

Net-Zero Energy Buildings Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Green Buildings & Sustainable Construction (Real Estate & Construction)
> **Source:** <https://www.mordorintelligence.com/industry-reports/net-zero-energy-buildings-market>
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 37.40 billion
Projected Forecast (2031)	USD 37.40 billion
Growth Rate (CAGR)	14.68 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Net-Zero Energy Buildings industry] (images/chart_2.png)

! [Net-Zero Energy Buildings Market Size] (images/chart_3.png)

! [Net-Zero Energy Buildings Market Share by Building Type, 2025] (images/chart_4.png)

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! [Net-Zero Energy Buildings Market Growth Rate by Region] (images/chart_6.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview	Study Period	2020 - 2031
Market Size (2026)		USD 37.40 Billion
Market Size (2031)		USD 74.20 Billion
Growth Rate (2026 - 2031)		14.68 %
Fastest Growing Market		Asia-Pacific
Largest Market		Asia-Pacific
Market Concentration		Medium

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Net-Zero Energy Buildings Market Analysis by Mordor IntelligenceThe Net-Zero Energy Buildings Market size was valued at USD 35.08 billion in 2025 and is estimated to grow from USD 37.40 billion in 2026 to reach USD 74.20 billion by 2031, at a CAGR of 14.68% during the forecast period (2026-2031).

The market is shaped by tighter building-performance rules, corporate decarbonization commitments, and lower-cost renewable energy systems. Buildings remain responsible for 34% of global energy-related CO2 emissions, underscoring the need to keep building efficiency central to national climate plans. The revised EU Energy Performance of Buildings Directive requires zero-emission standards for new public buildings from 2028 and all new buildings from 2030. These requirements shorten development planning cycles and make energy performance part of early project design. The net-zero energy buildings market is also moving toward continuous performance management because solar generation, storage, controls, and commissioning must work together over a building's operating life.

Key Report Takeaways* By building type, commercial buildings accounted for 43.8% of the net-zero energy market share in 2025, while institutional buildings recorded the highest projected CAGR at 15.6% through 2031.

* By offerings, solutions accounted for 68.4% of revenue in 2025, while services recorded the highest projected CAGR at 15.9% through 2031.

* By construction type, new construction accounted for 71.2% of the net-zero energy buildings market size in 2025, while renovation recorded the highest projected CAGR at 16.2% through 2031.

* By geography, Asia-Pacific held 37.1% of revenue in 2025 and recorded the highest projected CAGR at 16.8% through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Net-Zero Energy Buildings Market*Drivers | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Regulatory Mandates and Building Standards | +4.0% | Global, concentrated in Europe, North America, China, and Australia | Short term (≤ 2 years) |

Renewable Integration and Smart Technologies | +3.5% | Global, with Asia-Pacific as a core region | Medium term (2-4 years) |

Deep Energy Retrofits and Electrification Programs | +2.5% | North America and Europe, with spillover to Asia-Pacific | Medium term (2-4 years) |

Energy Cost Volatility and Building Energy Resilience | +2.0% | Global, concentrated in Europe and the Middle East and Africa | Short term (≤ 2 years) |

Grid-Interactive Building Solutions | +1.5% | North America, Europe, and advanced Asia-Pacific markets | Medium term (2-4 years) |

Performance-Based Delivery | +1.2% | North America and Europe | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The net-zero energy buildings market is moderately concentrated in integrated building platforms and fragmented in components and services. Siemens, Schneider Electric, Johnson Controls, Honeywell, and Trane Technologies compete in building management technology. Kingspan, ROCKWOOL, and Saint-Gobain compete through env

elope materials, insulation performance, and embodied-carbon credentials. Large commercial and institutional projects can support integrated platforms because their operating scale justifies more advanced controls. Smaller commercial and residential projects remain more fragmented.

Competitive strategy increasingly emphasizes ongoing building performance rather than isolated equipment sales. Trane Technologies and Amazon expanded the Brain Box AI deployment after the fulfillment-center pilots reported nearly 15% reductions in energy use. Johnson Controls stated in its 2026 sustainability report that its technologies helped customers cut more than USD 9.5 billion in energy costs. It also stated that 77% of its 2025 new-product research and development supported sustainability and climate innovation[3]Johnson Controls, “Johnson Controls’ 2026 Sustainability Report Highlights Energy Efficiency Returns in Mission-Critical Industries,” Johnson Controls, johnsoncontrols.com. These actions show why the net-zero energy buildings market increasingly includes recurring monitoring, optimization, and service work.

Suppliers are also adding capacity to address renovation demand. ROCKWOOL broke ground on a stone-wool manufacturing facility in Wallula, Washington, in April 2026, and commercial production is expected in 2028. Kingspan completed a 29,000 sq ft retrofit expansion at its DeLand, Florida headquarters in 2026. Kingspan reported a 60% reduction in embodied carbon through structural retention at the project. These examples show competition across materials, retrofit delivery, and building operations.

Net-Zero Energy Buildings Industry Leaders* Siemens AG

- * Schneider Electric SE
- * Johnson Controls International plc
- * Honeywell International Inc.
- * Daikin Industries, Ltd.

* *Disclaimer: Major Players sorted in no particular order
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Component Component 3 Scope Of The Report Bottom

Global Net-Zero Energy Buildings Market Report ScopeBy Building TypeResidential
|
Commercial |
Institutional |
Industrial |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
Europe | United Kingdom |
| Germany |
| France |
| Italy |
| Spain |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| Australia |

- | South Korea |
- | SouthEast Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philip
pines) |
- | Rest of Asia-Pacific |
- South America | Brazil |
- | Argentina |
- | Rest of South America |
- Middle East and Africa | Saudi Arabia |
- | United Arab Emirates |
- | Turkey |
- | South Africa |
- | Nigeria |
- | Rest of Middle East and Africa |

Frequently Asked Questions

What is the projected value of net-zero energy buildings by 2031?

The net-zero energy buildings market is projected to reach USD 74.2 billion by 2031, expanding at a 14.7% CAGR from 2026. The forecast reflects demand for higher-performance design, renovation delivery, and operational controls.

Which building type is growing fastest through 2031?

Institutional buildings are forecast to record the highest CAGR at 15.6% through 2031. The net-zero energy buildings market gains support from public emissions commitments covering hospitals, schools, and government facilities.

Which construction type has the strongest projected growth?

Renovation is forecast to grow at a 16.2% CAGR through 2031. The net-zero energy buildings market is supported by the large stock of inefficient buildings and energy-performance requirements.

What is driving demand for net-zero building projects?

Performance rules, retrofit and electrification programs, energy resilience needs, and smart building controls are key factors. These forces shape specifications and operations across the net-zero energy buildings market.