

European Building Renovation Market: Analysis By Building Type (Residential & Non-Residential) By Segment (Energy & Non-Energy Renovation) Size and Trends with Impact of COVID-19 and forecast up to 2026

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Abstracts

In 2021, European Building Renovation market was valued at US\$956.88 billion in 2021, and is expected to reach up to US\$1012.47 billion in 2026. Building renovation provides their services by offering energy & non-energy renovation solutions to homeowners. The significance for building renovation is increasing as buildings are responsible for generating 36% of green house gas emission in EU.

Building Renovation is serving as a potential way to tackle climate change while simulatenously creating employment opportunities for the people. In building renovation, focus would be on increasing the rate of deep renovation, as it has the potential of saving energy up to or more than 60%. State governments are implementing regulatory measures like mimmmum energy performance standards and energy performance certificate. For instance, France is planning to introduce a minimum standard base for the reduction of energy consumption (in KWh/m²/yr) compared to consumption in a reference year (40% in 2030, 50% in 2040 and 60% in 2050).

Market Segmentation Analysis:

By Building Type: The report involves the bifurcation of building types into two types; Residential & Non-Residential. Residential buildings segment accounted for the highest share in building renovation market by holding 52.93% share. Focus on building renovation will not only tackle climate change (since they are capable of reducing energy consumption by 5-6%), but it can also solve the problem of energy poverty in

EU. As per EC estimates that 34 million Europeans are unable to keep their homes adequately warm and with it hoping to solve the problem of energy poverty.

By Segment: The report further involves the bifurcation of segments in renovation market; Energy & Non-Energy. Energy renovation segment presents the most promising as EC aims to double the annual energy renovation rate of residential and non-residential buildings by 2030 and to foster deep energy renovation. Because at present only 11% of the EU existing building stock is renovated each year, and it has also been observed that these renovations rarely addresses the energy performance. Since, energy renovation rate is low at 1% and deep renovation only recording 0.2% per year. And given the fact that EC has revised its target from 44% GHG emission to 55% GHG emissions. Given EC targets and estimates, it is safe to say that energy renovation might be performing well in the market in coming years.

Europe Building Renovation Dynamics:

Growth Drivers: The installation of insulation for building renovation would help the market to register growth in coming years. As of now, there are 50 active incentive schemes, and 60% of them either focus on insulation or specifically mentioned it. The focus on insulation is happening because insulation provides the biggest saving on energy bills, putting initial investment, roofing and wall insulation into consideration the investment can generate 7% ROI, which is expected to be the reason behind being the key beneficiary of the building renovation agenda. However, significant factors such as quality upgradation of housing stock through EPC, government initiatives, urbanization, and lower than expected rate in green house gas emission reduction would provide the market required impetus it demands.

Challenges: The market also have to deal with some of the challenges such as problem with financing and little progress made in the market. These challenges are somewhat hampering market growth in coming years. Renovation of a house demands higher upfront cost with respect to its long-term return on investment. Since most of the building stock being devoted to the residential sector which put most of the pressure onto the private owners. This put government in a difficult position since they haven't been able to find a suitable solution for it.

Trends: European building renovation market growth would be receiving significant push from green deal, as it is expected that green deal can provide 20-25% upside to the market if its funds were able to bridge the investment gap. Other significant factor, Regulatory Instruments to invigorate building energy renovation is also capable of

generating required impetus in the market. As under this, state government and EC are exploring the possibilities of EPC and building renovation passport. These regulatory measure are expected to encourage private owners for energy renovation, thus helping the market to grow.

Impact Analysis of COVID-19 and Way Forward:

Europe building renovation market has also absorbed a slowdown due to halt in operations of construction industry. The pandemic also provided a way for government to revamp the economy by creating employment opportunities for skilled workforce through making significant investment in the segment. The pandemic also brought forth the problem of energy poverty and presented itself as a reliable solution. In post-COVID world, it is expected that government would be more focused towards regional renovation than national as some of the developed regions are in better position of promoting the structural policies, as they are the direct beneficiary of structural funds. The concern regarding construction materials will be visible as still many of the materials ain't green and this would defeat the purpose of building renovation in a broader picture perspective.

Competitive Landscape:

Europe building renovation market is moderately fragmented, with many players operating in the market.

The key players of Europe building renovation market are:

Effiage, S.A.

Sika AG

RockWool International A/S

Kingspan Group PIC

Skanska AB

Legrand

Schneider Electric SE

Saint-Gobain

ENGESA

Guildmore Ltd.

Sika AG focuses on the development and production of systems and products for bonding, sealing, damping, reinforcing, and protecting in the building sector. The company strongly focuses on energy-efficiency and cost-effectiveness helped the company in maintaining a strong customer base. RockWool International A/S and Saint-Gobain are better placed in the market in order to reap the benefits from Green Deal upside in the market.

Scope of the Report:

The report titled “Europe Building Renovation Market: Analysis By Building Type (Residential & Non-Residential) By Segment (Energy & Non-Energy Renovation), By Size and Trends with Impact of COVID-19 and forecast up to 2026”, includes :

An in-depth analysis of Europe Building Renovation market by value, by building type, by segment, etc.

A detailed analysis of Europe building renovation market by regional renovation plans building floor area, and deep renovation spending.

Comprehensive information about Europe market. This report analyses the market as per energy renovation rate in building stock (both residential & non-residential)

Provides an analysis of the COVID-19 impact on Europe building renovation market.

Assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall Europe building renovation market has also been forecasted for the period 2022-2026, taking into consideration the previous growth patterns, the growth drivers, and the current and future trends.

Evaluation of the potential role of building renovation in Europe to tackle climate change and significance in achieving the targets set for 2030 and 2050 by EU.

Identification of the existing building stock (residential & non-residential) by energy class and spending done on deep renovation as % of total renovation spending & energy related spending.

In-depth profiling of the key players, including the assessment of the business overview, market strategies, regional and business segments of the leading players in the market.

The recent developments, mergers and acquisitions related to mentioned key players are provided in the market report.

The in-depth analysis provides an insight into the Market, underlining the growth rate, opportunities and regional policies for building renovation (both in forced and planned) has been provided in the report.

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