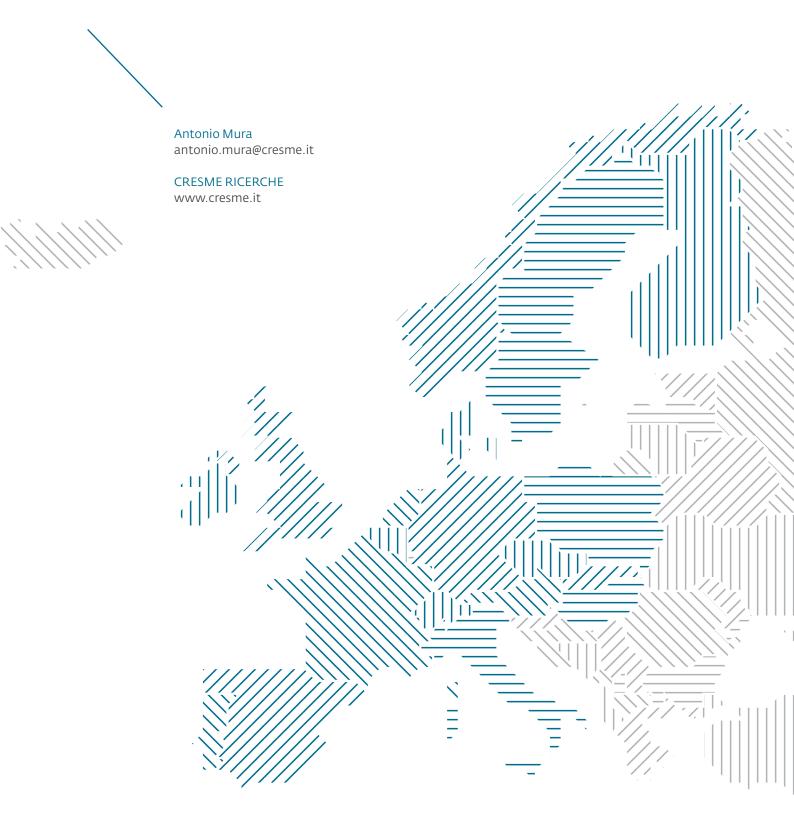
- Summer 2020 Stockholm (Sweden)
- Winter 2020 Munich (Germany)
- Summer 2021 Vienna (Austria)
- Winter 2021 Verona (Italy)
- Summer 2022 Warsaw (Poland)

In addition, EUROCONSTRUCT offers special studies for selected national and international clients based on well-founded knowledge of databases, methods, correlations and measures.

For details, please contact the EUROCONSTRUCT partner institute in your country.



Macroeconomic outlook



Macroeconomic outlook

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National Accounts components, EC19

vear-on-vear change in %

	2020	2021	2022	2023	2024
GDP					
Private consumption					
Public consumption					
Investment					
Exports					
Imports					

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manufacturing artists in some manage service.

Source: EUROCONSTRUCT, November 2021

Gross domestic product, constant prices

y-o-y change (%)

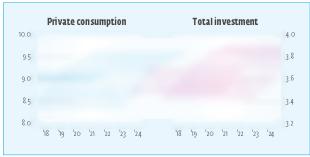
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Source: EUROCONSTRUCT, November 2021

Internal demand components (EC-19)

trillion euro at 2020 prices

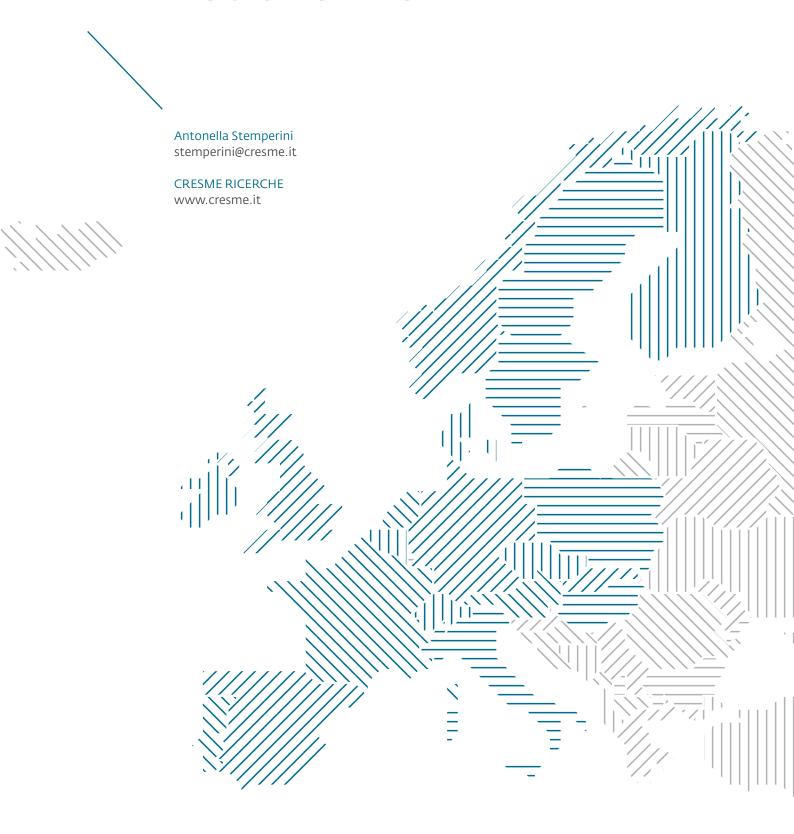


Source: EUROCONSTRUCT, November 2021

^{*} IMF (October 2021) for World and Euro area



Construction market overview



1. A recovery among optimism and uncertainty

Account two pages after the surfress of the par-

dents and the study and earlier uphases of the

account appeared, a number of tends have

amongsed which have been conformed over the

months. The economy as a whole has marked much

more quickly than expected, and the construction series has placed a decisive sole. Not only did it

complex, at least in part and carticities companed to

the trivel negative expertations, the dogs to produc-

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billiatractum transment as a dante fiscal policy

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GDP and Total construction output (EC-19)

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year to year change in %



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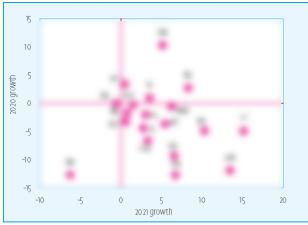
standards. For example, particularly among the

Meetly countries, these have been surfaced markets

Source: EUROCONSTRUCT, November 2021

Construction output growth in 2020 and 2021 by country, %

trigger had by the global health other.



There are two tracks demands of accompany that

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countries, where the during has been more dis-

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time, the secondary than your in your showing high.

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English Miles a tons today scowy path.

direction half to bustion.

Source: EUROCO NSTRUCT, November 2021

Section 2



Residential market



The Real Property lies

1. Overview

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metric to a such a put is puri-

ing market have been diving more well in securit man-

Sands to the growing bissued from broadwith

and has provided mindy cash flows and services

for the colorisation sector. After seconding growth, some of 1,175, 1,175 and 1,175 segentimes in exce.

and and area, the market was aspected to some

down to one according to the last finance of occ. This simplews hashed into a stury negative shark

count by the cortif up orbit. Like short other section of the economy, the continuation sector was found

In order to Stock the special of the viscos, which was growing at high speed, grossmanns, concerned

shout the beatth and well being if the population,

had to put in place tections teniennes such as both

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WITH MADRICULES, AS WAST AN ADDRESS OF ADDRESS.

ing building particle, with public administrations

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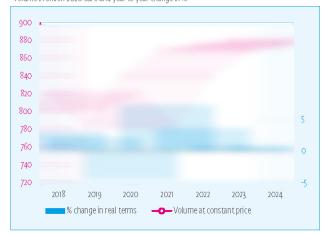
dependencies of bromus and 10 bisses and thus

processed a weak and was attitude amongst bottom.

Residential construction output (EC-19)

Time, and

volume in billion 2020 euro and year to year change in %



Source: EUROCONSTRUCT, November 2021

Residential construction by type of work (EC-19)

year to year change in %



tal) breaton. In this context of high uncertainty and face of losing their source of scottes, brown holds have been stone inclined to use their brooms

for expense of consent consumption. All of form

factors have led to a disage facilities to excidential pro-

factors, particularly is now sentential constitu-

to total, the new construction market fell by 4.45. The United Elegation (10.25), the Settler-

book (), Pri, Rosgori (), Pri and Spath (), Pri

seconded the largest ductions. However, new largeing production did not full in all countries. Countries

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duction than in one. Its average, Earteen European countries, experienced a more moderate duction

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country and wan dependent on the beginn of wron-

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bounting companies and others have pushioned to postpone their encounties work for him of letting

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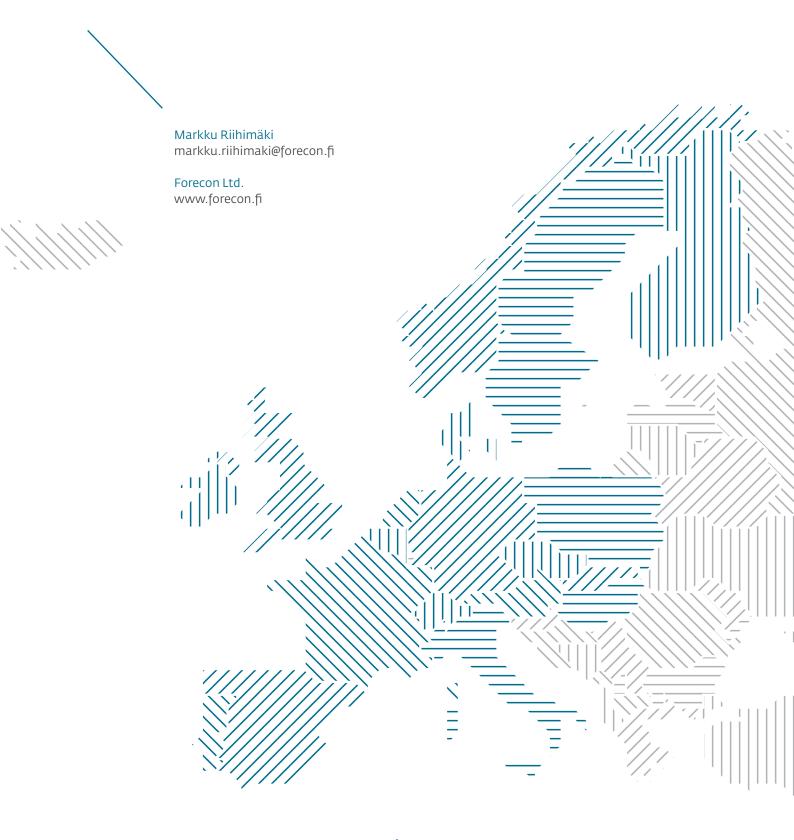
by the buildings to section such as construction,

big bred growth is the solve in the countries.

Source: EUROCONSTRUCT, November 2021



Non-residential market



Scottonic growth in the Successioner and is expected to be fast in one and one, and to continue to grow but at a decelerating pass in one, and one,

This will also be sellected in positive development

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other are expected to security law, which will happ

The CP ambient and energy efficiency improve-

ment of non-mediantical haldelings will require a

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position, but notes are also sugarities. The Mills and

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1. Brief overview

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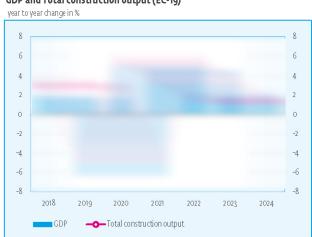
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GDP and Total construction output (EC-19)

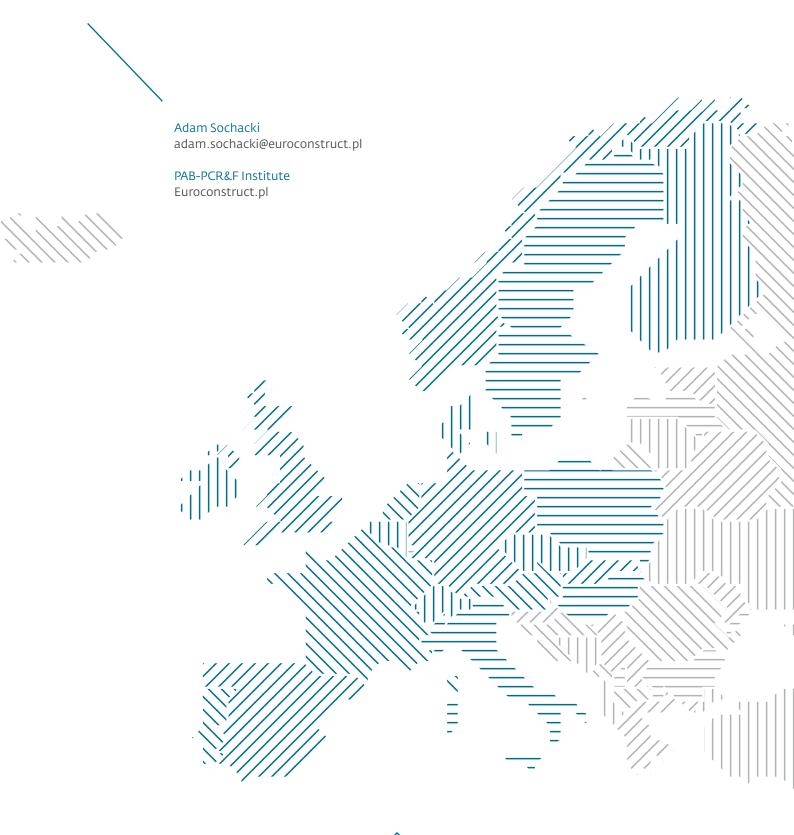
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Source: EUROCONSTRUCT, November 2021



Civil engineering market



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1. The civil engineering market

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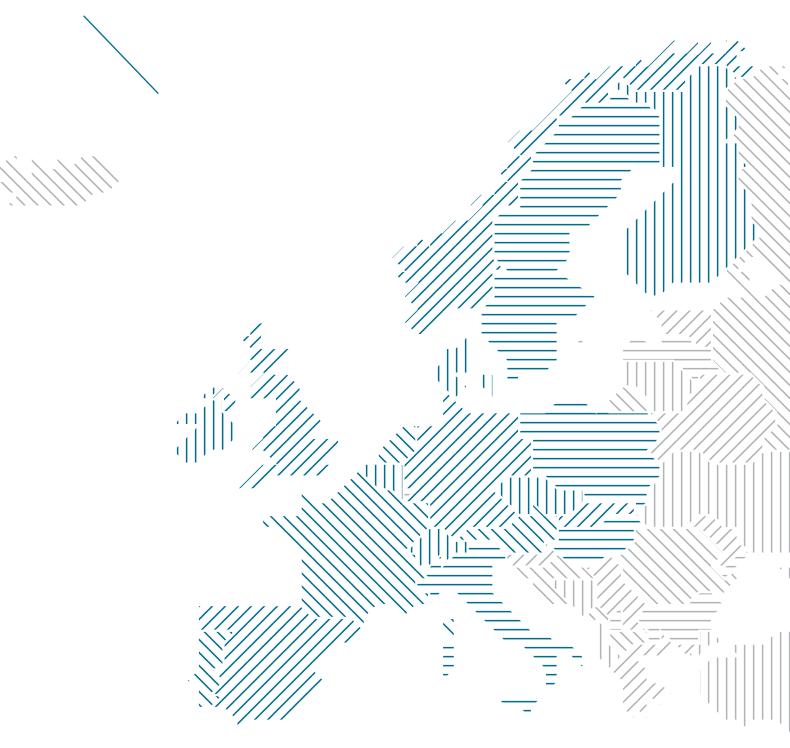
Civil engineering construction output (EC-19)

volume in billion 2020 euro and year to year change in %



Source: EUROCONSTRUCT, November 2021

Methodological notes and definitions



GENERAL DEFINITIONS

The following notes describe which are the most common definitions of the concepts of the Euroconstruct report among the different countries. These definitions do not apply literally to each of the 19 countries, so readers are encouraged to check the specific methodological notes of each country in order to identify the possible deviations from these standards that may apply to that particular market.

Macroeconomic

- Population and households: as of January 1st.
- **Unemployed:** figures based on labour force surveys that also include jobseekers that do not register at the employment offices.
- Unemployment rate: as percent of total labour force.
- **Construction prices:** annual change rate of sales prices, not construction costs.

Construction Output

Production is calculated according to branch definition, including not just works done by construction firms, but also works done by all firms that execute construction work regardless of the industry group they belong to. It also includes:

- Services provided by public bodies in the case that fees are involved.
- The builders' own effort, like do-it-yourself works.
- Works done by unregistered firms (black economy) should be included.

VAT or any other sales tax are not included.

Production value of a **building** project, residential and non-residential, includes:

- Project development.
- Planning and engineering works, architects.
- Plot work up.
- Construction work on the building including all intermediate products (building materials, transport cost, energy, use of machinery and equipment etc.)
- Installations work (electrical, plumbing, glazing, paintings and wallpaper, lifts etc.)
- Public fees (for building permits etc.)
- Financial costs, like interest and fees on construction loans (external funding)
- Fees to estate agents
- Transaction costs, if any
- Advertisement costs, if any

Production of **civil engineering** in general follows the same rules, so the value of investments (and maintenance) in civil engineering includes all intermediate products and not only the civil engineering part.

Residential

This category includes:

- Permanent residences
- Second homes or holiday homes owned by households.
- Building objects considered as auxiliary of the main residential object, such as garages, outhouses or other annexes.

The 1+2 family dwellings category includes:

- Detached or semi-detached houses that contain one or two dwellings (for example, a main dwelling plus one bed-sit, basement flat etc.)
- Farmhouses that contain one or two dwellings.

The **flats** category is for residential buildings that contain three or more dwellings, including the following cases:

- Row houses, linked houses and terraced houses.
- Multi-dwelling buildings of more than one storey, free-standing or linked.
- Residences and service residences for the elderly and other social groups, when the health care aspect is not dominant (otherwise they are categorised as nursing homes and accounted as non-residential)
- · Student homes.
- Other residential buildings for communities.
- Dwellings in non-residential buildings.

A **second home** is defined as any dwelling of the residential categories (1+2 families or flats), that is only in use temporarily as a holiday or leisure residence. Second homes also include cottages, huts, shacks, chalets, etc.

When second homes are a market product that is different from permanent homes (design, size...) and that market is big enough to be noticeable, and statistics allow them to be distinguished from permanent homes, they may be excluded from the figures for permits, starts or completed dwellings. However, they still are included in stock figures. Investments in second homes are also included in residential construction.

A residential building is considered **completed** when either a temporary permission to use the building is given by the competent authority, or when a certificate for completion is issued by the competent authority. This certificate should be given when final documentation about the building and a declaration from the builder that the building is completed is available.

Non-residential

This category includes every other building that is not considered residential. The following cases are also treated as non-residential:

- Buildings for temporary residential use that have a commercial purpose, for instance hotels, hostels, motels and holiday homes for rent by businesses/public bodies.
- Homes for the elderly with manned facilities and nursing services.

Non-residential surface is measured as utility floor space, which is the floor area measured within the outer walls.

The category of **buildings for education** includes the facilities (also playgrounds) for:

- Pre-school, kindergartens.
- · Primary and secondary education.
- Higher education, including laboratories and research facilities.

The category of buildings for health includes:

- Hospitals.
- Clinics, doctor's offices, medical centres, emergency clinics.
- Health and social services centres, health stations
- · Nursing homes.
- Residence and home with nursing and medical care.
- Buildings for rehabilitation, sanatoriums
- Other long-stay hospitals and primary health buildings.

The category of **industrial buildings** includes:

- Factory buildings.
- · Workshops.
- Treatment plants, pumping stations, transformer stations that can be considered buildings.

The category of **storage buildings** includes:

- · Warehouses.
- Cold storage warehouses.
- · Silo buildings and other specialised storage.

The category of **office buildings** includes:

- Buildings for bureaucratic purposes, town halls.
- Banks.
- · Post offices.
- · Buildings for the media.

The category of **commercial buildings** includes:

- Shopping centres, department stores.
- Detached shops.
- · Service stations.
- Other wholesale and retail trade buildings.
- Hotels, hostels, motels, pensions.
- Holiday camps, tourist chalets, apartment lodging buildings, camping huts, holiday bungalows.
- Restaurant buildings and derivatives: food kiosks, cafés, canteens, etc.
- Parking garages.
- · Fair and congress buildings.

 Buildings related to transport infrastructures such as railway stations and underground stations, airport terminals, air traffic control towers, telecommunication buildings, etc.

The category of **agricultural buildings** includes:

- Buildings for animals, granaries, fruit and vegetable storage, agricultural silos, buildings for hay/grain drying
- Greenhouses.
- Works buildings used for fishery and hunting, including fish farms, fishery boat-houses and sheds.

The category of **miscellaneous buildings** includes:

- Non-residential space in residential buildings.
- Buildings for entertainment: cinemas, theatres, concert halls, opera houses, discotheques.
- · Museums and art galleries.
- Libraries.
- Zoological and botanical gardens.
- Sports halls, ice arenas, indoor swimming pools, fitness centres and Buildings for other sports.
- Community centres, local meeting halls not for bureaucratic uses.
- Buildings for religious use: churches, chapels, houses of worship, parish houses, crematoriums, cemetery chapels, chapels of repose, convents, monasteries.
- · Monuments.
- · Prison buildings.
- Police stations.
- Fire stations, ambulance stations.
- Building for emergency preparedness: air-raid shelters, bunkers.
- Lighthouse buildings, pilot stations, radar facilities.
- Public toilets.

Renovation with change of use

Sometimes building renovation is related to a change of end use: from residential to non-residential buildings and vice versa. When a non-residential building is transformed to a residential building, the value of this production is included in residential renovation. And vice versa.

Civil Engineering

The category of **transport infrastructure** includes:

- Construction of roads and streets, including bridges and tunnels.
- Railways include also tramways and undergrounds, also with bridges and tunnels.
- "Other" collects airports and airfields, harbours, ports, breakwaters and moles, canals, etc.

The category of **energy** includes infrastructures for:

• Generating energy: power plants and power stations that can not be considered buildings, dams

for hydroelectric power production, wind farms, wave farms.

• Delivering energy: power transmission lines, gas supply lines.

The category of water works includes infrastructures for water supply, sewer and waste water transport and treatment; either for drinking water, irrigation, industrial water or river flow maintenance.

The category of **other civil engineering** includes infrastructures for agriculture, forestry and fishery, civil engineering facilities for the industry **that can**

not be considered buildings, outdoor sports and leisure facilities (for example, amusement parks).

Gross Domestic Product

To be comparable to the rest of the figures in Table 5, gross fixed capital formation in construction is measured at market prices, in contrast to the measure used in Tables 2, 4a and 4b that considers output at production prices, that is, without sales taxes (or sales subsidies).

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