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Growth in the construction sector, still at minimal levels, lost its impetus in 2017 ^[1]



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In 2017, the area of authorised building projects in Catalonia grew by 9%, representing a slowdown in the growth experienced in the last two years. The drop of 17% in the largest projects was offset by a very positive increase in small and medium-sized ones. The regions of Barcelona and Girona showed the most consistent growth, which, however, is still not being reflected in the other regions. Building renovation continues to be at a standstill, which is a very worrying factor..

On Monday, 15 January, at a meeting open to the media, the COAC made an analysis of construction and building renovation activity in Catalonia during 2017, based on projects in the construction phase

Analysis of the authorised building area in Catalonia

Last year concluded with a total of 3,907,014 m² authorised for construction, 327,000 m² more than the previous year, which represents an increase of 9.1% compared to 2016. In view of these figures, it is worth making the following observations:

1.- Even though the authorised construction area has increased, it is still way below what we might regard as 'normal' (we are still very much below the record minimum of the previous 25 years, not counting the period of the economic crisis).

This increase of 9.1% is much lower than the increases in the immediately preceding years (24% in 2016 and 26% in 2015).

3.- As in the last two years, we are not seeing uniform growth across the whole region. Only the provinces of Barcelona and Girona are experiencing consistent growth.

4.- In 2017, large-scale projects (i.e. with an area of more than 10,000 m²) declined, offset by the increase in small and medium-sized projects.

5.- The total authorised construction area in Catalonia corresponds to 7,820 projects, a figure that is still very much below the European standard, which, were we to achieve this level, would lead to the more uniform recovery of architectural practices and the sector in general.

Analysis by size and number of authorised projects

The projects authorised in 2017 with an area of more than 10,000 m², i.e. the largest projects, have seen the biggest drop (17% compared to 2016, 7 points lower). In all, an area of 853,747 m² was authorised in 2017, corresponding to 49 projects.

On the other hand, projects smaller than 10,000 m² increased, especially the 3,000-10,000 m² and the 500-3,000 m² segments, rising 27% above the figure in 2016 (a significant increase of 8 points) with a total of 2,005,893 m² authorised, representing 1,116 projects.

Comparing the number of projects with that of the previous year, the conclusion is that in 2017 the total number increased by 207 projects (23% more). We can view this as a positive fact, given that it represents a better distribution of work in the sector rather than being concentrated into a few very large projects, which has been the general trend since 2014. Even so, the drop in large-scale projects is not good news.

Analysis of the authorised construction area by region

In the province of Barcelona, not including the capital, the overall increase in 2017 was 17%. Despite this, it should be noted that projects of more than 10,000 m² fell by 18% compared to 2016, a year in which they grew significantly. On the other hand, medium-to-large, medium and small projects grew significantly, with increases close to 50%, apart from the smallest projects which grew to a lesser extent. The province of Barcelona continues to set the general trends in construction in Catalonia

With regard to the city of Barcelona, there was actually negative year-on-year growth of 13% compared to 2016. This situation was caused by the drop in projects of more than

3,000 m² (15% fewer projects of 3,000-10,000 m² and 24% fewer projects of over 10,000 m²).

It is worth pointing out that in 2016 the Catalan capital experienced an exceptional third quarter, with six major projects, that has not been repeated. If it were not for this fact, the quarterly figures for 2017 would be very much along the lines of the other quarters of 2016.

The Ebre, Lleida and Tarragona regions have witnessed very low and insignificant growth. **Girona**, on the other hand, has experienced more consistent growth at around 20% this year, with 580,000 m² authorised in 2017, against 265,000 m² in Tarragona and 183,000 m² in Lleida.

Analysis by type of building: new build versus building renovation

New build continues to grow, although less strongly than the previous year (in 2016 it grew by 30%, while this year by just 12%). Although building renovation work increased slightly, it is still very much at a standstill. In overall figures, in 2017 there was 2,569,000 m² of new build and 1,252,610 m² of building renovations authorised.

In the province of Barcelona, building renovation dropped back to 2015 levels. On the other hand, in the city of Barcelona, renovations fluctuated without pointing to a clear trend either way.

The building renovation projects authorised by the COAC are those that either affect the overall structure of the building and its layout, or entail a change of use. Consequently, it can be deduced from these figures that urban building renovation in general, which is so essential in a building stock as old and obsolete as ours, with evident challenges such as energy efficiency and sustainability, is just not happening.

There is a lack of information on small-scale building renovation, without which it is very difficult to drive forward efficient urban renovation policies.

Analysis by use: residential/non-residential habitatge / nohabitatge

Residential housing continues to grow (more than in 2016), while non-residential construction has witnessed a significant decline compared to 2016, a year when it experienced a major upturn

With regard to non-residential construction, every building type witnessed a decline apart from industrial. In 2017 the total volume of authorised square metres for industrial buildings (308,071 m²) was higher than the other sectors (retail, hospitality, offices, health and education).

The common denominator for these other sectors in 2016 was that they all grew considerably. In the case of retail, which had witnessed significant growth since 2015, growth fell by 27% this year. Even so, some 260,000 m² were authorised, this being the sector with the highest planned construction area after industry. The hospitality and offices sectors fell by 28% and 16% respectively.

Education and health fell by around 50%. There had been significant growth in 2016, though the number of square metres this was based on was very low. This year 50,000 m²

was authorised for the education sector and 40,000 m² for the health sector.

Housing

In 2017, plans for 11,250 houses were authorised, resulting in growth of 32% along similar lines to 2016. Housing in general has grown consistently since 2013, when 2,888 new houses were authorised.

This figure would equal that of 2009, in the midst of the economic crisis, representing 57% less than the record minimum (in 1991) of the previous 25 years (not taking the crisis years into account).

The bulk of housing projects authorised in Catalonia in 2017 correspond to medium-sized projects (500?3,000 m²) and medium-to-large ones (3,000 ? 10,000 m²). In terms of the number of houses per project, most projects were for between two and fifty properties.

If we look at how these new housing projects were distributed regionally, we can see that there was growth in every region apart from Ebre. The province of Barcelona had the highest growth, showing a very positive trend. The trend was also very positive in Girona, while although there was growth in the city of Barcelona, a slowdown was noted.

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