

Methodological approach and bibliography of sources

The methodology used to develop the infographic is based on desk research and secondary market analysis, drawing on data and estimates from existing reports and other publicly available sources. It is not intended to constitute a scientific study or a comprehensive measurement of the sector, but rather to provide an indicative order of magnitude of the economic impact of energy efficiency in the EU. All estimates and calculations are based on deliberately conservative assumptions which should be interpreted as indicative rather than definitive.

- Turnover and market size data
 - Data for European turnover, employment and number of patents for the European Alliance to Save Energy have been provided by seven industrial EU-ASE members through a survey (updated 06/02/2025) and data added on June 2026.
 - Data on the market value of the energy efficiency industrial ecosystem has been derived from studies and market analyses concerning the following, not exhaustive, list of technologies: insulation materials, energy efficient windows, LED lighting, heat pumps, smart water meters, water purifiers, waste heat recovery systems, and others. The aggregated market value reported in the infographic is a conservative estimation that does not take into account the broad array of all existing energy efficiency technologies. In addition, it does not take into account, due to the lack of data, the indirect economic impact generated by these technologies along very long and complex value chains.

Market data Sources:

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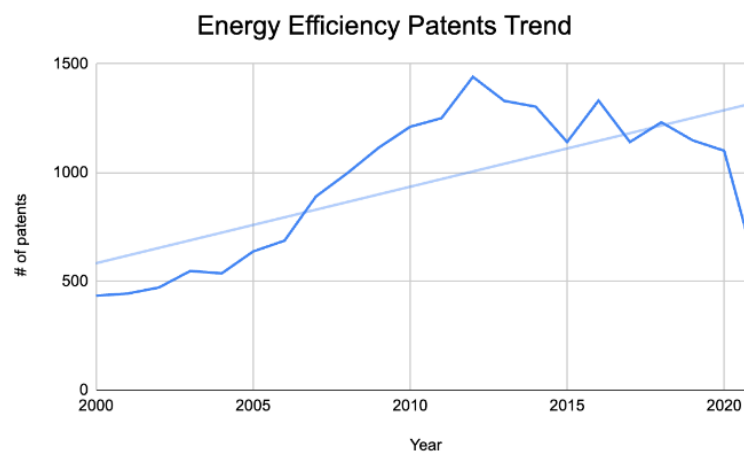
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- Steam Trap Market Size, Share, and Industry Analysis By Type (Thermodynamic Steam Traps, Mechanical Steam Traps, and Thermostatic Steam Traps), By Material (Cast Iron, Steel, and Others), By End User Industries (Oil & Gas, Power Utilities, Chemicals & Petrochemicals, Food & Beverages, Mining, Pharmaceuticals, and Others), and Regional Forecast, 2026-2034. (n.d.- g). Fortune Business Insights. Retrieved August 20, 2026, from <https://www.fortunebusinessinsights.com/steam-trap-market-112708>

- Patent Data

- 2000-2024: Energy technology patents data explorer – data tools. (n.d.-b). IEA. Retrieved August 15, 2026, from <https://www.iea.org/data-tools/patents>
- 2000-2035:



- Based on 2000-2024 Historical IEA data, assuming the trend increases by approximately 35 patents annually:
 - 2025: 1,455
 - 2030: 1,630
 - 2035: 1,805
 - Cumulative total through 2035

There are 11 projected years from 2025 through 2035:

$$\text{Projected patents}_{2025-2035} = \frac{11(1,455, +1805)}{2} = 17,930$$

$$\text{Cumulative total}_{2000-2035} = 21,361 + 17,930 = 39,291$$

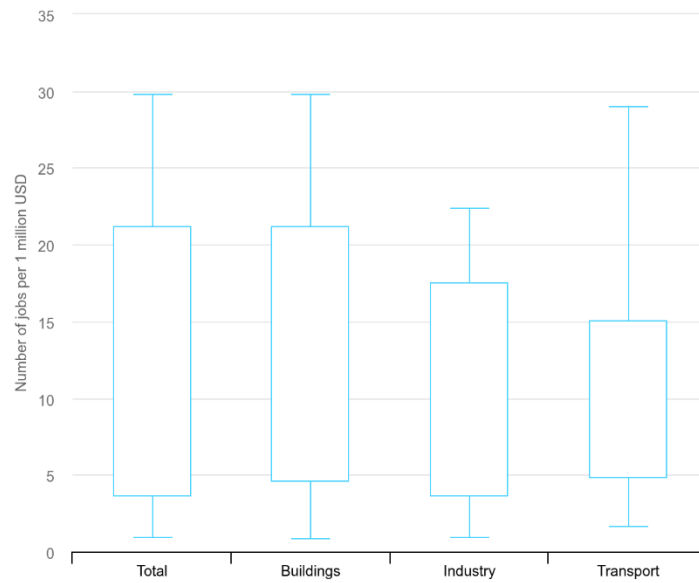
Rounding downwards, by 2035 total cumulative patents in energy efficiency
= 39,200

- Employment Data:

- The European Commission, drawing on IEA estimates, reports that approximately €200 billion was invested annually in energy efficiency in Europe between 2021 and 2023. Report from the Commission to the European Parliament and the Council on energy efficiency financing in Europe an assessment of public spending for energy efficiency and the energy performance of buildings [EUR-Lex - 52026DC0118 - EN - EUR-Lex](#)
- The [Recovery and Resilience Facility](#) launched in 2021, allocated €184 billion to energy-related measures, of which €106.5 billion will be dedicated to energy efficiency measures, with a focus on public and residential buildings, including social housing. Investing in Energy Efficiency [Investing in energy efficiency - Energy - European Commission](#)
- Based on the above we used a conservative assumption of €100 billion in annual EU investment for energy efficiency.
- By using the IEA's estimate of up to 22 jobs created or maintained for one year per US\$1 million invested in building energy efficiency (as illustrated in the graph below), we calculated the employment impact in the order of 2.2–2.4 million job-years annually. This is an indicative estimate rather than a direct measurement of employment.
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