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**Building in
Catalonia
underpins the
start of the
recovery, though
still very far from
a normal situation**

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On Monday 25 January, at an open meeting with the media, the COAC analysed the construction and building renovation sector in Catalonia during 2015.

Last year closed with authorizations for 2,881,076 m2, 26% more than in 2014. While this is a very positive figure, we need to highlight certain considerations to make a proper evaluation of the state of the sector:

1. We did not witness sustained growth throughout 2015: There was a steep rise in the first half of the year which later dropped away.

2. The increase in authorized surface area was primarily due to the authorization of very big projects (over 10,000 m²), some of which were halted due to the crisis that resumed in 2015.
3. The authorized surface area is still at exceptionally low levels across the whole of Catalonia, and very much below the normal levels of construction and building renovation in the rest of Europe.

This situation is still unsustainable for the sector, which needs economic policies to promote and reactivate the industry and complete its modernization process.

ANALYSIS BY REGION

The province of Barcelona (not taking the city of Barcelona into account) has grown for the first time, with 38.45% more authorizations than in 2014. However, it is worth bearing in mind that 24.3% of this total is accounted for by major projects of more than 10,000 m². The city of Barcelona, despite witnessing a significant upturn in 2014 (77.9%), grew in a much more restrained way in 2015 (14.7%). The other regions (Girona, Tarragona, Lleida and Ebre) maintained the general trend of a rise in their authorized surface area.

ANALYSIS BY TYPE OF BUILDING

In absolute terms, new build is continuing to experience the most significant growth (33%), with almost 1,800,000 m² authorized. The authorized surface area for renovations has also grown, to around 1,000,000 m², although compared to new build this growth is much more moderate (18%).

ANALYSIS BY USE

The current figures indicate a recovery in housing, which is growing more than the non-residential market, thus starting to return to normal. With regard to non-residential uses, there was a considerable increase in commercial property, which once again is represented by authorization of major projects. Other sectors are not recovering and in some cases are continuing on their own particular downturn: education, health and industry, for example. With regard to the number of authorizations for housing, 2015 closed with a total of 6,351, an increase of 47% compared to 2014.

CONCLUSIONS

The total volume of authorized surface area is still very much below the figure that would equate to the usual minimum.

The sector is not yet experiencing a sufficiently strong structural recovery. There is a great deal of diversity with regard to the type of projects, although the major projects have a bigger impact on overall growth. We can say, then, that the reactivation of the sector is still not having an impact on either the majority of architects or other professionals and firms working in the sector.

The increase in activity reflected in the amount of authorized surface area is primarily due to major projects in the province of Barcelona. Growth continues to be insignificant for the other provinces.

The strong growth in the city of Barcelona in 2014 (over 70%) was not maintained during 2015, even though growth did continue (around 15% compared to the previous year).

These figures underline something that the COAC has been demanding for some considerable time: the need to implement measures of structural change to drive and steer the sector's recovery and, as a knock-on factor, the economy.

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