

Commercial Energy-Efficient Building Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Component Type (Ventilation Systems, Lighting Technologies, Energy Management Systems and Controls, By Region & Competition, 2021-2031F

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Abstracts

The Global Commercial Energy-Efficient Building Market is projected to grow substantially from USD 34.97 billion in 2025 to USD 51.08 billion by 2031, demonstrating a 6.52% CAGR. These non-residential structures are specifically engineered to minimize power consumption through advanced insulation, smart management systems, and high-performance materials, all while maintaining operational utility. This market expansion is largely driven by stringent government decarbonization mandates, rising utility costs, and the increasing prioritization of corporate sustainability goals, especially given that the buildings and construction sector accounted for approximately 34% of global energy demand in 2024. However, a significant barrier to widespread adoption is the substantial initial capital expenditure required for green construction and retrofitting technologies, often compounded by the split incentive dilemma where property owners incur costs but tenants benefit from savings, leading to reluctance in funding improvements.

Market Driver

Two primary factors are fundamentally reshaping the market. First, stringent government regulations and building energy codes are mandating higher performance standards and accelerating the phase-out of carbon-intensive assets. Governments are integrating the building sector into climate strategies, enforcing rigorous codes that

target both operational and embodied carbon, shifting from voluntary guidelines to enforceable national frameworks requiring tangible decarbonization pathways. For instance, over 40 countries have utilized the 'NDC Scorecard for Sustainable Buildings' to evaluate climate action plans, creating 16 National Action Plans aligning building policies with 1.5°C pathways by October 2025. This forces commercial property owners to adopt energy-efficient technologies to avoid regulatory penalties and asset devaluation. Second, the retrofitting and renovation of aging commercial infrastructure is a critical driver, necessitated by the urgent need to modernize existing stock that falls short of modern standards, as new construction alone cannot offset sector-wide emissions. Significant capital is targeting deep retrofitting to improve insulation and digital management capabilities, with end-use investment in energy efficiency projected to reach nearly USD 800 billion globally in 2025, reflecting a 6% annual growth. This investment is crucial for addressing the sector's environmental footprint, considering construction materials like steel and cement were responsible for 18% of global emissions in 2025.

Market Challenge

A formidable barrier to the commercial energy-efficient building market's growth is the substantial initial capital expenditure associated with green technologies. Property developers and owners face heavy upfront costs for high-performance materials and integrated management systems, often with extended periods before realizing a return on investment. This financial hurdle is intensified by the split incentive dilemma, where landlords fund efficiency upgrades but tenants enjoy the subsequent lower utility expenses. This disconnect in financial benefit creates a strong disincentive for owners to approve projects, thereby hindering the widespread implementation of necessary retrofits and new sustainable developments. Market data underscores these financial obstacles; global investment in green construction activities reportedly declined by 7% in 2023. This reduction in capital allocation reflects investor hesitation amidst cost concerns, directly impeding the market's ability to scale operations and meet the rising global demand for decarbonized commercial infrastructure.

Market Trends

Two key trends are currently shaping the market. Firstly, accelerated electrification via commercial heat pump deployment is replacing fossil-fuel boilers to decarbonize heating systems. This involves installing high-performance heat pumps that eliminate on-site emissions and operate effectively in diverse climates, driven by regulatory pressure to phase out gas infrastructure and the superior efficiency of electric alternatives.

Manufacturers shipped 32% more heat pumps than gas furnaces in 2024, signaling the industry's decisive pivot toward electrification to future-proof assets against strict environmental codes and volatile fuel prices. Secondly, the widespread adoption of AI-driven digital twins for predictive energy modeling is transforming facility management into a proactive discipline. These systems create virtual replicas of physical buildings, utilizing machine learning to simulate energy usage and identify operational inefficiencies before they impact performance. This technology enables precise, data-backed adjustments that significantly reduce utility costs and carbon footprints without compromising occupant comfort, with 55% of global executives planning increased investment in smart building technologies in the near term to meet rigorous net-zero targets.

Key Market Players

Cleantech Group

Johnson Controls

Ameresco Inc.

Serious Energy Inc.

Knauf Insulation

Architectural Energy Corporation

KMC Controls Inc.

Report Scope

In this report, the Global Commercial Energy-Efficient Building Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Commercial Energy-Efficient Building Market, By Component Type

Ventilation Systems

Lighting Technologies

Energy Management Systems & Controls

Commercial Energy-Efficient Building Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Commercial Energy-Efficient Building Market.

Available Customizations:

Global Commercial Energy-Efficient Building Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Component Type (Ventilation Systems, Lighting Technologies, Energy Management Systems & Controls)
 - 5.2.2. By Region
 - 5.2.3. By Company (2025)

5.3. Market Map

6. NORTH AMERICA COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Component Type

6.2.2. By Country

6.3. North America: Country Analysis

6.3.1. United States Commercial Energy-Efficient Building Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Component Type

6.3.2. Canada Commercial Energy-Efficient Building Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Component Type

6.3.3. Mexico Commercial Energy-Efficient Building Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Component Type

7. EUROPE COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Component Type

7.2.2. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Commercial Energy-Efficient Building Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

- 7.3.1.2.1. By Component Type
- 7.3.2. France Commercial Energy-Efficient Building Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Component Type
- 7.3.3. United Kingdom Commercial Energy-Efficient Building Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Component Type
- 7.3.4. Italy Commercial Energy-Efficient Building Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Component Type
- 7.3.5. Spain Commercial Energy-Efficient Building Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Component Type

8. ASIA PACIFIC COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Component Type
 - 8.2.2. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Commercial Energy-Efficient Building Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Component Type
 - 8.3.2. India Commercial Energy-Efficient Building Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value

- 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Component Type
- 8.3.3. Japan Commercial Energy-Efficient Building Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Component Type
- 8.3.4. South Korea Commercial Energy-Efficient Building Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Component Type
- 8.3.5. Australia Commercial Energy-Efficient Building Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Component Type

9. MIDDLE EAST & AFRICA COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Component Type
 - 9.2.2. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Commercial Energy-Efficient Building Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Component Type
 - 9.3.2. UAE Commercial Energy-Efficient Building Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Component Type
 - 9.3.3. South Africa Commercial Energy-Efficient Building Market Outlook
 - 9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Component Type

10. SOUTH AMERICA COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Component Type

10.2.2. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Commercial Energy-Efficient Building Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Component Type

10.3.2. Colombia Commercial Energy-Efficient Building Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Component Type

10.3.3. Argentina Commercial Energy-Efficient Building Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Component Type

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL COMMERCIAL ENERGY-EFFICIENT BUILDING MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Cleantech Group
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
- 15.2. Johnson Controls
- 15.3. Ameresco Inc.
- 15.4. Serious Energy Inc.
- 15.5. Knauf Insulation
- 15.6. Architectural Energy Corporation
- 15.7. KMC Controls Inc.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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