



Statistics Report 2025



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Executive Summary

Europe's cement and construction markets are stabilising after several years of contraction, but the data makes one thing clear: recovery alone will not secure the sector's future in Europe.

At global level, production dropped below 4 billion tonnes in 2024 for the first time since 2012, driven primarily by a sharp decline in China. At the same time, production continues to expand in other regions, notably India and a group of emerging economies. This is reshaping global competition and reinforcing the importance of a level playing field for European industry.

In Europe, production and consumption trends in 2024 show only marginal declines, confirming a slowdown in the downturn. However, this stabilisation comes in a context where imports have increased and exports have decreased, reflecting growing competitive pressure on EU-based production. This trend directly reinforces the importance of effective carbon leakage measures, including a well-functioning CBAM.

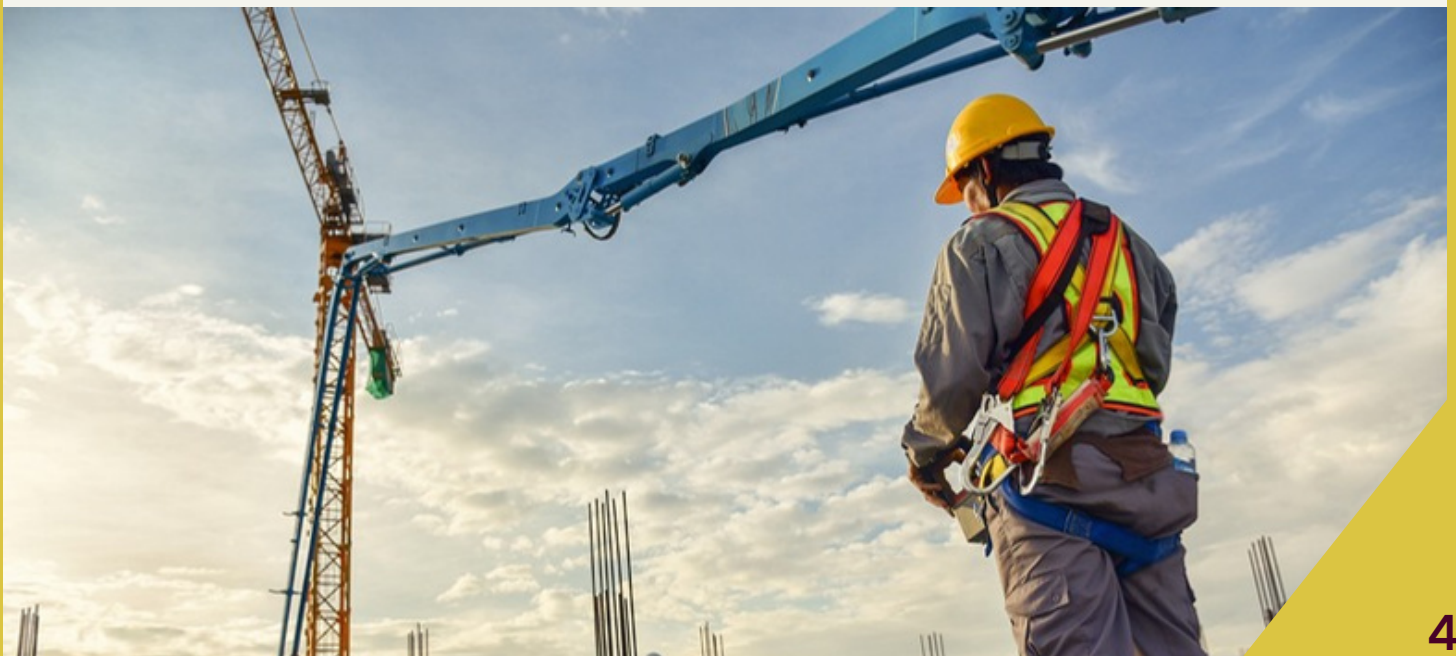
Construction markets are gradually recovering, with civil engineering leading growth and residential construction expected to regain momentum from 2026 onwards.

Demand fundamentals remain strong, particularly for infrastructure, housing and energy systems.

However, the pace of recovery remains constrained by structural challenges, including high energy prices, financing conditions and uneven market developments across regions. These factors continue to affect both demand and investment decisions.

The data presented in this report therefore underpins the key messages of Cement Europe's [2025 Activity Report](#): the transition and recovery of the sector depend on the right framework conditions. Competitive energy, CO2 infrastructure, effective carbon leakage protection, and access to funding are not abstract policy discussions, they are decisive factors shaping production, trade flows and investment in Europe.

This Statistics Report provides the evidence base to support these priorities and to ensure that policy decisions are grounded in market realities.



Cement and Construction Markets in Context

Europe's cement and construction markets are entering a period of stabilisation after several years of contraction, against a backdrop of shifting global dynamics and continued economic uncertainty.

While early signs of recovery are emerging, the pace and scale of this recovery remain closely linked to broader market conditions and policy developments.

Global Cement Production and Demand Trends in G20

Main world producers - The G-20 Group + permanent invitee Spain

Cement production (Million tonnes)

Country	2001	2005	2010	2015	2020	2021	2022	2023	2024
China	661,0	1.079,6	1.881,9	2.350,0	2.376,9	2.362,8	2.118,0	2.022,9	1.840,9
India	102,9	146,8	220,0	270,0	290,0	351,6	387,6	417,7	438,1
EU 28/EU27**	225,6	251,1	192,1	167,2	171,5	182,5	175,8	161,1	160,8
USA	88,9	99,4	65,2	83,4	89,3	93,0	93,0	90,0	85,0
Brazil	39,4	39,2	59,1	72,0	61,1	65,9	63,6	66,5	64,6
Turkey	35,9	42,8	62,7	71,4	72,3	78,9	73,7	81,5	84,8
Russian Federation	28,7	49,5	50,4	69,0	55,8	60,1	60,8	63,0	65,1
Indonesia	31,1	36,1	39,5	65,0	64,8	69,2	69,5	66,9	67,7
South Korea	52,0	49,1	47,4	52,0	47,5	50,4	51,1	51,1	46,7
Japan	79,5	72,7	56,6	55,0	51,1	50,2	48,9	47,7	46,4
Saudi Arabia	20,0	26,1	42,5	55,0	53,4	53,7	52,6	49,0	51,2
Mexico	33,2	38,1	34,5	39,8	41,9	45,2	43,9	48,0	45,6
Germany	32,1	31,9	29,9	31,1	35,5	35,0	32,9	28,2	26,8
Italy	39,8	46,4	34,4	20,8	18,1	20,6	18,8	18,8	19,4
France	19,1	21,7	18,0	15,6	16,7	17,5	16,8	15,4	14,0
South Africa	8,4	12,1	10,9	14,0	13,3	13,4	13,0	13,3	12,5
Canada	12,1	13,5	12,4	12,5	13,0	14,0	13,7	13,7	14,3
Argentina	5,5	7,6	10,4	12,2	9,9	12,1	13,0	12,9	9,5
United Kingdom	11,9	11,6	7,9	9,6	8,0	9,0	8,4	7,7	7,3
Australia	6,8	9,1	8,3	9,3	9,6	9,6	10,1	11,1	10,2
Spain	40,5	50,3	26,2	15,1	16,2	18,6	18,5	17,9	17,9

EU28 until 2019/ EU27 as of 2020 reporting year

Sources: Cement Europe, US Geological Survey, Global Cement Report, country websites

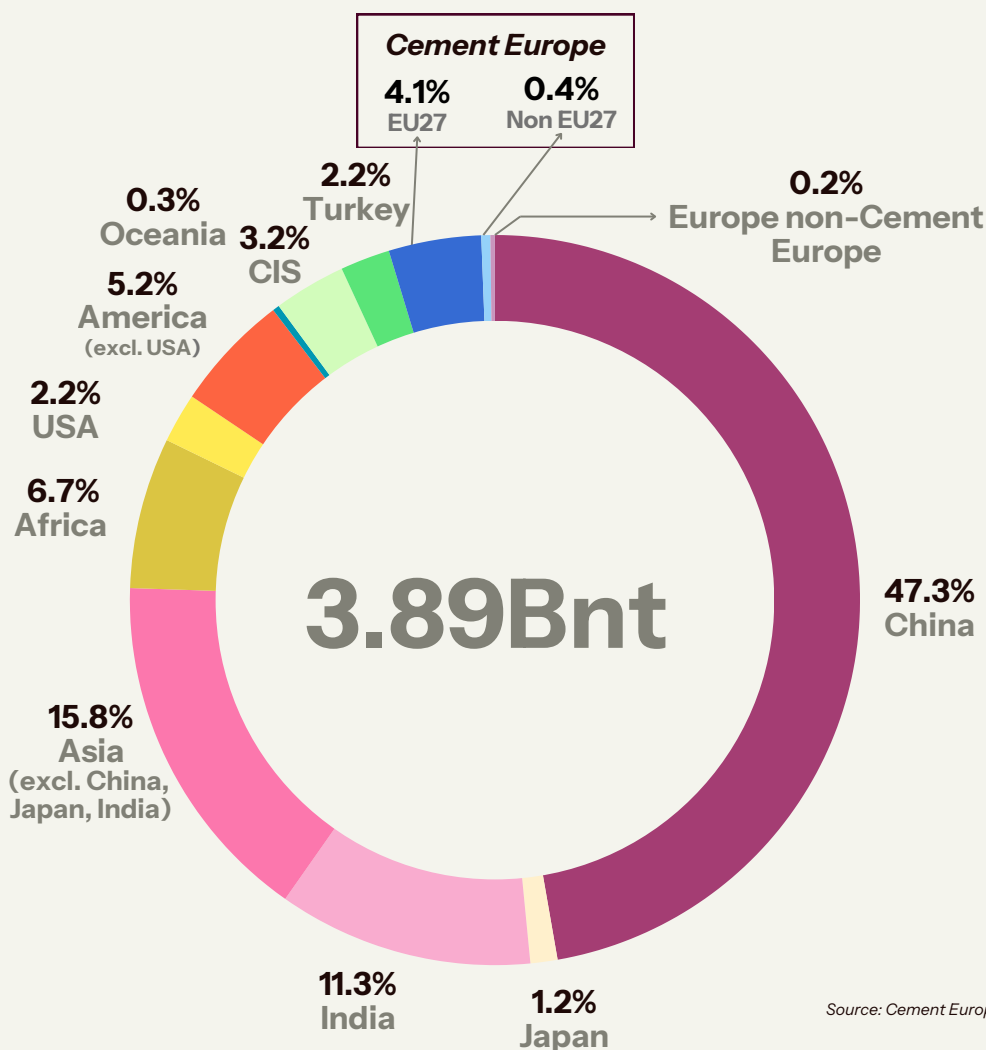
Global cement production in 2024 is estimated at approximately **3.89 billion tonnes**, falling below the 4 billion tonne mark for the first time since 2012. This shift is largely driven by developments in China, where production declined by 182 million tonnes year-on-year, while still accounting for **47% of global output**.

Over the longer term, China's production peaked at around 2.4 billion tonnes between 2010 and 2014 and has since declined to approximately 1.84 billion tonnes. In contrast, India has steadily expanded its production capacity, nearly doubling its output over the same period.

Beyond the G20, which represents around **80% of global cement production**, a group of emerging economies accounted for nearly **9% of global output in 2024**. These include Nigeria (30 Mt), Vietnam (78 Mt), Thailand (26 Mt) and Bangladesh (36 Mt), as well as Iran (75 Mt), Egypt (49 Mt) and Pakistan (40 Mt).

Looking ahead, global demand is expected to stabilise. According to International Cement Review, cement demand in 2025 is projected at **3.87 billion tonnes**, broadly in line with 2024 levels, with Chinese consumption at 1.79 billion tonnes. For 2026, only marginal growth is expected, with risks remaining to the downside.

World cement production 2024, by region and main countries,
% Estimations



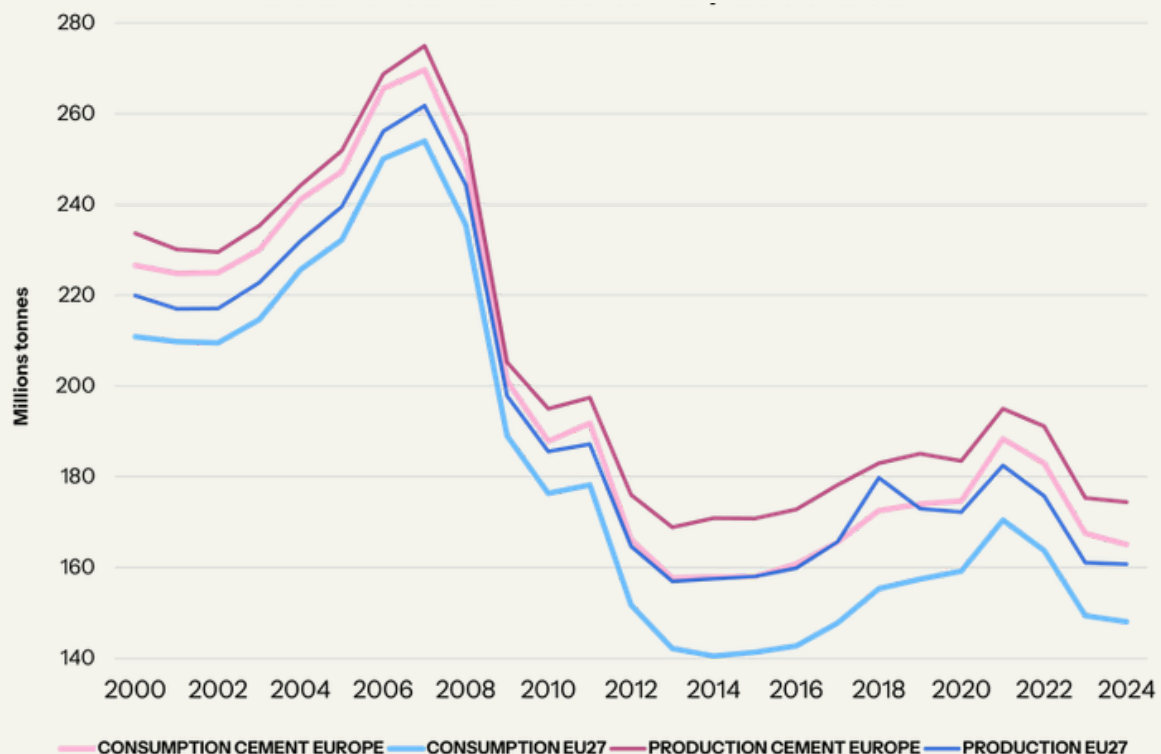
European Cement Market: Production and Consumption

Within Cement Europe membership and the EU27, 2024 reflects a period of relative stabilisation.

Production in the Cement Europe area decreased slightly by **924,000 tonnes to 174.5 million tonnes**, representing a limited decline of **0.5%**. EU27 production followed a similar trend, decreasing by **299,000 tonnes (0.2%)** to reach **160.8 million tonnes**.

Cement consumption across Cement Europe members declined from **167.5 million tonnes in 2023 to 165.1 million tonnes in 2024**, while EU27 consumption decreased by **1.3 million tonnes to 148.1 million tonnes**.

Cement production & consumption
EU27 & Cement Europe / 2000-2024



However, underlying trends vary significantly across countries. While some markets continued to contract, others returned to growth, resulting in a more balanced picture compared to the previous year.

Overall, around half of Cement Europe member countries recorded declining consumption, while the other half experienced growth.

Evolution of cement consumption in Cement Europe countries

Variation 2024/2023 (%)



Source: Cement Europe

This reflects a broader shift: whereas the aggregate decline across regions reached around **8% between 2023 and 2024**, the contraction moderates to approximately **1% between 2024 and 2025**, indicating early signs of stabilisation.

Looking ahead, forecasts from Euroconstruct* for a subgroup of EU16 countries point to a gradual recovery, with cement consumption expected to grow by **2% in 2025**, followed by **3.6% in 2026**, **2.7% in 2027** and **1.7% in 2028**.

Construction Market Overview

Construction activity remains closely linked to broader economic conditions but continues to face structural challenges.

In 2025, total construction output in the Euroconstruct area reached **€2.282 trillion**, representing a modest increase of **0.3% compared to 2024**, while GDP grew by **1.3%** over the same period.

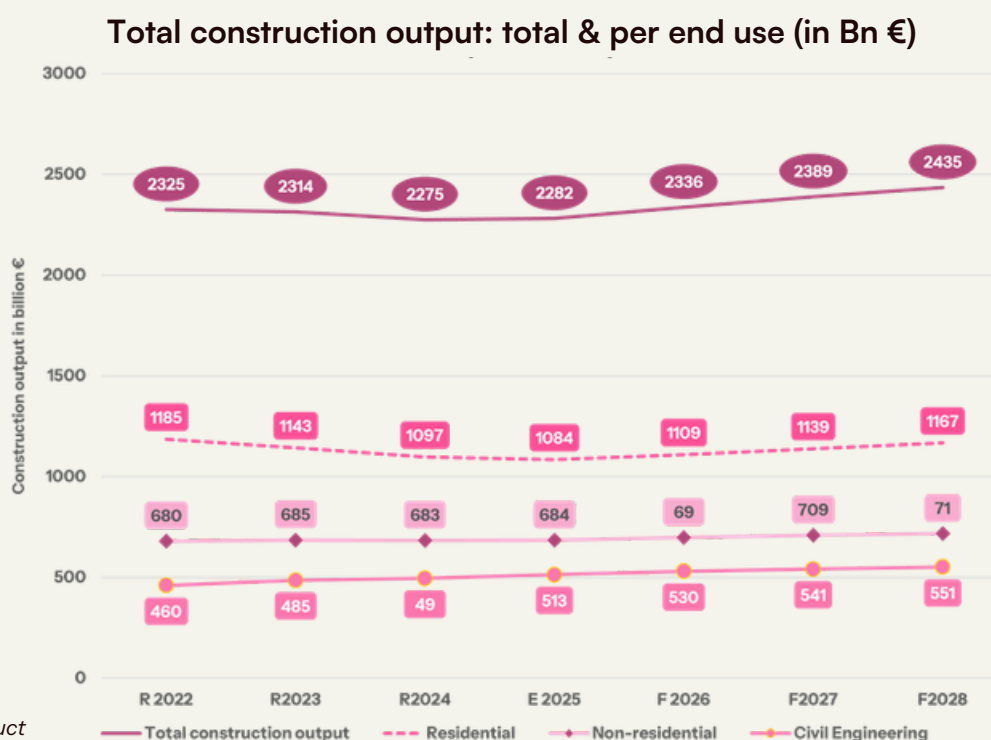
The sector continues to operate under pressure from **high interest rates, inflation and elevated construction costs**, although the situation varies significantly between countries.

Looking ahead, construction activity is expected to gradually recover. In the Euroconstruct area, output is projected to grow by **2.4% in 2026**, followed by **2.2% in 2027** and **1.9% in 2028**, reaching **€2.34 trillion, €2.39 trillion and €2.44 trillion** respectively.

In Eastern and Southeast Europe, outlooks diverge. The Eastern European Construction Forecasting Association (EECFA)** forecasts a more pessimistic trajectory in Southeast Europe, largely driven by fiscal adjustments in Romania. In contrast, the outlook for Eastern Europe remains more positive, with stronger growth expected in Türkiye, continued decline in Russia, and gradual recovery in Ukraine, although large-scale post-war reconstruction is not yet anticipated.

Construction Market by Segment

Across construction segments, 2025 marks a gradual rebalancing.



Civil engineering continues to drive growth, supported by infrastructure investment, while new building construction shows only limited recovery in the short term. Renovation, particularly in the residential segment, remains weaker than in previous years despite its historically stabilising role.

Overall, total building activity declined by **0.7% in 2025**, with residential construction falling by **1.2%**, while non-residential construction grew slightly by **0.2%**. Civil engineering remained the strongest performing segment, with growth of **3.7%**.

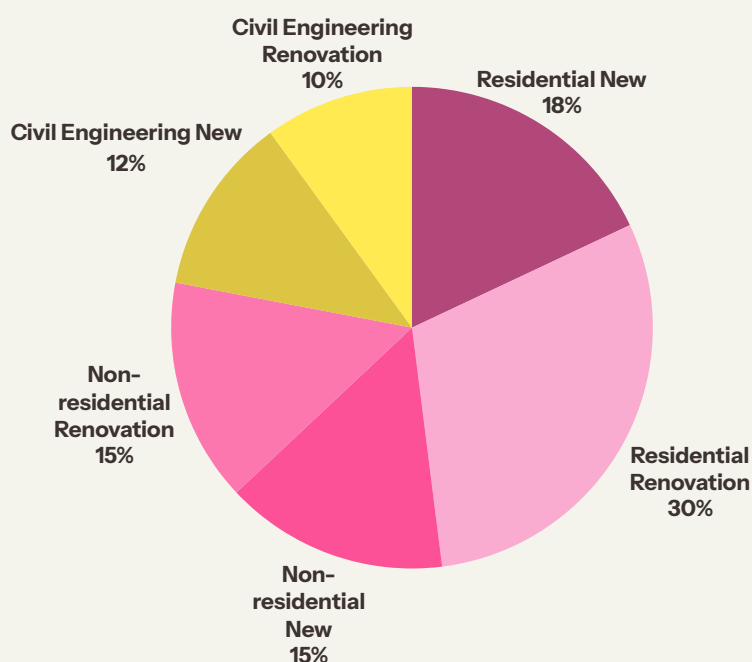
Within residential construction, trends are shifting. New residential buildings returned to modest growth (**+0.3% in 2025**, compared to -8.2% in 2024), while residential renovation declined further (**-2.0% in 2025**, compared to -1.3% in 2024).

Looking ahead, civil engineering is expected to remain the main driver of growth in the near term, with projected increases of **3.3% in 2026, 2.1% in 2027 and 1.9% in 2028**.

At the same time, building construction is expected to regain momentum, with overall growth of **2.1%, 2.3% and 1.9%** over the same period. Residential construction is forecast to grow more strongly (**2.3%, 2.7% and 2.5%**), while non-residential construction is expected to remain more moderate (**1.9%, 1.7% and 1.1%**). By 2027, residential construction is expected to regain a leading role in both volume and growth.

The overall structure of the construction market remains broadly stable, with **33% new buildings, 45% building renovation and 22% civil engineering**. Within residential construction, renovation continues to represent the largest share.

Construction markets by segments in 2024, 33% account for new buildings, 45% for building renovation & 22% for Civil Engineering



Source: Euroconstruct

*Euroconstruct (19 countries), including Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, Czechia, Hungary, Poland, Slovakia

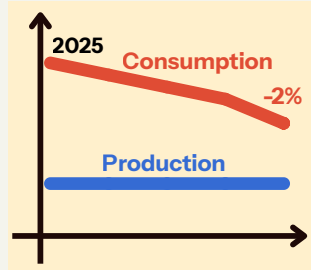
**Eastern European Construction Forecasting Association (EECF), which includes Southeastern Europe (Bulgaria, Croatia, Romania, Serbia, Slovenia) and Eastern European Region (Russia, Turkey, Ukraine).

Country reports



Austria

In Austria, cement production remained broadly stable in 2025 ($\pm 0\%$ year on year), supported by higher exports, while domestic consumption declined by 2%, marking the third consecutive annual decrease. Demand for cement in one- and two-family housing continued to weaken, albeit at a slower pace, while civil engineering remained supported by secure funding.



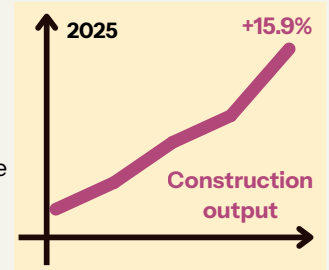
From 2026 onwards, a shift in trends is expected*, with building construction gradually recovering and civil engineering activity moderating. Overall, the prolonged downturn in the construction sector is anticipated to come to an end in 2026, with a modest recovery emerging.



Bulgaria

Based on statistical data, market growth in 2025 is estimated* at around 4.0%.

Total construction output in September 2025 year-to-date increased by 15.9% compared with the previous year, driven by 14.9% growth in buildings, 2.6% in civil engineering and 29.2% in specialised construction activities.



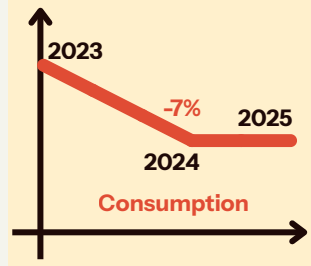
Despite political stability, infrastructure construction did not increase significantly, as efforts to reduce the budget deficit ahead of Euro area accession constrained capital spending. Real estate and residential activity remained strong and continued to drive cement consumption.

In 2026, construction is expected* to remain close to or slightly below 2025 levels, with potential cooling in the real estate market.



Belgium

Between 2023 and 2024, cement consumption declined by 7%, while the first half of 2025 showed signs of stabilisation.



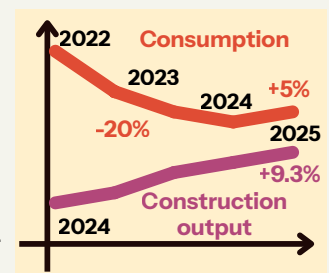
The sharp decrease reflects an unprecedented slowdown in new building construction, only partially offset by 6% growth in infrastructure works. The situation remains challenging, with a record number of contractor bankruptcies in 2025. No significant improvement is expected* in 2026, except for limited positive developments in specific segments. Some encouraging signals point to a potential recovery in 2027; however, infrastructure activity is projected to begin slowing down at that stage.



Czech Republic

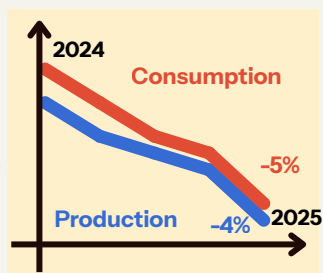
Official data for 2025 is not yet available; however, estimates* indicate that cement consumption increased by approximately 5% compared with 2024, following a decline of up to 20% between 2022 and 2023.

Construction output rose by 9.3% year on year, with building construction up 8.6% and civil engineering up 10.5%. The total value of construction orders increased by 8.8% to CZK 422 billion, despite a 21.4% decrease in the number of orders. Housing starts declined by 2.2% to 35,819 units, while completions increased by 11.5% to 33,742 dwellings.



Denmark

Cement production (-4%) and consumption (-5%) declined compared with 2024, reflecting a slowdown in the second half of the year. A 10–15% increase is expected* in 2026.

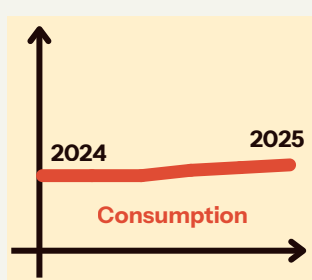


In 2025, investment in residential and commercial construction grew moderately and is expected* to translate into higher production values in 2026. The Fehmarn Belt Link, Denmark's largest infrastructure project, progressed slowly due to postponed permits. Infrastructure activity overall continued to grow, although labour shortages remained a constraint.

The 2026 outlook is positive, particularly for housing and commercial construction. Stricter CO₂ regulations from July 2025 are expected* to further influence demand for low-carbon cement.

Estonia

Cement consumption in 2025 remained broadly in line with 2024, with a slight increase based on 11-month data. Total consumption reached 408 kt in 2024 and 405 kt in the first 11 months of 2025. Exports declined, with the precast sector most affected after ready-mix concrete (RMC). Market activity improved in Q3 and Q4, driven by RMC.

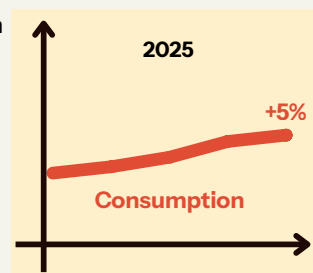


Residential permit applications rose by 38% (number) and 26.9% (thousand m²), while starts fell by 4.9%. Permits for use increased by 4.9% and 7.3%.

In non-residential buildings, applications rose by 1.4%, 13.0% and 2.2%, with starts up 9.3%. Permits for use increased by 9.7%, 29.5%, and 27.1%.

Finland

In 2025, cement consumption is estimated* to have increased by around 5%. Demand growth was primarily driven by non-residential construction (+11%), while new residential construction and civil engineering both showed modest recovery (+2%).

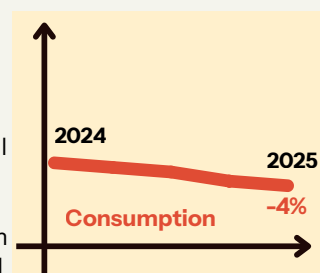


The overall increase in construction output was supported by falling interest rates and a more positive macroeconomic outlook.

In 2026, construction activity is expected* to continue recovering, with further growth anticipated in both residential and non-residential segments.

France

In 2025, France's cement consumption is estimated* to have declined by around 4% compared with 2024. Weak economic growth and political uncertainty weighed on confidence and investment. Despite improved momentum at year-end in both residential and non-residential segments, overall activity remained below the five-year average. Civil engineering activity was broadly stable (-0.4% compared with 2024). End-market indicators were mixed: demand for ready-mix concrete remained negative, while prefabrication stabilised.

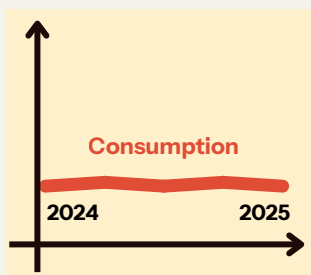


In 2026, consumption could increase slightly, with a potential rebound in building partly offsetting a likely dip in public works linked to the municipal electoral cycle.



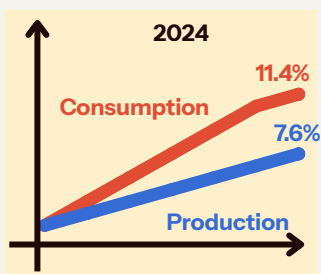
Germany

After losing around one third of its market volume since 2020, the German cement market most likely reached its lowest point in 2025, with consumption remaining at a similar level to 2024. Construction policy developments were encouraging, as a new federal government committed to improving framework conditions, particularly for residential construction and infrastructure. Parliament approved a EUR 500 billion special fund for infrastructure, to be invested over 12 years. As a result, cement consumption is expected to increase again in the coming years.



Greece

The Greek economy expanded by 2.0% in 2025, with 2.2% growth expected* in 2026. Construction activity moderated slightly, with new building permits declining by 2.4% and total building surface decreasing by 7.1%.



In 2024, cement production increased by 7.6%, domestic consumption by 11.4%, and clinker and cement imports by 9.0% compared with 2023.

Inflation declined to 2.4% but remained above the EU27 average. Electricity costs for energy-intensive industries continued to exceed the EU average.

Prospects for 2026 remain positive, with public and private investment expected* to grow by more than 10%.



Hungary

In 2025, Hungary's economic growth remained below 1%, while inflation and high interest rates constrained investment. Construction output was volatile, declining in some months and increasing in others. In the second half of the year, total construction volume was 2.5–9.7% higher year on year; in October, building construction rose by 14.7% and civil engineering by 3.7%, following a decline of around 9% at the beginning of the year.



The cement sector faced stagnant demand, strong import competition, and high energy and transport costs. Emergency government measures, including additional taxes and a ban on refuse-derived fuel imports, further constrained operations and green investments. The 2026 outlook is cautiously more positive.



Ireland

Housing completions increased in 2025 to 36,284, the highest level in recent years. The government has committed to delivering 300,000 new homes between 2025 and 2030 and has introduced reforms to support supply and remove barriers to delivery. These measures were complemented by a new Housing Action Plan published in November 2025, broadly welcomed by industry, and an Accelerating Infrastructure report and action plan published in December. The latter aims to fast-track projects under the revised National Development Plan, which includes increased investment commitments.



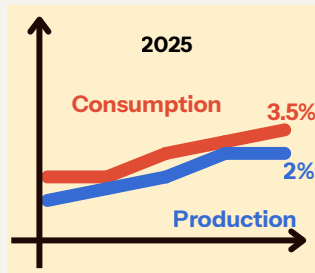
Italy

Italy's cement market in 2025 is expected* to expand modestly, with production up 2% and consumption up 3.5%, based on forecasts.

Construction activity showed a clear divergence: residential investment, particularly in extraordinary maintenance, declined, while non-residential activity strengthened, driven by public works.

Public procurement increased in both the number and value of tenders, supported by NextGenerationEU projects, with around half of available funds allocated to construction.

For 2026, a broadly similar and slightly positive trend is expected*, again led by public investment in public works.

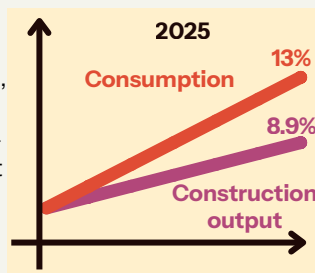


Latvia

Construction output increased by 8.9%, driven by a 28.8% rise in civil engineering, while residential and other construction remained at 2024 levels. Uncertainty and interest rates continued to constrain recovery in the residential segment. Power infrastructure investment supported overall growth.

Cement consumption increased by around 13% year on year. Domestic production grew more moderately, as imports rose by approximately 25%. Exports increased by 15%, supported by recovery in Nordic markets and Estonia.

The 2026 outlook is cautiously positive, with GDP forecast at +2.5% and continued support from wind energy and defence-related infrastructure.

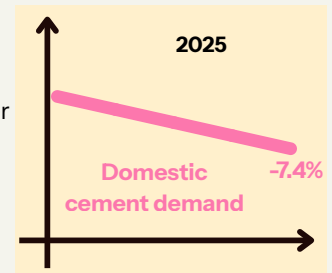


Lithuania

In 2025, domestic cement demand decreased by 7.4% compared with 2024, mainly due to lower investment in residential construction.

Overall construction activity increased by 2.4% year on year. Engineering structures accounted for 55.3% of total construction output, followed by non-residential buildings (37.5%) and residential buildings (7.2%).

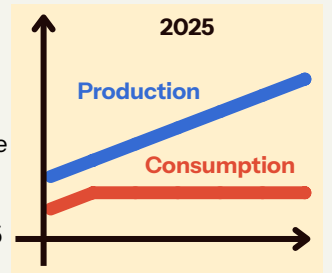
Looking ahead, domestic cement sales are expected* to remain at a similar level in 2026, supported by relatively stable demand for engineering construction works.



Luxembourg

In 2025, cement production increased compared with 2024 due to higher export volumes, while domestic consumption remained stable at a low level. Following a nearly 40% decline in residential activity, early 2025 showed signs of stabilisation, supported by stable interest rates and infrastructure investment offsetting private sector weakness.

In 2026, the sector is expected* to stabilise while undergoing significant transformation. New European climate policies, the operational entry into force of the CBAM, decarbonisation requirements and persistent labour shortages will shape market conditions.



The Netherlands

In 2025, the cement market is expected* to have grown by around 3%, according to the cement federation and import trends. Growth was mainly driven by the residential segment, although the number of completed dwellings was lower than previously anticipated.



The non-residential segment was negatively affected by global uncertainty, impacting the internationally oriented Dutch economy.

In 2026, further growth is expected*, supported by a new government aiming to ease permitting procedures and facilitate the issuance of additional building permits.

Norway

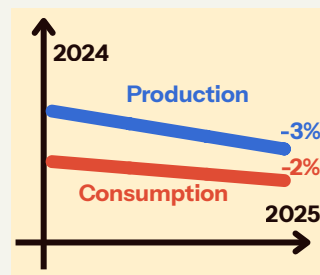
Building activity in housing and commercial sectors declined during 2025 but stabilised towards year-end. New-build activity remained subdued due to high interest rates and weak demand, with gradual recovery expected* in 2026. Civil



engineering remains the strongest segment, supported by infrastructure projects and increased public and defence investment. Residential recovery is unlikely before 2027.

Poland

In 2025, cement production declined by 3% year on year and consumption by 2%, partly due to increased imports. Construction output fell by 1.5%. Residential construction decreased by 1%, with housing starts down over 9%, reflecting market correction and weak



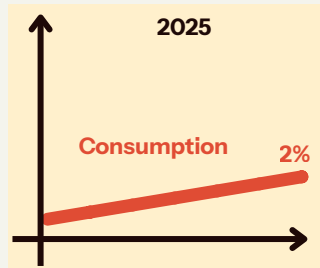
demographics. Non-residential activity declined by 2%, affected by geopolitical uncertainty and structural changes in office and logistics demand. Civil engineering fell by 1% due to delays in EU-funded investments.

Despite this, prospects for 2026 remain optimistic, supported by major infrastructure projects, EU and national recovery funds, high industrial CAPEX and new defence investments.

Portugal

Cement consumption increased by 2.0% in 2025.

GDP grew by 1.9% in 2025 and is projected to accelerate to 2.3% in 2026. Despite trade tensions, uncertainty and euro appreciation, growth remained supported by easing financial conditions, increased EU funds and expansionary fiscal policy.



Construction activity rose by 4.1% in 2025, driven by civil engineering (+5.5%), while residential buildings grew by 4.0% and non-residential buildings by 1.0%.

In 2026, cement consumption is expected* to increase by 7.4%, alongside 4.4% growth in construction, led by civil engineering (+5.5%), residential (+4.4%) and non-residential (+2.0%).

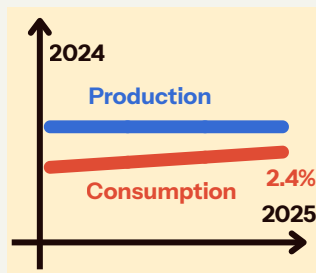
Romania

According to the National Institute of Statistics, cement production in 2025 remained at the 2024 level, while consumption increased by 2.4%.

Construction output rose by 8.0%, driven by capital repairs (+45.6%) and new construction (+5.5%), while maintenance works declined by 4.2%. Growth was recorded across all segments: non-residential buildings (+13.0%), residential buildings (+11.4%) and civil engineering (+4.5%).

The acceleration was largely supported by budget disbursements for investment projects and private sector activity ahead of new fiscal measures.

In 2026, Romania is expected* to record 1.0% economic growth, with construction remaining dynamic, supported by EU-funded infrastructure projects.

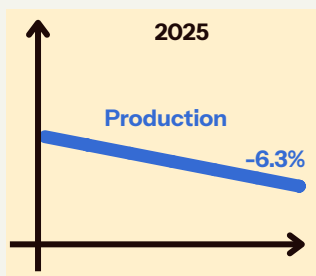


Serbia

Cement production in 2025 decreased by 6.3%, while imports increased by almost 23% compared with 2024.

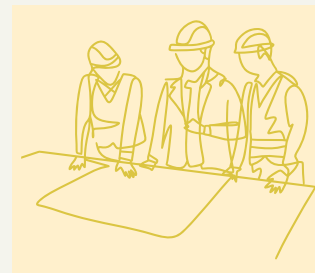
Construction activity declined significantly. Although residential building value showed some growth, civil engineering, including roads, pipelines and industrial structures, fell by more than 26% in the first half of the year. Regional disparities persisted: activity outside the capital weakened, while Belgrade grew by over 19%, supported by large-scale projects such as EXPO 2027 and Belgrade Waterfront.

In 2026, the construction sector is expected* to continue lagging behind the broader economic recovery.



Slovakia

Slovakia experienced a significant decline in cement sales in 2025 compared with 2024, mainly due to weaker exports, as approximately 50% of domestic production is exported.

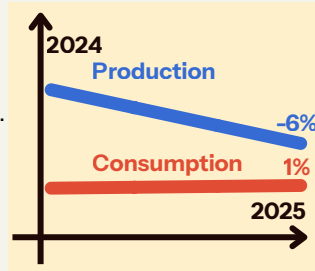


Civil engineering was the main growth driver, expanding by 5%, while the residential segment remained very weak. Non-residential construction recorded moderate growth.

Prospects for 2026 are subdued. The market is not expected* to expand, and major civil engineering projects remain insufficiently prepared for short-term implementation.

Slovenia

In 2025, cement production in Slovenia declined by 6% compared with 2024, while consumption increased by 1%. Construction activity showed modest recovery, with projected output growth of 0.7%, supported by EU-funded infrastructure and renewed growth in building permits (+2%).



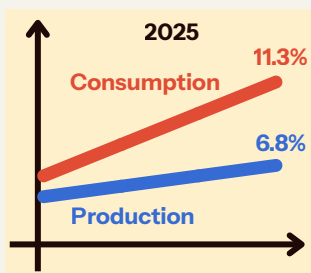
The sector continues to face labour shortages, high material costs and weaker demand for new, higher-priced housing in certain segments. Nevertheless, investment is expected* to strengthen, driven by elevated government spending and increased residential investment.

The value of construction in the first eleven months of 2025 was 10% higher year on year, mainly due to non-residential and specialised construction activities.



Spain

In 2025, preliminary data* show that cement consumption in Spain increased by 11.3% to 16.58 Mt, while production rose by 6.8%. Civil engineering tendering grew by 11.7%, with new housing units authorised up 7.7% and authorised non-residential floor area increasing by 8.5%.



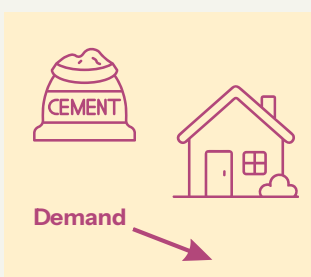
Cement and clinker exports declined by 10.1% to 4.49 Mt, and Spain lost its position as the EU's leading exporter to Germany. Imports increased by 38.8% to 2.01 Mt, including 1.32 Mt of clinker (+68.8%). Compared with 2016, exports have halved while imports have increased sixfold.

Oficemen forecasts growth of 3% in 2026.



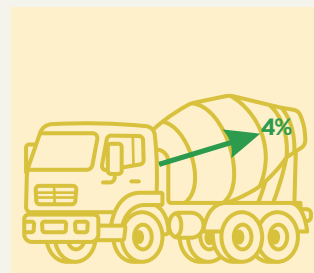
Sweden

Cement demand declined in 2025 due to weaker housing and commercial activity, though conditions stabilised towards year-end. Markets are expected* to strengthen in 2026. Residential remains weakest, while non-residential and civil engineering activity are set to grow, supported by infrastructure and public investment.



Switzerland

After a challenging 2024, Swiss cement deliveries stabilised during the year and reached a 4% increase by the end of 2025. Cement production primarily serves domestic demand, with total consumption amounting to 4,217,181 tonnes.



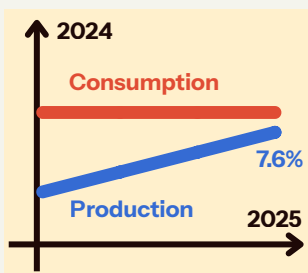
Construction activity increased moderately in 2025, supported by favourable interest rates that stimulated residential construction. Infrastructure development remained challenging, with delays and resizing of major projects.

Global economic uncertainty, particularly regarding trade policy, limits visibility for 2026. Nevertheless, a moderate increase in construction activity is expected*, which would have positive effects on the cement sector.



Ukraine

In 2025, cement production in Ukraine reached 8.5 million tonnes, 7.6% higher than in 2024 but 22.5% below the pre-war level of 2021. Cement consumption remained stable at 6.5 million tonnes.



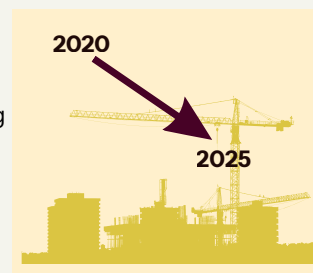
Construction output increased by 12% in 2025. Non-residential construction grew by 27.4%, representing 32.7% of total output, while residential construction increased by 13.6% (13.4% share). Civil engineering expanded by 3.6% and accounted for 54% of total activity.

Under wartime conditions, infrastructure and defence-related projects remain the only sustainable drivers of construction demand.



United Kingdom

Using ready-mixed concrete sales as a proxy for cement demand, UK volumes fell by a further 9.9% in 2025, following a 60-year low in 2024. Reports point to the fastest decline in construction activity since 2020, driven by economic uncertainty, regulatory constraints, and planning delays. Weak new housing, commercial and infrastructure activity reflects a persistent shortage of new work.



Project delays, rescoping, and cancellations have increased amid rising cost pressures and subdued economic conditions. With unemployment rising and confidence remaining fragile, recovery is expected* to be gradual, with construction output forecast to grow by only 1.7% in 2026.

* The data is an estimation as the official data for 2025 was not yet available at the time of collection of this input.





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