The Sustainable Construction Observatory
BY SAINT-GOBAIN

Sustainable Construction Barometer

2026 – 4th edition

Foreword

Benoit Bazin
Chairman and CEO
Saint-Gobain Group

“Sustainable construction is not yet systematically integrated into the way projects are designed, financed, and evaluated. Closing this gap is now one of the greatest opportunities for transformation of the sector.”

The transformation of buildings and infrastructure is no longer just a matter of raising awareness. All around the world, sustainable construction is progressing, becoming more structured, and gaining visibility. **The need is becoming increasingly clear, particularly in terms of resilience and adaptation. And yet it has still not become the norm**. Its adoption and integration into operational decision-making remain uneven.

The 2026 Sustainable Construction Barometer reveals a gap between ambition and implementation. Sustainable construction is not yet systematically integrated into the way projects are designed, financed, and evaluated. Closing this gap is one of the greatest opportunities today for transformation of the sector.

Our joint priority must now be to consolidate the main criteria that really influence decision-making. **Sustainable construction must become a priority when assessing costs, deadlines, performance, and risk exposure over the lifetime of buildings**. This is how we will ensure that the progress made is firmly established over the long term.

This conviction guided the drafting of the Action Paper* by the Sustainable Construction Observatory, launched by Saint-Gobain at COP30. Its goal **is to go beyond simply reasserting ambitions and to identify the concrete levers needed to scale up**, through 13 priority actions designed to drive systemic change.

Resilience is a perfect illustration of this tension. Regions exposed to climate hazards understand its importance. However, it must be better integrated into decision-making in investment and public or private procurement. Recognizing resilience as a factor in performance and risk reduction will help to fully reveal its value.

Sustainable construction will become a key factor in decision-making once we make its benefits indisputable and visible over time and in practice. Beyond environmental performance, this means better promoting the benefits it brings to the well-being of occupants, while not neglecting the human and financial costs of inaction.

Transforming a shared ambition into wide-scale action is the collective responsibility of all who design, finance, regulate, and inhabit the built environment.”

*See: www.saint-gobain.com/en/observatory/action-paper

The Sustainable Construction Observatory

BY SAINT-GOBAIN

The construction sector is at the heart of the major challenges shaping our future, standing at the crossroads of the demographic, social, energy, and climate issues that human communities face. These challenges cannot be met without the sector accelerating its transformation towards ever more sustainable construction: a built environment that positively contributes to people's health and well-being, is resilient to climate hazards, low in carbon emissions, and provides accessible housing for all without compromising on quality and performance.

This transition requires the collective mobilization of all stakeholders – professionals, institutions, and citizens. This is why Saint-Gobain launched the Sustainable Construction Observatory in 2023, positioning itself as a leading company, both a pioneer and a driving force to accelerate sustainable construction worldwide by bringing together all stakeholders.

LISTEN

The Observatory analyzes the state of sustainable construction around the world. It examines perceptions and identifies barriers, levers for progress, planned solutions, and key players. It provides a measure of progress and helps us identify the best areas to focus our collective efforts.

The Sustainable Construction Observatory produces an annual international Barometer, shared with stakeholders and the general public.

INFORM

The Observatory brings together knowledge, experience and analyses of sustainable construction, covering both challenges and potential solutions. Its purpose is to inform stakeholders and support decision-making.

The Sustainable Construction Observatory has launched an online magazine, *Constructing a Sustainable Future*, to explore all aspects of sustainable construction, its impact on the climate and on society, and showcase innovative solutions and inspiring projects.

UNITE

The Observatory unites players from across a fragmented international market, including construction professionals, institutions, and members of the general public. It promotes the sharing of ideas and best practices and contributes to the development and implementation of new solutions.

The Sustainable Construction Observatory holds "Sustainable Construction Talks", frequent international meetings at major national and multi-lateral events.

METHODOLOGY

QUANTITATIVE COMPONENT

Quantitative study carried out by Occurrence–Ifop, from October 16 to November 14, 2025, on two samples:

- **Stakeholders** (4,800 respondents, 30 countries, aged 18 and over): self-administered online questionnaire (via the social networks of the target audience), broken down as follows:
  - 1,500 **professionals** (construction and public works, architecture, housing, professional organizations in the building trades, energy, industry, construction waste management)
  - 1,500 **students** (construction, building and public works, civil engineering, architecture, spatial design)
  - 1,200 **members of associations** (ecological transition, housing, construction, energy, climate change, circular economy)
  - 600 **local elected officials or local government representatives** (in the UAE and Saudi Arabia, in the absence of local elected officials, representatives of the public authorities were interviewed). Specific study method: questionnaire administered by telephone.
- **Citizens** (30,000 respondents, 30 countries, aged 18 and over): 1,000 individuals per country, a representative sample of the population of each country surveyed. Online omnibus questionnaire.

As this is a barometric survey, the results are compared with those of the previous edition (2025 Barometer).
Significant changes are indicated as follows: +5
Differences by profile and by geographic area are shown as follows:

- Significantly higher result: ***43%***
- Significantly lower result: 35%

All analyses in this document have been validated by Occurrence–Ifop.

160 stakeholder respondents per country and 1,000 citizens per country. Countries surveyed:

AFRICA
South Africa
Egypt
Kenya*
Morocco

NORTH AMERICA
Canada
United States

LATIN AMERICA
Argentina
Brazil
Colombia
Mexico

ASIA-PACIFIC
China
India
Indonesia
Malaysia*
Vietnam

EUROPE
Germany
Spain
Finland
France
Italy
Norway
Poland
Portugal
Czech Republic
Romania*
United Kingdom
Switzerland
Türkiye

MIDDLE EAST
Saudi Arabia
United Arab Emirates

* new country in 2026

QUALITATIVE COMPONENT

An international qualitative study on **the perceptions of adaptation and resilience issues in the construction sector among financial institutions** (commercial banks, development banks, insurers) worldwide, with **21 respondents**.

Semi-structured interviews lasting approximately 45 to 60 minutes, conducted between November 29 and December 23, 2025, by videoconference or phone.

KEY TAKEAWAYS

Sustainable construction: now an established concept, but unevenly adopted.

Sustainable construction is now a widely recognized concept. 67% of stakeholders and 39% of citizens say they understand exactly what the concept is all about; 94% and 84% respectively are at least aware of it.

However, this widespread recognition coexists with significant variations across regions and countries. Stakeholder awareness remains lower in Asia-Pacific (58%) than in the Middle East (75%), and there are sometimes considerable differences within the same region: in Europe, the gap between Romania (86%) and Czech Republic (40%) illustrates the difference in maturity between countries in the same area. Among citizens, familiarity with the concept remains socially differentiated, and is higher among young people and university graduates.

Sustainable construction **is thus emerging as a common framework, while its adoption is progressing at different speeds across regions and profiles**.

Resilience gaining ground, benefits to be better highlighted to keep up the momentum.

Among the criteria cited to define sustainable construction, **resilience continues to gain ground**. After a sharp increase in the previous edition (up 8 points between 2024 and 2025), **it gained another 5 points this year among both stakeholders and citizens**, with a particularly strong importance in Africa and the Middle East, regions already exposed to extreme climates.

Interviews with financial stakeholders highlight the growing attention paid to resilience, while also emphasizing the need to clarify its definition and demonstrate a clear return on investment.

KEY TAKEAWAYS

The value of sustainable construction: a central issue.

Beyond knowledge of sustainable construction, **the question of its value proves decisive**. **47% of stakeholders believe that sustainable construction creates more value than traditional construction** (a new question in 2026). This perception is weaker in some regions (38% in Asia-Pacific, 45% in Europe) and among elected officials, with only 34% saying they are convinced.

The **competitiveness of solutions remains perceived as a crucial driver for fast-tracking sustainable construction**: as in the previous edition, it is cited by nearly one in three stakeholders. Furthermore, respondents in favor of "going backwards" on sustainable construction (a minority opinion, representing only 6% of stakeholders) mainly cite excessive costs and a lack of performance guarantees for users.

It's no longer just a question of asserting the ambitions of sustainable construction. There is a need to show its value: demonstrating tangible benefits, guaranteeing performance for users, and substantiating the competitiveness of solutions in order to become firmly established in decision-making by stakeholders.

KEY TAKEAWAYS

Shared intentions, but limited action so far.

There is broad consensus on the need to speed up: 87% of stakeholders believe that there is a need to go further. Stakeholders upstream in the value chain (architects and engineering firms) continue to be identified as drivers (56%, stable), and the expected momentum is based on cooperation between stakeholders rather than on a single leader.

However, for the third year running, practices are struggling to keep up. Only 32% of professionals routinely assess carbon footprints and 30% say they already carry out sustainable projects, compared with 55% who say that they "intend to do so". Among elected officials, while sustainability remains an important criterion in the awarding of public contracts (86%), it has declined since the previous edition (98% in 2025). Among students and associations, good intentions still weigh heavier than taking action: 78% of students value training in sustainable construction, but only 5% would categorically refuse a job offer from a company that is not committed to sustainability. 24% of associations have already boycotted unsustainable projects, while 50% might do so in the future.

Citizen buy-in as a driver to fast-tracking deployment?

The barometer also highlights the important role of citizens in accelerating the transition toward sustainable construction.

63% of citizens consider the development of more sustainable construction to be a priority, up 4 points from the previous edition. Citizens are also paying increasing attention to the health and well-being benefits for occupants: 19% of citizens now include this aspect in their definition of sustainable construction (up 4 points).

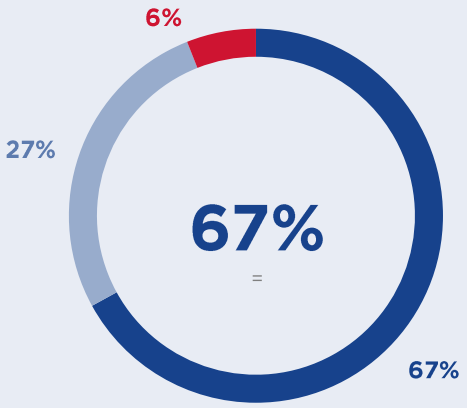
Furthermore, nearly one-third of citizens and stakeholders believe **that raising public awareness is essential to stepping up progress**.

Strengthening the visibility of the value created—particularly for building users—can therefore play a key role in accelerating adoption and scaling sustainable construction practices.

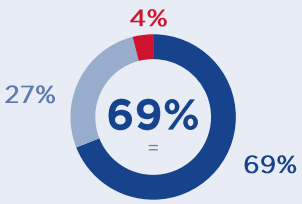
Awareness and understanding of sustainable construction

A STABLE FEELING OF AWARENESS, BUT MAJOR REGIONAL DISPARITIES

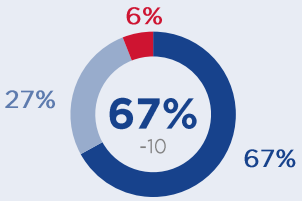
Are you familiar with or have you heard of the concept of sustainable construction?



Students



Local elected officials



AREA FOCUS

	Yes, and I know exactly what it is about	Yes, but I don't really know anything about it	No, I've never heard of it	Know exactly what it is about
AFRICA	67%	24%	9	67% =
NORTH AMERICA	66%	27%	7	66% =
LATIN AMERICA	68%	27%	5	68% =
ASIA-PACIFIC	58%	35%	7	58% =
EUROPE	69%	26%	5	*69%* =
MIDDLE EAST	75%	20%	5	*75%* =
ROMANIA	86%	12%	2	*86%*
TÜRKIYE	46%	40%	14	46%
CZECH REPUBLIC	40%	49%	11	40%

Yes, and I know exactly what it is about

Yes, but I don't really know anything about it

No, I've never heard of it

Base: stakeholders (4,800 respondents) – single answer

Awareness of sustainable construction has stabilized this year: 67% of stakeholders say they know exactly what it's about, and 94% have at least heard of it.

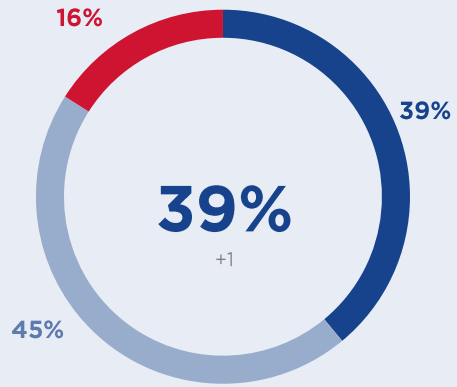
Among elected officials, after a peak in 2025, there was a 10-point decline this year, bringing them back to the average level for all stakeholders.

Behind this overall stability, however, there are significant regional disparities. Asia-Pacific lags behind, with 58% of respondents saying they are familiar with the concept, compared with 69% in Europe and 75% in the Middle East.

Disparities are also evident within regions. In Europe, for example, 86% of stakeholders in Romania say they are familiar with the concept of sustainable construction, compared with only 40% in Czech Republic, a 46-point gap between the two countries.

HIGH LEVEL OF AWARENESS BUT LIMITED KNOWLEDGE AMONG CITIZENS, WITH SIGNIFICANT DEMOGRAPHIC DIFFERENCES

Are you familiar with or have you heard of the concept of sustainable construction?



AREA FOCUS

				Know exactly what it is about	
AFRICA	47%	40%	13	*47%*	+3
NORTH AMERICA	24%	43%	33	24%	=
LATIN AMERICA	39%	48%	13	*39%*	-3
ASIA-PACIFIC	45%	43%	12	*45%*	-3
EUROPE	33%	50%	17	33%	+2
MIDDLE EAST	57%	34%	9	*57%*	=

PRIMARY/SECONDARY EDUCATION	27%	49%	24	27%
HIGH SCHOOL	33%	50%	17	33%
UNIVERSITY DEGREE	48%	41%	11	*48%*

18-24 YEARS OLD	37%	46%	17	37%
25-34 YEARS OLD	46%	41%	13	*46%*
35-44 YEARS OLD	42%	45%	13	*42%*
45-49 YEARS OLD	36%	48%	16	36%
50-64 YEARS OLD	32%	50%	18	32%
65 YEARS OLD AND OVER	25%	52%	23	25%

Yes, and I know exactly what it is about

Yes, but I don't really know anything about it

No, I've never heard of it

Base: citizens (30,000 respondents) – single answer

84% of citizens say they have heard of sustainable construction, and nearly 4 in 10 (39%) consider that they know exactly what it is about. However, awareness is highly uneven, with significant geographical and socio-demographic disparities.

As in 2025, North America and Europe appear to be lagging behind overall. As with the stakeholders, marked contrasts can also be observed within regions. In Europe, Romania reports 65% awareness, compared with 14% in Czech Republic. In Asia, India stands at 60%, compared with 29% in Malaysia.

Socio-demographic factors also make a difference, particularly educational attainment and age. Hence, 48% of university graduates say they are familiar with the concept, compared with 27% of citizens without a degree. Similarly, 46% of citizens aged 25–34 say they are familiar with the concept, compared with 25% of those aged 65 and older.

PERCEPTION OF SUSTAINABLE CONSTRUCTION FOCUSED ON ENERGY EFFICIENCY, WITH RESILIENCE GAINING GROUND

Which of the following definitions best fits sustainable construction?

	First	Total	Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Energy-efficient construction	17%	33%	-	29%	31%	32%	25%	***36%***	36%
Construction using ecological materials	15%	30%	=	22%	19%	***50%***	26%	30%	11%
Construction aimed at achieving carbon neutrality	15%	26%	-3	15%	32%	19%	21%	***33%***	20%
Construction able to withstand natural and climatic hazards	14%	26%	+5	***42%***	22%	21%	31%	18%	***41%***
Evolutive construction capable of adapting to new uses	11%	22%	=	23%	20%	19%	21%	21%	***32%***
Construction aimed at reducing building waste	9%	19%	=	18%	23%	23%	***24%***	16%	14%
Construction that uses fewer exhaustible materials	9%	19%	=	15%	24%	11%	16%	***22%***	16%
Construction that promotes the well-being and health of occupants	8%	18%	=	20%	19%	15%	***25%***	15%	16%

First Total

Base: stakeholders familiar with the concept of sustainable construction (4,512 respondents) – two possible answers

While energy efficiency remains the most frequently cited factor associated with sustainable construction (33%), the definition of the concept continues to evolve towards more resilience (mentioned by 26% of stakeholders, up 5 points this year, following an 8-point increase in 2025).

However, this trend varies greatly depending on the context: resilience is cited more often by respondents from regions where risk is perceived as particularly tangible. It is thus cited by more than 40% of stakeholders in Africa and the Middle East, compared with 22% in North America and 18% in Europe.

Given the differences observed between regions and countries, the broader challenge, now more than ever, is to develop a narrative that is shared and adaptable, while being grounded in local perceptions of what sustainable construction means.

CITIZENS' DEFINITION DOMINATED BY MATERIALS, BUT INCREASINGLY MARKED BY RESILIENCE

Which of the following definitions best fits sustainable construction?

	First	Total	Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Construction using ecological materials	20%	35%	-3	20%	28%	***54%***	28%	***41%***	19%
Energy-efficient construction	16%	31%	-3	24%	28%	26%	23%	***39%***	29%
Construction able to withstand natural and climatic hazards	16%	28%	+5	***39%***	22%	25%	***35%***	22%	32%
Construction aimed at reducing building waste	10%	19%	-	23%	***27%***	20%	23%	15%	26%
Construction that uses fewer exhaustible materials	9%	19%	-1	16%	***26%***	17%	16%	***20%***	20%
Construction that promotes the well-being and health of occupants	9%	19%	+4	***26%***	16%	19%	***26%***	14%	20%
Construction aimed at achieving carbon neutrality	9%	18%	-4	12%	25%	11%	18%	***22%***	18%
Evolutive construction capable of adapting to new uses	8%	15%	+1	***21%***	10%	14%	***22%***	11%	21%

First Total

Base: citizens familiar with the concept of sustainable construction (25,328 respondents) – two possible answers

For citizens, sustainable construction is primarily associated with the use of ecological materials (35%). As with stakeholders, this result is driven by Latin America at 54%. Energy efficiency, which also ranks highly (31%), is driven by Europe (39%) in particular.

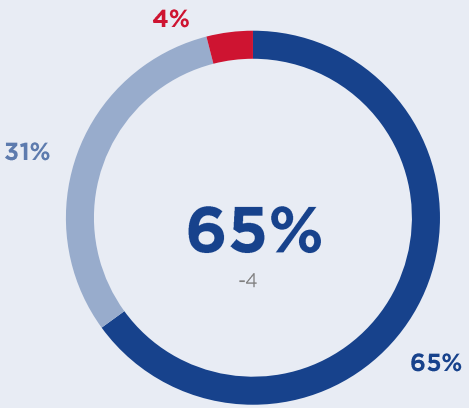
As with stakeholders, the resilience of buildings to climatic hazards increased by 5 points this year and is the priority in Africa (39%), Asia-Pacific (35%), and the Middle East (32%).

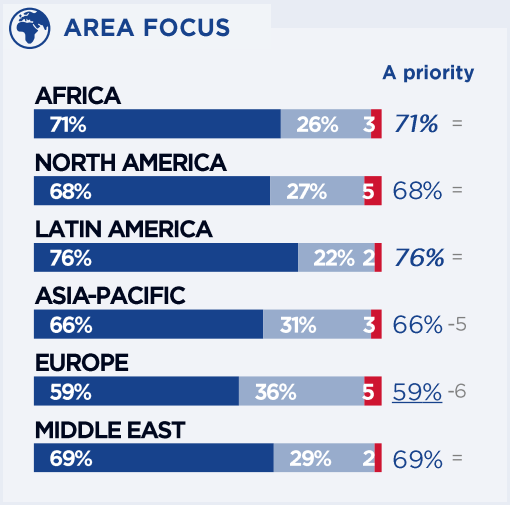
Lastly, the health and well-being of occupants is gaining ground (19%, up 4 points) and is gradually emerging as a key component of sustainable construction, particularly in Africa and the Asia-Pacific region, where more than one in four citizens cite this issue.

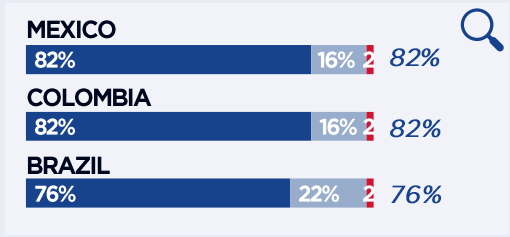
Importance and perceived value of sustainable construction

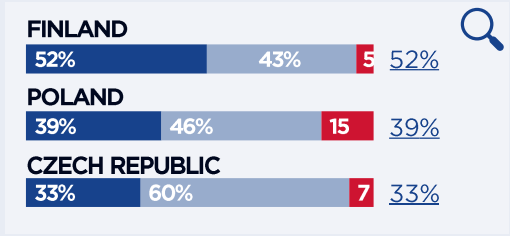
SUSTAINABLE CONSTRUCTION AS A PRIORITY: DOWN IN EUROPE, STILL STRONG IN LATIN AMERICA

In your opinion, would you say implementing more sustainable construction is...?









A priority

Important but not a priority

Of secondary importance

Base: stakeholders (4,800 respondents) – single answer

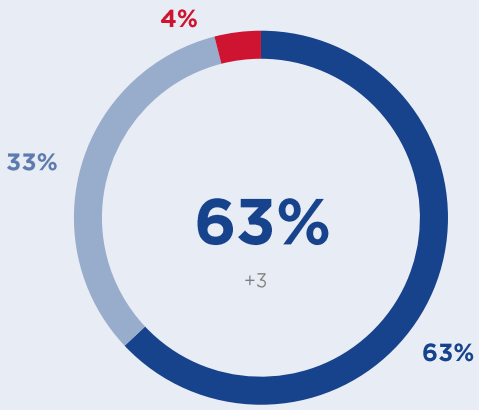
Nearly two out of three stakeholders (65%) believe that implementing more sustainable construction is a priority. However, this score is down 4 points from last year, with 31% of respondents replying “important but not a priority” in 2026, indicating a slight decline in the perceived sense of urgency.

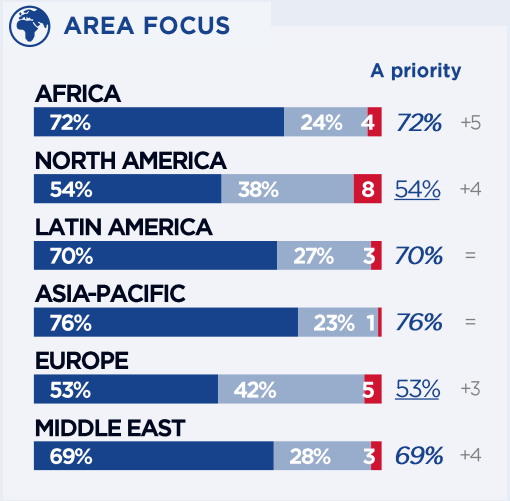
This decline is primarily driven by Europe: only 59% of respondents there consider the issue a priority, down 6 points and significantly below the global average. Specifically, several countries stand out for their notably lower scores, including Finland (52%), Poland (39%), and Czech Republic (33%), reflecting a perception that the issue is less urgent.

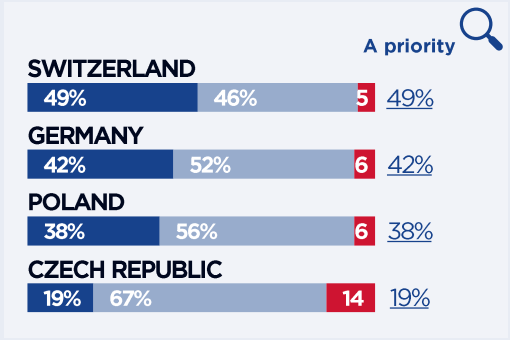
In contrast, the level of perceived urgency remains high in Latin America: 76% of stakeholders there consider sustainable construction a priority. The scores are particularly high in Mexico and Colombia (82% in both countries) and Brazil (76%).

ALSO A PRIORITY FOR CITIZENS, BUT EUROPE AND NORTH AMERICA LAG BEHIND

In your opinion, would you say implementing more sustainable construction is...?







A priority

Important but not a priority

Of secondary importance

Base: citizens (30,000 respondents) – single answer

Unlike stakeholders, citizens increasingly view sustainable construction as a priority, with a 3-point increase this year to 63%.

However, this strong overall score masks significant geographic disparities. Only 54% of citizens in North America consider sustainable construction a priority, and just 53% in Europe. Despite slight improvements, both these regions still clearly lag behind, with scores at least 15 points below those observed elsewhere (76% in Asia-Pacific, for example).

The gap is particularly pronounced in Europe, the only region where several countries have fallen below the threshold of one in two citizens viewing sustainable construction as a priority: Switzerland (49%), Germany (42%), Poland (38%) and Czech Republic (19%). This reflects a shift to “important but not a priority”, suggesting a reduction in the intensity of buy-in rather than total rejection of the issue.

SUSTAINABLE CONSTRUCTION: A STRONG DESIRE TO DO MORE, AMID CONTRASTING NATIONAL TRENDS

When it comes to sustainable construction, would you say...?

	We need to do more	We need to go backwards	It's fine the way it is
World Average	87% =	6% =	7% =
AFRICA	***89%***	4%	7%
NORTH AMERICA	88%	4%	8%
LATIN AMERICA	***94%***	3%	3%
ASIA-PACIFIC	84%	7%	9%
EUROPE	83%	***8%***	***9%***
MIDDLE EAST	***91%***	5%	4%
TÜRKIYE	79%	***16%***	5%
CHINA	76%	***16%***	8%
NORWAY	77%	***15%***	8%
SWITZERLAND	81%	10%	9%
POLAND	74%	10%	***16%***
FRANCE	72%	9%	***19%***

Base: stakeholders (4,800 respondents) – single answer

Once again this year, a large majority of stakeholders (87%) say that we "need to do more" in the field of sustainable construction. This result is stable and remains driven by Latin America (94%) and the Middle East (91%) in particular.

On this issue too, trends vary significantly from country to country: France and Poland tend to favor the status quo (more than 15% of respondents believe that "it's fine the way it is"), while Norway and Türkiye show a stronger tendency to roll back (more than 15% of respondents say "we need to go backwards").

China stands out in particular for its marked shift this year: the percentage of respondents who say "we need to go backwards" has risen to 16%, from 4% in 2025.

A QUESTION OF CONFIDENCE AND PERCEIVED VALUE

You indicated that you wish to step back regarding sustainable construction. What are the main reasons?

NEW QUESTION

Top 3 reasons given:

19%

There is a lack of interest in environmental issues among investors-contractors

16%

Costs are perceived as too high for buyers-users

16%

There is a lack of guarantee regarding the actual performance of sustainable construction (energy, comfort, durability) for buyers-users

Stakeholders who want to roll back on sustainable construction cite two main reasons:

- Firstly, 19% believe that environmental issues are no longer a top priority for investors and developers, which may reflect a shift in the priority given to sustainability issues in the current macroeconomic and geopolitical context.

- Secondly, respondents put forward arguments based on economics and efficiency: 16% cite the perceived high cost, while 16% say that performance levels for users are not yet sufficiently guaranteed or proven.

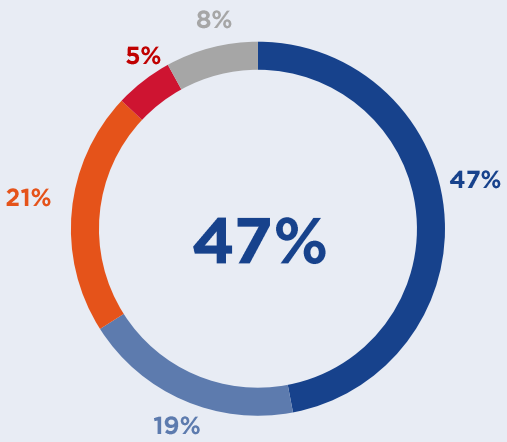
Overall, these factors point to obstacles that are both reputational (loss of perceived priority) and economic (lack of proven return on investment), which simultaneously weigh on investor confidence and the ability to demonstrate tangible benefits for users.

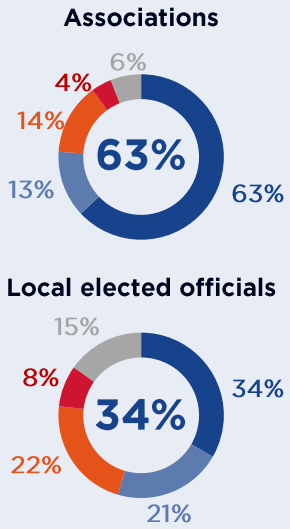
Base: stakeholders wishing to backtrack on sustainable construction (304 respondents) – Two possible answers from among 15 options. Details of responses on page 82.

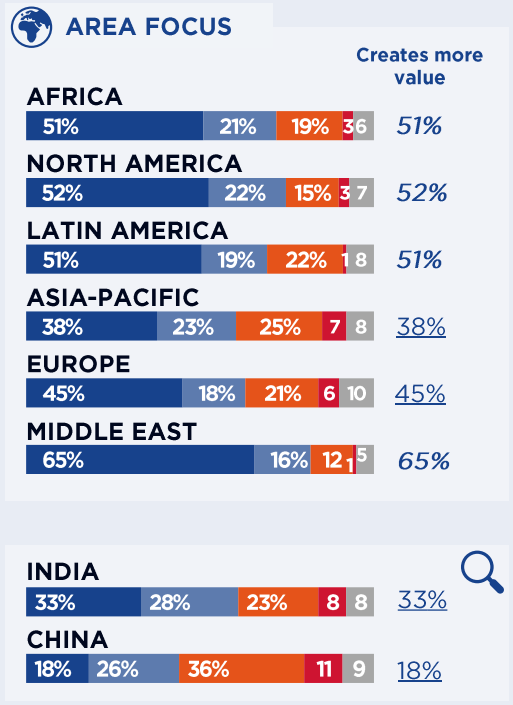
FROM COMPLIANCE TO BUY-IN: THE CHALLENGE OF DEMONSTRATING VALUE

In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...

NEW QUESTION







- Creates more value than traditional construction
- Creates value but less than traditional construction
- I don't know
- Creates as much value as traditional construction
- Creates no value

Base: stakeholders (4,800 respondents) – single answer

47% of stakeholders believe that sustainable construction creates more value than traditional construction. This belief is particularly strong for associations (63%) but much less so among elected officials, with more than one in four believing that it creates less value than traditional construction or no value at all.

Geographically, Asia-Pacific and Europe show lower levels of buy-in, with fewer than half of stakeholders convinced of the added value.

This perception also raises doubts in the world's two most populous countries. In India, 33% believe sustainable construction creates more value, while 23% believe it creates less. In China, 18% believe it creates more value and 36% believe it creates less.

This finding makes demonstrating value a central issue in promoting adoption based on buy-in rather than compliance alone.

Objectives and priority levers

COMPETITIVENESS, AWARENESS-RAISING, AND ALIGNMENT OF STAKEHOLDERS AT THE TOP OF THE AGENDA

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Make sustainable materials, products, and solutions more competitive	32%	=	34%	34%	32%	28%	32%	40%
Raise public awareness of the challenges of sustainable construction	31%	=	35%	31%	38%	35%	25%	***45%***
Raise awareness among all stakeholders and strengthen their collaboration	30%	=	35%	36%	35%	30%	25%	33%
Make the sustainable performance of constructions more visible and transparent	27%	=	34%	31%	27%	31%	23%	33%
Prioritize the use of bio-materials over conventional materials	26%	-	28%	23%	25%	***32%***	23%	30%
Train professionals more	22%	=	23%	20%	27%	23%	23%	11%
Offers new innovative solutions	21%	=	26%	16%	20%	26%	18%	28%
Renovate existing buildings	17%	=	10%	17%	8%	12%	***25%***	8%

Base: stakeholders (4,800 respondents) – several possible ranked responses – Only the top 8 responses are shown (15 responses in total).
Details of responses on pages 78 and 79.

Like last year, nearly one in three stakeholder respondents cites two priority drivers for fast-tracking the sector's transition: strengthening the competitiveness of sustainable solutions (32%) and raising awareness among the general public (31%) and stakeholders (30%).

These two signals suggest that proposing new solutions (21%) is less important than providing the right conditions for deploying solutions that are already available.

This means improving affordability while facilitating widespread adoption across the entire value chain (specifiers, financiers, contractors, users).

While there is broad consensus on the priorities, regional differences nevertheless emerge: renovation is more to the fore in Europe (25%), while there is stronger interest in biomaterials in Asia-Pacific (32%).

COMPETITIVENESS AND AWARENESS-RAISING ALSO PRIORITIZED BY CITIZENS

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Make sustainable materials, products, and solutions more competitive	32%	=	30%	34%	34%	39%	28%	33%
Raise public awareness of the challenges of sustainable construction	29%	-1	37%	24%	***38%***	35%	23%	30%
Make the sustainable performance of constructions more visible and transparent	28%	+2	33%	28%	32%	***37%***	22%	32%
Prioritize the use of bio-materials over conventional materials	28%	-2	28%	26%	28%	***37%***	24%	26%
Raise awareness among all stakeholders and strengthen their collaboration	22%	+2	***33%***	17%	26%	26%	15%	25%
Proposes new innovative solutions	21%	-1	23%	19%	23%	21%	21%	20%
Renovate existing buildings	17%	-2	13%	18%	9%	11%	***23%***	14%
Train professionals more	16%	+2	18%	15%	18%	18%	16%	12%

Base: citizens (30,000 respondents) – several possible ranked responses – Only the top 8 responses are shown (15 responses in total).
Details of responses on pages 80 and 81.

For citizens, making sustainable solutions more competitive is the top priority for fast-tracking the development of sustainable construction (32%), followed by raising public awareness (29%) and increased expectations for transparency on building performance (a slight increase at 28%).

These results reflect two key expectations: making solutions more affordable and providing clearer, verifiable information about their actual benefits.

As with stakeholders, the priorities are broadly shared, though with some regional variations: greater emphasis on raising public awareness in Latin America (38%), on awareness-raising and stakeholder collaboration in Africa (33%), a focus on performance transparency and biomaterials in the Asia-Pacific region (37% for both items), and a greater emphasis on renovation in Europe (23%).

DESIGN PROFESSIONALS BY FAR THE MOST LEGITIMATE ACTORS

Which of the following do you think are the most legitimate to advance sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Architects and building engineers	56%	=	***67%***	57%	47%	54%	56%	62%
Private companies in the construction sector	38%	-6	36%	32%	***50%***	35%	37%	37%
Local elected officials or local government representatives	30%	*	28%	***41%***	34%	29%	26%	32%
Public institutions	27%	-8	19%	19%	23%	23%	***35%***	23%
Citizens	16%	=	14%	16%	19%	16%	15%	14%
Associations	11%	=	9%	10%	12%	***19%***	9%	6%
Tradespeople	9%	+2	8%	***16%***	5%	10%	9%	13%

Base: stakeholders (4,800 respondents) – two possible answers | *Change not shown for local elected officials due to methodological changes

Architects and engineering firms are still seen as the most legitimate actors in advancing sustainable construction (56%), ahead of private companies in the sector (38%, down 6 points) and local elected officials or local government representatives (30%).

This hierarchy highlights the leading role expected of design professionals and technical experts who operate at the upstream end of the value chain.

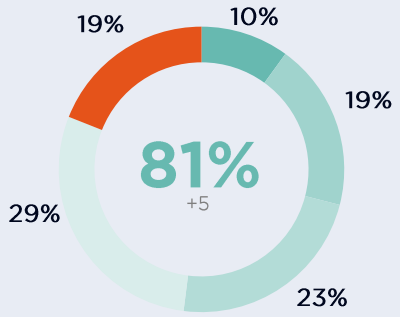
There are significant regional variations on this issue, reflecting differences in the structure of institutions and the sector from one region to another.

- The legitimacy of architects is thus considered particularly high in Africa (67%) and the Middle East (62%).
- Private companies are cited more often in Latin America (50%).
- Public institutions score higher in Europe (35%).
- Local elected officials are cited more frequently in North America (41%).

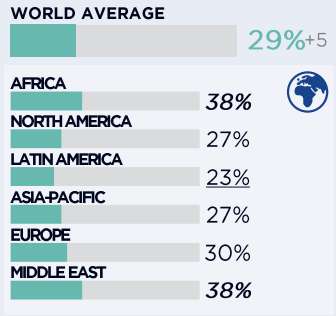
SUSTAINABLE CONSTRUCTION, A GROWING TREND AND BECOMING STRONGER

Is all or part of your business in the field of sustainable construction?

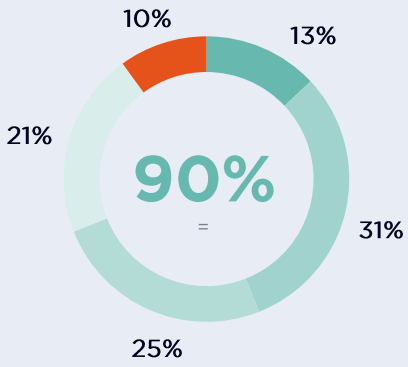
CURRENTLY



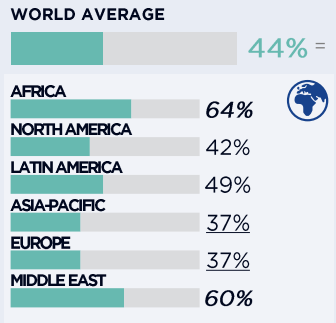
From 50% to 100% of their business



IN THE NEXT 5 YEARS



From 50% to 100% of their business in the next 5 years



Yes, all of it
Yes, more than 50%
Yes, between 25% and 50%
Yes, less than 25%
None of it is in the field of sustainable construction

Base: professionals (1,500 respondents) – single answer

81% of professionals now say that all or part of their business is in the field of sustainable construction, up from last year. The proportion whose business is predominantly sustainable (50-100%) stands at 29%, while the proportion of professionals with no business in this field has fallen by 5 points to 19%.

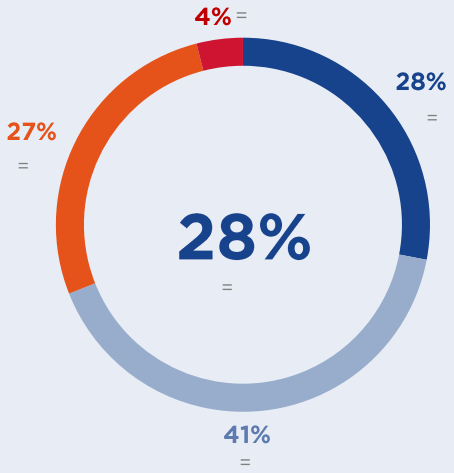
Looking ahead five years, 90% expect that part of their business will be in sustainable construction, and 44% forecast that the majority of their business will be sustainable, a sign that the move towards sustainable construction remains an unstoppable trend.

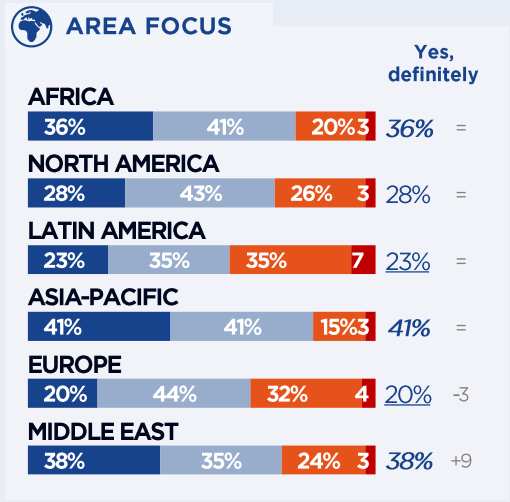
Projections vary by region: Africa and the Middle East show five-year projections above the global average (64% and 60% respectively of business that is predominantly sustainable), while Europe and Asia-Pacific show more modest levels (37% in both regions).

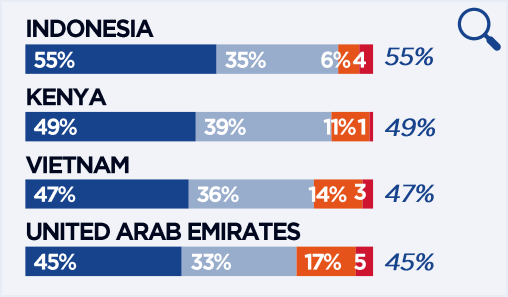
Information and training

LIMITED SENSE OF BEING WELL-INFORMED, WITH EUROPE LAGGING FAR BEHIND

Do you feel sufficiently informed about the subject of sustainable construction?







Yes, definitely · Yes, somewhat · No, not really · No, not at all

Base: stakeholders (4,800 respondents) – single answer

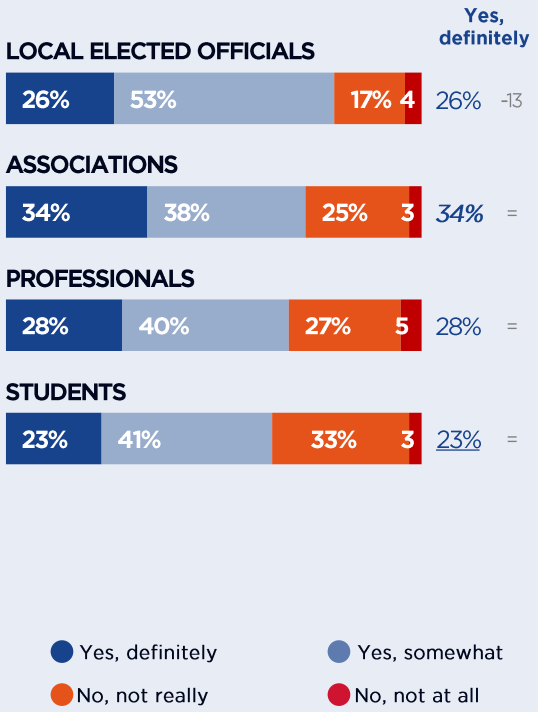
The sense of being sufficiently informed about sustainable construction remains stable, with more than two-thirds of stakeholders (69%) replying positively. However, those replying that they are fully informed remain in the minority at 28%.

There are significant regional variations. In Europe, only 20% of stakeholders consider themselves fully informed, down from 2025. In contrast, Asia, the Middle East, and Africa appear to be better equipped in terms of awareness-raising, with more than one-third of stakeholders claiming to be fully informed and around 80% at least partially informed.

These differences are confirmed in the breakdown by country: the four countries with the highest proportion of fully informed respondents are in Asia and Africa (Indonesia, Kenya, Vietnam, and the United Arab Emirates), and nearly half of the respondents in these countries claim to be fully informed.

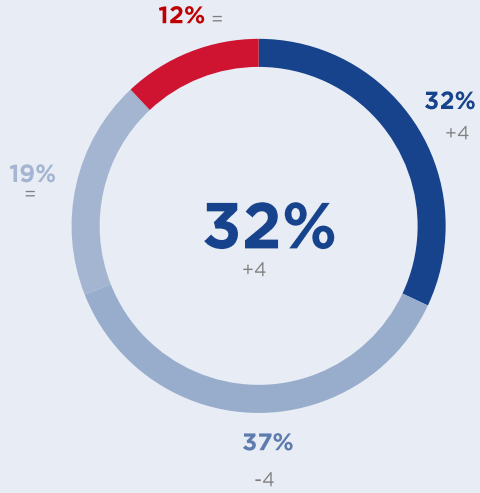
ASSOCIATIONS: THE MOST WELL-INFORMED ABOUT SUSTAINABLE CONSTRUCTION

Do you feel sufficiently informed about the subject of sustainable construction?



Base: stakeholders (4,800 respondents) – single answer

As part of your training, do you receive lessons on the subject of sustainable construction?



Base: students (1,500 respondents) – single answer

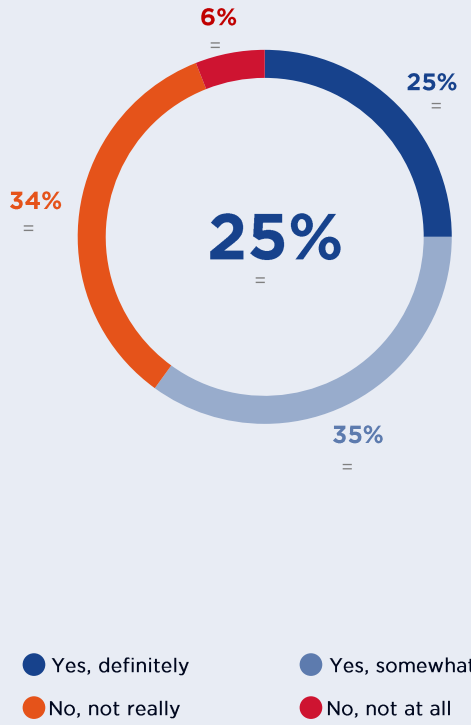
The sense of being well-informed varies among stakeholders but remains generally limited: associations consider themselves better informed than others (34% feel fully informed), while professionals in the sector and elected officials are in the average range (28% and 26%, respectively), and students below average (23%).

However, 32% of students report that they are regularly taught about sustainable construction as part of their studies. This type of training should thus be made more widely available, to foster a stronger sense of being well-informed among students.

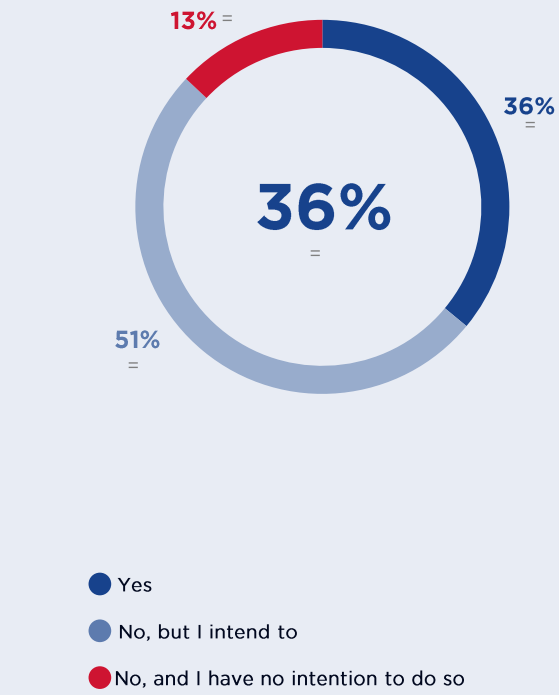
While fewer elected officials claim to be fully informed than last year (down 13 points), they remain at the average level for stakeholders, with 53% saying they are “somewhat” well-informed on the subject of sustainable construction.

FURTHER ROOM FOR IMPROVEMENT IN TRAINING

Do you feel sufficiently trained on the subject of sustainable construction?



Have you been trained in sustainable construction?



One-quarter of professionals (25%) claims to be fully trained in sustainable construction, a figure consistent with their sense of being well-informed (28%). Conversely, the proportion of those who feel they have not at all been trained remains negligible: it accounts for only 6% of professionals familiar with the subject.

Like students, more than one-third of professionals (36%) report having already taken at least one course on sustainable construction.

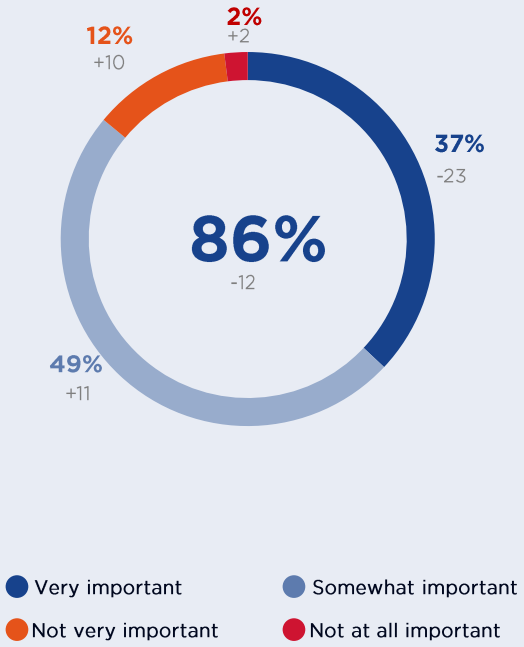
However, this raises questions about the role and impact of training programs: 60% say they are sufficiently well-trained, but only 36% have actually taken a training course.

Base: professionals familiar with the concept of sustainable construction (1,372 respondents) – single answer

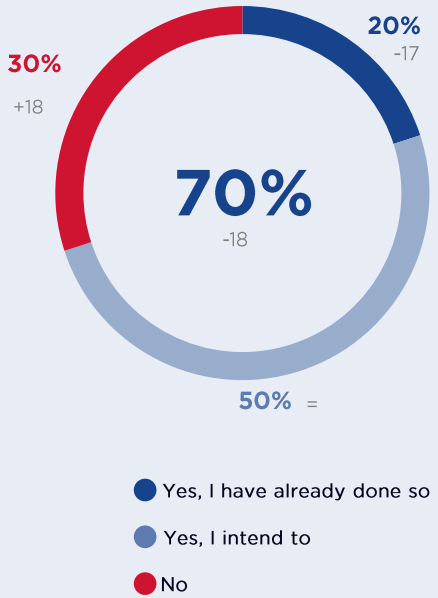
Concrete commitments by stakeholders

ELECTED OFFICIALS LESS WILLING TO TAKE CONCRETE ACTION

Today as an elected official, in relation to construction projects, is the sustainable dimension an important or unimportant criterion among those for awarding public contracts?



Are you personally prepared to exclude projects from public building/construction contracts that do not take into account sustainable construction methods?



The sustainable aspect of a construction project is viewed as an important criterion when awarding contracts by 86% of elected officials, and 37% of them consider it very important: down 23 points on last year.

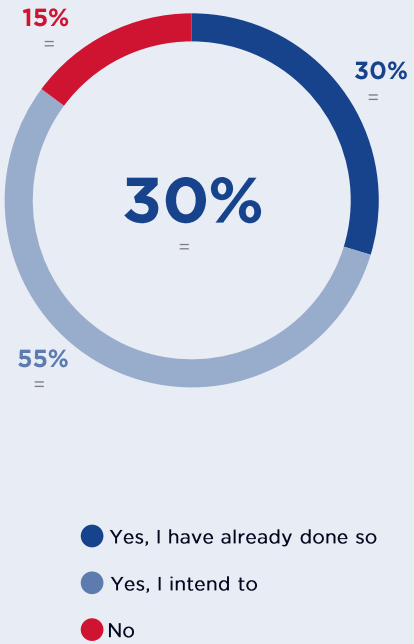
Similarly, fewer elected officials report having already rejected projects that did not incorporate sustainable construction methods (20%, down 17 points), and an increasing number say they are opposed to the idea of doing so.

This position is consistent with the pattern observed earlier regarding their perception of the value of sustainable construction: 30% of elected officials believe that it creates less value than traditional construction or no value at all.

Base: local elected officials (600 respondents) – single answer

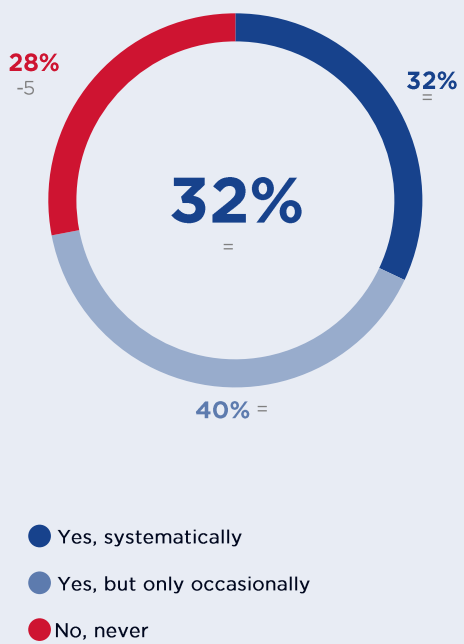
A STABLE LEVEL OF CONCRETE COMMITMENT AMONG PROFESSIONALS

Are you personally prepared to do more jobs that take sustainable construction into account?



Base: professionals (1,500 respondents) – single answer

Do you assess the carbon footprint of your sustainable building projects?



Base: professionals who are involved in sustainable construction (1,208 respondents) – single answer

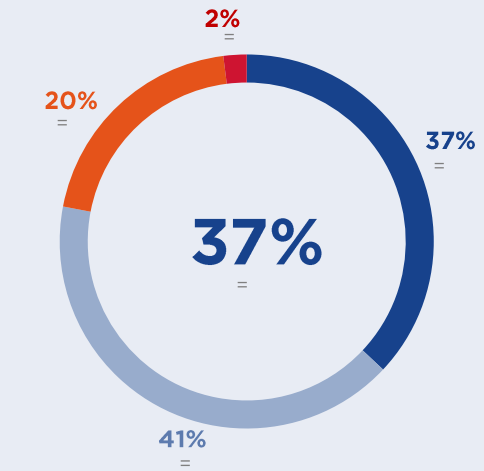
Buy-in for sustainable construction remains high among professionals: while 85% are planning or already undertaking more projects that incorporate sustainable practices, only 30% are currently doing so – a figure that remains unchanged from last year. Only a minority (15%) are still reticent.

Among professionals already working in sustainable construction, 32% report that they systematically assess the carbon footprint of their projects. 40% say they do so occasionally, while 28% say they never assess the carbon footprint, a figure that is on the decline.

Systematic application of sustainable construction practices thus remains limited.

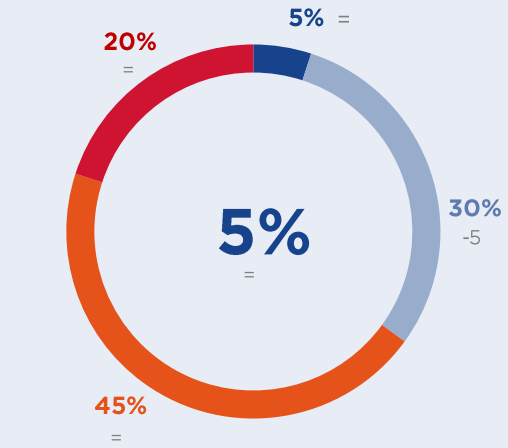
TRAINING IN SUSTAINABLE CONSTRUCTION: A DRIVER FOR JOBS

In your opinion, is your training in the field of sustainable construction a criterion that could make the difference in obtaining a job?



Base: students who receive lessons on the subject of sustainable construction (1,321 respondents) – single answer

Are you personally prepared to accept a job offer at a company that is not committed to sustainable construction?



Base: students (1,500 respondents) – single answer

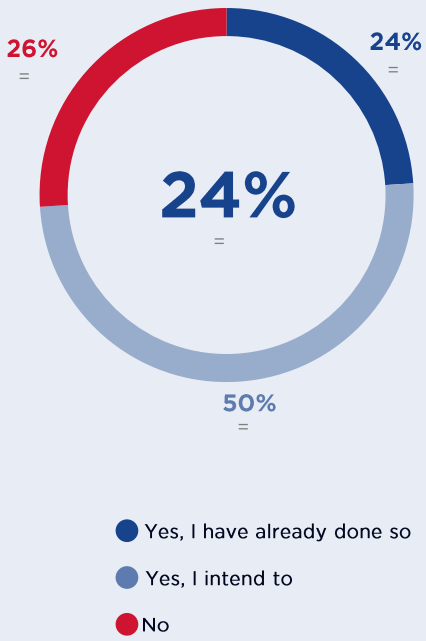
Among students trained in sustainable construction, 37% view their training as a key factor in finding a job. Overall, 78% (stable) view this training as a factor that could make a difference when seeking employment.

However, while training in sustainable construction may be an advantage in the job market, only 5% of students would categorically turn down a job offer from a company that is not committed to sustainable construction – a figure that has remained stable.

Thus, while sustainable construction is widely seen as an employability factor, it rarely translates into a firm refusal to work for employers who are less committed to sustainability.

STABILITY IN BOYCOTTS BY ASSOCIATIONS

Are you personally prepared to boycott construction companies that are not doing enough to build more sustainably?



24% of associations have already called for a boycott of companies that are not sufficiently committed to more sustainable construction.

One association in two is considering this type of initiative, a figure that remains unchanged from last year.

Base: associations (1,200 respondents) – single answer

Qualitative study

Investment in construction: how do adaptation and resilience fit in?

Details of the methodology: page 4

Key concepts

Adaptation

Adaptation means changes made to a building, infrastructure, or project in order to adjust to new conditions (climatic, regulatory, technological, etc.).

Its goal is to make the built environment compatible with current or foreseeable changes.

Examples:

- Improving insulation to better withstand heatwaves or cold snaps.
- Elevating buildings in flood-prone areas.
- Using natural ventilation systems to reduce reliance on air conditioning.
- Use materials that are resistant to moisture or storms.

Adaptation can be reactive or proactive: it can be planned in advance or implemented in response to a change.

Adaptation is one component of resilience

Resilience encompasses adaptation but with the addition of robustness and flexibility in the face of unforeseen circumstances.

Examples:

- Adaptation of a building on the seashore could mean raising the ground floor (to protect against flooding).
- Resilience is achieved by combining this adaptation with corrosion-resistant materials, an independent power supply, and an evacuation plan.

Resilience

Resilience goes a step further: it means designing or adapting a building so that it can withstand shocks, absorb impacts, and quickly recover after disruption (caused by a natural disaster, an energy crisis, etc.).

It ensures the durability and functionality of the built environment, even during extreme or unforeseen events.

Examples:

- Hurricane-resistant structures.
- Redundant systems (electricity, water) to maintain supply during outages.
- Modular spaces that can be adapted to changes of use (e.g. to serve as shelters in a crisis).
- Energy self-sufficiency (solar panels, rainwater harvesting).

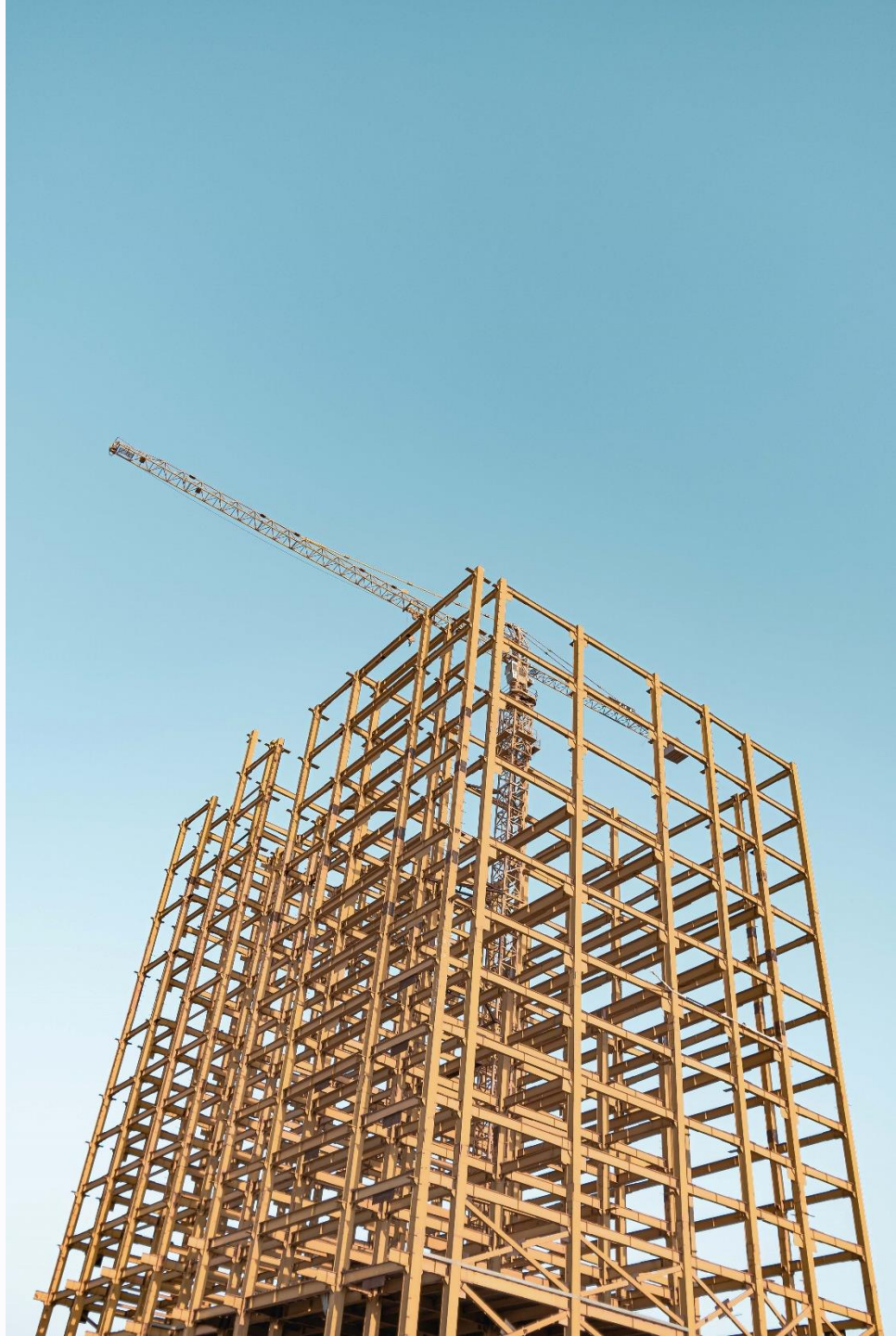
Resilience is a holistic approach: it takes multiple risks and scenarios into account, with a focus on longevity and the ability to bounce back. It combines climate adaptation, safety, and flexibility of use.

CLIMATE ADAPTATION AND RESILIENCE: WIDELY RECOGNIZED, BUT RARELY IMPLEMENTED

While climate adaptation and resilience are now widely recognized as necessary, they **remain difficult to translate into concrete strategies and practices**.

The immaturity of the market, the complexity of existing frameworks, and a business model that remains unclear continue to hinder their widespread implementation, beyond a handful of early adopters.

"As part of our commitment to sustainability, we aim to achieve carbon neutrality across our entire financing portfolio by 2050. Mitigation is clearly our main tool, with quantified targets. No specific targets have been set regarding adaptation."
(Universal bank)



RECOGNITION OF THE IMPORTANCE OF ADAPTATION AND RESILIENCE, BUT LIMITED IMPLEMENTATION

Adaptability and resilience are now recognized issues throughout the financial sector.
But implementation remains limited due to:

- Fragmented standards
- Complex risk models
- Inadequate reflection in financial statements
- Uncertain return on investment

THE MAIN OBSTACLE: RETURN ON INVESTMENT

There are upstream barriers, but **the main obstacles are economic:**

- No simple metric equivalent to CO_2
- Long-term and uncertain benefits
- Immediate and visible costs

Until the return on investment in resilience is standardized and can be directly incorporated into decision-making, it will continue to be viewed as a cost rather than a driver of performance.

MATURITY GAP BETWEEN STAKEHOLDERS

- Insurance companies → The most mature (risk-based integration)
- Development banks → Leaders in their sector (focus on infrastructure)
- Universal banks → Wide variations, with mitigation still prevailing

DECISION-MAKING CHAIN FOR CLIMATE ADAPTATION AND RESILIENCE

The barriers and obstacles are presented on the following pages through a schematic representation of the investment decision-making chain.

Risk awareness and prioritization

Identify physical climate risks and **promote shared awareness**

1 **Policy and market guidance**

Translate risk awareness into **policy and market signals** that guide investment and financing decisions

2 **Frameworks and standards**

Develop common frameworks, taxonomies, and standards to **assess and validate** adaptation and resilience measures

3 **Macro analysis and diagnostics**

Analyze risks and exposure **at the portfolio level to guide capital allocation and risk management**

4 **Micro analysis and diagnostics**

Perform diagnostics at **project** level to **identify vulnerabilities and evaluate the technical feasibility and cost** of adaptation and resilience measures

5 **Business case and ROI**

Assess the **economic viability of investment** in resilience, including cost-benefit analysis, risk reduction, and value preservation

6 **Structuring and financing**

Structure **financial instruments** to fund adaptation and resilience projects and attract large-scale investment

7 **Operational & commercial deployment**

Roll out the solutions to individuals and businesses: distribution, advice, and **adoption by end users**

8

ADAPTATION AND RESILIENCE REMAIN MARGINAL, OFTEN ONLY ACTIVATED AFTER A CRISIS

Risk awareness and prioritization

Despite the increasing frequency of extreme weather events, adaptation and resilience have not yet become fully integrated into economic decision-making. **Long-term physical risks remain poorly understood and are often perceived as abstract**, particularly in developed economies.

Awareness generally increases in the wake of major disasters, highlighting an approach that is still largely reactive. In many regions, particularly in the Global South, stakeholders point to **a lack of collective maturity on these issues**.

This primarily reflects **a societal barrier**: adaptation is struggling to gain traction in public debate and strategic priorities.

Nevertheless, the increasing visibility of climate-related disasters and changing societal expectations **could gradually raise awareness of these issues**.

"Nothing will really change until climate disasters start really hitting rich countries and wealthy people directly, because humans only act when a crisis affects them."
(Universal bank)

"Governments are moving, but awareness also has to change for the public, and I think the new generations are going to change that."
(Development bank)

FRAMEWORKS ARE IN PLACE, BUT PRIORITIZATION REMAINS GEOGRAPHICALLY UNEVEN

Policy and market guidance

Regulations on adaptation and resilience do exist, but **their implementation remains inconsistent and is often given** lower priority than other issues. In developed economies, the focus remains primarily on the energy transition, competitiveness, and decarbonization. In emerging economies, pressing social issues and basic infrastructure needs **tend to relegate adaptation to the back burner**.

The lack of alignment between national, regional, and local frameworks creates uncertainty for economic decision-makers. Financial incentives for adaptation and resilience remain limited, and market signals still appear weak, particularly for small and medium-sized enterprises.

Against this background, **some private initiatives are emerging**, while stricter climate transparency requirements **and the introduction of targeted public incentives are gradually helping to shape the landscape**.

"Right now, the focus is on immediate needs like hospitals and essential infrastructure, not long-term adaptation."
(Development bank)

"Once our local version of IFRS S2* is rolled out, clients subject to the requirement will start thinking seriously about climate risk."
(Universal bank)

"We need energetic and innovative private companies to provide concrete solutions, and to engage with policymakers by showing where the pain points are and what policy support is needed."
(Universal bank)

* The ISSB sustainability reporting standard, which defines the information to be disclosed regarding climate-related risks and opportunities, governance, strategy, and risk management, as well as indicators and targets, including GHG emissions (Scopes 1, 2, and 3) and, where applicable, transition-related disclosures.

BENCHMARKS AND STANDARDS THAT REMAIN COMPLEX AND OF LITTLE PRACTICAL USE

Frameworks and standards

Taxonomies, frameworks and standards related to adaptation and resilience have been developed in recent years. However, they are often **perceived as complex, not sufficiently practical, and difficult for non-specialists to apply**.

Assessment of adaptation and resilience measures relies heavily on qualitative criteria, with **few standardized thresholds or indicators**. This situation perpetuates fragmentation between international frameworks, local variations, and existing certifications, making alignment difficult across the value chain.

As a result, **adaptation and resilience are often subsumed under broader sustainability frameworks or conflated with mitigation**, in the absence of clear benchmarks for identifying, validating, and comparing the relevant measures.

At the same time, sectoral initiatives and support tools are emerging to clarify practices and facilitate the adoption of existing standards.

"Moving heating, ventilation, and air conditioning from the ground floor, or figuring a way to have less water usage in case of a drought, that's a very difficult and not standard measure, compared to gigawatts generation."
(Universal bank)

"In many taxonomies they don't reference what level of green building certifications would be deemed as green."
(Universal bank)

"Investors or developers are often looking for some type of industry seal of approval to say, OK, focus on these five things... support those companies... use those products."
(Universal bank)

INVESTMENT TIMELINES OUT OF STEP WITH LONG-TERM PHYSICAL RISKS

Macro analysis and diagnostics

At the portfolio level, **the incorporation of climate-related physical risks remains constrained by an inherent difference in timescale**. Decisions on investment, credit, and asset-holding are typically far shorter term than the timescale for changes in climate risks.

In this context, **potential long-term impacts still carry little weight** in capital allocation decisions and investment trade-offs. Furthermore, not all financial players operate on the same timeframe, making it difficult to align incentives.

Adaptation and resilience thus remain marginal issues in many portfolio strategies, even though some long-term investors and regulatory requirements are starting to incorporate physical risk scenarios more explicitly.

"A commercial bank typically provide shorter term loans and in the short term, in terms of credit risk, it may not change the needle very much."
(Development bank)

"Many [asset managers] don't hold assets for that long. They think, 'I'll own this building for five years, then I'll sell it."
(Universal bank)

"Follow the money. If investors are screening for this risk for portfolio management or due diligence decisions, it sends a really powerful message."
(Insurance company)

"Whoever is tasked with the management and upkeep of this very costly asset in the future will want to make sure that the social and financial profits are as undisrupted as possible."
(Insurance company)

TECHNICAL TOOLS THAT REMAIN DIFFICULT TO IMPLEMENT AND INTEGRATE

Micro analysis and diagnostics

At the project level, the assessment and integration of adaptation and resilience measures often remain **complex, costly, and highly dependent on the local context**. Physical risk assessments require specialized expertise, which can be a barrier, particularly for small-scale projects.

Adaptation and resilience measures are also closely linked to the environment in which assets operate – infrastructure, networks, urban developments – which **limits their standardization and complicates their integration into portfolios** or financial instruments.

Existing evaluation mechanisms and incentives also **tend to favor new build**, while the renovation of existing properties, which are often more exposed to risk, remains more difficult to organize.

Nevertheless, simplified tools and support mechanisms are emerging to facilitate the initial approach and help identify priority vulnerabilities.

"The assessment of sustainability goals sometimes do incentivize new buildings as opposed to the retrofitting of existing buildings"
(Commercial bank)

"Taxonomy requirements call for robust climate risk and vulnerability assessment (CRVA), which is often too costly for small projects."
(Development bank)

"There is a tool out there to help them, but a lot of times the companies or the governments don't really know where to begin."
(Insurance company)

"The lowest hanging fruit is probably new infrastructure construction."
(Insurance company)

ECONOMIC ASSESSMENT FRAMEWORK THAT STILL LACKS STABILITY

One of the main obstacles to the implementation of adaptation and resilience measures is **the difficulty in clearly demonstrating their economic returns**. Unlike mitigation, which relies on widely accepted indicators, adaptation and resilience **lack simple, standardized metrics** for assessing and comparing benefits.

The costs are immediate, visible, and concentrated in the early stages, while the benefits are long-term, probabilistic, and often indirect (reduction of future losses, business continuity, preservation of value). This asymmetry makes it difficult to incorporate adaptation and resilience considerations into financial models, credit analyses, or investment decisions.

The translation of physical risks into operational financial variables is still applied inconsistently by different stakeholders. In this context, **certain indicators, particularly those from the insurance sector, are beginning to make the economic impacts of physical risk more tangible**, though they do not yet constitute a stable framework for evaluation.

"We collect the data and assess the risk, but we have not yet in a systematic, robust manner, managed to embed it into the credit risk."
(Development bank)

"Publishers of ESG data should be able to express estimated benefits using a common metric, comparable to $tCO_2eq.$ for mitigation, which would make it easier for lenders and investors to make decisions."
(Universal bank)

"We are working to integrate certification into the credit analysis process, to make it clear that it is not an end in itself: it already contains key information about the real estate project and the company, which can be used in the financial assessment."
(Development bank)

FINANCIAL INSTRUMENTS THAT REMAIN MARGINAL AND DIFFICULT TO STANDARDIZE

Structuring and financing

There are few financial instruments explicitly dedicated to adaptation and resilience. **The market remains largely structured around instruments focused on mitigation**, particularly green bonds and products related to energy efficiency or new build.

Adaptation and resilience projects are often of **modest size, fragmented, and highly context-specific**, which makes it difficult to aggregate them and transform them into standardized financial products. The traceability and transparency of how funds are used may also raise questions, particularly in some emerging markets.

This limits the liquidity and comparability of financial instruments devoted to adaptation and resilience. Nevertheless, financial instruments from a few pioneering issuers, notably in the public sector, are evidence of an emerging trend that is still in the experimental phase.

"Green building with certifications like BREEAM is well established, so it's much easier. With adaptation, you often have lots of small projects that need to be bundled together to make financing work."
(Universal bank)

"The Tokyo Metropolitan Government issued the first resilience bond to improve structures to resist floods and earthquakes."
(Universal bank)

IMPLEMENTATION / LAST-MILE DELIVERY STILL A SECONDARY ISSUE, HELD BACK BY UPSTREAM DECISION-MAKING

Operational and commercial deployment

At this stage of market maturity, **most of the barriers to adaptation and resilience lie upstream in the decision-making process**. The challenges of operational implementation have thus been explored in less detail, not because the process is inherently simple but because projects rarely reach this stage.

When solutions are proposed, their implementation may be hindered by a disconnect between strategy and the reality on the ground. Customer-facing staff (bank advisors, sales teams, local managers) sometimes lack incentives, appropriate tools, or clear guidelines for promoting products and services related to adaptation and resilience.

Understanding of these products by end users thus remains limited, especially for small- and medium-sized enterprises and individual consumers. The operational implementation of adaptation and resilience thus depends heavily on the ability of organizations to align governance, information systems, and business objectives.

"From mitigation projects I've worked on, one question is how this actually works at branch level. Advisors are driven by sales KPIs, so without alignment between headquarters and branches, adaptation won't really be implemented."
(Development bank)

Appendices
Country Focus

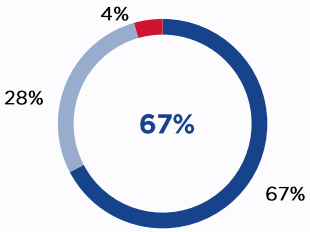
Key indicators

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 ARGENTINA

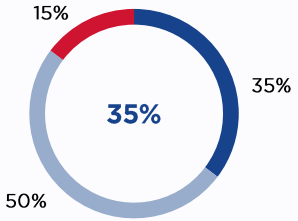
Are you familiar with or have you heard of the concept of sustainable construction?

STAKEHOLDERS



67%

CITIZENS

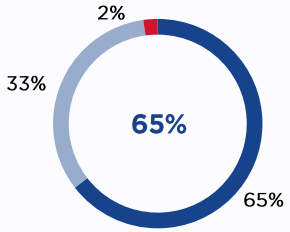


39%

- Yes, and I know exactly what it is about
- Yes, but I don't really know anything about it
- No, I've never heard of it

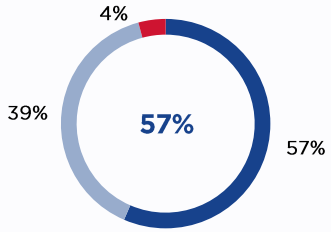
In your opinion, would you say implementing more sustainable construction is...?

STAKEHOLDERS



65%

CITIZENS

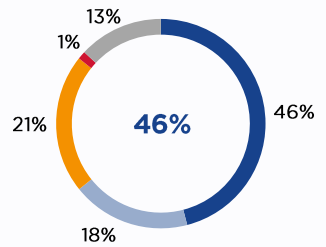


63%

- A priority
- Important but not a priority
- Of secondary importance

In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...

STAKEHOLDERS



47%

- Creates more value than traditional construction
- Creates as much value as traditional construction
- Creates value but less than traditional construction
- Creates no value
- I don't know

Which of the following definitions best fits sustainable construction? (TOP 2)

STAKEHOLDERS

Construction using ecological materials — 51%

Energy efficient construction — 43%

CITIZENS

Construction using ecological materials — 55%

Energy efficient construction — 32%

Priority actions to accelerate the development of sustainable construction? (TOP 2)

STAKEHOLDERS

Raise awareness among all stakeholders and strengthen their collaboration — 37%

Raise public awareness of the challenges of sustainable construction — 35%

CITIZENS

Raise public awareness of the challenges of sustainable construction — 43%

Make sustainable materials, products and solutions more competitive — 31%

Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)

STAKEHOLDERS

Architects and building engineers — 49%

Private companies in the construction sector — 42%

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Global result

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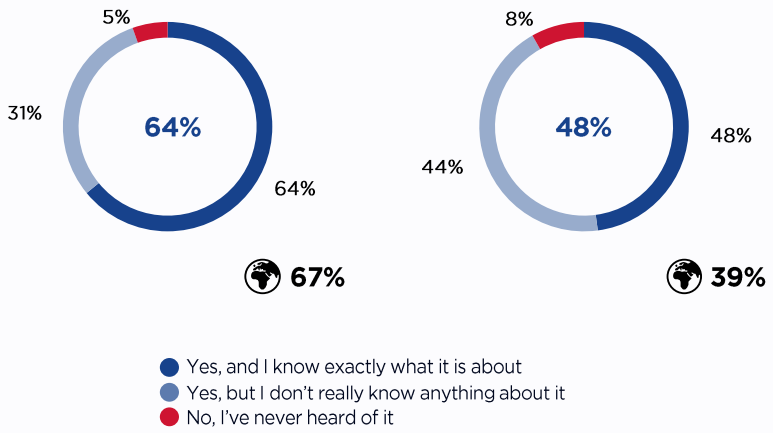
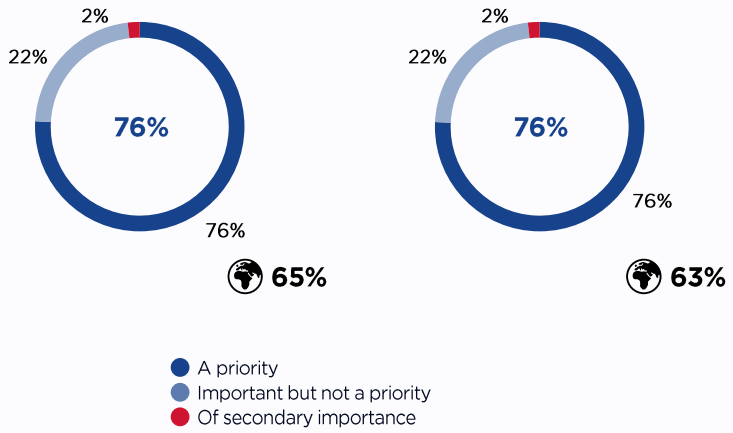


In your opinion, would you say implementing more sustainable construction is...?



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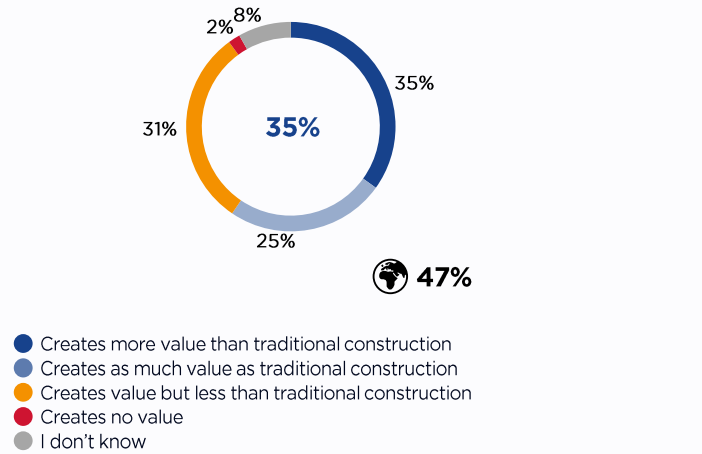

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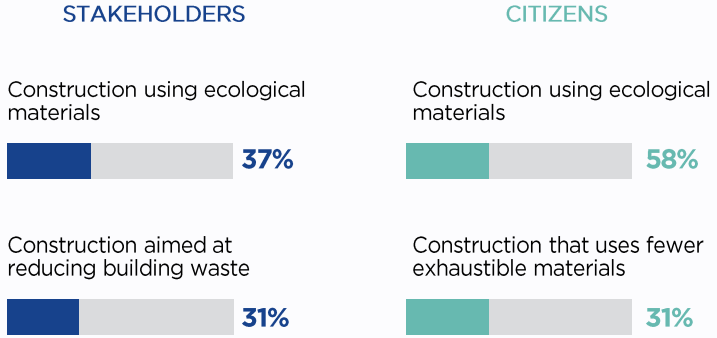

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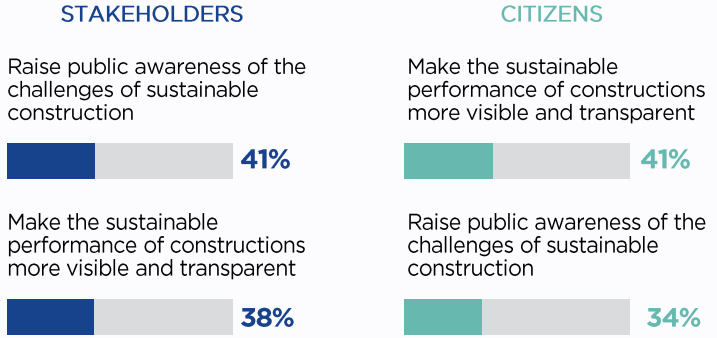

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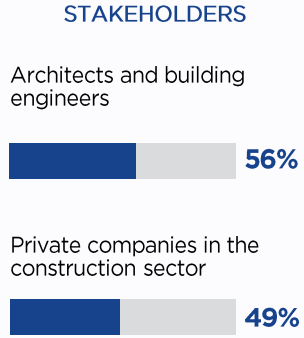

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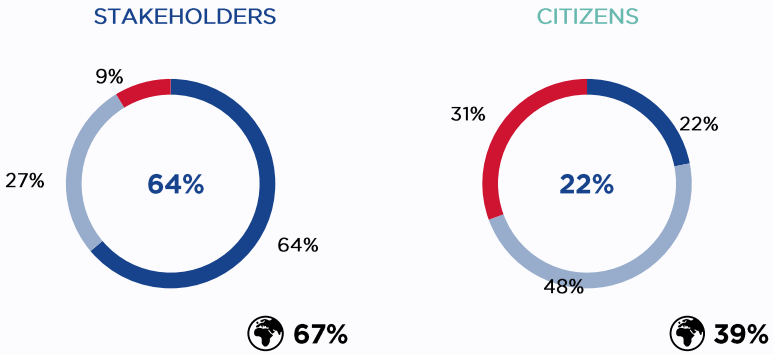
Global result

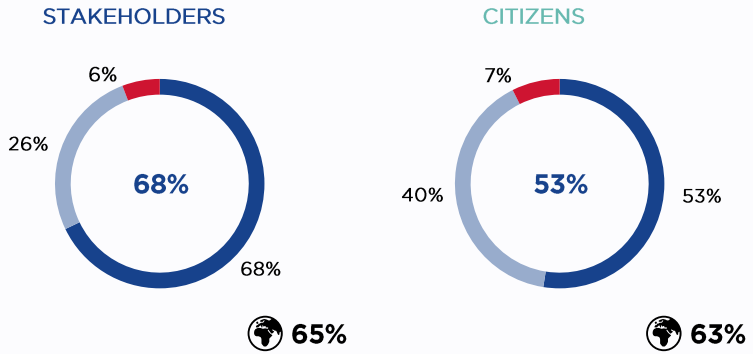
The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 CANADA

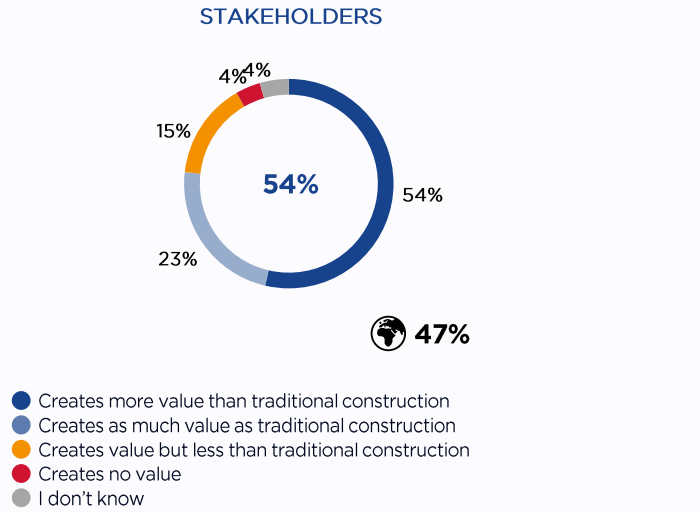
Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



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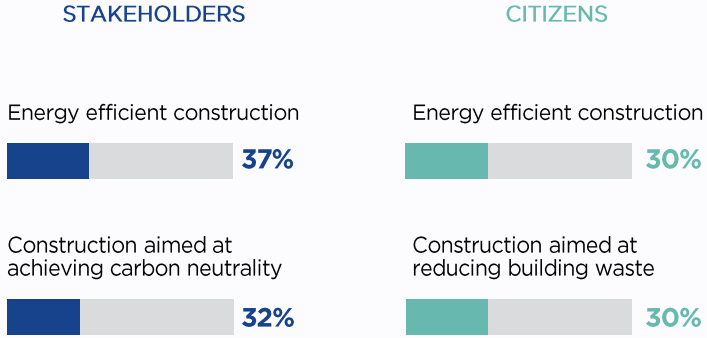

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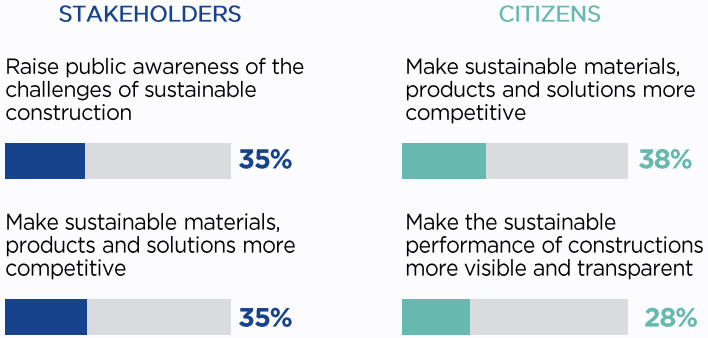

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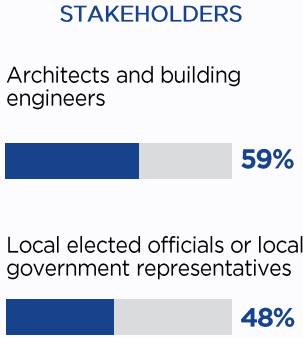

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Global result

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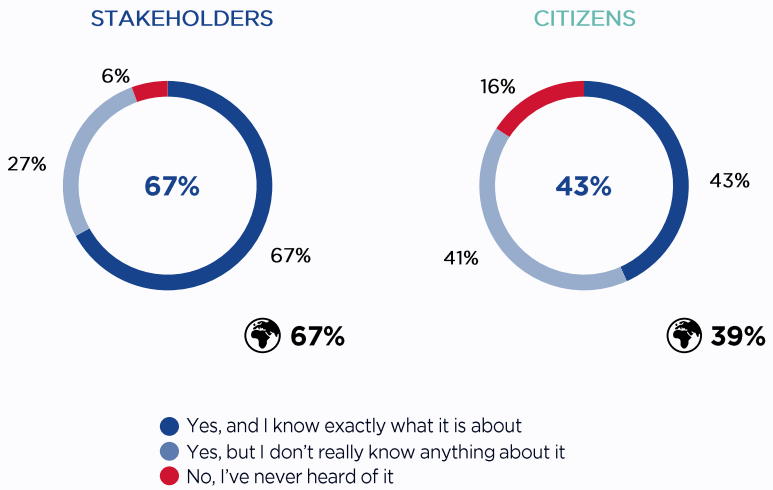

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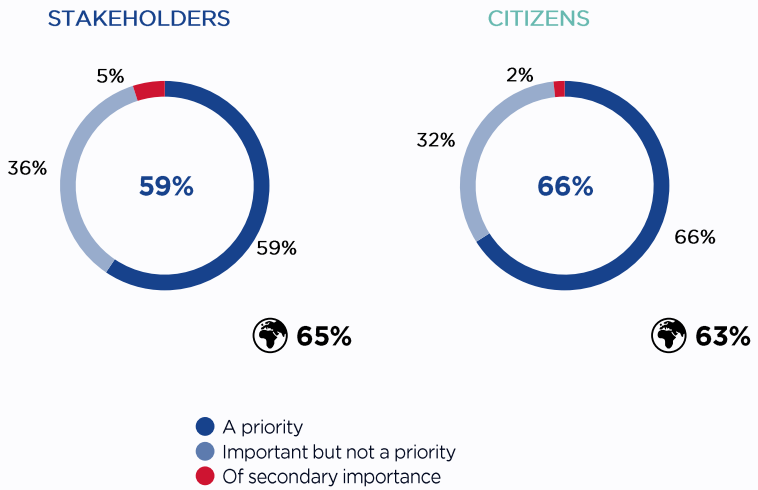

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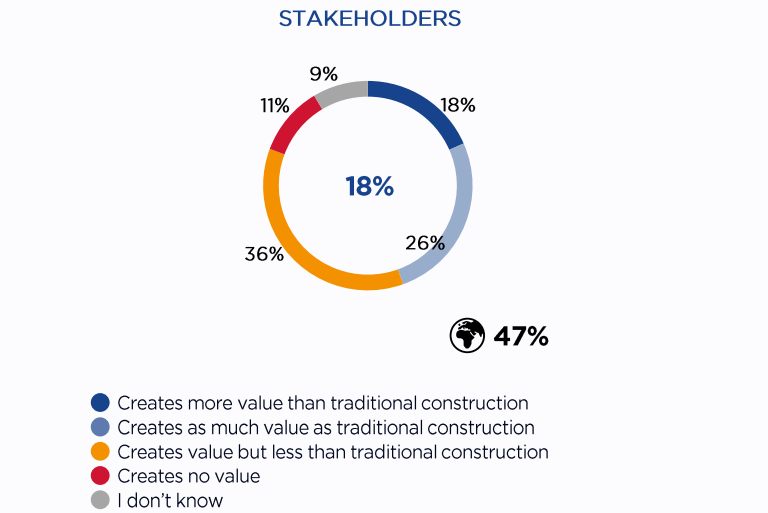

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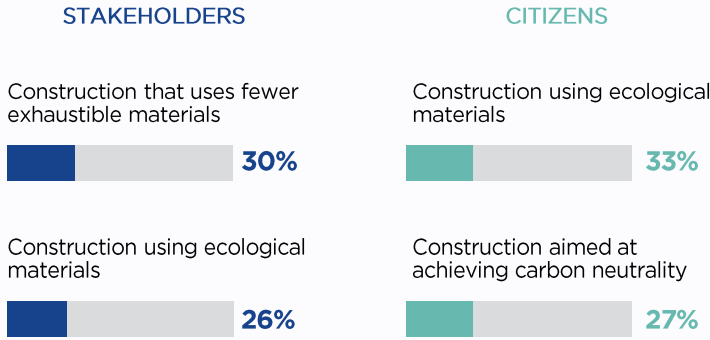
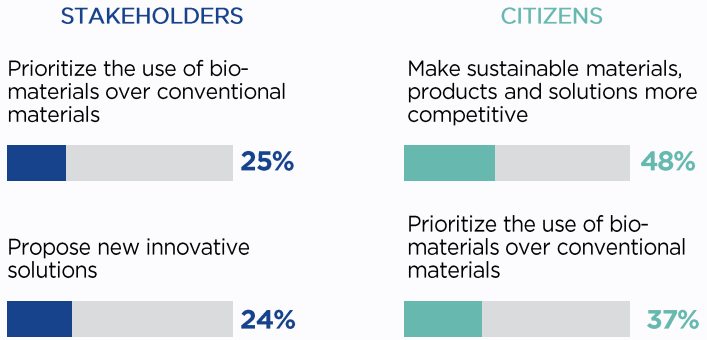


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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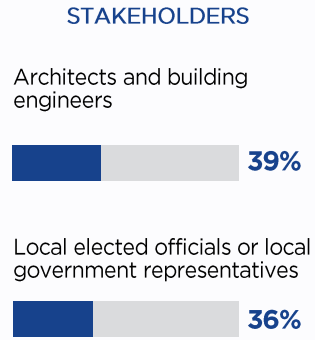

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Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 COLOMBIA

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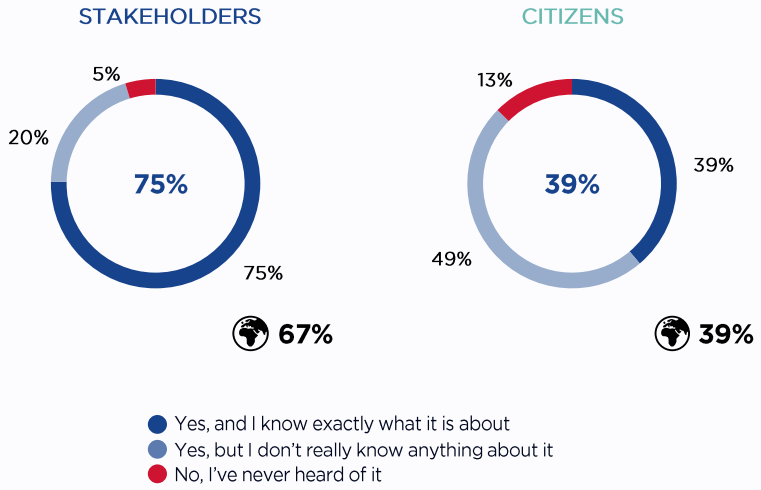

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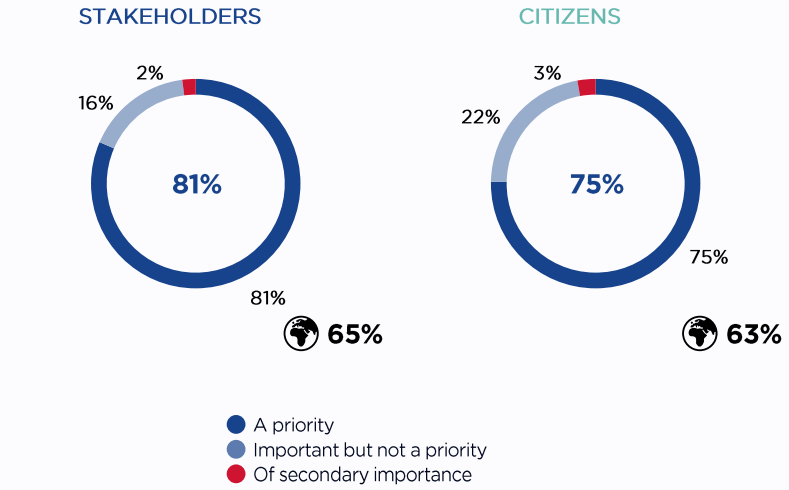

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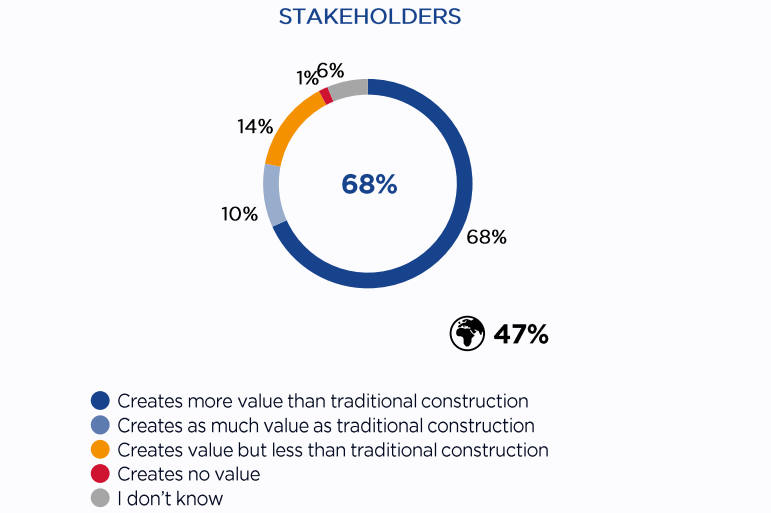

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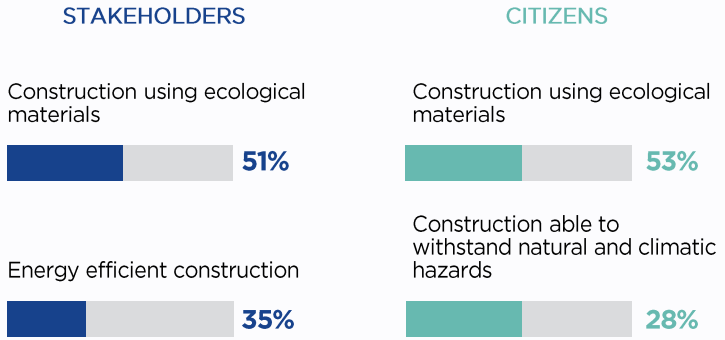

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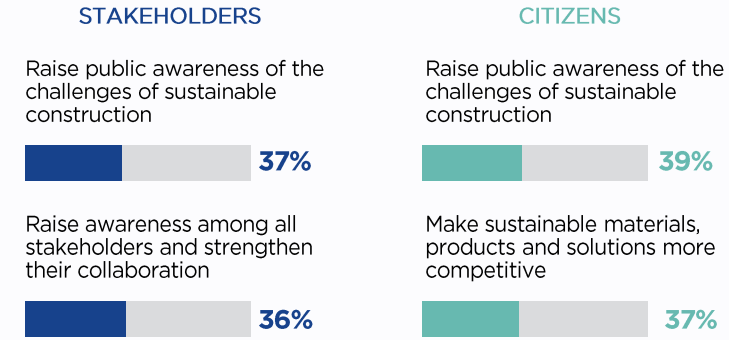

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Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 CZECH REPUBLIC

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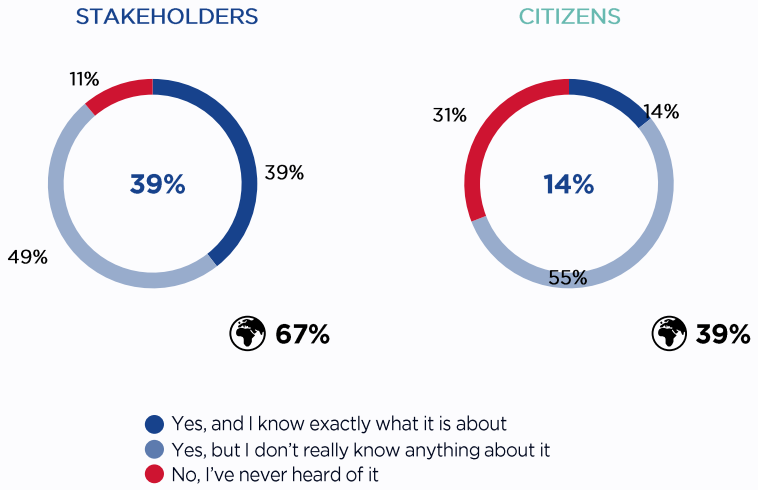

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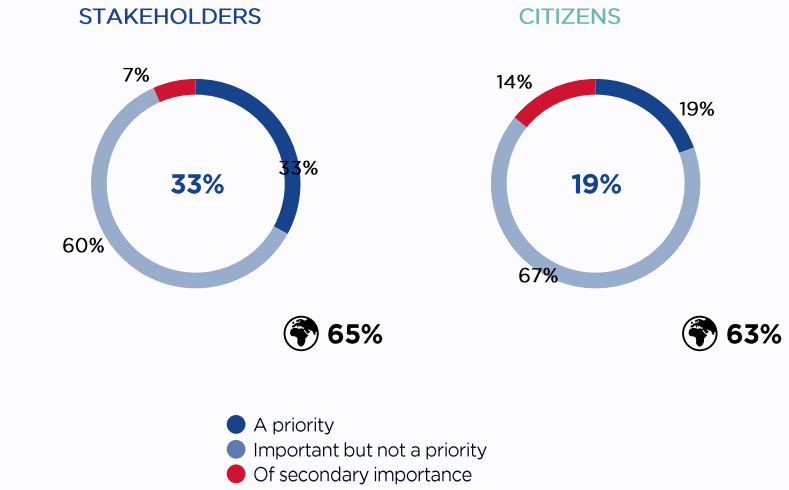

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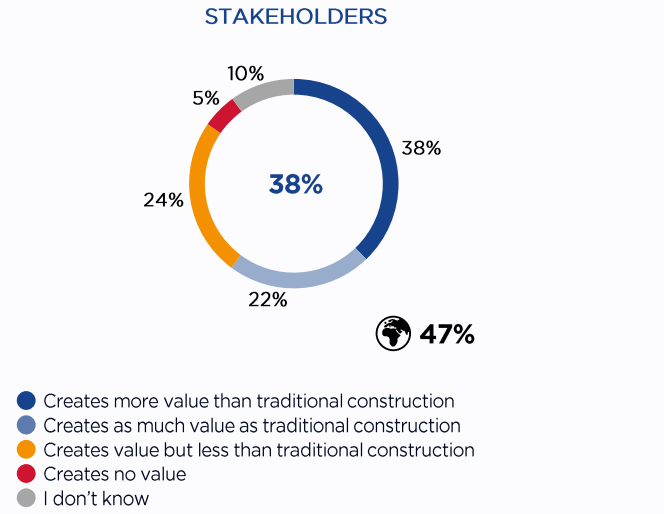

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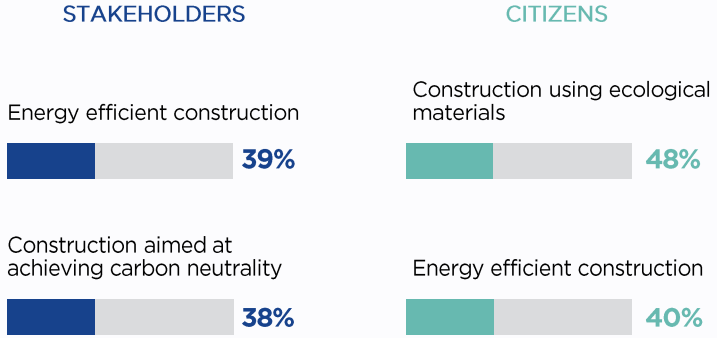

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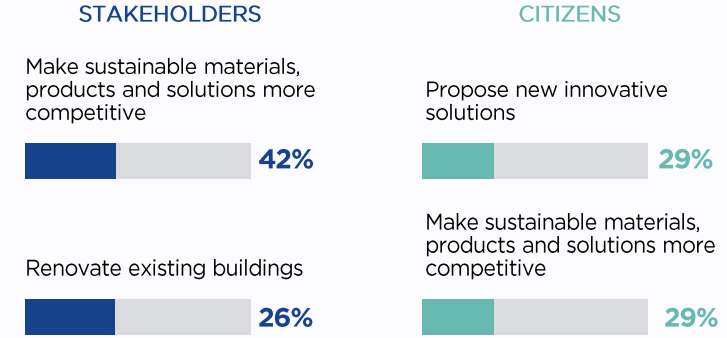

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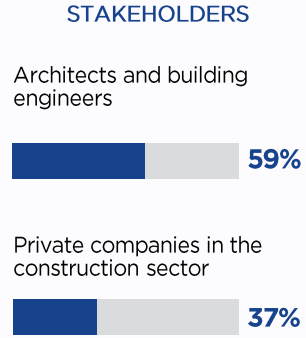

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Global result

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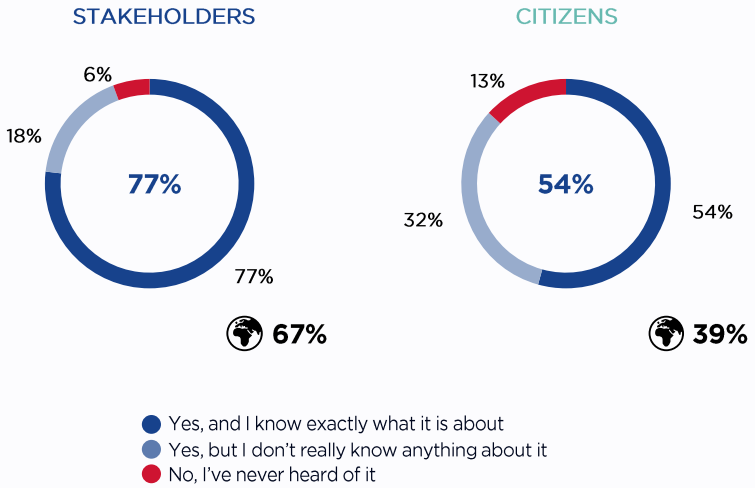

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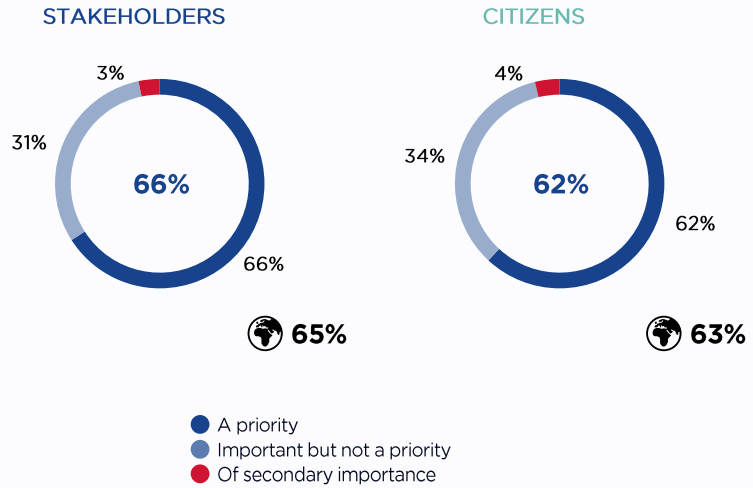

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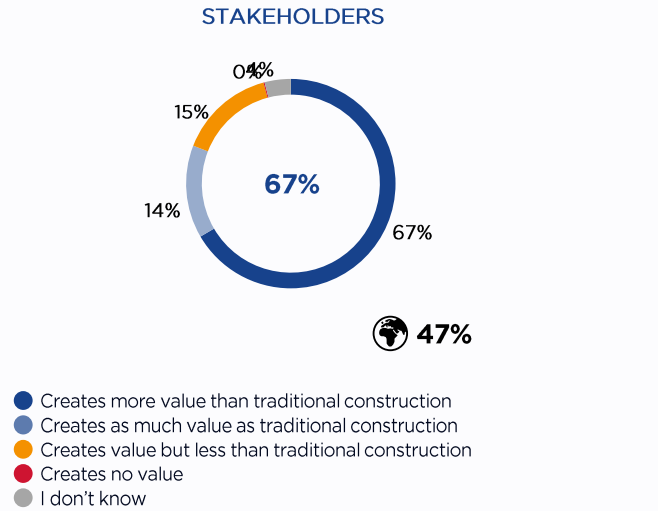

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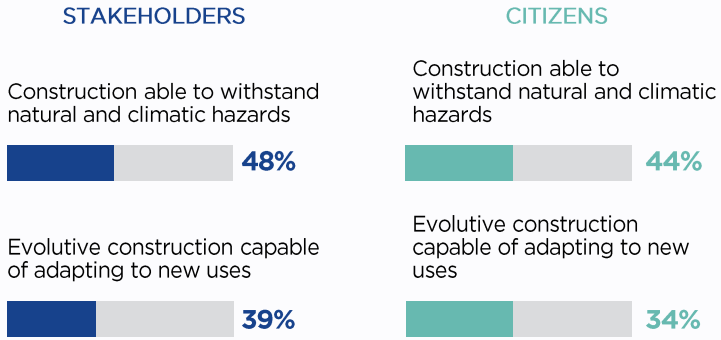
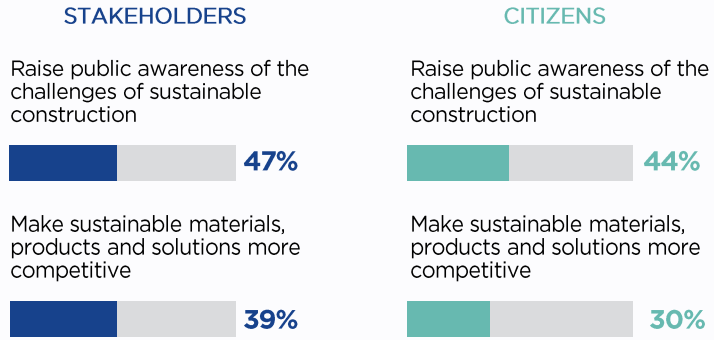
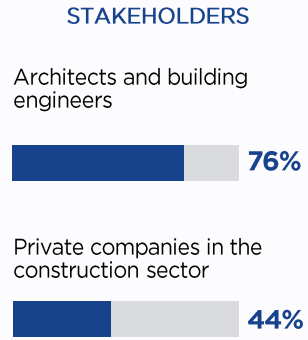


Priority actions to accelerate the development of sustainable construction? (TOP 2)



Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)



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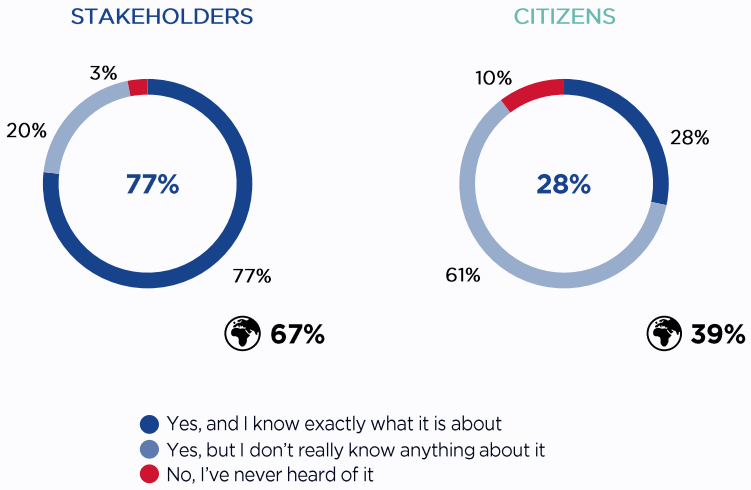
Global result

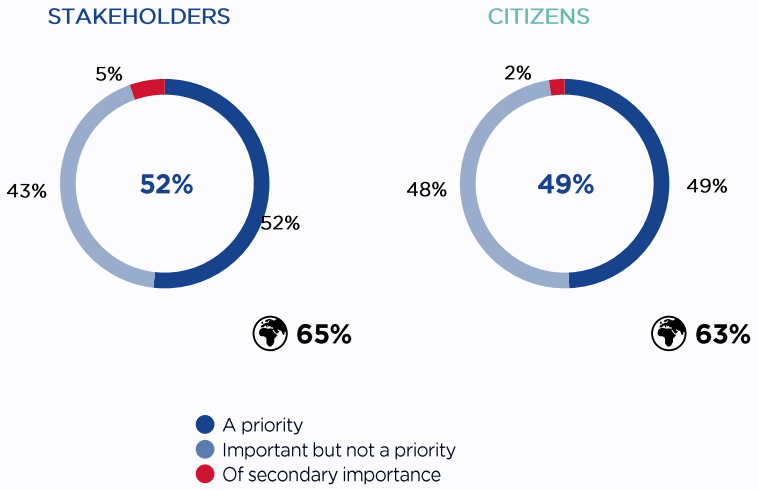
The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 FINLAND

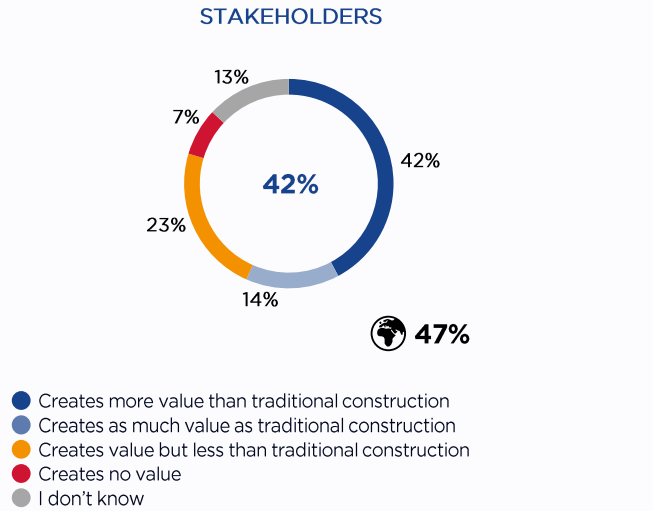
Are you familiar with or have you heard of the concept of sustainable construction?



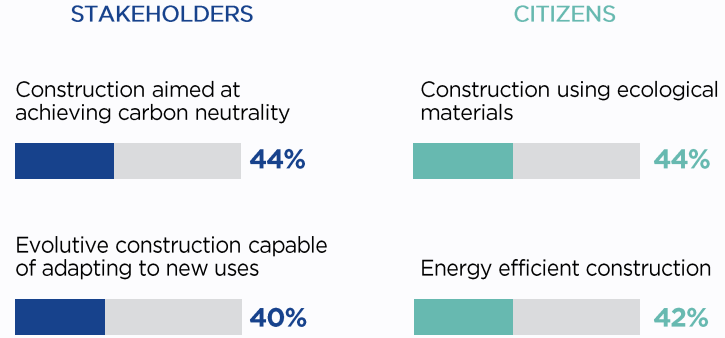
In your opinion, would you say implementing more sustainable construction is...?



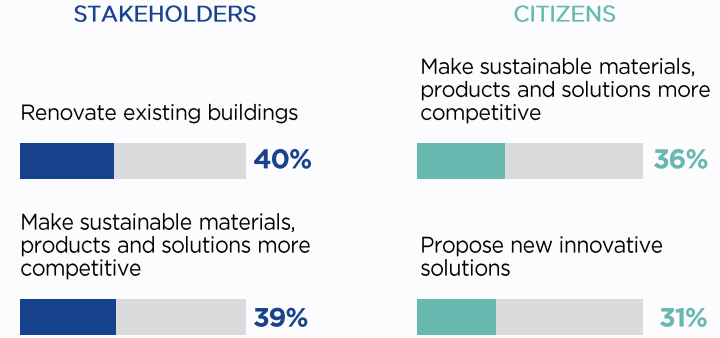
In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



Which of the following definitions best fits sustainable construction? (TOP 2)



Priority actions to accelerate the development of sustainable construction? (TOP 2)



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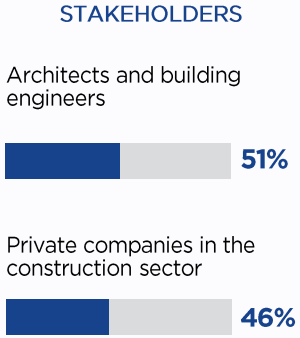

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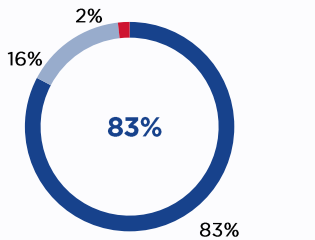
Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 FRANCE

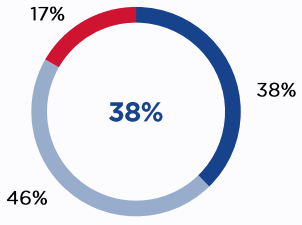
Are you familiar with or have you heard of the concept of sustainable construction?

STAKEHOLDERS



67%

CITIZENS

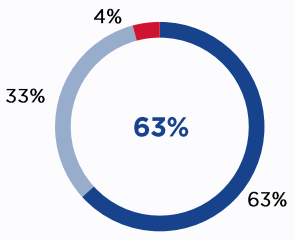


39%

- Yes, and I know exactly what it is about
- Yes, but I don't really know anything about it
- No, I've never heard of it

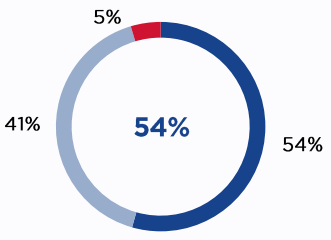
In your opinion, would you say implementing more sustainable construction is...?

STAKEHOLDERS



65%

CITIZENS

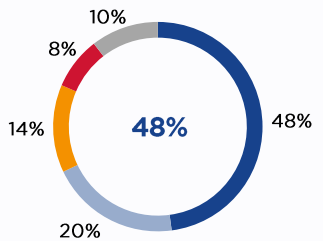


63%

- A priority
- Important but not a priority
- Of secondary importance

In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...

STAKEHOLDERS



47%

- Creates more value than traditional construction
- Creates as much value as traditional construction
- Creates value but less than traditional construction
- Creates no value
- I don't know

Which of the following definitions best fits sustainable construction? (TOP 2)

STAKEHOLDERS

Energy efficient construction — 34%

Construction able to withstand natural and climatic hazards — 32%

CITIZENS

Energy efficient construction — 39%

Construction using ecological materials — 36%

Priority actions to accelerate the development of sustainable construction? (TOP 2)

STAKEHOLDERS

Train professionals more — 34%

Renovate existing buildings — 32%

CITIZENS

Prioritize the use of bio-materials over conventional materials — 27%

Renovate existing buildings — 24%

Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)

STAKEHOLDERS

Architects and building engineers — 61%

Private companies in the construction sector — 29%

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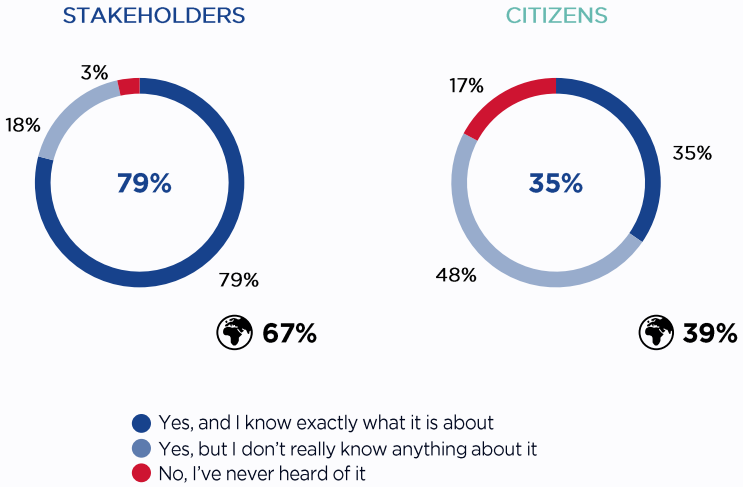
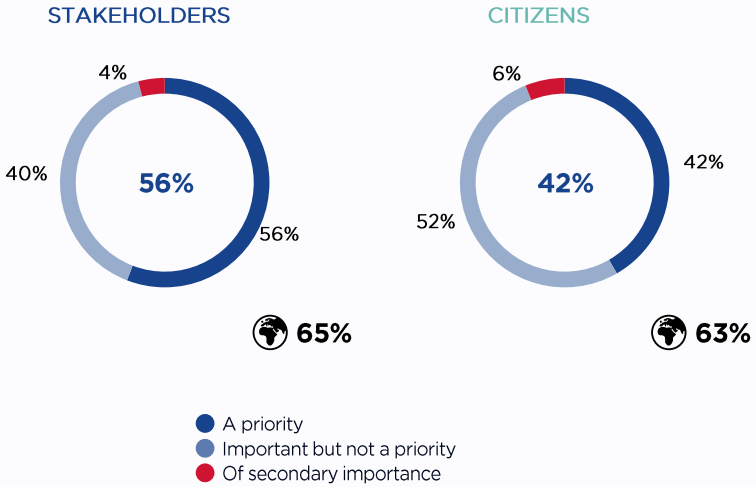
Global result

Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



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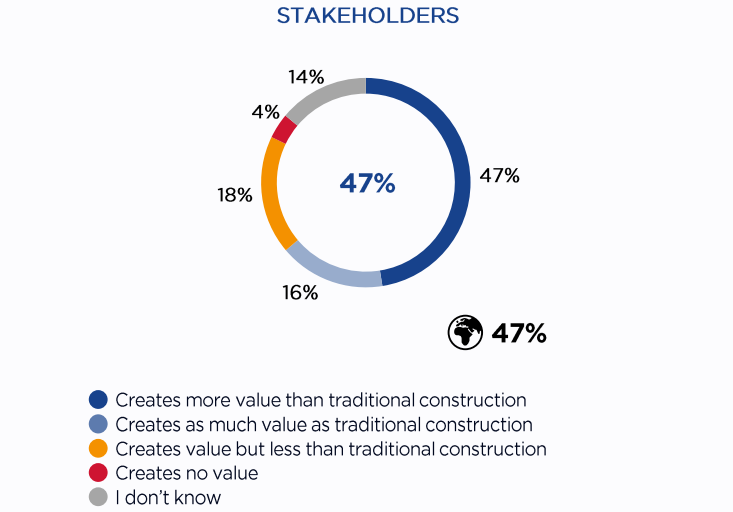

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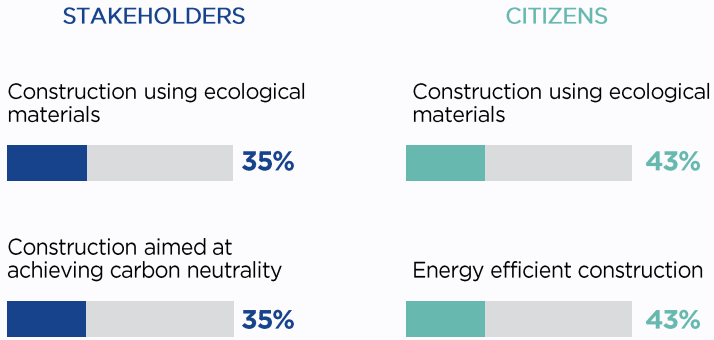
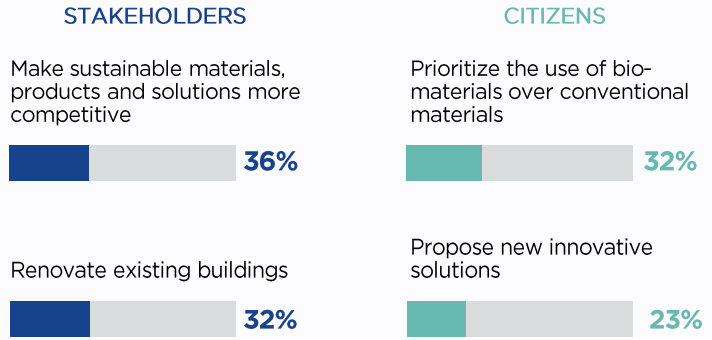


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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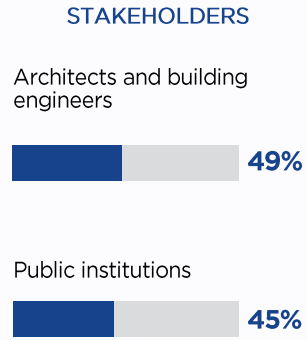

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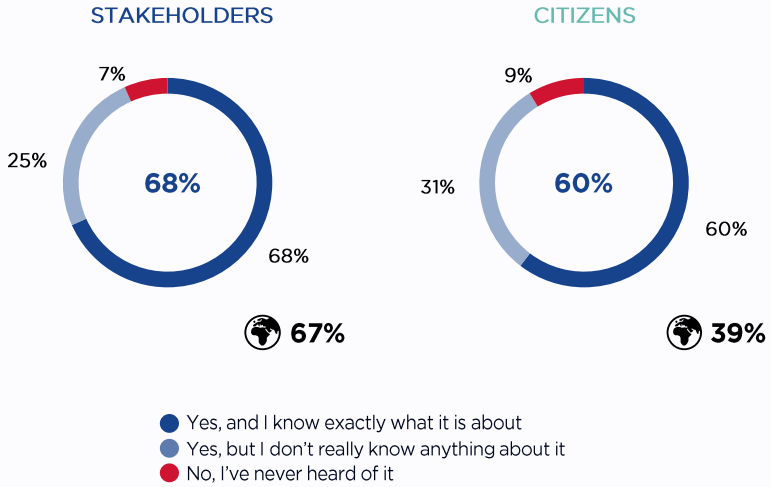
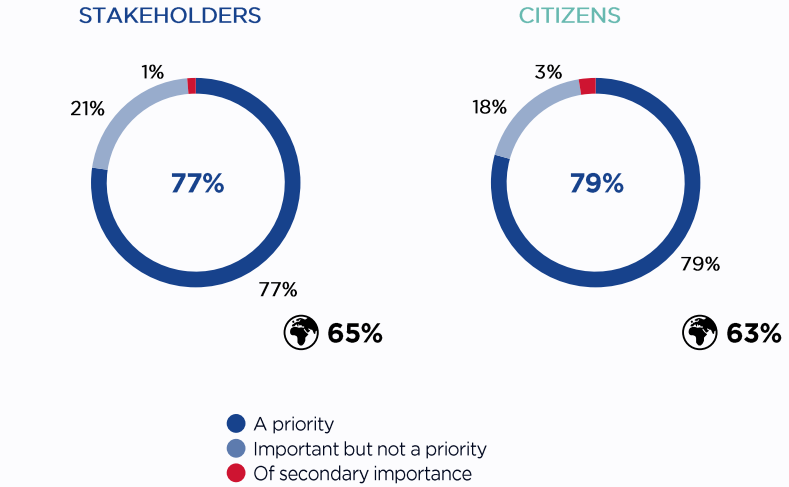
Global result

Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



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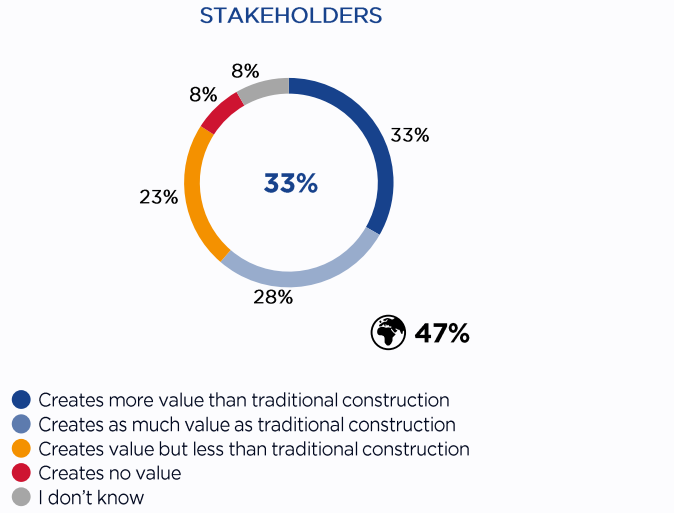

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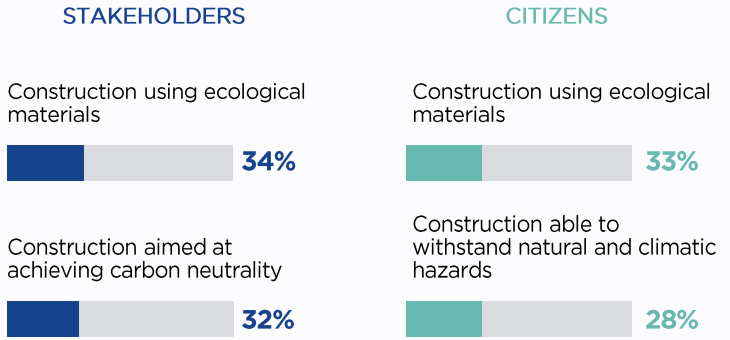
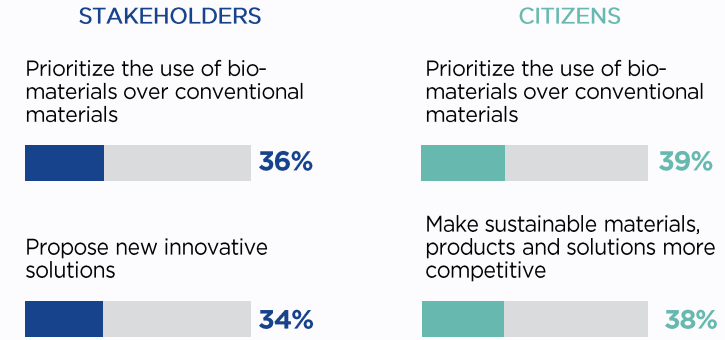


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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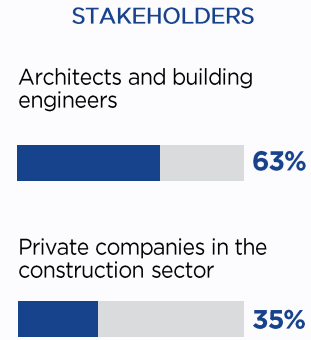

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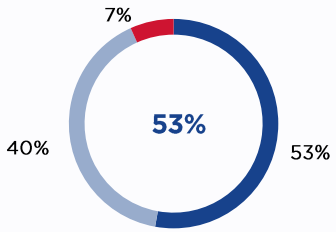
Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 INDONESIA

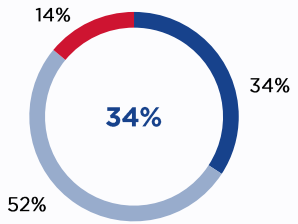
Are you familiar with or have you heard of the concept of sustainable construction?

STAKEHOLDERS



67%

CITIZENS



39%

- Yes, and I know exactly what it is about
- Yes, but I don't really know anything about it
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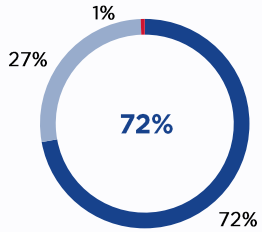
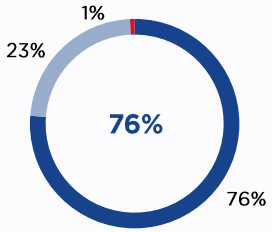
In your opinion, would you say implementing more sustainable construction is...?

STAKEHOLDERS



65%

CITIZENS



63%

- A priority
- Important but not a priority
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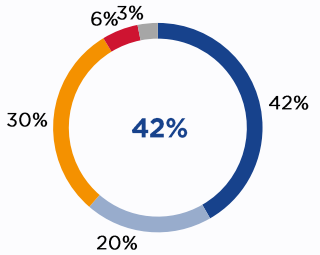
In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...

STAKEHOLDERS



47%

- Creates more value than traditional construction
- Creates as much value as traditional construction
- Creates value but less than traditional construction
- Creates no value
- I don't know

Which of the following definitions best fits sustainable construction? (TOP 2)

STAKEHOLDERS

Construction able to withstand natural and climatic hazards — 35%

Construction aimed at reducing building waste — 31%

CITIZENS

Construction able to withstand natural and climatic hazards — 33%

Construction aimed at reducing building waste — 31%

Priority actions to accelerate the development of sustainable construction? (TOP 2)

STAKEHOLDERS

Raise public awareness of the challenges of sustainable construction — 42%

Raise awareness among all stakeholders and strengthen their collaboration — 36%

CITIZENS

Raise public awareness of the challenges of sustainable construction — 44%

Make sustainable materials, products and solutions more competitive — 43%

Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)

STAKEHOLDERS

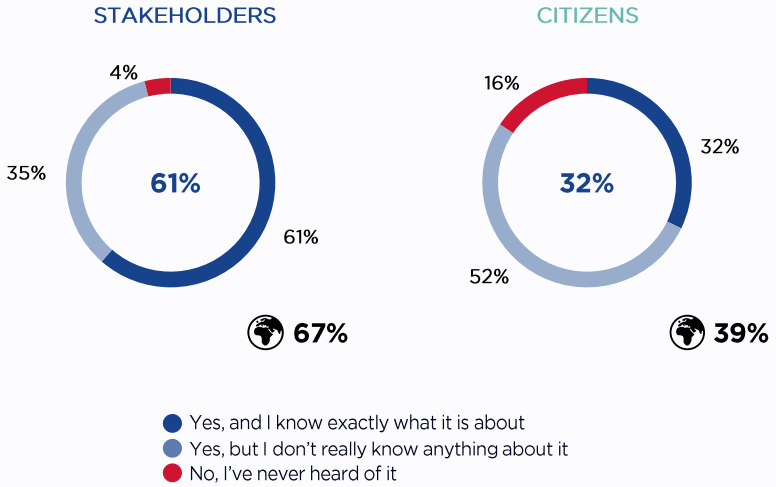
Architects and building engineers — 50%

Public institutions — 38%

Quantitative survey conducted by Occurrence–Ifop, from October 16 to November 14, 2025, among two samples: 1. Stakeholders (4,800 respondents, 30 countries, aged 18 and over): 1,500 professionals, 1,500 students, 1,200 association members, and 600 local elected officials or local government representatives. 2. Citizens (30,000 respondents, 30 countries, aged 18 and over): 1,000 individuals per country, representative sample of the population of each country surveyed. 160 "stakeholder" respondents and 1,000 citizens per country.

Global result

Are you familiar with or have you heard of the concept of sustainable construction?



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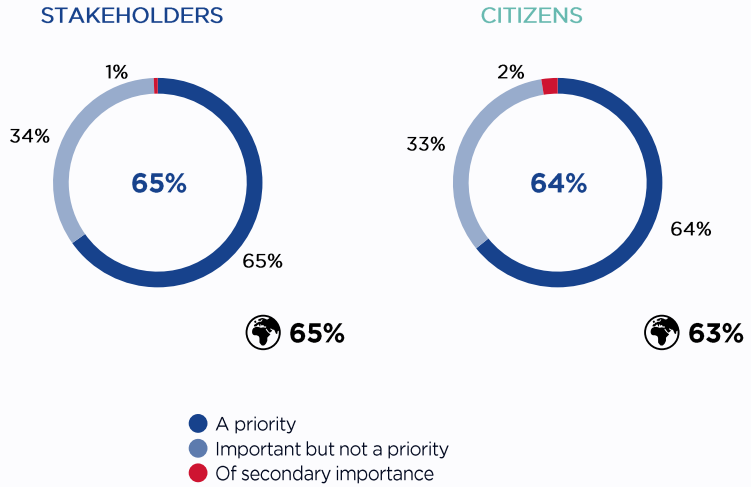

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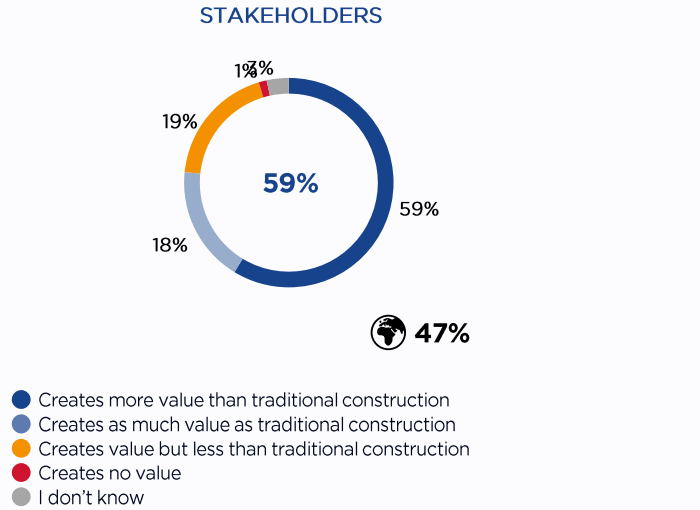

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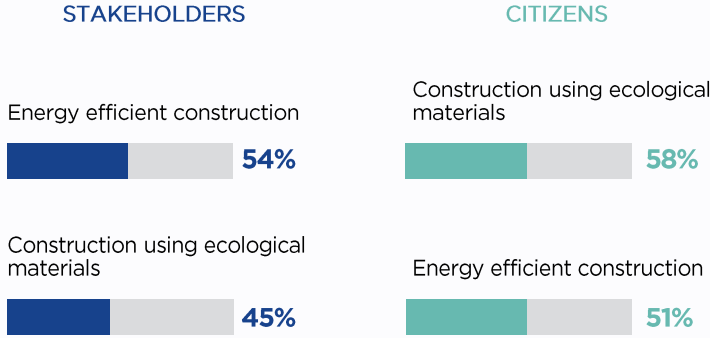
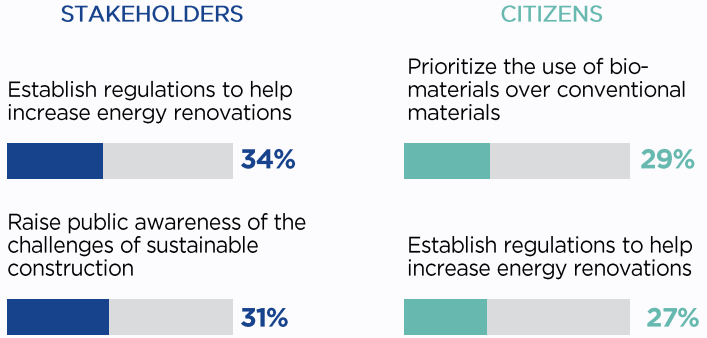


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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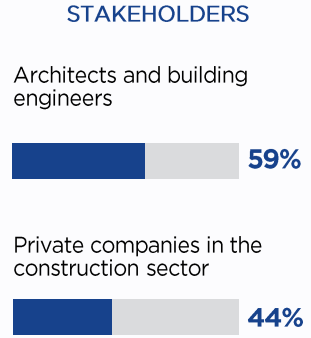

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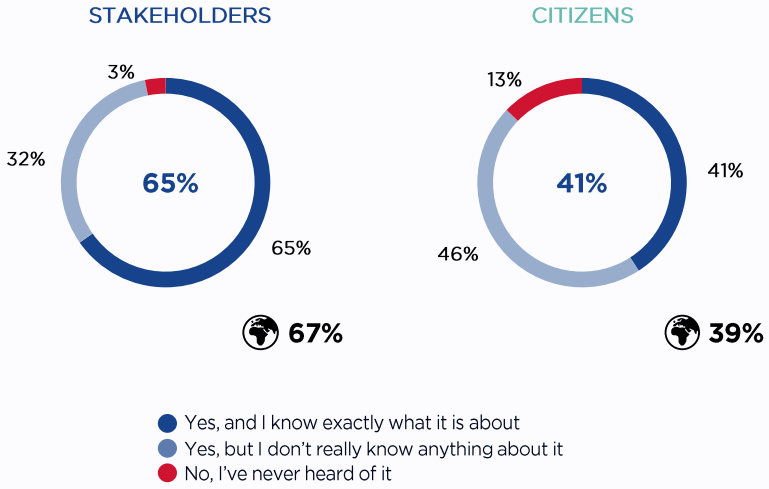
Global result

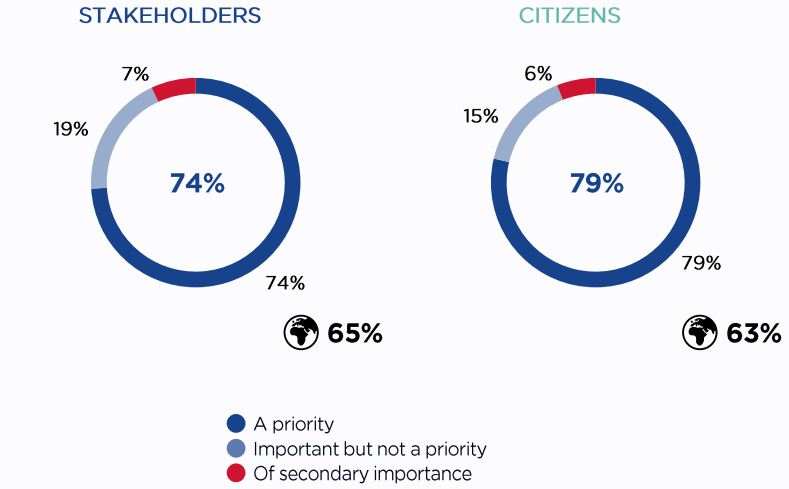
The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 KENYA

Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



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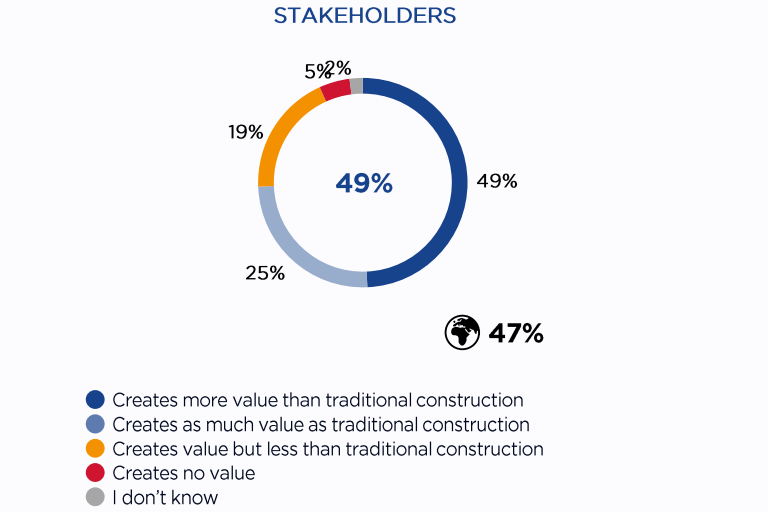

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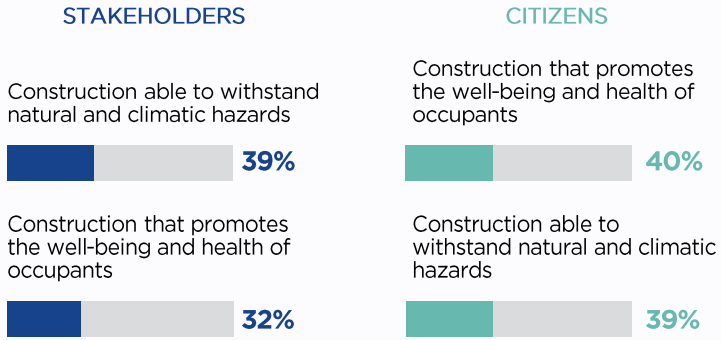
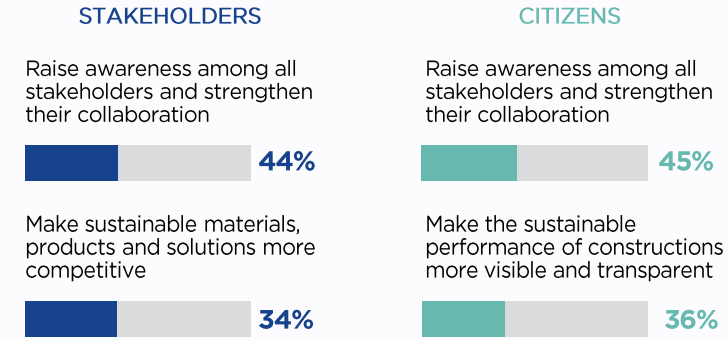
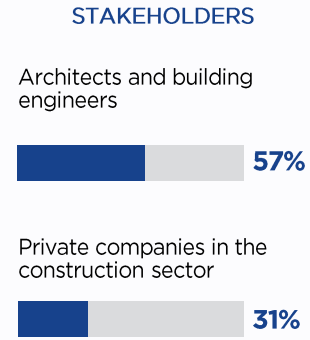


Priority actions to accelerate the development of sustainable construction? (TOP 2)



Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)



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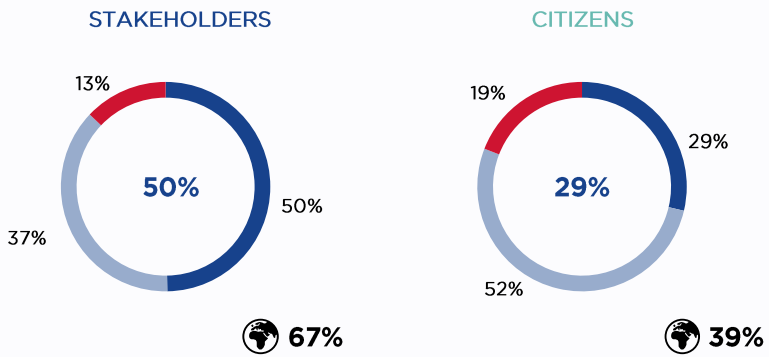
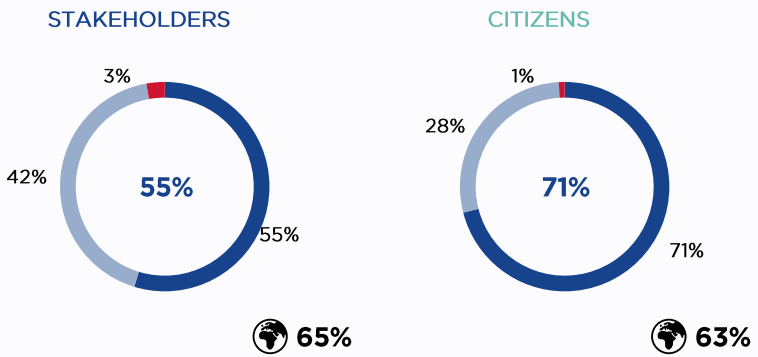
Global result

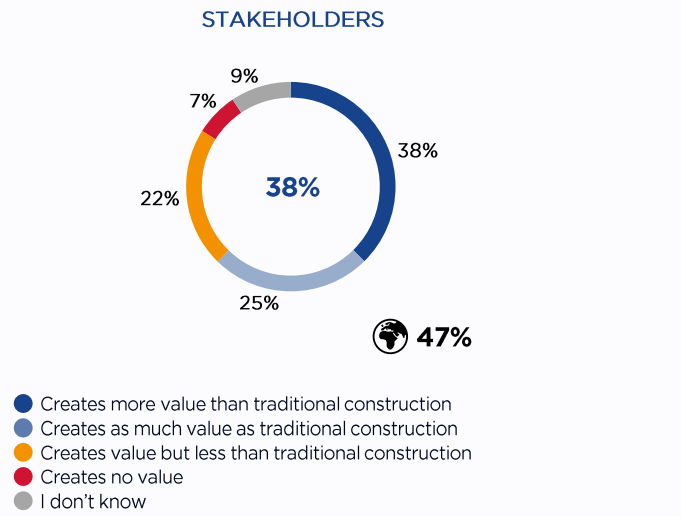
Are you familiar with or have you heard of the concept of sustainable construction?



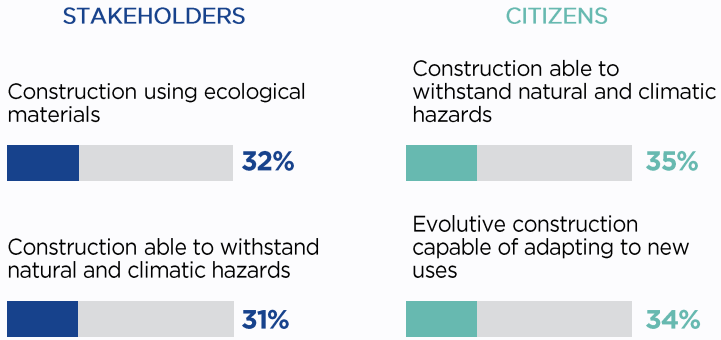
In your opinion, would you say implementing more sustainable construction is...?



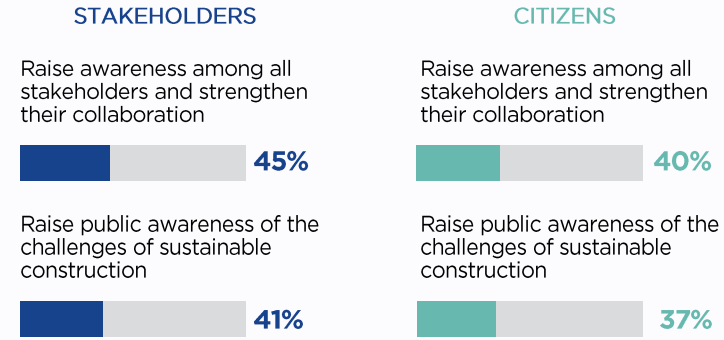
In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



Which of the following definitions best fits sustainable construction? (TOP 2)



Priority actions to accelerate the development of sustainable construction? (TOP 2)



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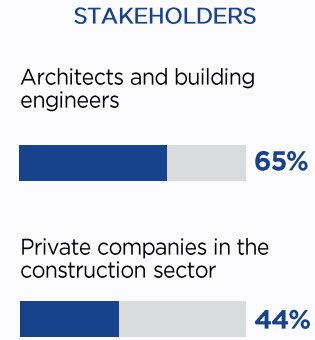

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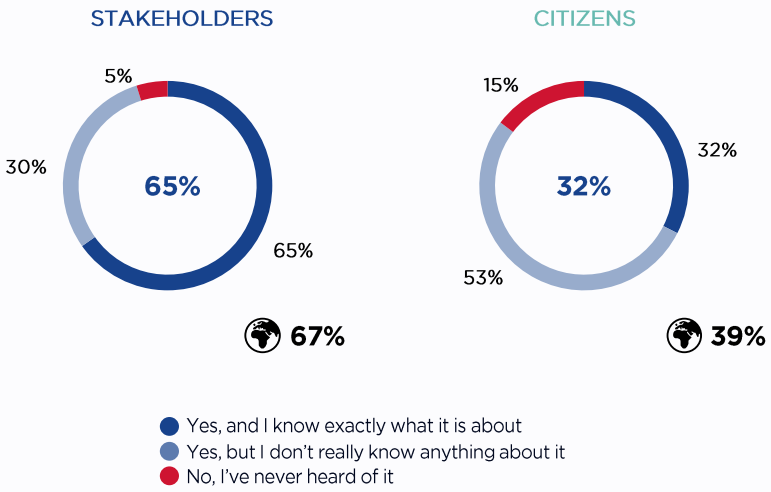
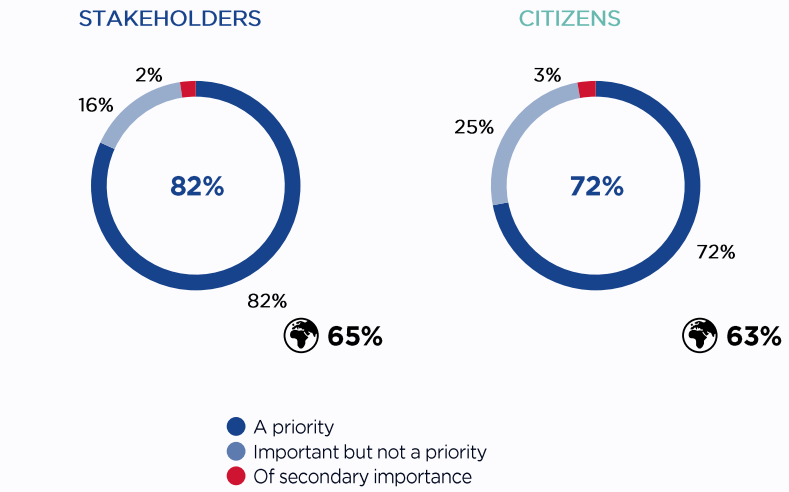
Global result

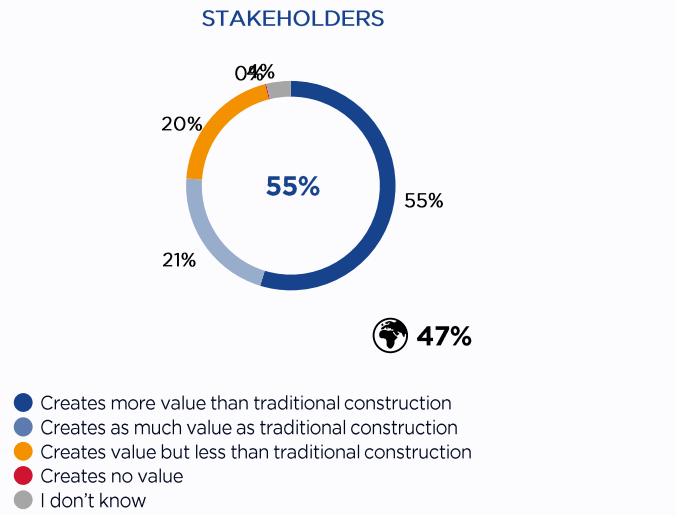
Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



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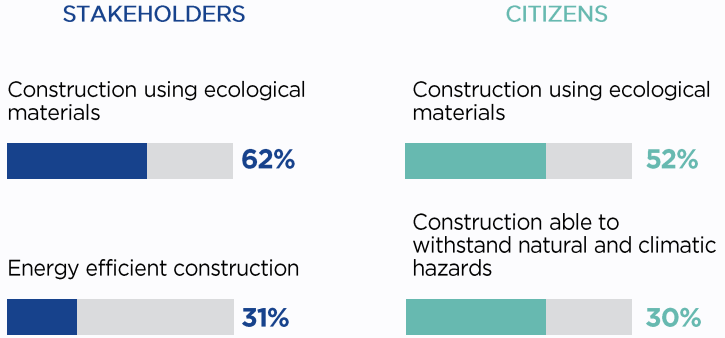
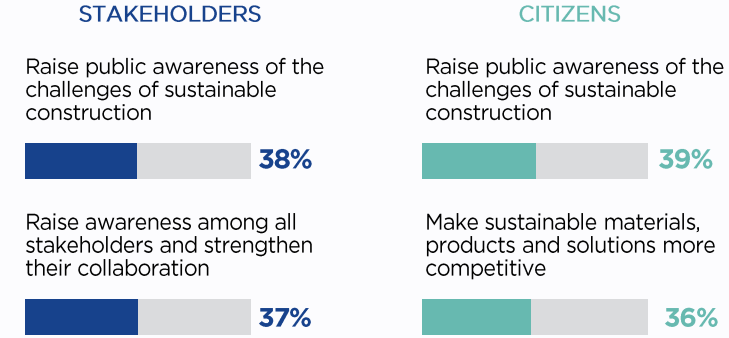


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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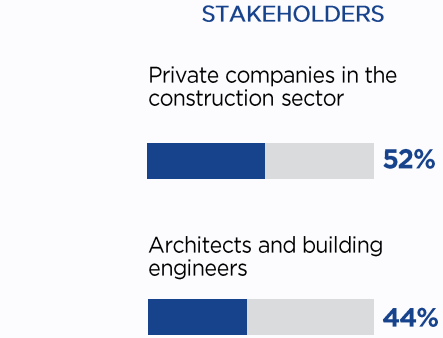

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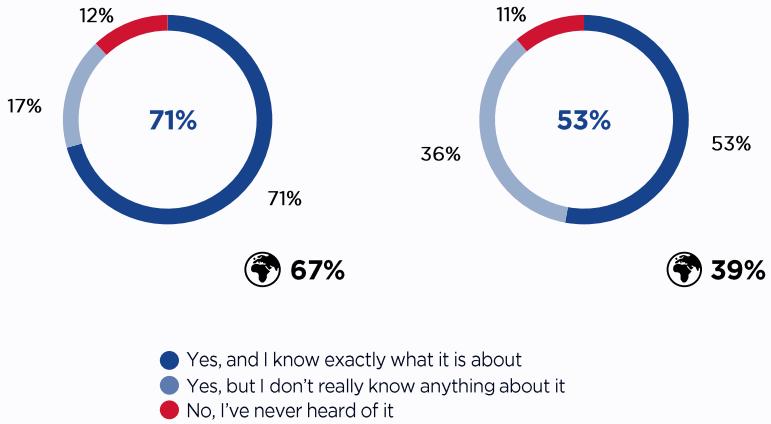
Global result

Are you familiar with or have you heard of the concept of sustainable construction?



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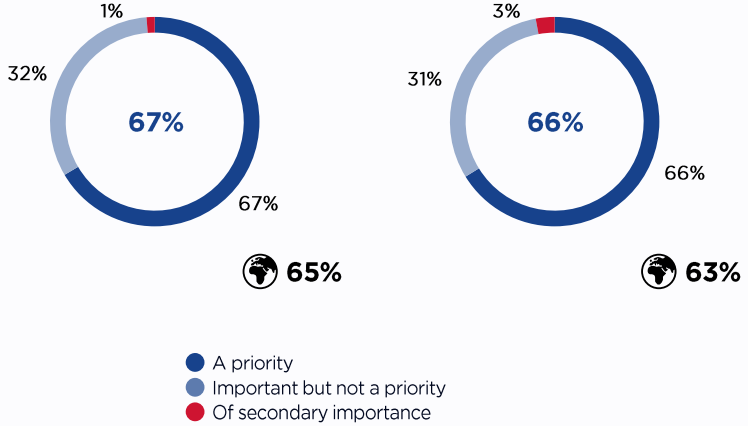
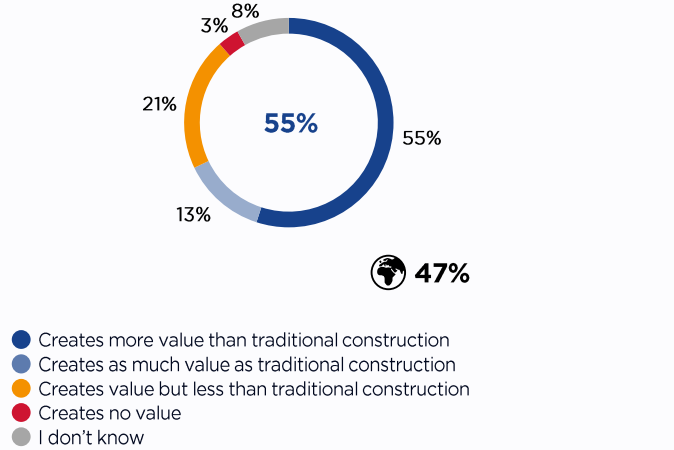
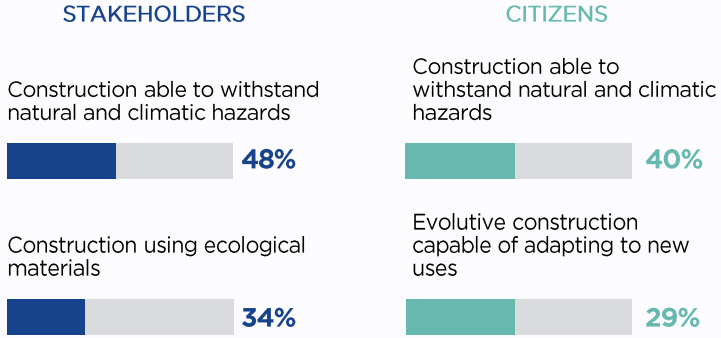


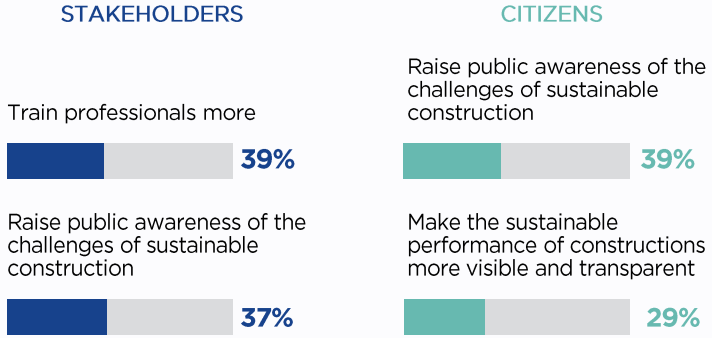
In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



Which of the following definitions best fits sustainable construction? (TOP 2)



Priority actions to accelerate the development of sustainable construction? (TOP 2)



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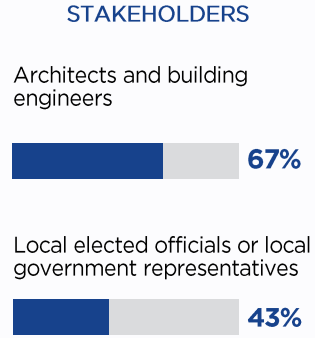

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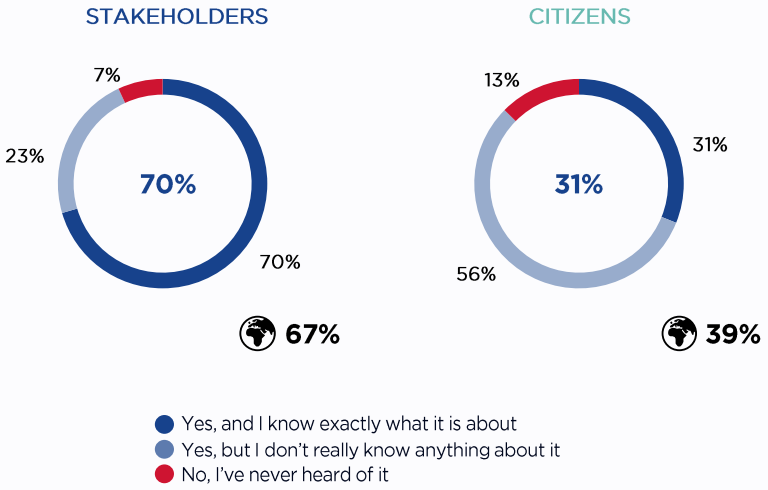
Global result

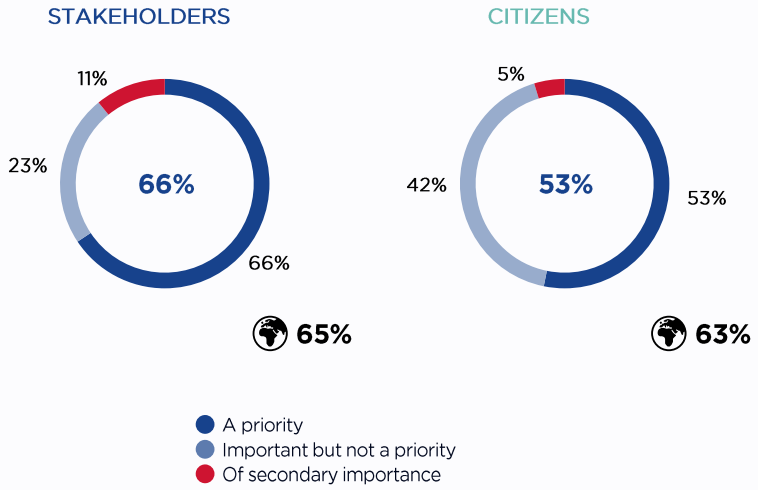
The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 NORWAY

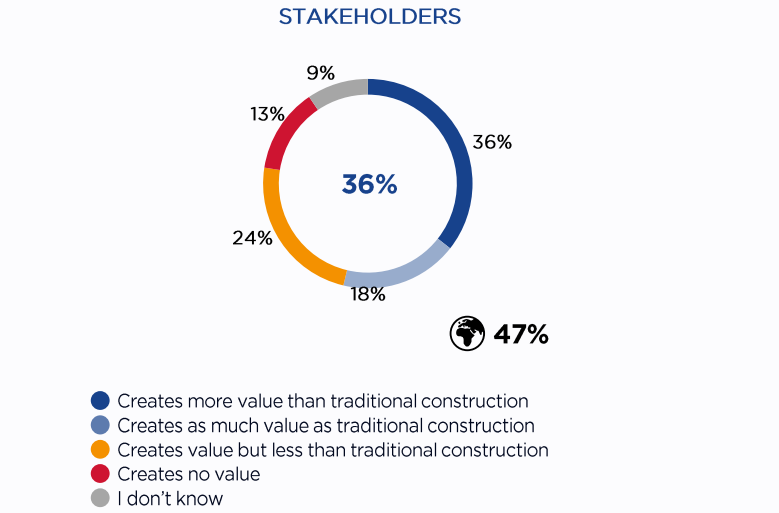
Are you familiar with or have you heard of the concept of sustainable construction?



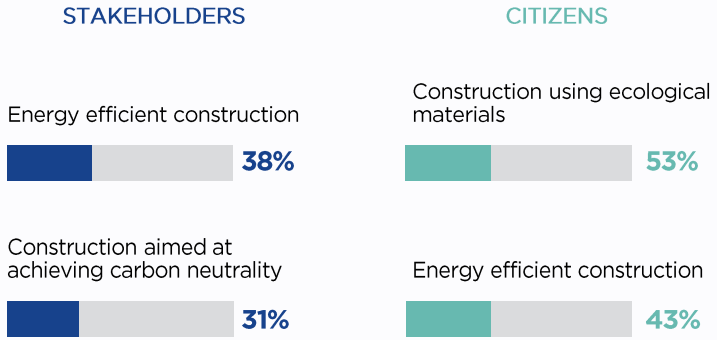
In your opinion, would you say implementing more sustainable construction is...?



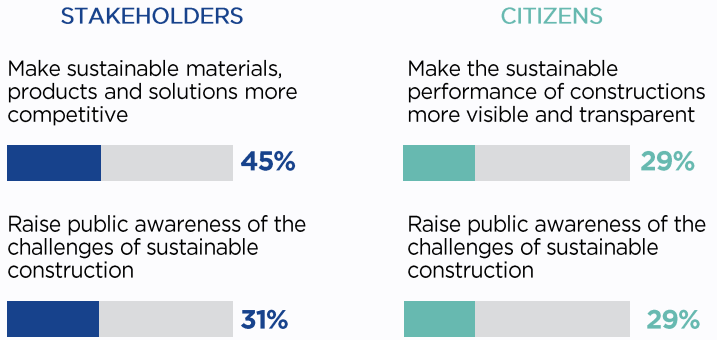
In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



Which of the following definitions best fits sustainable construction? (TOP 2)



Priority actions to accelerate the development of sustainable construction? (TOP 2)



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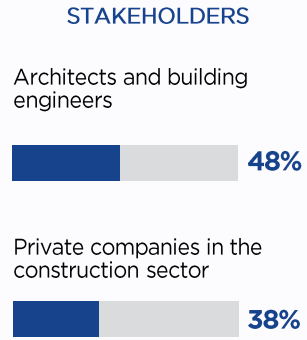

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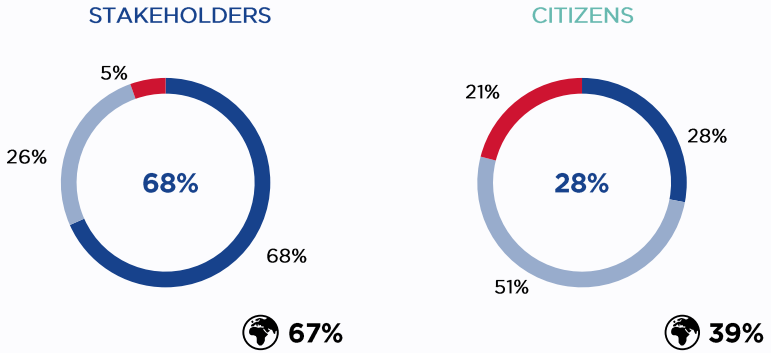
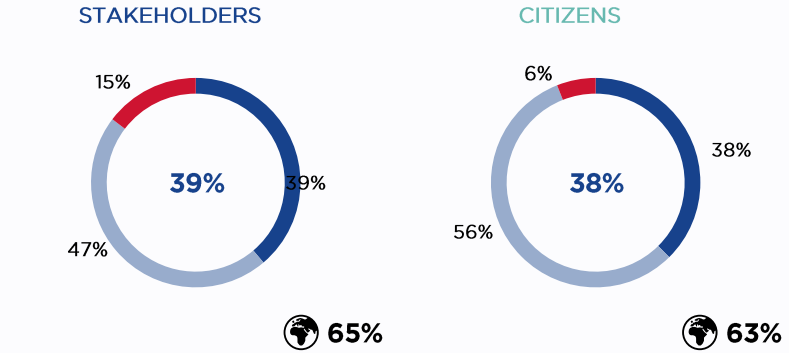
Global result

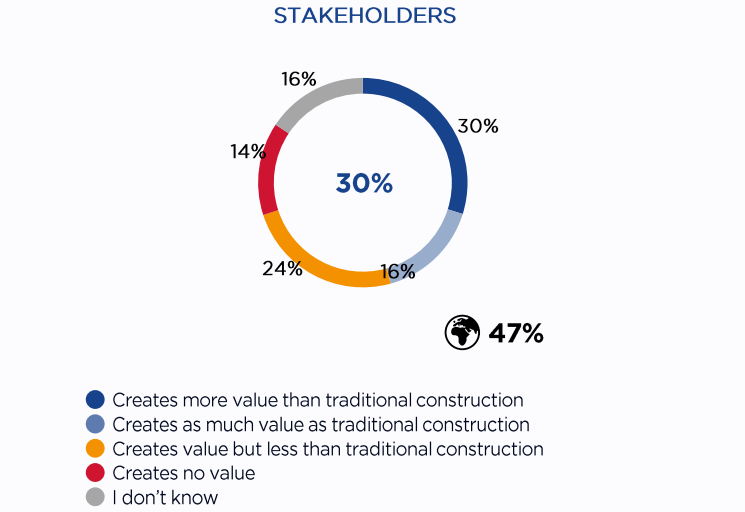
Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



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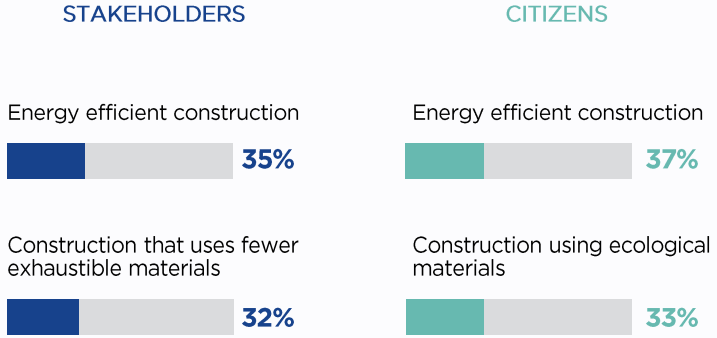
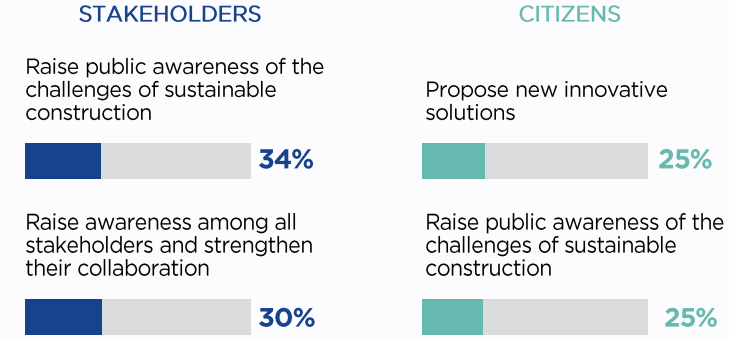


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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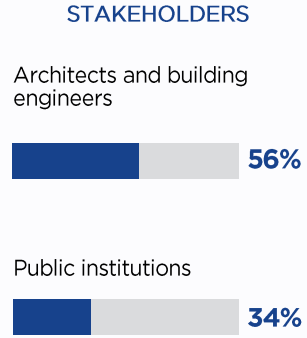

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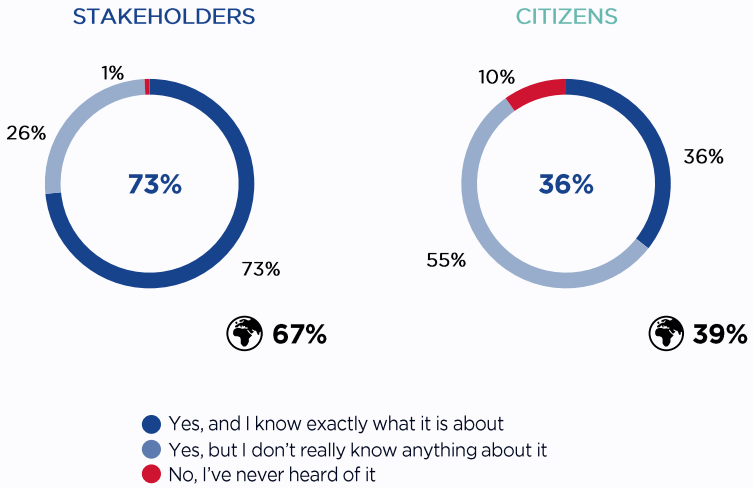
Global result

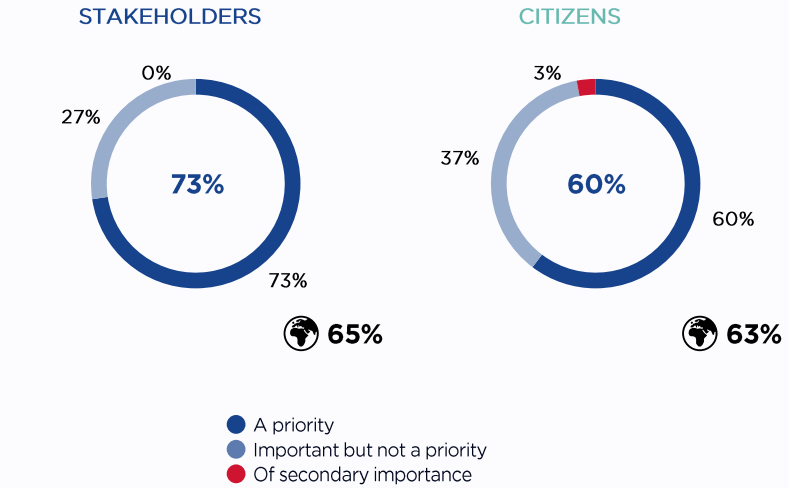
The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 PORTUGAL

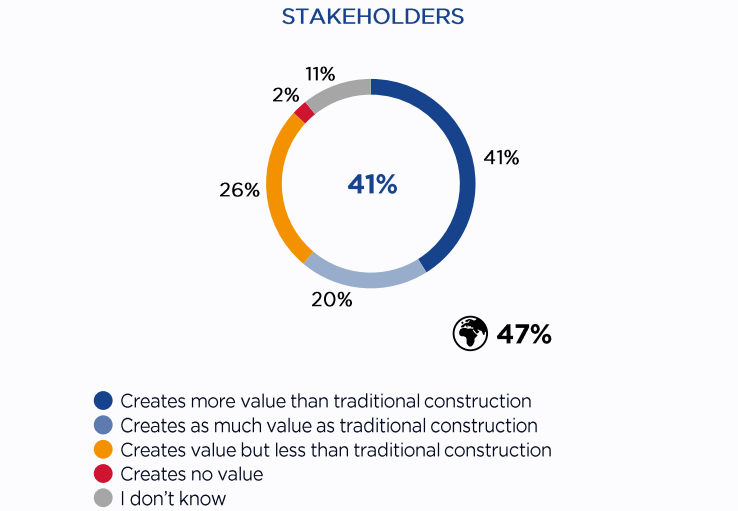
Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



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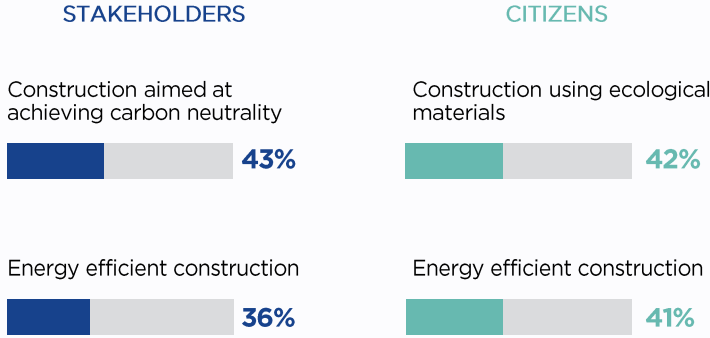
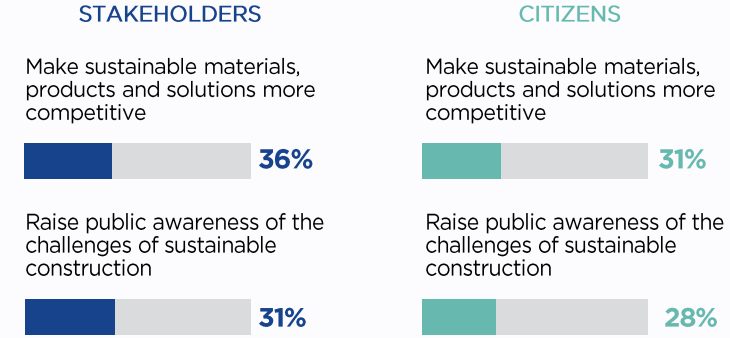


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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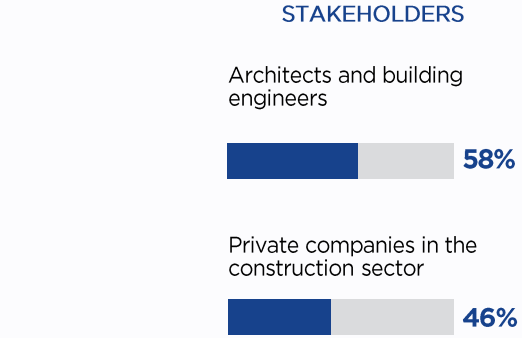

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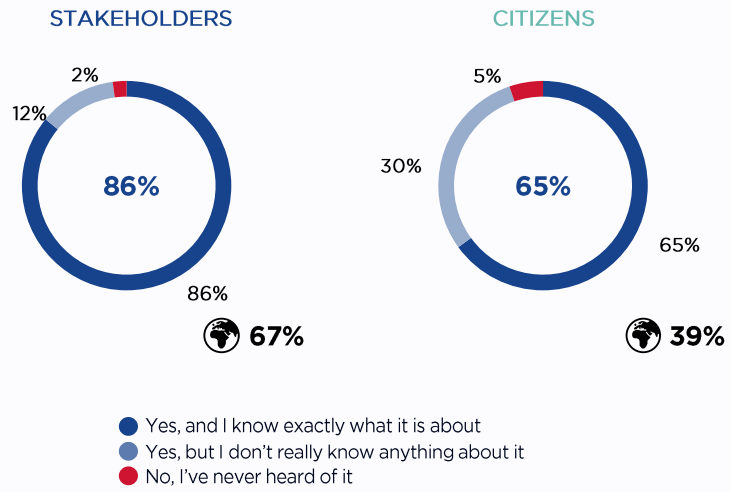
Global result

Are you familiar with or have you heard of the concept of sustainable construction?



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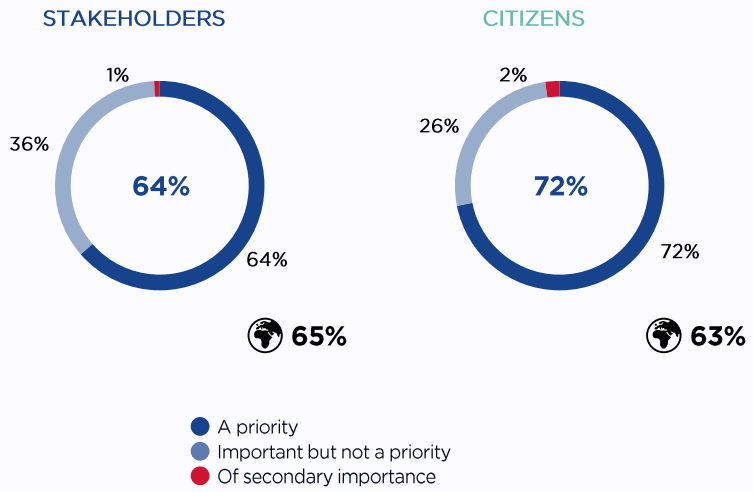

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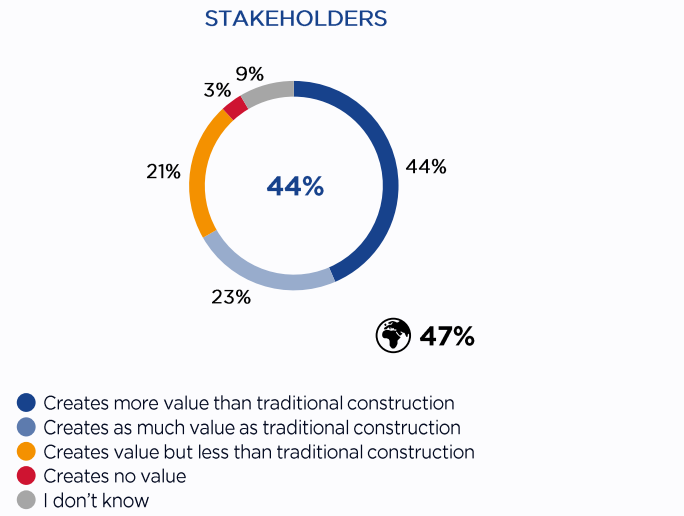

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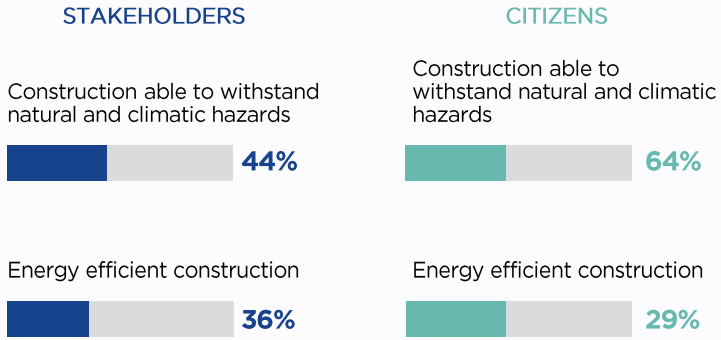
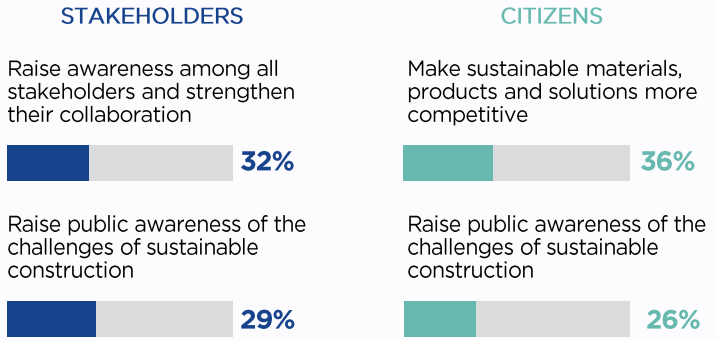


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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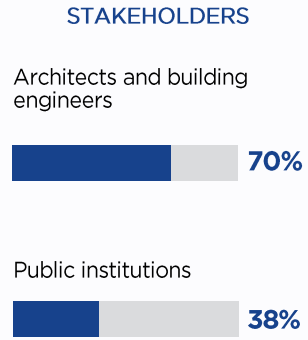

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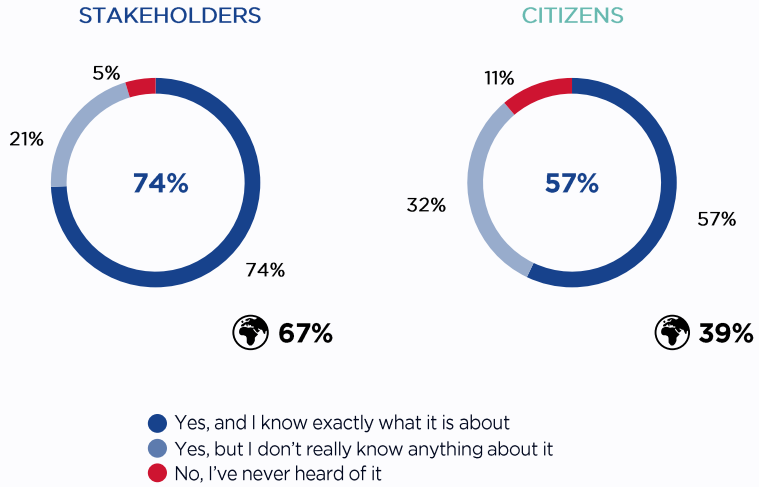
Global result

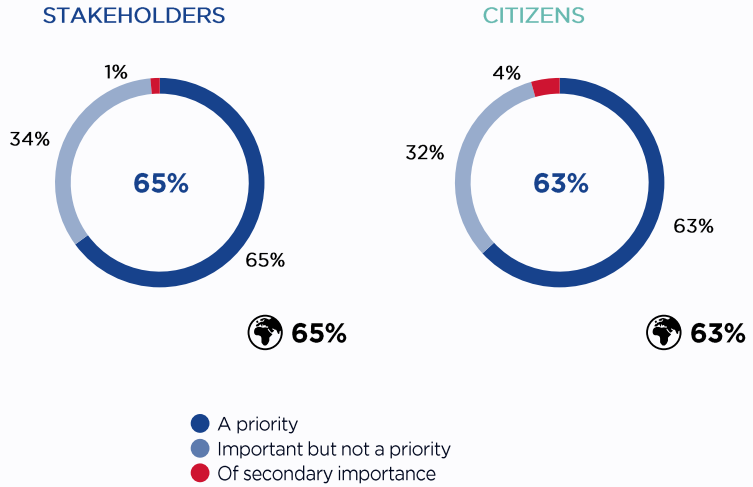
The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 SAUDI ARABIA

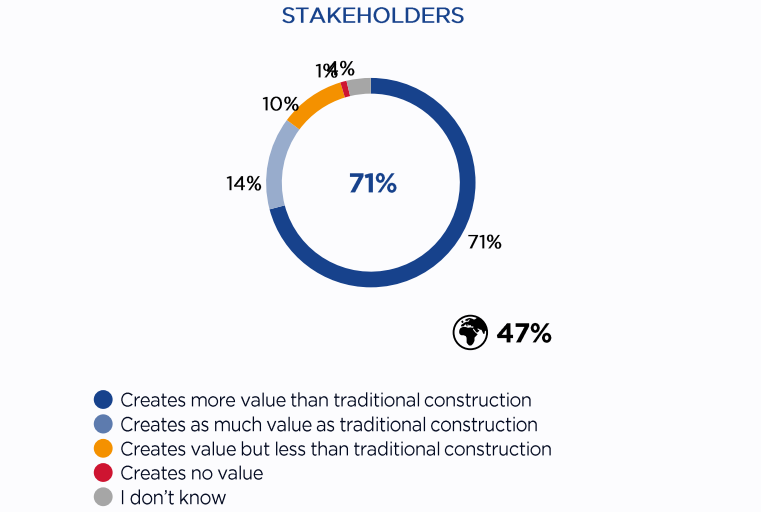
Are you familiar with or have you heard of the concept of sustainable construction?



In your opinion, would you say implementing more sustainable construction is...?



In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...



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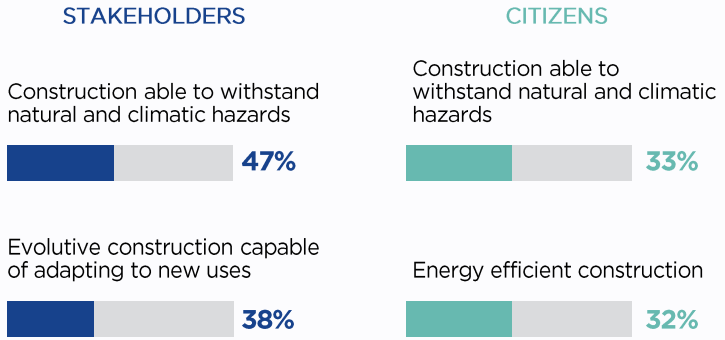
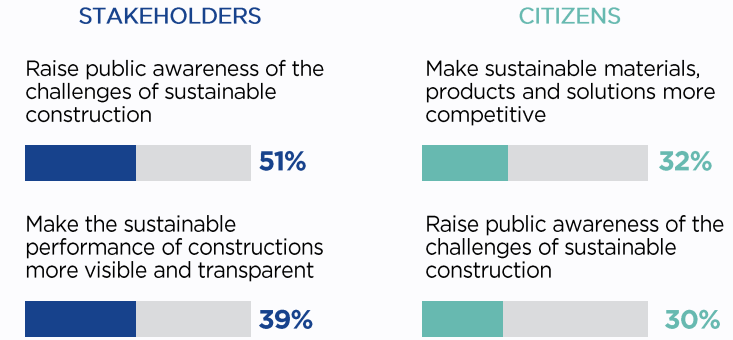
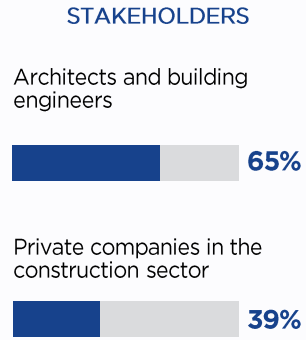


Priority actions to accelerate the development of sustainable construction? (TOP 2)



Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)



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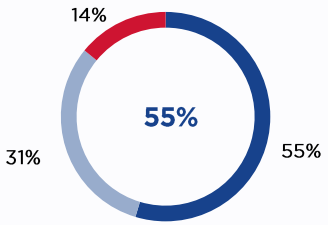
Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 SOUTH AFRICA

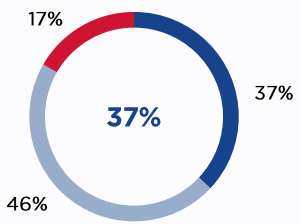
Are you familiar with or have you heard of the concept of sustainable construction?

STAKEHOLDERS



67%

CITIZENS

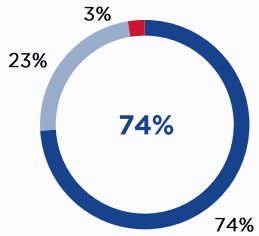


39%

- Yes, and I know exactly what it is about
- Yes, but I don't really know anything about it
- No, I've never heard of it

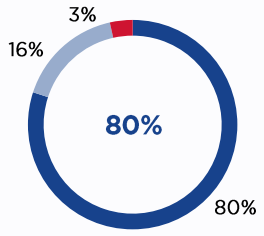
In your opinion, would you say implementing more sustainable construction is...?

STAKEHOLDERS



65%

CITIZENS

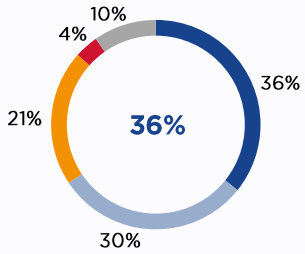


63%

- A priority
- Important but not a priority
- Of secondary importance

In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...

STAKEHOLDERS



47%

- Creates more value than traditional construction
- Creates as much value as traditional construction
- Creates value but less than traditional construction
- Creates no value
- I don't know

Which of the following definitions best fits sustainable construction? (TOP 2)

STAKEHOLDERS

Construction able to withstand natural and climatic hazards — 32%

Energy efficient construction — 28%

CITIZENS

Construction able to withstand natural and climatic hazards — 32%

Construction aimed at reducing building waste — 29%

Priority actions to accelerate the development of sustainable construction? (TOP 2)

STAKEHOLDERS

Make the sustainable performance of constructions more visible and transparent — 37%

Make sustainable materials, products and solutions more competitive — 33%

CITIZENS

Make the sustainable performance of constructions more visible and transparent — 37%

Prioritize the use of bio-materials over conventional materials — 36%

Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)

STAKEHOLDERS

Architects and building engineers — 68%

Private companies in the construction sector — 36%

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Global result

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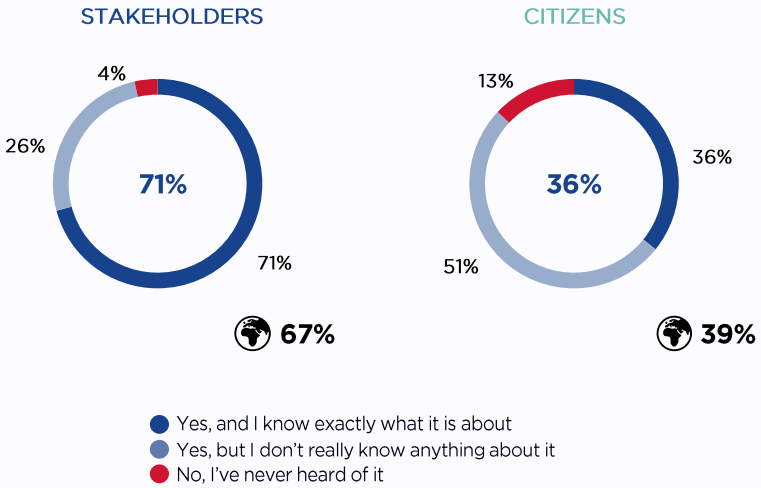
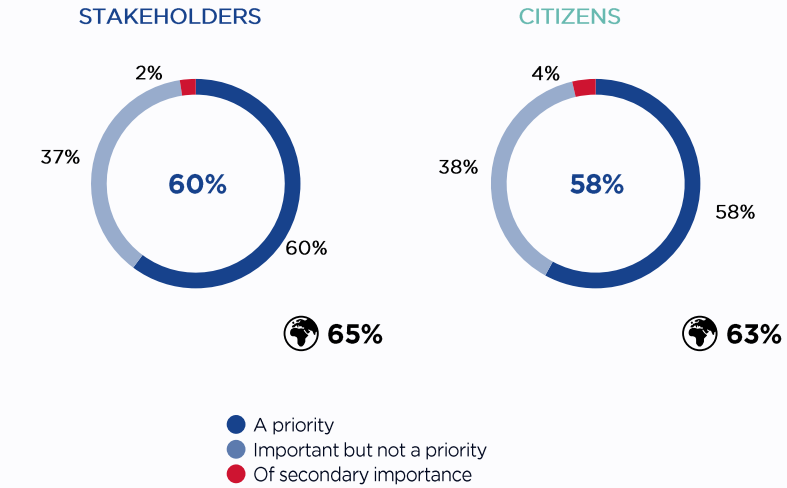


In your opinion, would you say implementing more sustainable construction is...?



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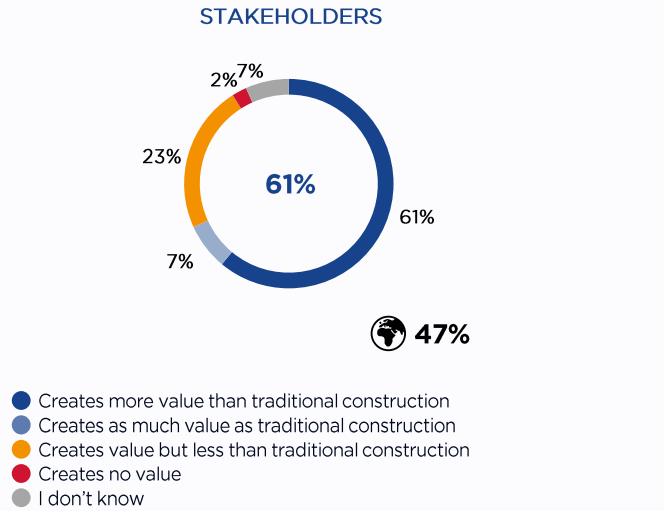

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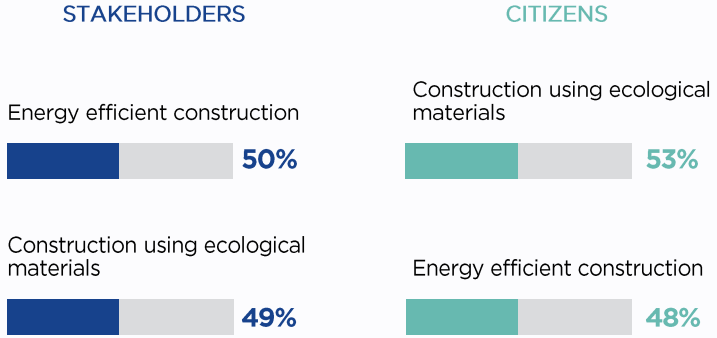

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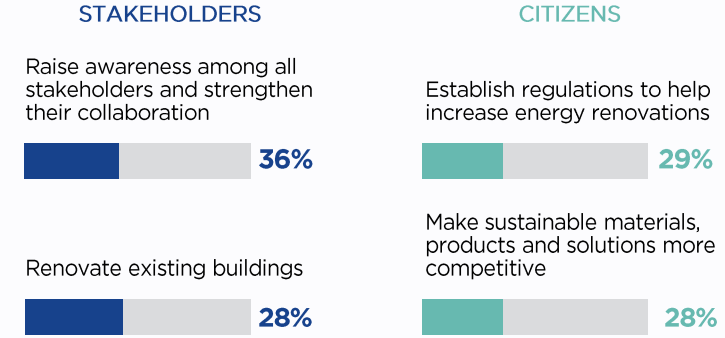

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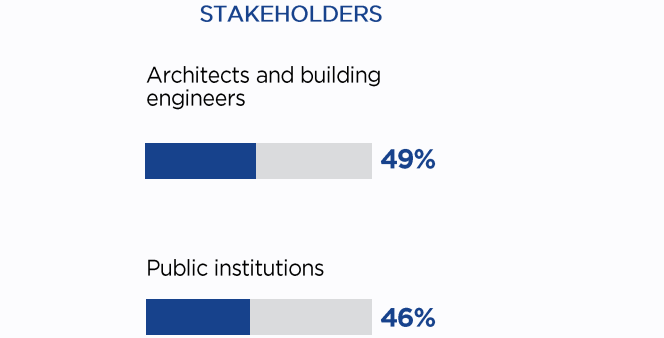

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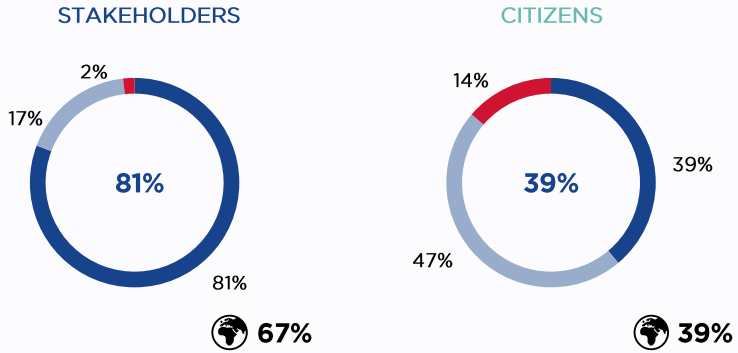
Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 SWITZERLAND

Are you familiar with or have you heard of the concept of sustainable construction?



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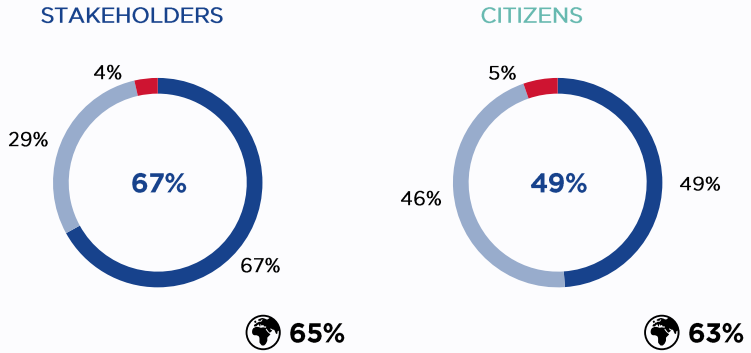

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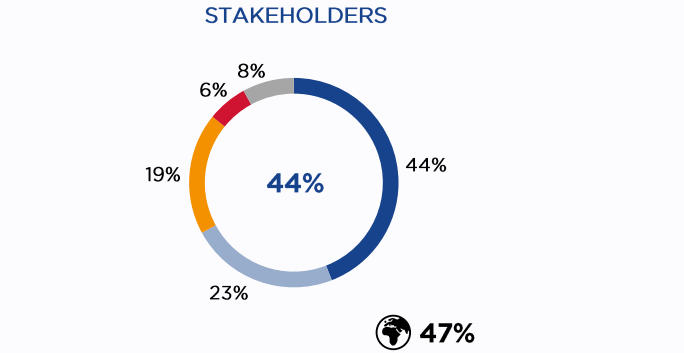

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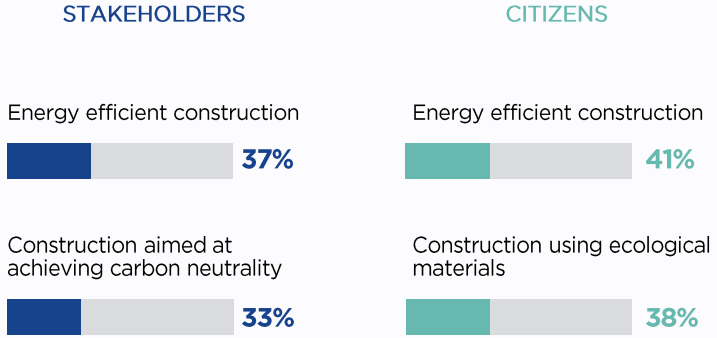
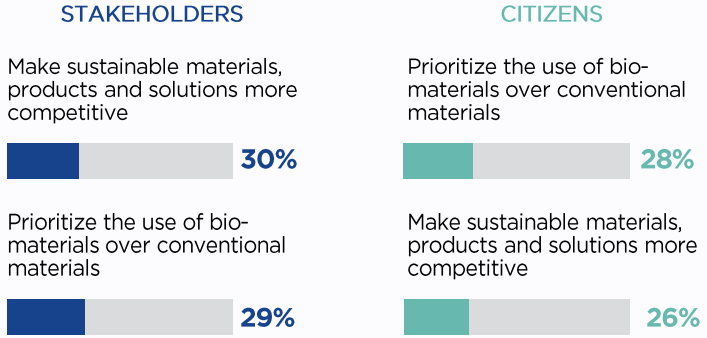


Priority actions to accelerate the development of sustainable construction? (TOP 2)



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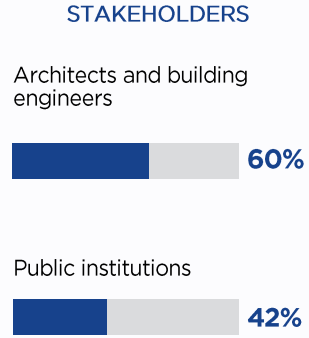

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Global result

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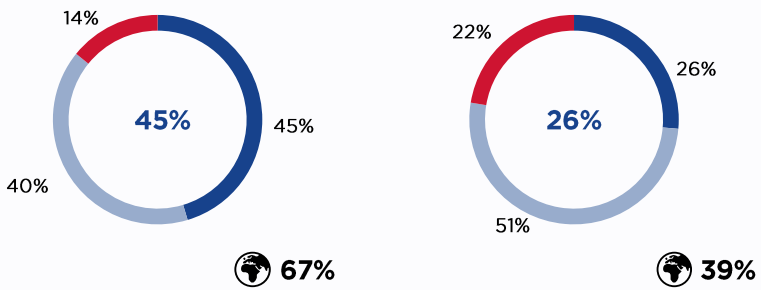

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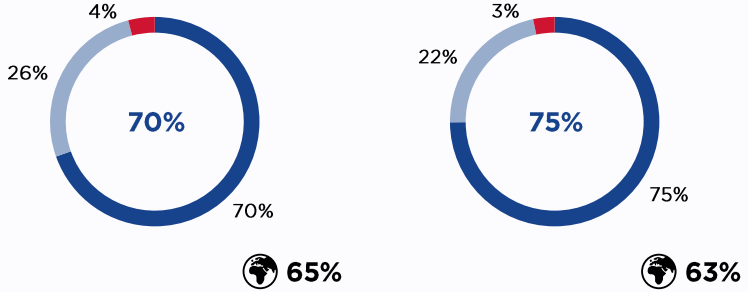

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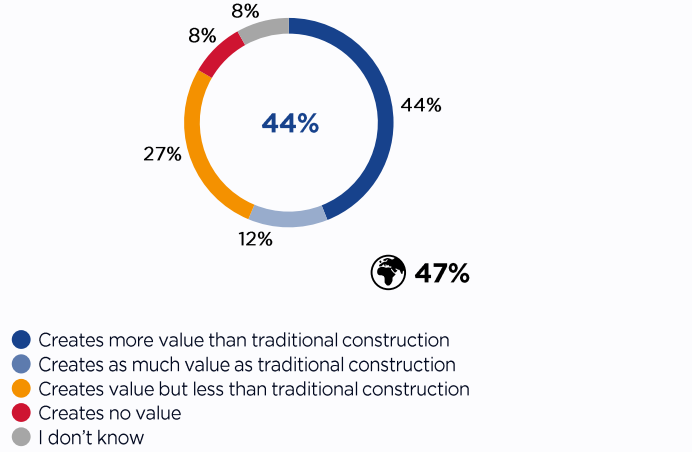

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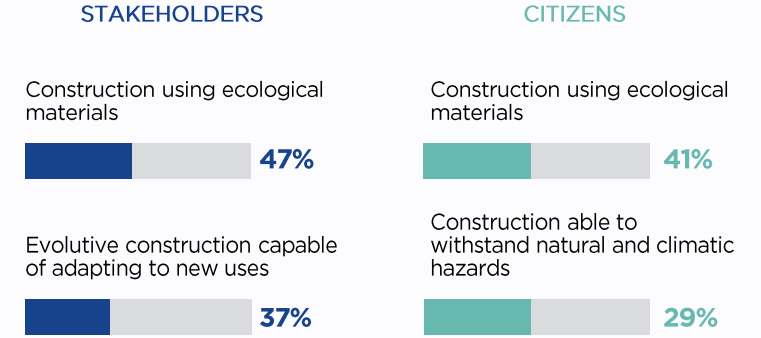

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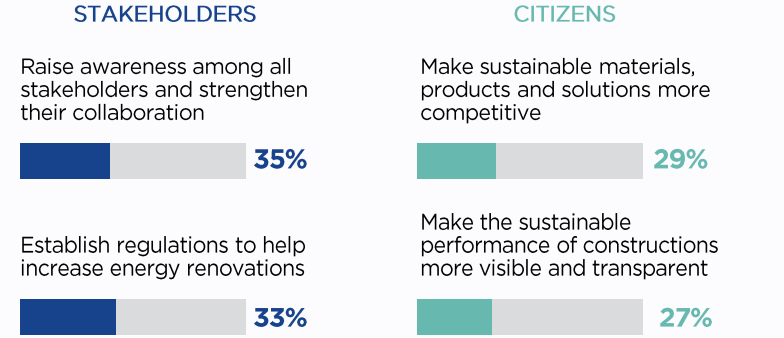

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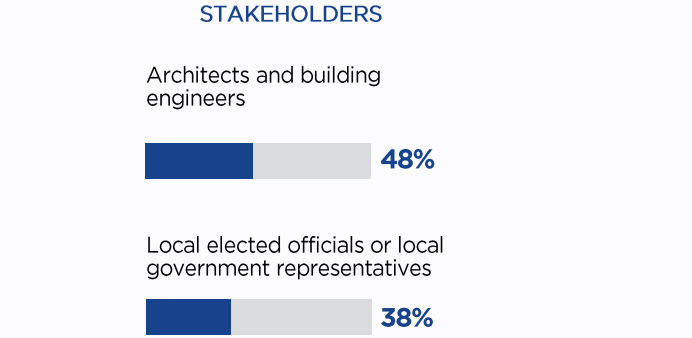

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Global result

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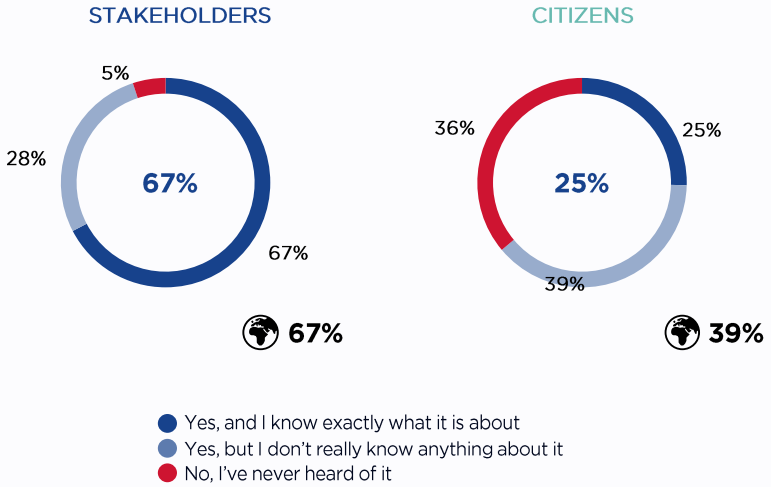

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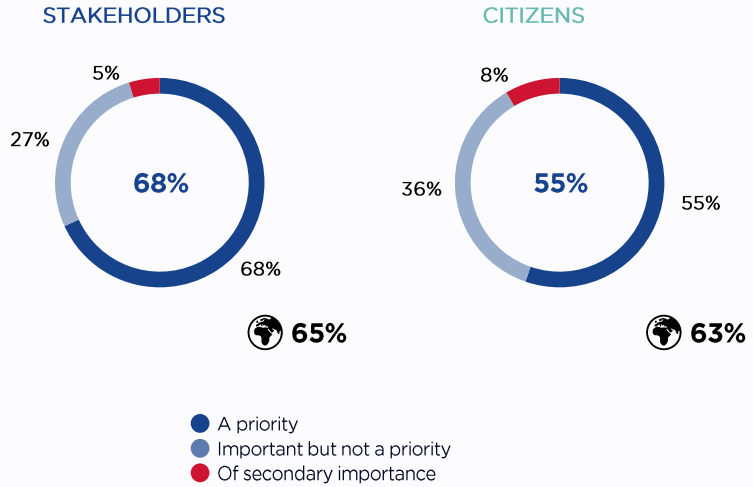

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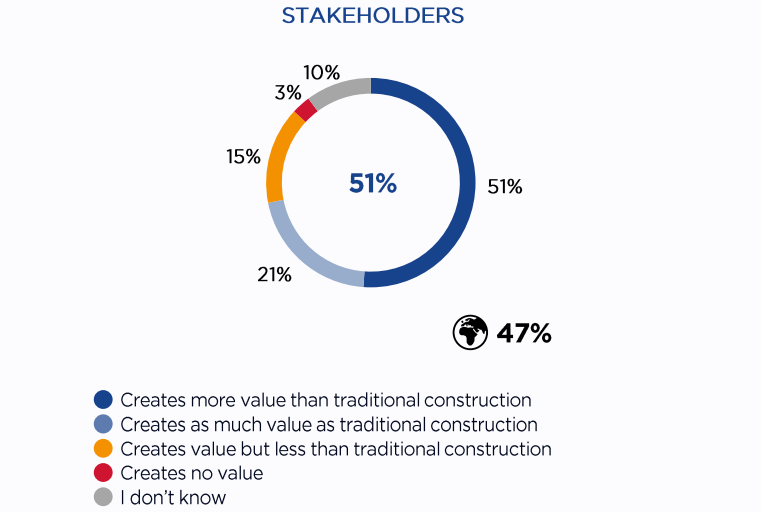

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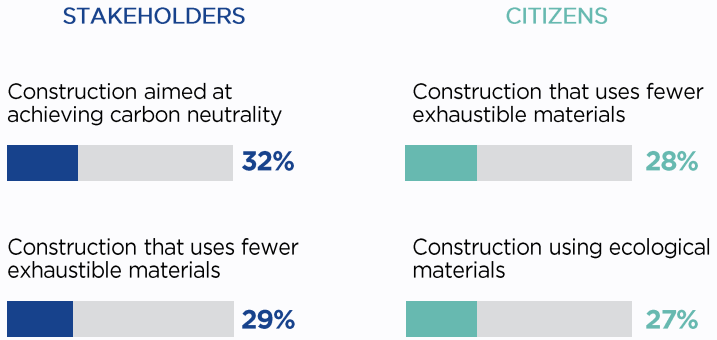

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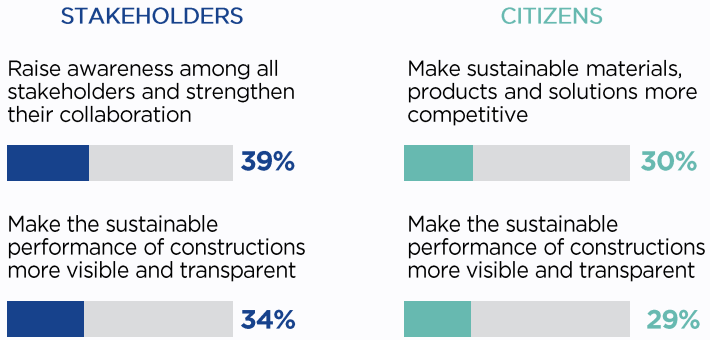

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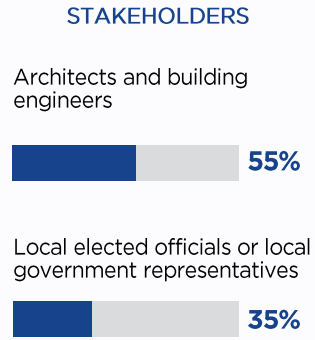

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Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026
UNITED ARAB EMIRATES

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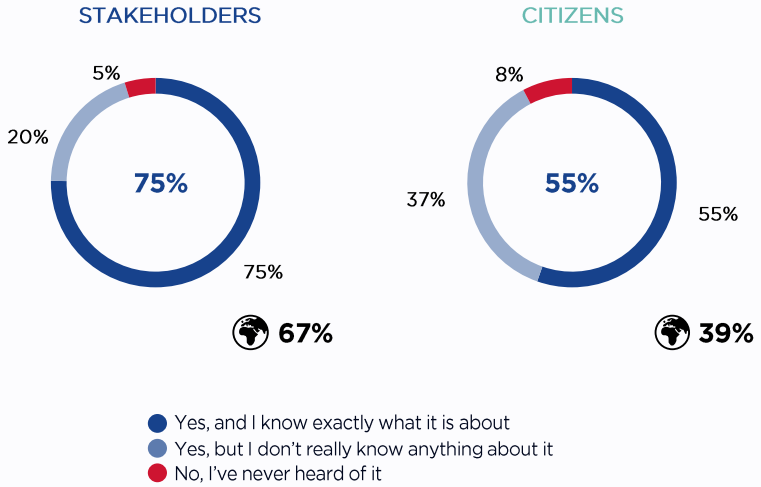

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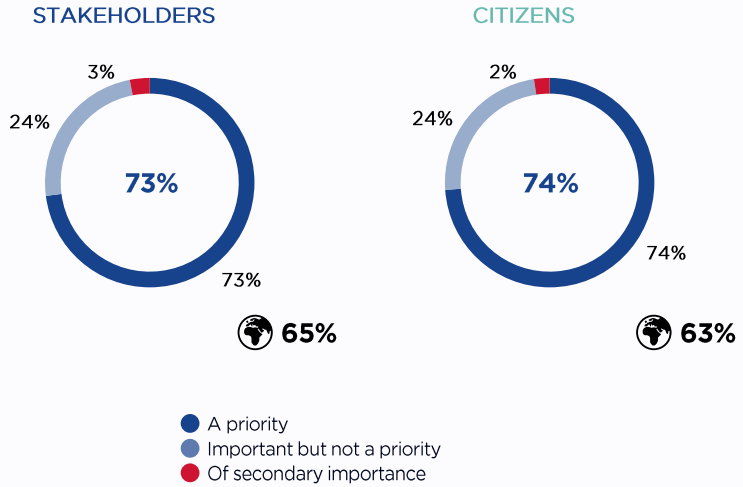

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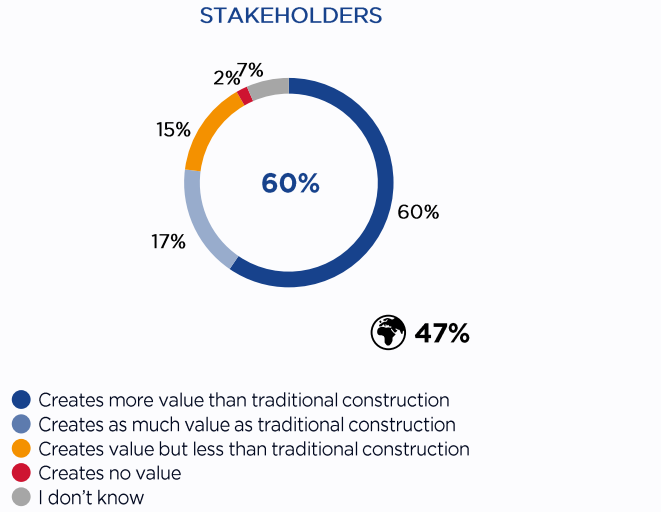

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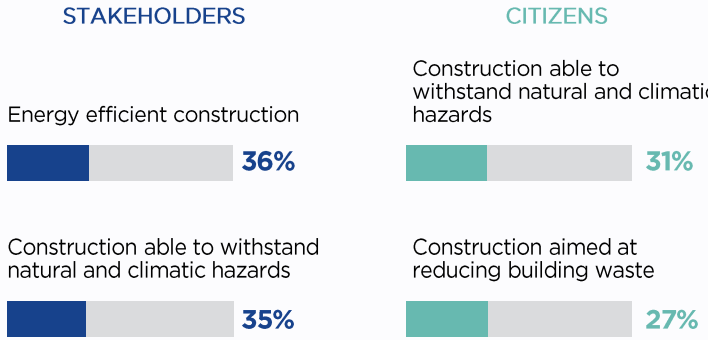

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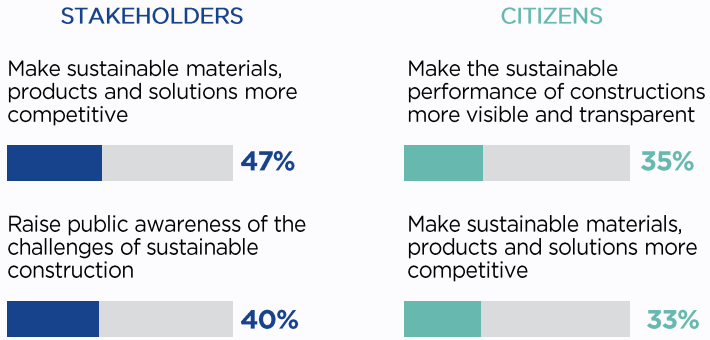

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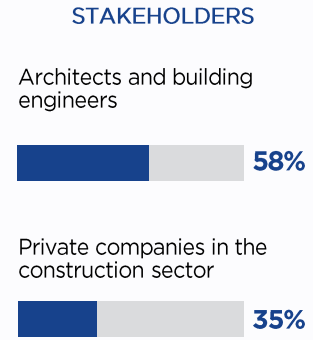

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Global result

The Sustainable Construction Observatory
BY SAINT-GOBAIN

OVERVIEW 2026 UNITED KINGDOM

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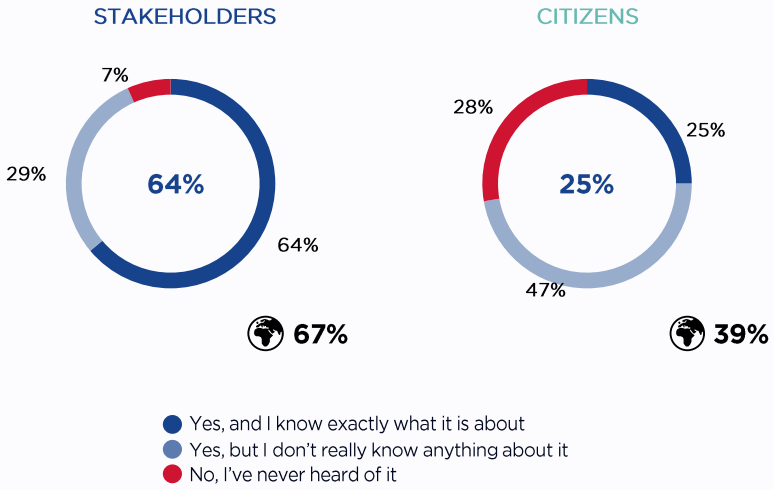

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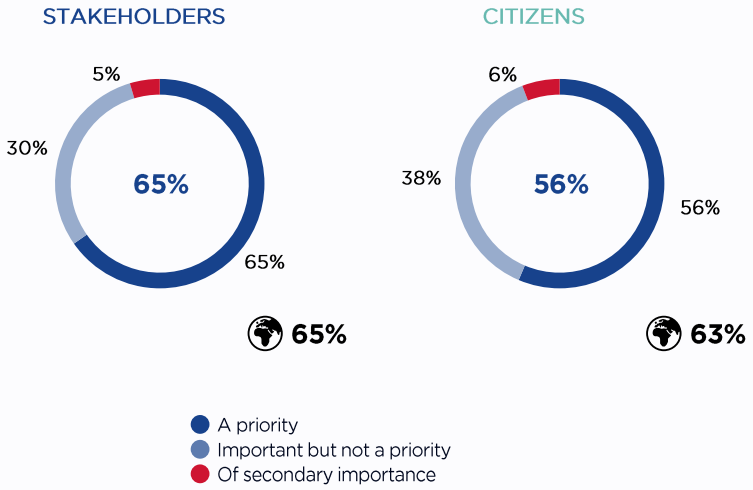

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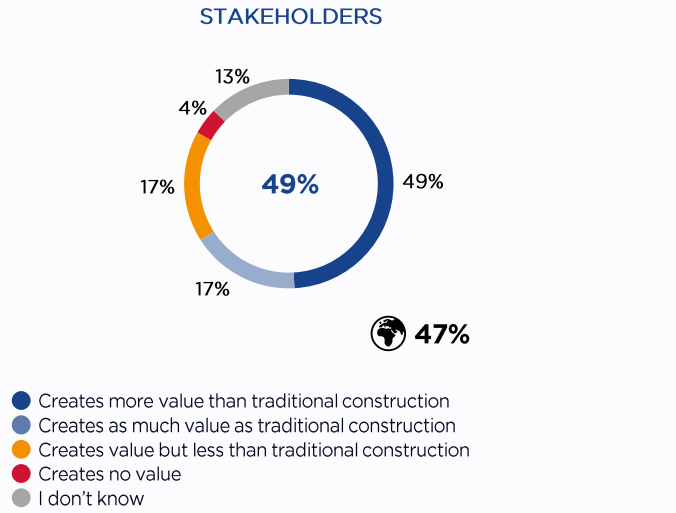

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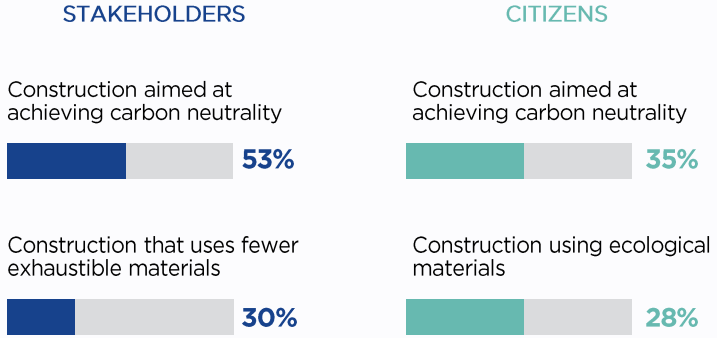

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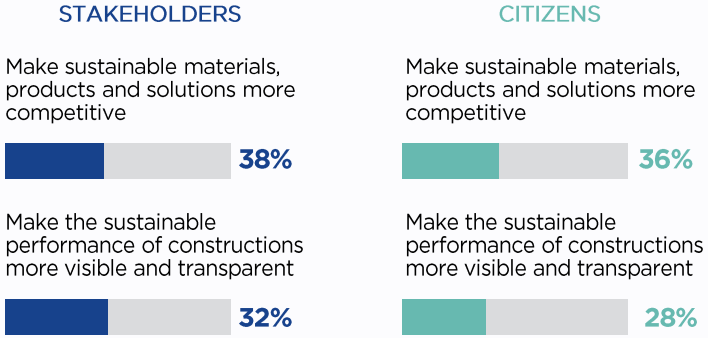
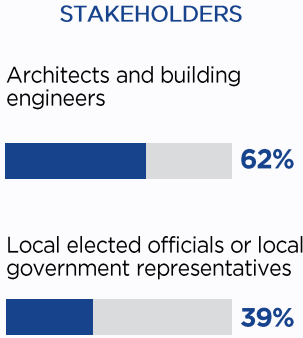


Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)



Quantitative survey conducted by Occurrence–Ifop, from October 16 to November 14, 2025, among two samples: 1. Stakeholders (4,800 respondents, 30 countries, aged 18 and over): 1,500 professionals, 1,500 students, 1,200 association members, and 600 local elected officials or local government representatives. 2. Citizens (30,000 respondents, 30 countries, aged 18 and over): 1,000 individuals per country, representative sample of the population of each country surveyed. 160 "stakeholder" respondents and 1,000 citizens per country.

Global result

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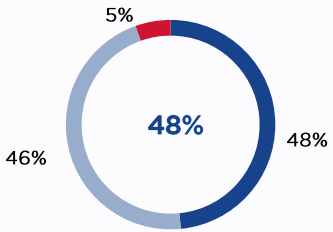
OVERVIEW 2026 VIETNAM

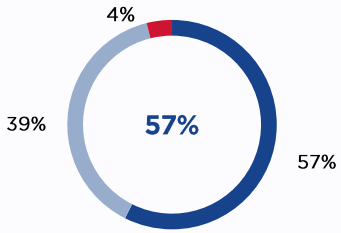
Are you familiar with or have you heard of the concept of sustainable construction?

STAKEHOLDERS



67%

CITIZENS

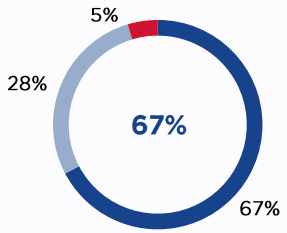


39%

- Yes, and I know exactly what it is about
- Yes, but I don't really know anything about it
- No, I've never heard of it

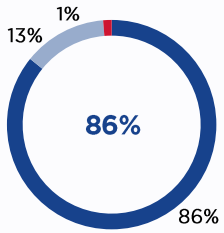
In your opinion, would you say implementing more sustainable construction is...?

STAKEHOLDERS



65%

CITIZENS

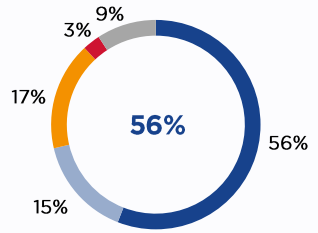


63%

- A priority
- Important but not a priority
- Of secondary importance

In your opinion, today, sustainable construction, considering both its economic profitability and its overall value (environmental, social, heritage)...

STAKEHOLDERS



47%

- Creates more value than traditional construction
- Creates as much value as traditional construction
- Creates value but less than traditional construction
- Creates no value
- I don't know

Which of the following definitions best fits sustainable construction? (TOP 2)

STAKEHOLDERS

Construction able to withstand natural and climatic hazards — 37%

Energy efficient construction — 30%

CITIZENS

Construction able to withstand natural and climatic hazards — 52%

Construction that promotes the well-being and health of occupants — 30%

Priority actions to accelerate the development of sustainable construction? (TOP 2)

STAKEHOLDERS

Prioritize the use of bio-materials over conventional materials — 44%

Raise public awareness of the challenges of sustainable construction — 42%

CITIZENS

Make the sustainable performance of constructions more visible and transparent — 47%

Prioritize the use of bio-materials over conventional materials — 42%

Which of the following do you think are the most legitimate to advance sustainable construction? (TOP 2)

STAKEHOLDERS

Architects and building engineers — 50%

Local elected officials or local government representatives — 40%

Quantitative survey conducted by Occurrence–Ifop, from October 16 to November 14, 2025, among two samples: 1. Stakeholders (4,800 respondents, 30 countries, aged 18 and over): 1,500 professionals, 1,500 students, 1,200 association members, and 600 local elected officials or local government representatives. 2. Citizens (30,000 respondents, 30 countries, aged 18 and over): 1,000 individuals per country, representative sample of the population of each country surveyed. 160 "stakeholder" respondents and 1,000 citizens per country.

Global result

Appendices

Additional results

COMPETITIVENESS, AWARENESS-RAISING, AND ALIGNMENT OF STAKEHOLDERS REMAIN AT THE TOP OF THE AGENDA

Details of the answers to the question presented on page 20.

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Make sustainable materials, products, and solutions more competitive	32%	=	34	34	32	28	32	40
Raise public awareness of the challenges of sustainable construction	31%	=	35	31	38	35	25	*45*
Raise awareness among all stakeholders and strengthen their collaboration	30%	=	35	36	35	30	25	33
Make the sustainable performance of constructions more visible and transparent	27%	=	34	31	27	31	23	33
Prioritize the use of bio-materials over conventional materials	26%	-	28	23	25	*32*	23	30
Train professionals more	22%	=	23	20	27	23	23	11
Proposes new innovative solutions	21%	=	26	16%	20	26	18	28
Renovate existing buildings	17%	=	10	17	8	12	*25*	8

Base: stakeholders (4,800 respondents) – several possible ranked responses – Only the top 8 responses are shown (15 responses in total).

COMPETITIVENESS, AWARENESS-RAISING, AND ALIGNMENT OF STAKEHOLDERS REMAIN AT THE TOP OF THE AGENDA

Details of the answers to the question presented on page 20.

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Increase public aid for individuals	11%	+2	8	9	8	9	*14*	6
Move towards more regulation	11%	=	10	*19*	*19*	11	8	6
Increase public aid for professionals	10%	=	10	9	11	9	10	15
***Establish regulations to help increase energy renovations**	9%	=	-	-	-	-	*21%*	-
Move towards less regulation	7%	=	2	9	7	5	9	2
Prioritize collective housing	6%	=	6	8	6	*8%*	6	6
Simplify the role of labels and certification	6%	=	5	7	5	*8*	6	6

Base: stakeholders (4,800 respondents) – several possible ranked responses – Only the last 7 responses are shown (15 responses in total) | * Term only used in Europe

COMPETITIVENESS AND AWARENESS-RAISING ALSO PRIORITIZED BY CITIZENS

Details of the answers to the question presented on page 21.

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Make sustainable materials, products, and solutions more competitive	32%	=	30	34	34	39	28	33
Raise public awareness of the challenges of sustainable construction	29%	-1	37	24	***38***	35	23	30
Make the sustainable performance of constructions more visible and transparent	28%	+2	33	28	32	***37***	22	32
Prioritize the use of bio-materials over conventional materials	28%	-	28	26	28	***37***	24	26
Raise awareness among all stakeholders and strengthen their collaboration	22%	+2	***33***	17	26	26	15	25
Proposes new innovative solutions	21%	-1	23	19	23	21	21	20
Renovate existing buildings	17%	-2	13%	18%	9	11	***23***	14
Train professionals more	16%	+2	18	15	18	18	16	12

Base: citizens (30,000 respondents) – several possible ranked responses – Only the top 8 responses are shown (15 responses in total).

COMPETITIVENESS AND AWARENESS-RAISING ALSO PRIORITIZED BY CITIZENS

Details of the answers to the question presented on page 21.

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA	NORTH AMERICA	LATIN AMERICA	ASIA-PACIFIC	EUROPE	MIDDLE EAST
Increase public aid for individuals	13%	-	14	14	10	8	*15*	15
Increase public aid for professionals	10%	=	10	9	10	9	10	12
Prioritize collective housing	8%	=	8	10	8	7	8	10
Move towards more regulation	8%	-	7	11	*12*	7	7	10
Establish regulations to help increase energy renovations	8%	-	-	-	-	-	*18%*	-
Simplify the role of labels and certification	7%	=	4	8	6	7	*8*	10
Move towards less regulation	7%	+1	3	8	5	5	*9*	7

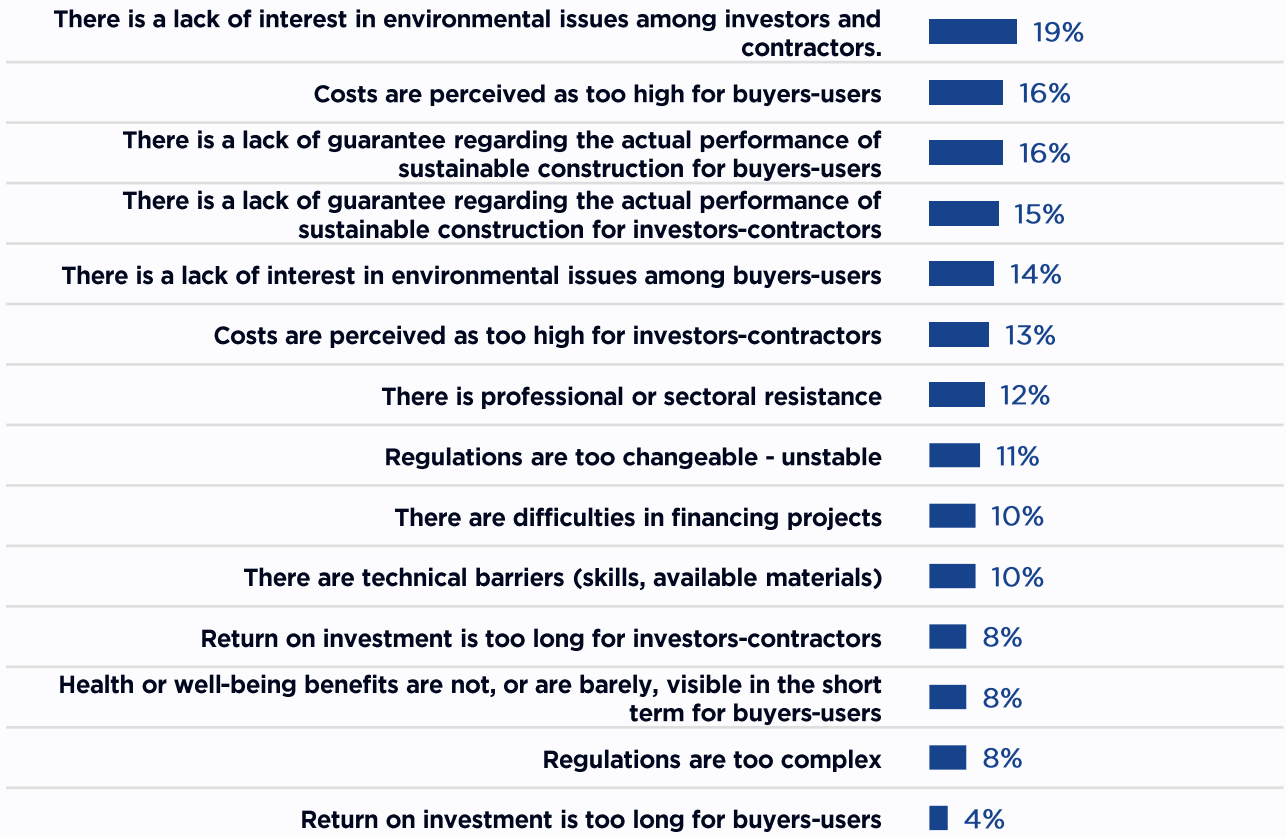
Base: citizens (30,000 respondents) – several possible ranked responses – Only the last 7 responses are shown (15 responses in total) | * Term only used in Europe

A QUESTION OF CONFIDENCE AND PERCEIVED VALUE

Details of the answers to the question presented on page 17.

You indicated that you wish to step back regarding sustainable construction. What are the main reasons?

NEW QUESTION



Base: stakeholders wishing to backtrack on sustainable construction (304 respondents) – Two possible answers from among 15 options

The Sustainable Construction Observatory
BY SAINT-GOBAIN

To find out more and explore the 2026 edition of our Barometer, go to the Sustainable Construction Observatory website:
www.saint-gobain.com/en/observatory/2026-sustainable-construction-barometer
sustainable-construction-observatory@saint-gobain.com

To learn more about sustainable construction and the factors driving its growth, visit the online magazine Constructing a Sustainable Future:
https://www.constructing-sustainable-future.com/en/home/

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