



European Contractor Monitor H1-2023

Sustainability and Circularity

July 2023

About European Contractor Monitor

THE GOAL

To get a picture of the economic situation in the construction market among contractors on a European scale and to get insights into the usage of prefabricated solutions by main contractors. This research is done bi-annually, with registered contractors divided over the 8 major European markets.

THE RESEARCH TOPICS

Recurring topic: Economic developments of construction companies in Europe (order book and turnover development)

Bi-annual theme topics in 2023:
H1: Sustainability and Circularity
 H2: Purchase Channels

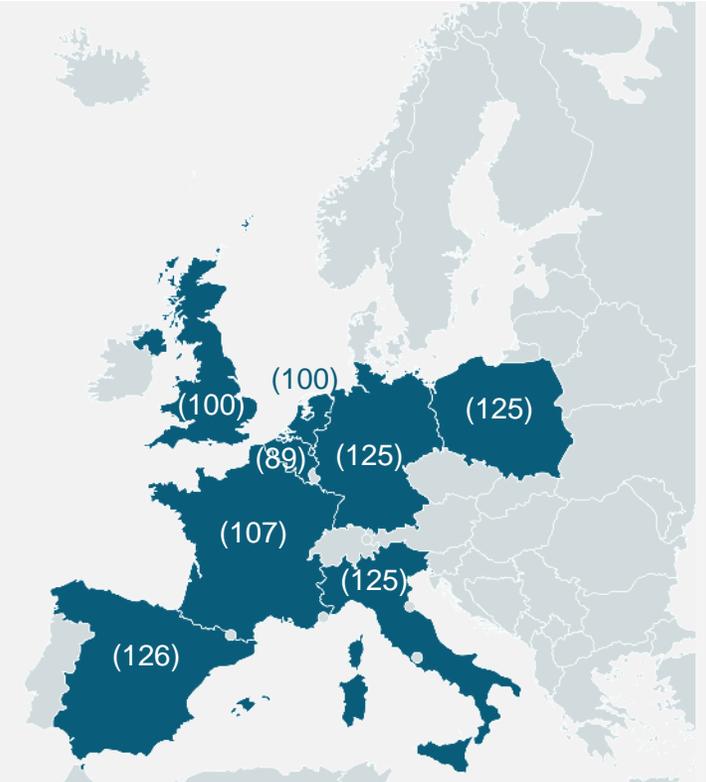
THE TIMELINE



COUNTRY SCOPE

Total of 897 Phone interviews

Background characteristics of the interviewed respondents can be found in [the country-specific profiling the contractor chapter](#).



PROJECT TEAM



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About target group & methodology



Surveying construction companies...

Mid-sized (5 to 15 employees) and **large** (more than 15 employees) building contractors who are active both in residential and non-residential segments are interviewed. Most interviews are conducted with owners/ directors, with purchasers, with BIM managers or with construction site/ project managers of these companies.

... selected from a country-representative database

USP possesses an **international database of construction companies**, which is constantly updated. Therefore, respondents are not part of a fixed panel; the sample varies from wave to wave.

... through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient sample in order to provide insights that can be relied upon. These phone calls are made **by fixed fieldwork partners, located in the respective countries.**

... centralised and continuous quality control

Results in each country are monitored by the USP project team throughout the fieldwork period. We implement our extensive experience in order to **make sure the answers are of high quality and provide the insights that meet the goal of the project.**

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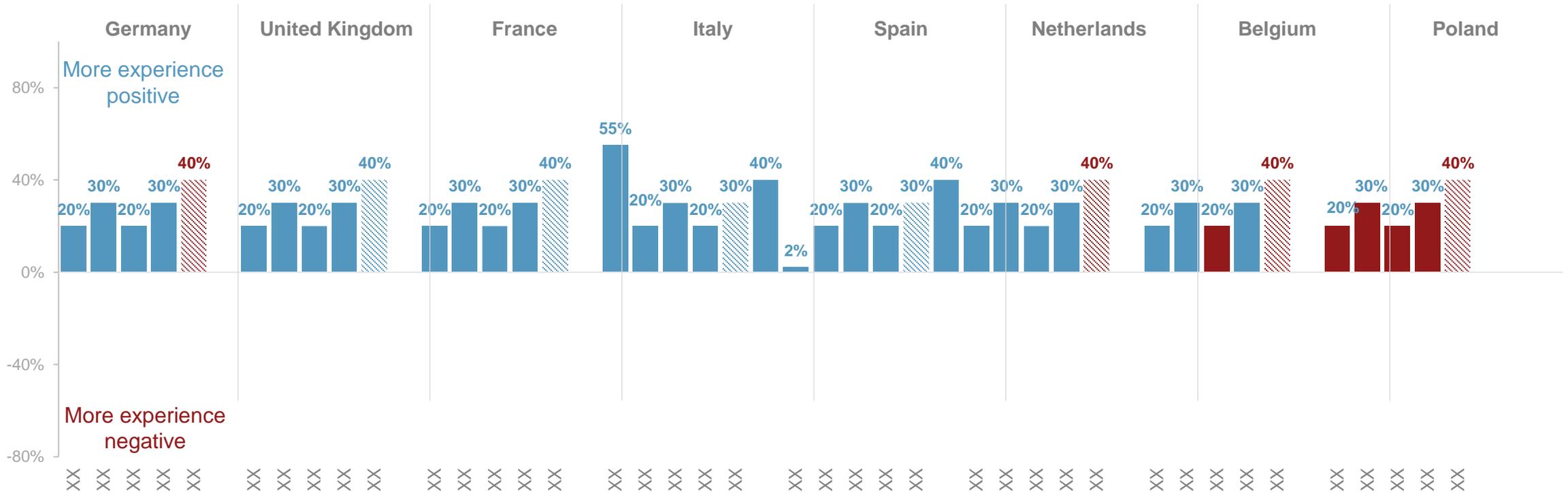


Turnover development

Most countries experienced a XX

Net share regarding turnover

If you compare your turnover of XX to XX, how did your turnover develop?



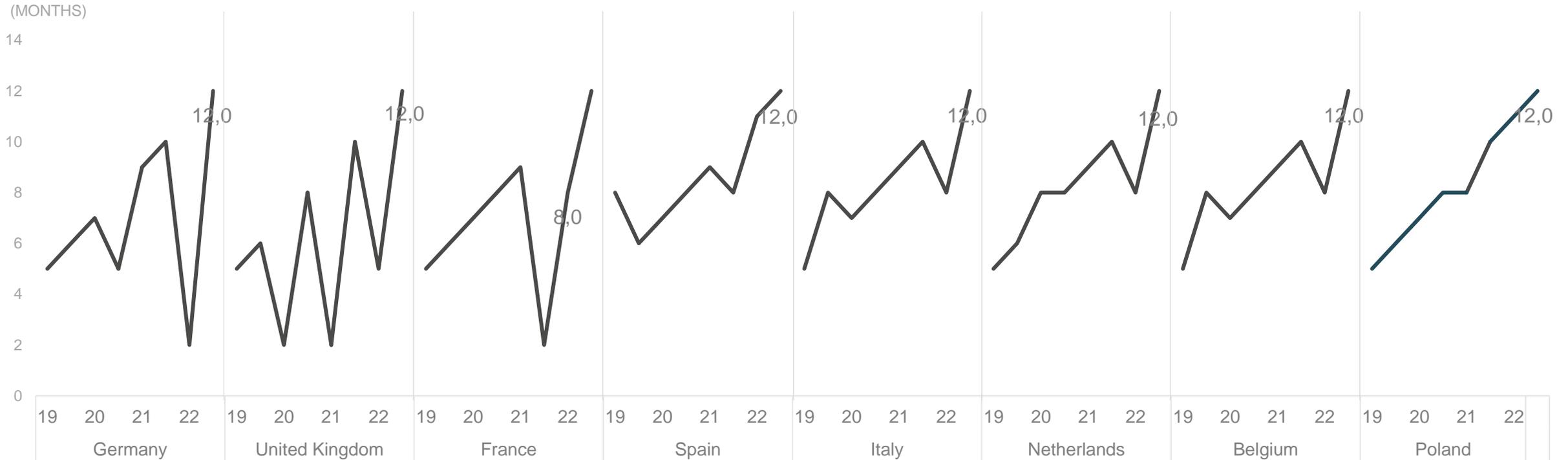
Base: n=XX

Order portfolio

Order books XX

Order portfolio

Question:



Base: n=XX

Labour shortage

In general, xx % of European respondents stated that there is some or extreme labour shortage in their countries. The smallest labour shortage is seen in xx, while the biggest is seen in xx and xx.

Labor shortage

To what degree do you face labour shortage for this year in your company?

		Not at all	A little bit	Moderate	Some	Extreme	Total some or extreme shortage
Total	N=897	20%	20%	20%	20%	20%	xx%
UK	n=100	20%	20%	20%	20%	20%	xx%
Germany	n=125	20%	20%	20%	20%	20%	xx%
France	n=107	20%	20%	20%	20%	20%	xx%
Spain	n=126	20%	20%	20%	20%	20%	xx%
Italy	n=125	20%	20%	20%	20%	20%	xx%
Netherlands	n=100	20%	20%	20%	20%	20%	xx%
Belgium	n=89	20%	20%	20%	20%	20%	xx%
Poland	n=125	20%	20%	20%	20%		xx%

*Results are weighted: Actual N = 897

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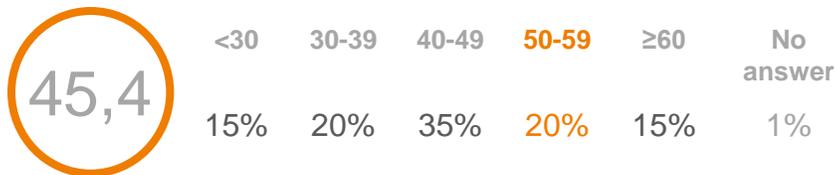
Background characteristics

Company profile

How many **full-time employees** does your company have?



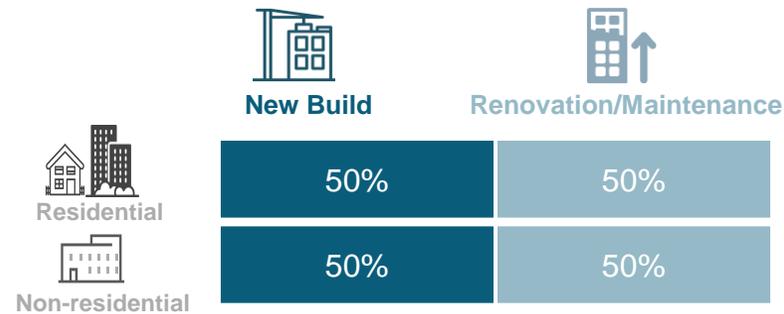
Average age



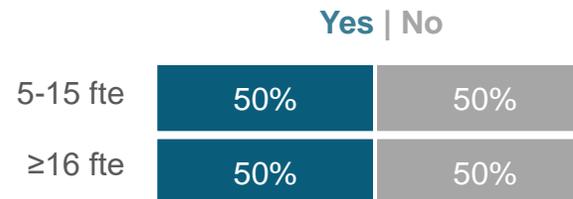
Base: n=XX

Project segmentation

What percentage of XX do you get XX?



Does your company develop and build projects themselves?

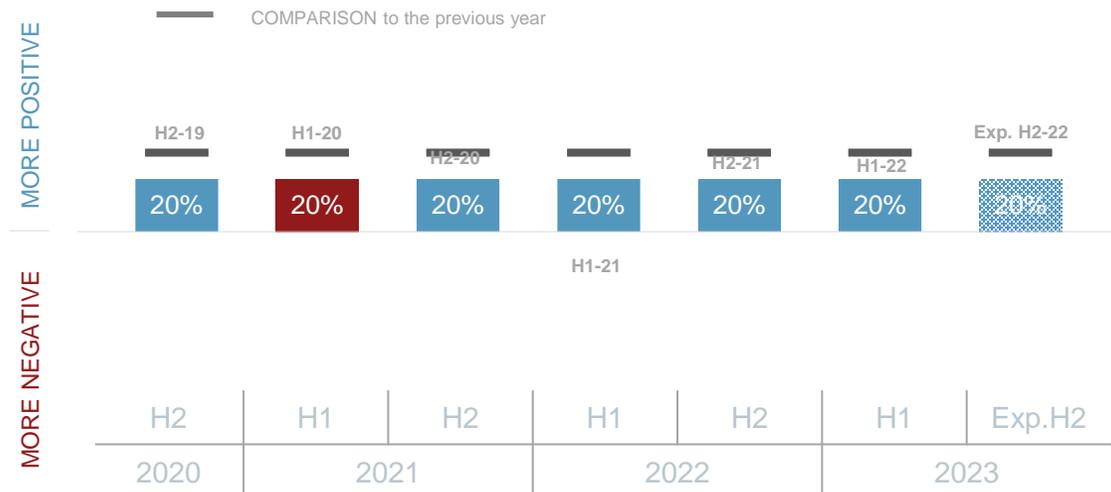


Germany experiences XXX half year compared to the previous half year

Net share of contractors' experience regarding turnover

If you compare your turnover of **H1-23 to H1-22**, how did your turnover develop?
 What are your **expectations** for the development in **H2-23 compared to H2-22**?

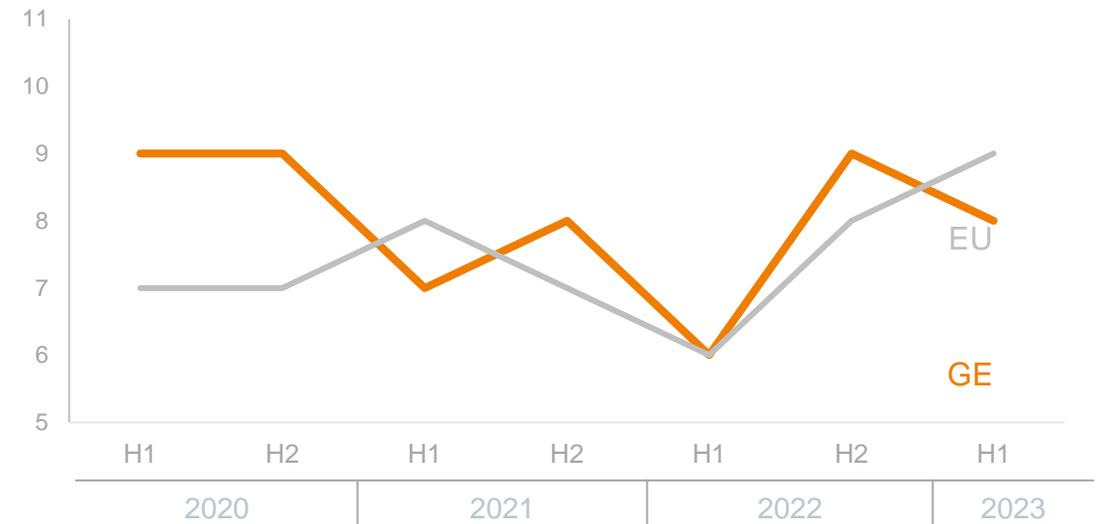
(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)



How big is your **current order book** portfolio?

For how many months will you be able to keep your current staff working?

ORDER BOOK (MONTHS)



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XX best describe sustainable construction.

According to contractors, xx is the most important characteristic of the circular economy in the construction sector.

Sustainability

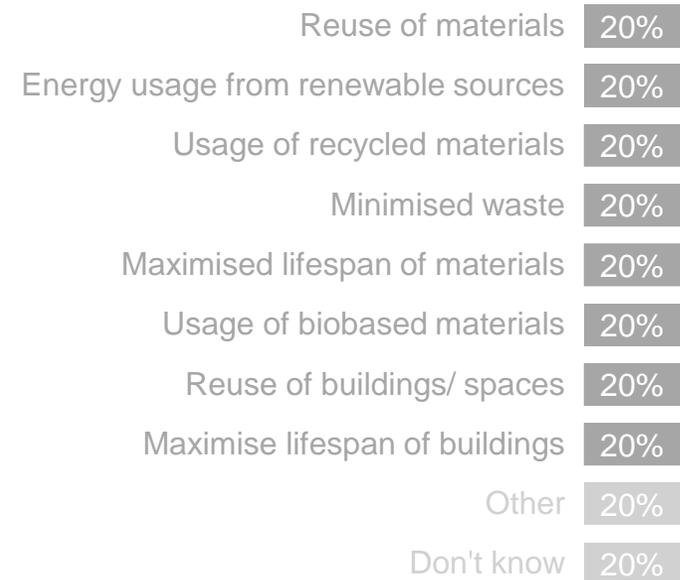
What describes sustainable construction best according to you?



Base: n=XX

Circularity

What do you think are the most important characteristics of circular economy in the construction sector?



Base: n=XX

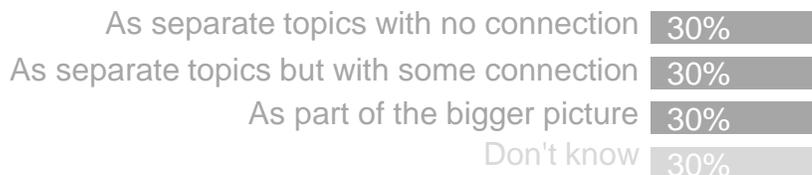
XX are the most influential in promoting sustainable building construction.

Clients usually xx for sustainability. Circularity and sustainability are often seen as xx.

Which stakeholders/ parties do you think are the most influential in promoting sustainable building construction?

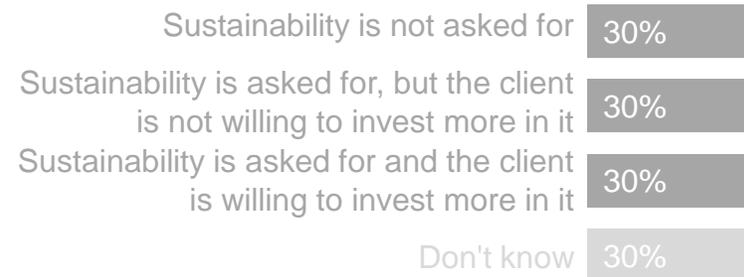


How does your organization see the connection between circular construction, CO₂ reduction, energy efficiency and sustainability?



Base: n=XX

To what extent do your clients ask for sustainability and are they willing to invest more in it?

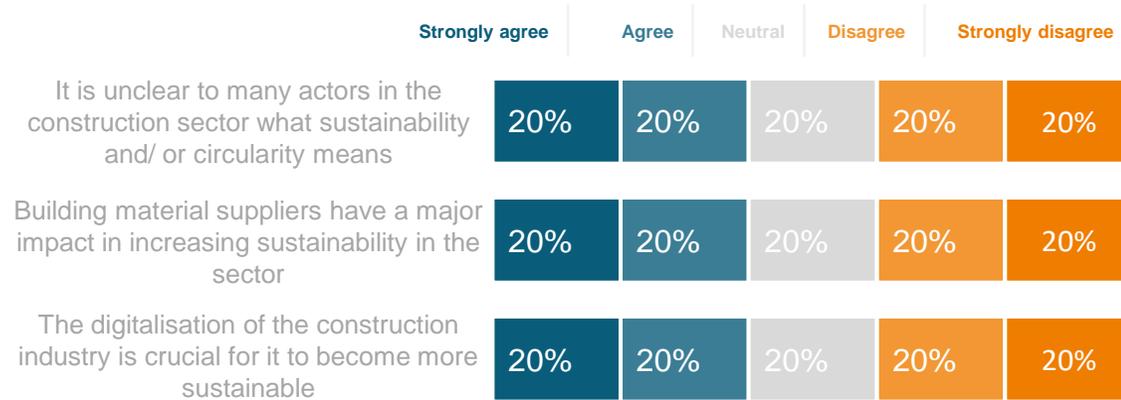


Base: n=XX

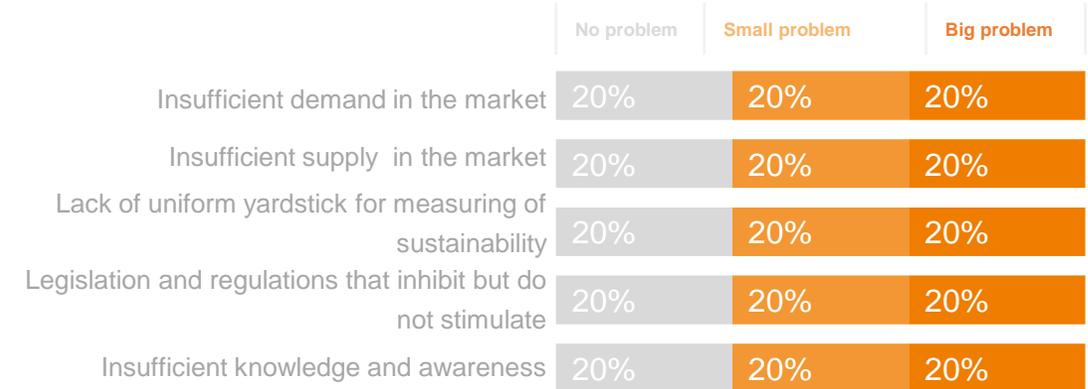
XX have biggest impact on increasing sustainability.

XX is/are seen as one of the biggest problems for the transition to a sustainable and circular construction sector, along with xx. The latter observation is also reflected in the statement xx.

To what degree do you disagree or agree with the following statements?



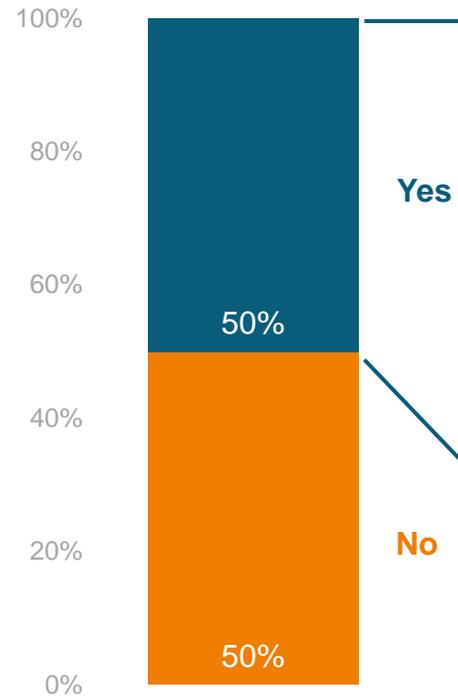
To what extent do you see the following issues as a problem for the transition to a sustainable and circular construction sector?



Generally, respondents are xx with the term ‘material passport’.

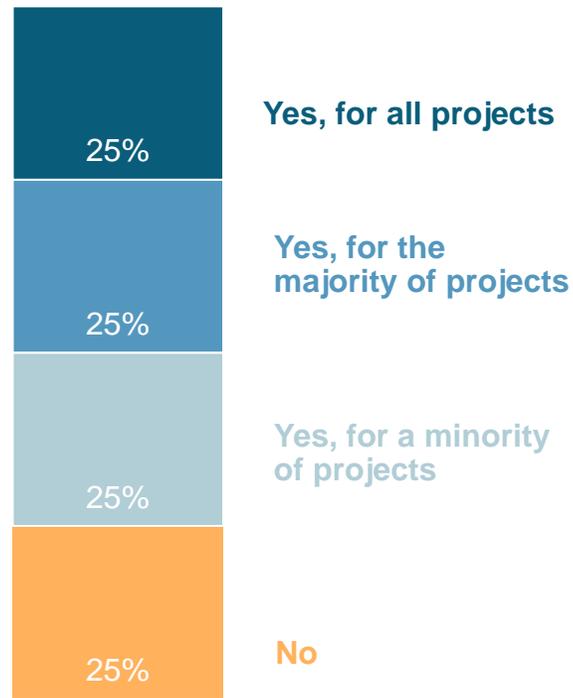
If they are familiar, % of contractors use the material passport. It is positive/negative/neutral to see that xx.

Are you familiar with the term „Material passport“?



Base: n=XX

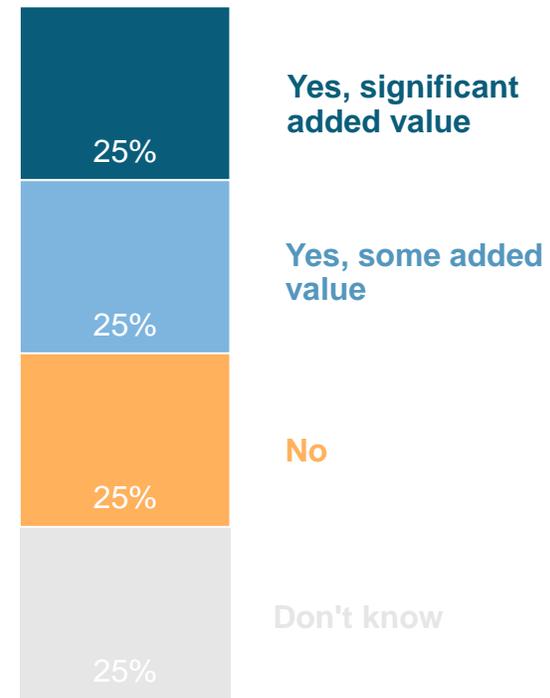
Does your organization make use Material passport?



Base: n=XX

*Note: This question was asked only if respondent is familiar with term.

Do you think that Material passport offers added value for implementing in your own projects in a more circular way?



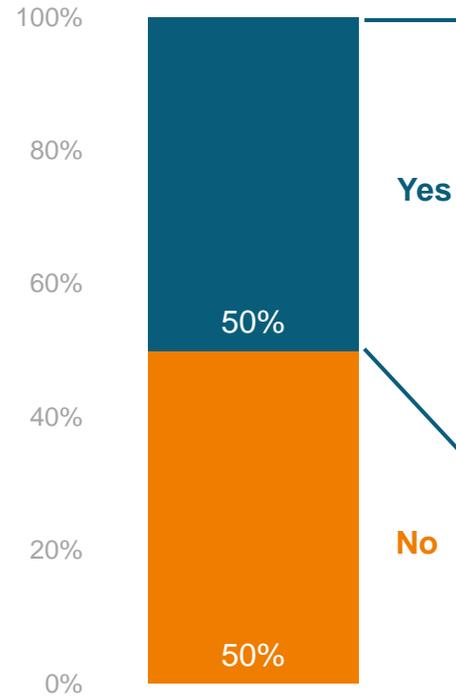
Base: n=XX

*Note: This question was asked only if respondent is familiar with term.

Generally, respondents are xx with the term 'urban mining'.

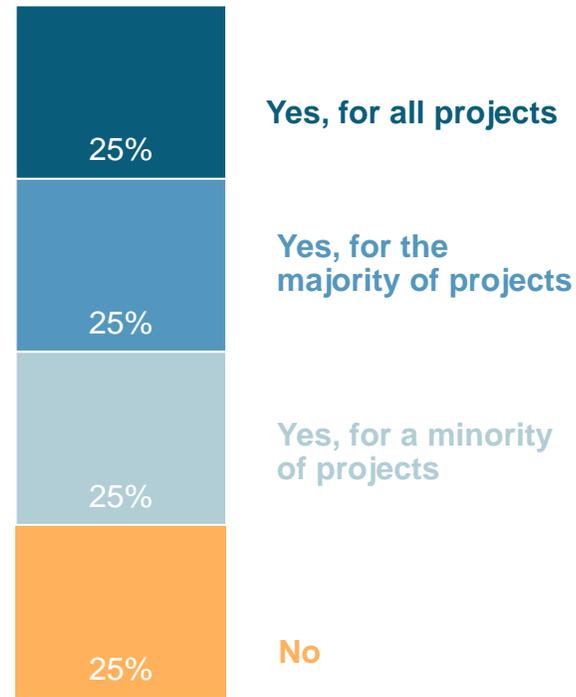
& of the ones that are familiar with urban mining are using urban mining.

Are you familiar with the term „Urban mining“?



Base: n=XX

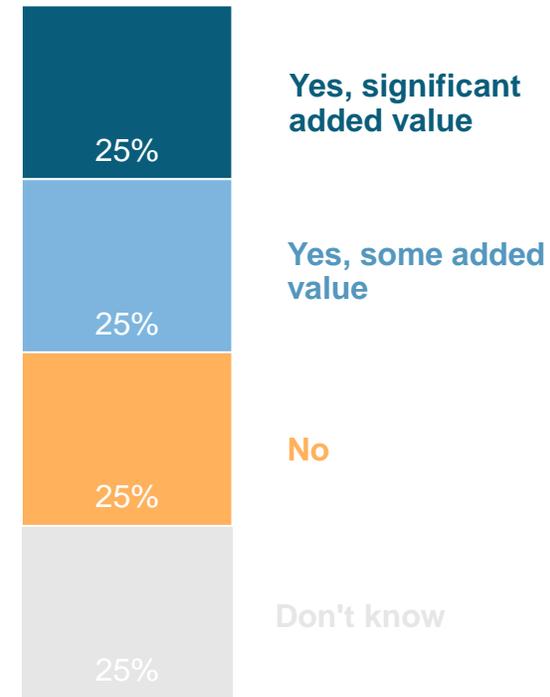
Does your organization make use Urban mining?



Base: n=XX

*Note: This question was asked only if respondent is familiar with term.

Do you think that Urban mining offers added value for implementing in your own projects in a more circular way?



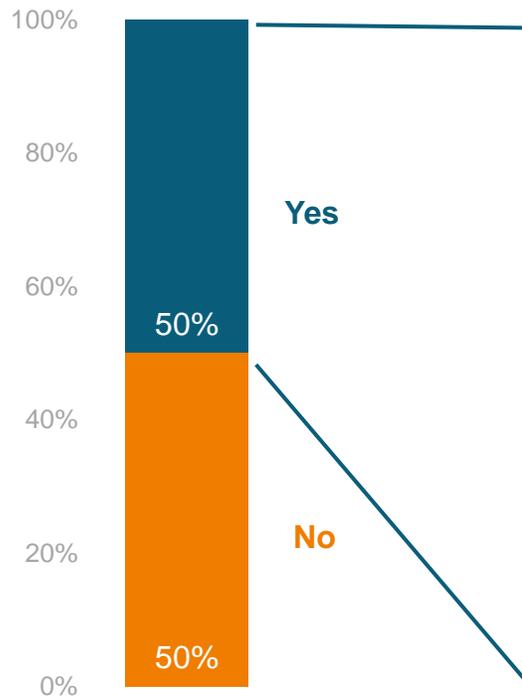
Base: n=XX

*Note: This question was asked only if respondent is familiar with term.

Generally, respondents are xx with the term 'EPD'.

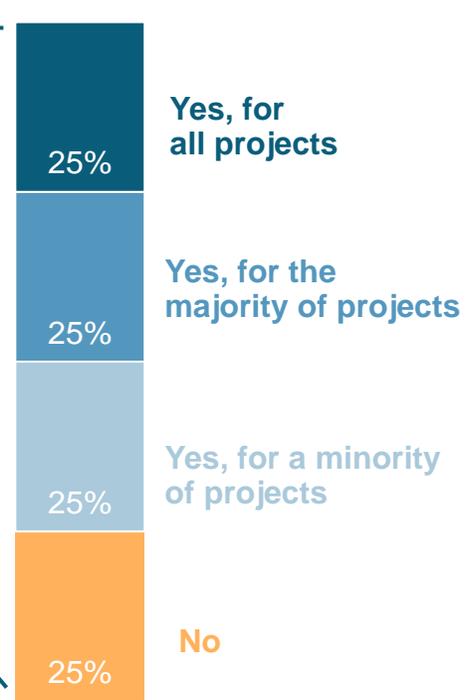
Compared to the other two terms, we do see that xx. The main reason for contractors not working with EPDs is because xx.

Are you familiar with the term 'EPD'?



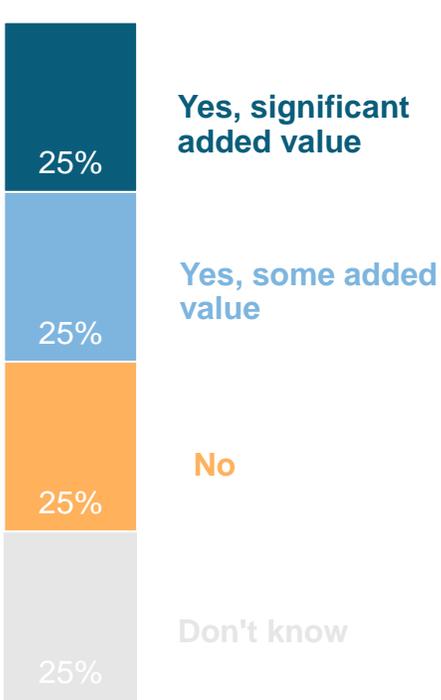
Base: n=XX

Does your organization make use of EPDs?



Base: n=XX
 *Note: This question was asked only if respondent is familiar with term.

Do you think that EPDs offer added value for implementing in your own projects in a more circular way?



Base: n=XX
 *Note: This question was asked only if respondent is familiar with term..

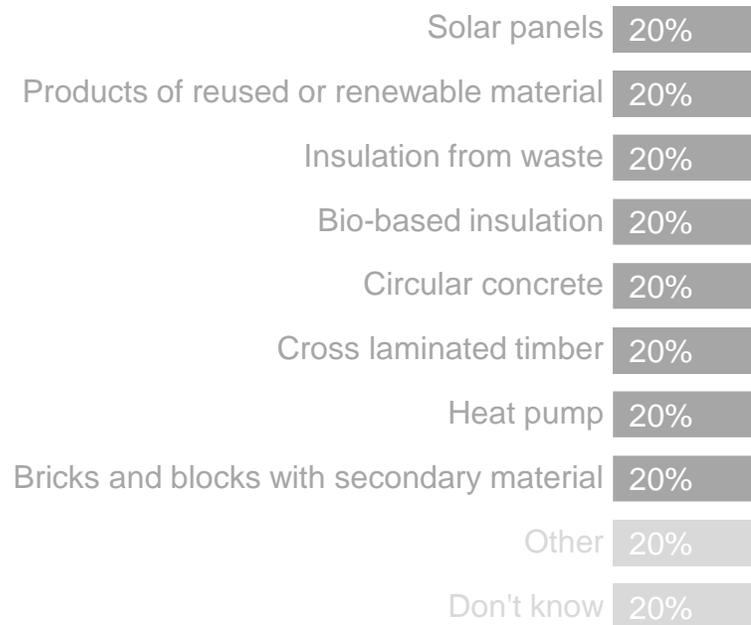
Why is your organization not working (more) with EPDs?



Base: n=XX
 *Note: This question was asked only if a respondent's organization not uses EPD at all or for a minority of projects.

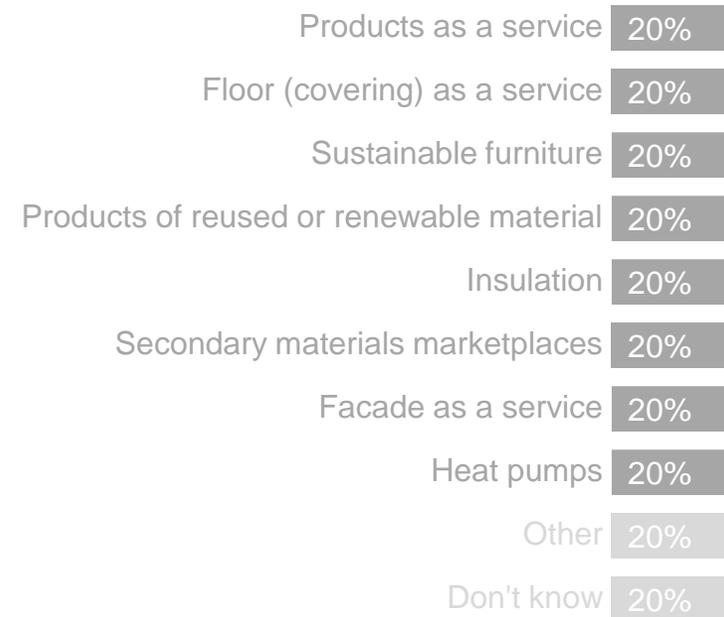
Generally, xx% know innovative product solutions and services regarding sustainable and circular construction.

What are innovative **product solutions** with regard to sustainable and circular construction that are already being used?



Base: n=XX

What are innovative **product services** with regard to sustainable and circular construction that are already being used?

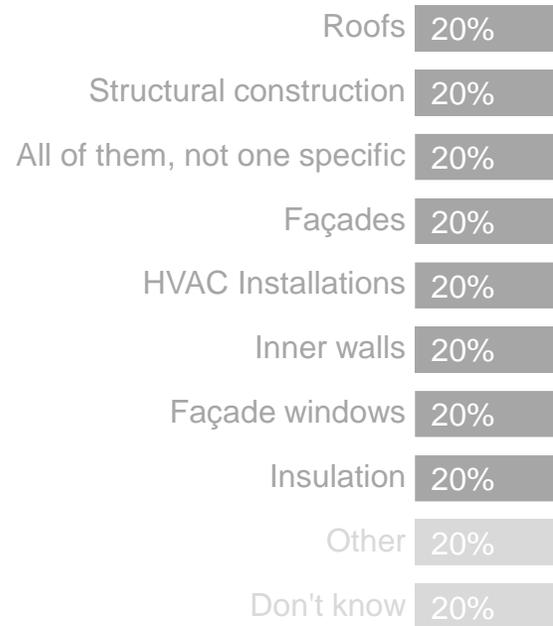


Base: n=XX

Contractors: xx are contributing most

Manufacturers of building and installation materials should contribute to creating a more sustainable and circular construction sector by using xx.

Which building components do you think contribute the most to create a sustainable building?



Base: n=XX

How can manufacturers of building and installation materials contribute to create a more sustainable and circular construction sector, both generic as at construction site specifically?



Base: n=XX

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XX is the best description of sustainable construction.

That description of sustainable construction is most evident in xx. Additionally, over half of the xx contractors state that xx best describe sustainable construction.

Sustainability

What describes sustainable construction best according to you?

	 United Kingdom	 Germany	 France	 Spain	 Italy	 Netherlands	 Belgium	 Poland	 5-15 fte	 ≥16 fte
Energy efficient buildings	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Environmentally friendly materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Renewable materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Long-lasting materials or products	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Recyclable materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Low impact on ecosystem	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Waste management	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Environmentally friendly production	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

XX is the best description of the circular economy.

That is most evident in the xx and xx. In xx, contractors say that a circular economy is about xx. Additionally, half of xxrespondents answered xx.

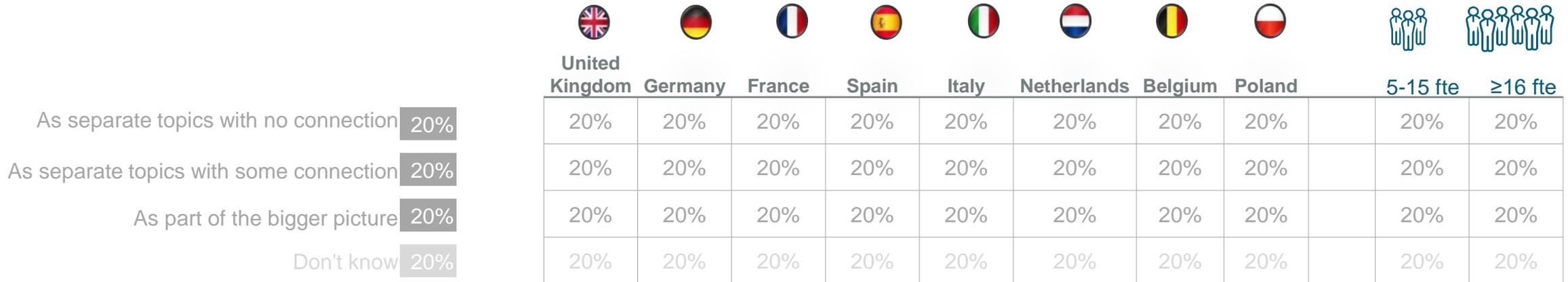
Circularity

What do you think are the most important characteristics of circular economy in the construction sector?

	 United Kingdom	 Germany	 France	 Spain	 Italy	 Netherlands	 Belgium	 Poland	 5-15 fte	 ≥16 fte
Reuse of materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Energy usage from renewable sources	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Usage of recycled materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Minimised waste	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Maximised lifespan of materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Usage of biobased materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Reuse of buildings/ spaces	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Maximise lifespan of buildings	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

Circularity, CO₂ reduction, energy efficiency and sustainability are often seen as XX.

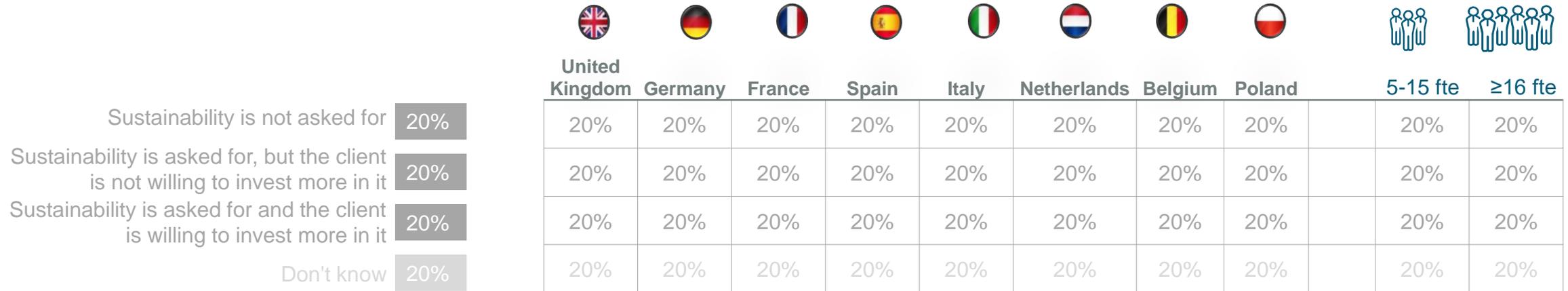
How does your organization see the connection between circular construction, CO₂ reduction, energy efficiency and sustainability?



Clients usually do xx for sustainability. That is most obvious in xx.

The data shows some indication that sustainability is xx in xx, but xx in it. XX contractors' clients demand sustainability xx.

To what extent do your clients ask for sustainability and are they willing to invest more in it?



XX are most influential in promoting sustainable building construction

That is most evident in xx. In xx, contractors also think that the xx play a vital role.

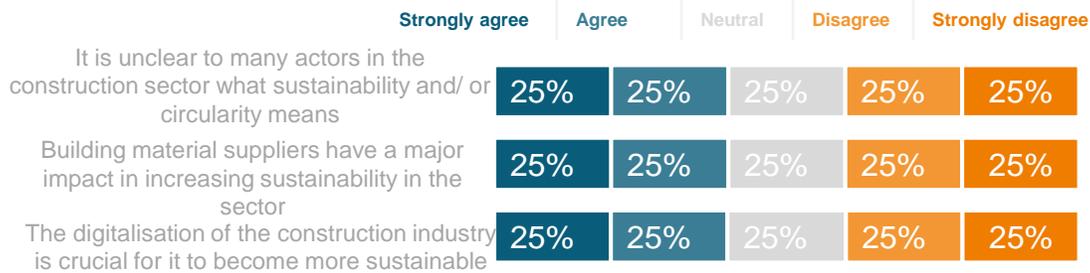
Which stakeholders/ parties do you think are the most influential in promoting sustainable building construction?



XX in xx what sustainability/ circularity xx.

The majority of the contractors in xx also state that xx have a major impact on increasing sustainability. Whether xx in xx and to xx sized contractors.

To what degree do you disagree or agree with the following statements?



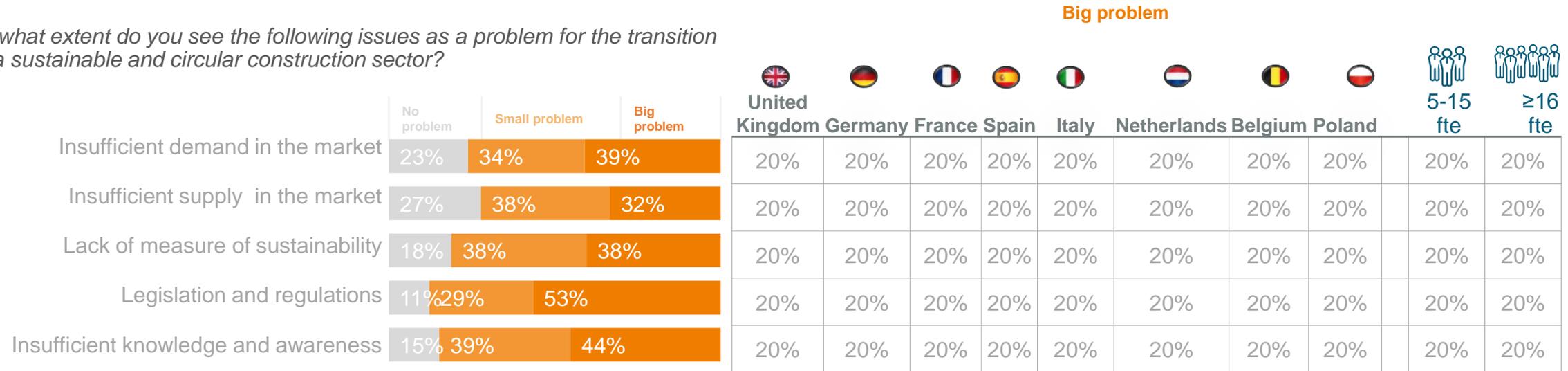
Strongly (Agree)

	United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland	5-15 fte	≥16 fte
20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	
20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	
20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	

XX is/are the biggest problems for the transition

This is especially the case in the xx, but contractors in other countries also xx for the transition to a sustainable and circular construction sector.

To what extent do you see the following issues as a problem for the transition to a sustainable and circular construction sector?



XX respondents are the most familiar with the term ‘material passport’

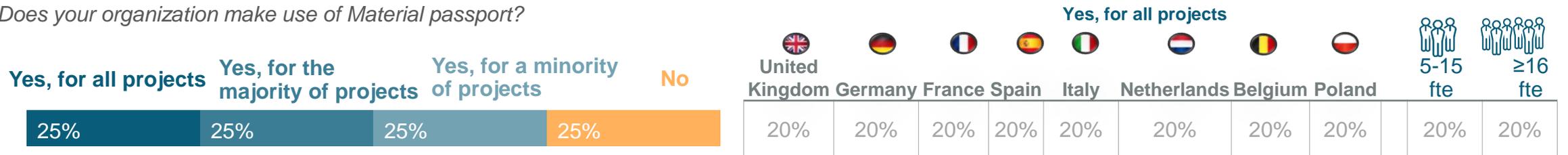
When xx with it, the material passport is xx.

Are you familiar with the term „Material passport“?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

Does your organization make use of Material passport?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

Do you think that Material passport offers added value for implementing in your own projects in a more circular way?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

XX respondents are the most familiar with the term 'urban mining'

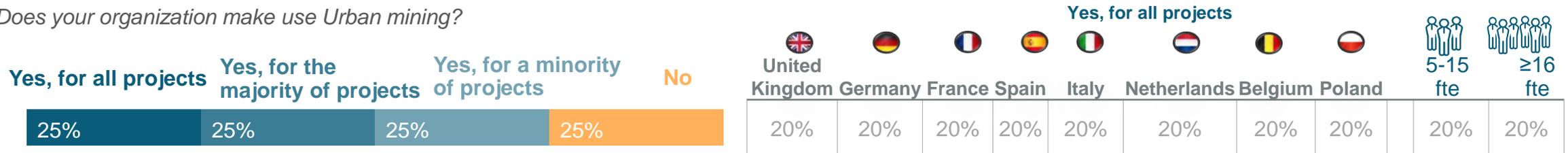
When xx with it, the urban mining is xx.

Are you familiar with the term „Urban mining“?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

Does your organization make use Urban mining?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

Do you think that Urban mining offers added value for implementing in your own projects in a more circular way?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

XX respondents are the most familiar with the term 'EPD'

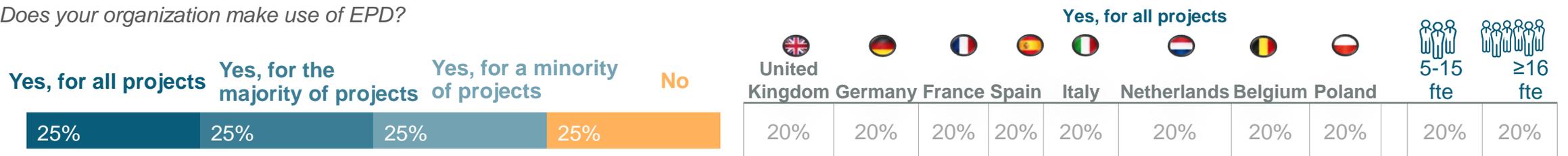
When xx with it, the EPD is xx.

Are you familiar with the term 'EPD'?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

Does your organization make use of EPD?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

Do you think that EPDs offer added value for implementing in your own projects in a more circular way?



N=xx; United Kingdom N=xx; Germany N=xx; France N=xx; Spain N= xx; Italy N=xx; Netherlands N=xx; Belgium N=xx; Poland N=xx; Small FTE N = xx Big FTE N = xx

The most important reason for not working with EPDs is the fact that xx.

Why is your organisation not working (more) with EPDs?

											
		United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland	5-15 fte	≥16 fte
Clients don't demand it	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Not aware/ lack of awareness	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Costs/ too expensive	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Lack of expertise	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Complexity	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Lack of standardization	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Lack of access to it	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

XX are the most used innovative product solutions

This is especially the case in xx. Contractors in the xx gave a xx to the question.

What are innovative product solutions with regard to sustainable and circular construction that are already being used?

											
		United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland	5-15 fte	≥16 fte
Solar panels	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Products of reused or renewable material	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Insulation from waste	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bio-based insulation	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Circular concrete	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Cross laminated timber	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Heat pump	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Bricks and blocks with secondary material	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

XX are the most used innovative product services

This is especially the case in xx. Contractors in the xx gave a xx to the question.

What are innovative product services with regard to sustainable and circular construction that are already being used?

											
		United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland	5-15 fte	≥16 fte
Products as a service	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Floor (covering) as a service	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Sustainable furniture	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Products of renewable material	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Insulation	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Secondary materials marketplaces	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Facade as a service	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Heat pumps	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

For xx contractors, xx contribute the most to creating sustainable buildings

XX the most in the xx. According to xx contractors, there is xx.

Which building components do you think contribute the most to create a sustainable building?

											
		United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland	5-15 fte	≥16 fte
Roofs	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Structural construction	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
All of them, not one specific	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Façades	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
HVAC Installations	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Inner walls	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Façade windows	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Insulation	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

Manufacturers of building and installation materials contribute to creating a more sustainable and circular construction sector by xx.

That is most evident in xx.

How can manufacturers of building and installation materials contribute to create a more sustainable and circular construction sector, both generic as at construction site specifically?

											
		United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland	5-15 fte	≥16 fte
Use sustainable materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Education, inform the market	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Reduce waste during production	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Innovation	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Reducing prices	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Cooperate more with contractors	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Use environmental packaging materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Use less packaging materials	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Don't know	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%

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