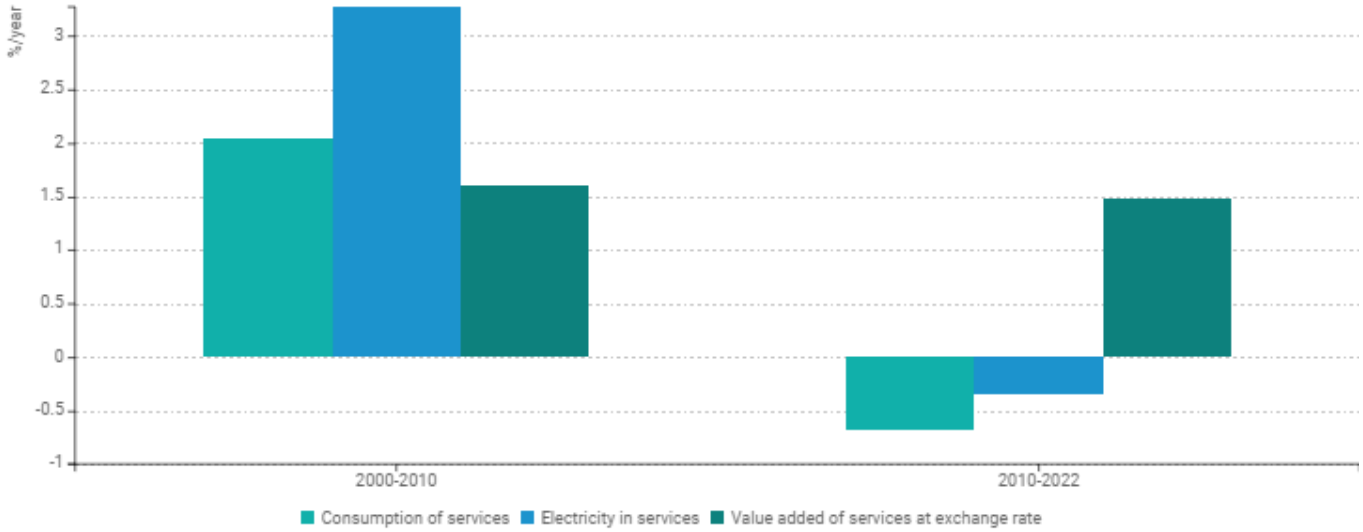
Sectoral Profile - Services

Energy consumption

Changes in energy consumption and value added of services

- Between 2000 and 2010, electricity consumption of services grew by 3.3%/year, twice as fast as value added (+1.6%/year).
- Between 2010 and 2022, electricity consumption decreased by 0.3%/year, half as fast as energy consumption over the same period (-0.7%/year), despite growth in value added of services growing at a similar level (+1.5%/year).

Energy consumption and VA growth (EU)

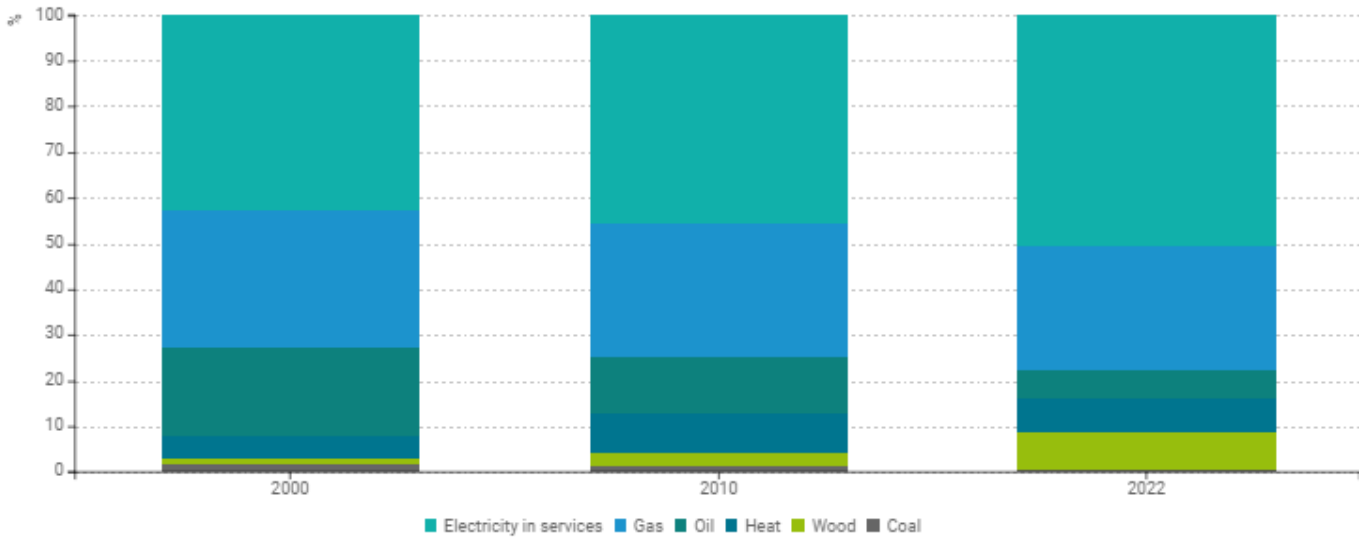


Note: Energy consumption at normal climate.

Fuel mix (EU)

- Notable increase in electricity penetration from around 43% in 2000 to 51% in 2022 (+8 points), with the most significant growth observed between 2010 and 2022 (+5 points).
- Slightly decrease of gas share from 29% in 2010 to 27% in 2022, while it remained relatively stable before 2010.
- Steady decrease in oil share from 20% in 2000 to 6% in 2022.
- Increase of renewables share, from around 1.5% in 2000 to 8% in 2022.
- Gas and electricity represent currently 78% of energy consumption in the service sector.

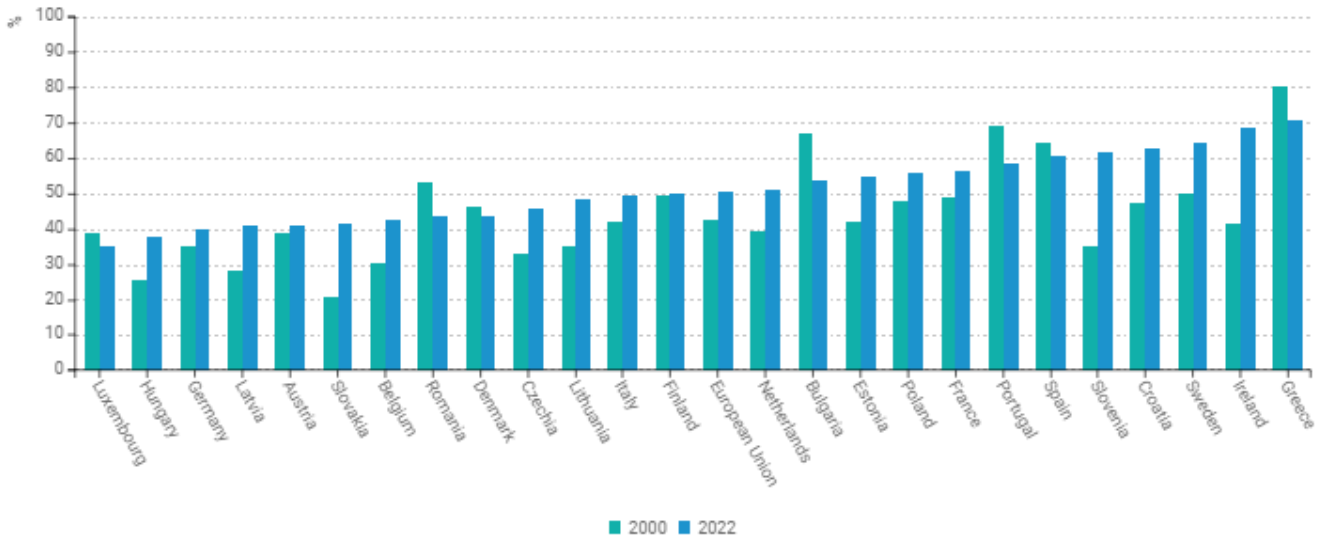
Energy consumption by fuel in the service sector (EU)



Share of electricity in total consumption

- Electricity supplies around half of EU energy consumption in services, while 4 EU countries have a significantly higher share of electricity: Malta, Greece, Ireland and Cyprus (around 70%).
- Increasing penetration of electricity in most EU countries, especially in Slovakia where this rate doubled between 2000 and 2022, or in Slovenia and Ireland (+27 pp for both).
- Decreasing share in 9 EU countries, with the strongest reduction in Bulgaria (-13 pp).

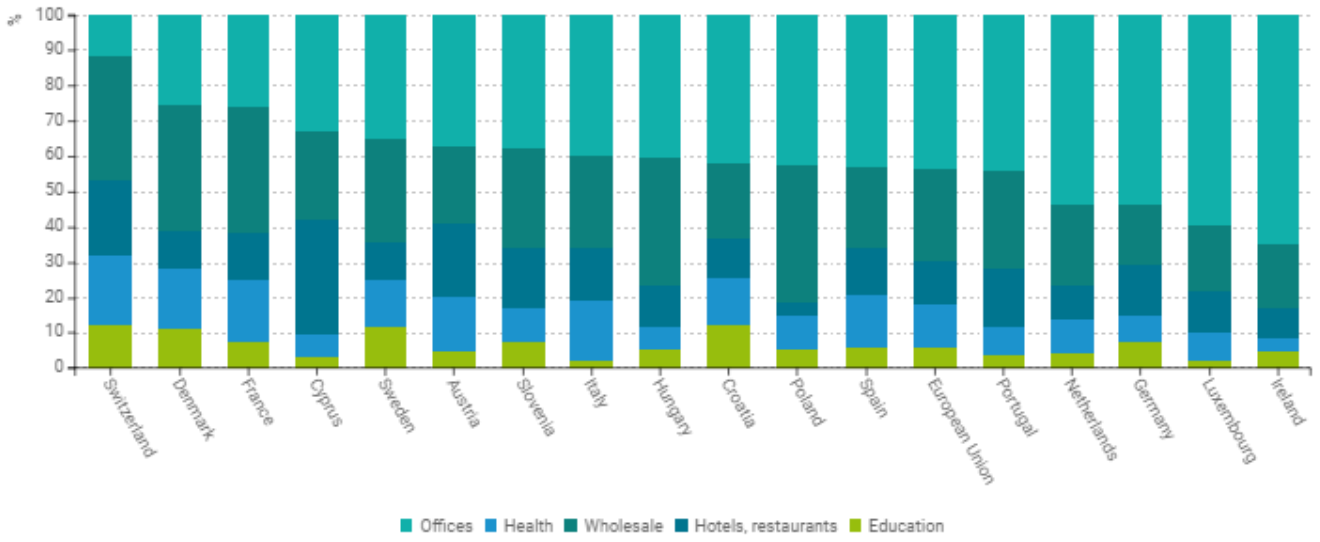
Share of electricity in total energy consumption



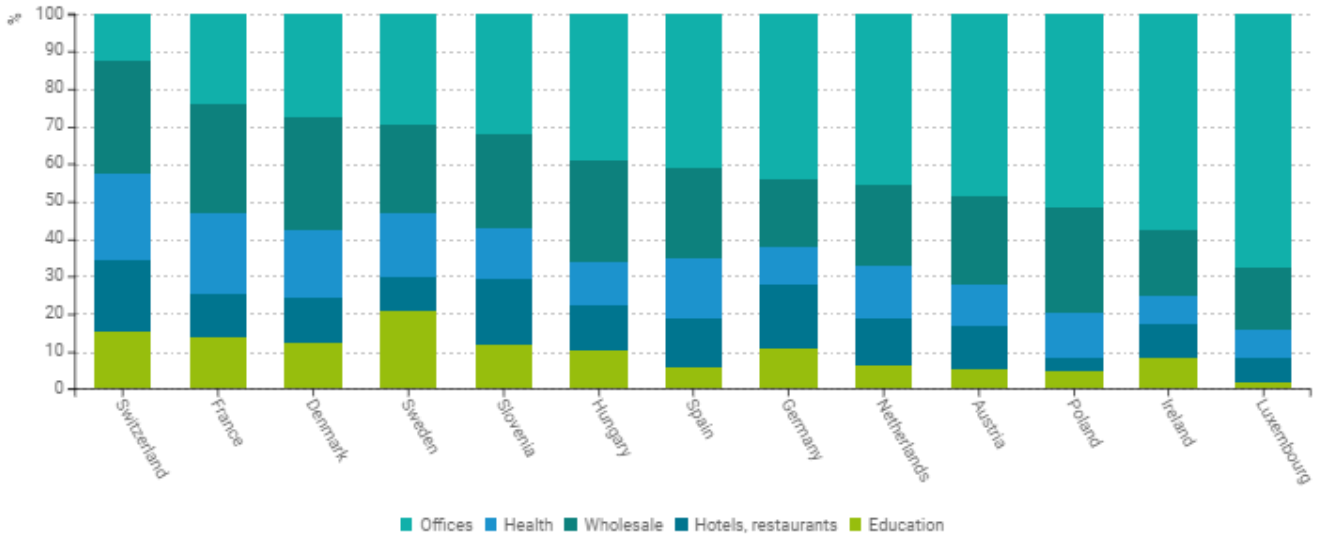
Energy consumption by branch

- Offices absorb 43% of the electricity used in the service sector at EU level, followed by wholesale and trade with 27% (70% for both).
- Offices are the leading electricity consumer in most countries, except in Denmark and France where wholesale and trade holds the top position, accounting for 36%.

Electricity consumption by sub-sector (2022)



Energy consumption by sub-sector (2022)

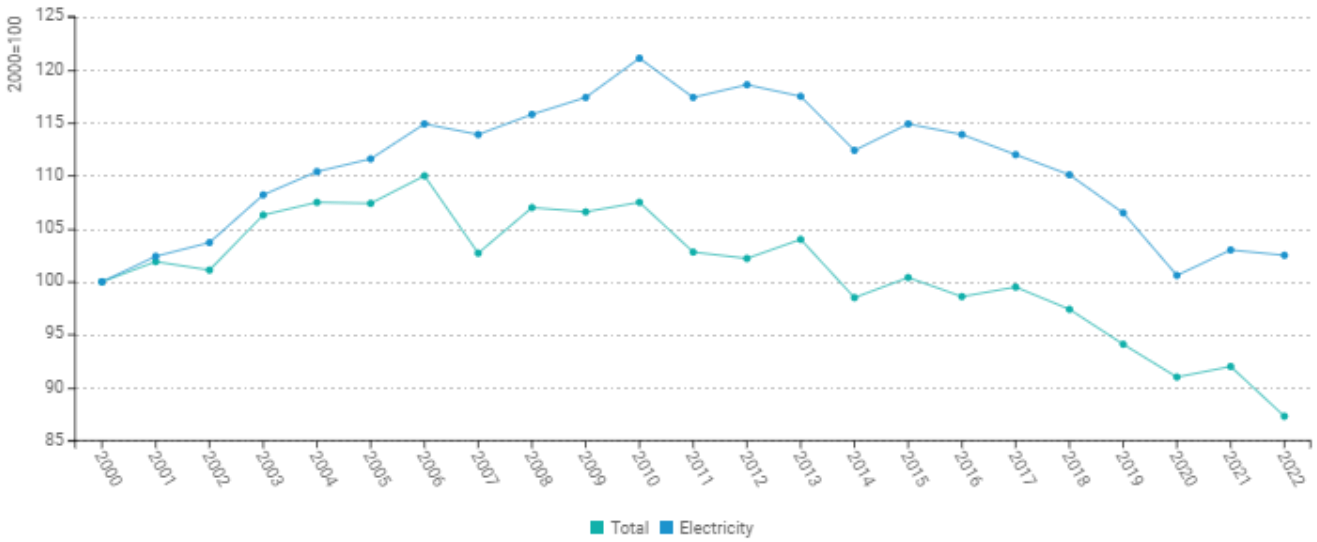


Electricity consumption per employee

Energy and electricity consumption per employee

- Downward trend in energy consumption per employee at EU level since 2010 (-1.7%/year), after a slight progression between 2000 and 2010 (+0.7%/year);
- Downward trend in electricity consumption per employee in the EU since 2010 (-1.4%/year), with an acceleration since 2018 (-1.8%/year); this follows a steady progression until 2010 (+1.9% year over 2000-2010).

Energy and electricity consumption per employee

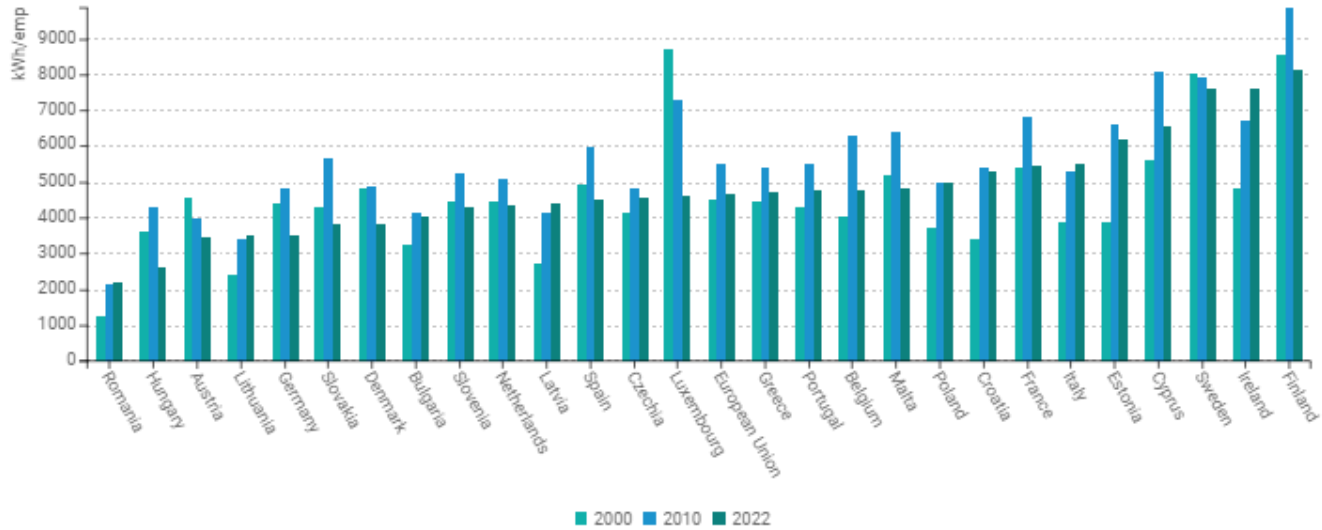


Note: Energy consumption at normal climate.

Electricity consumption per employee in EU countries

- Electricity consumption per employee has also been decreasing in most countries since 2010. Austria and Luxembourg have been on a declining trend over the whole period.
- Large discrepancies among countries: Romania has an electricity consumption per employee 3.7 times lower than Finland.

Electricity consumption per employee

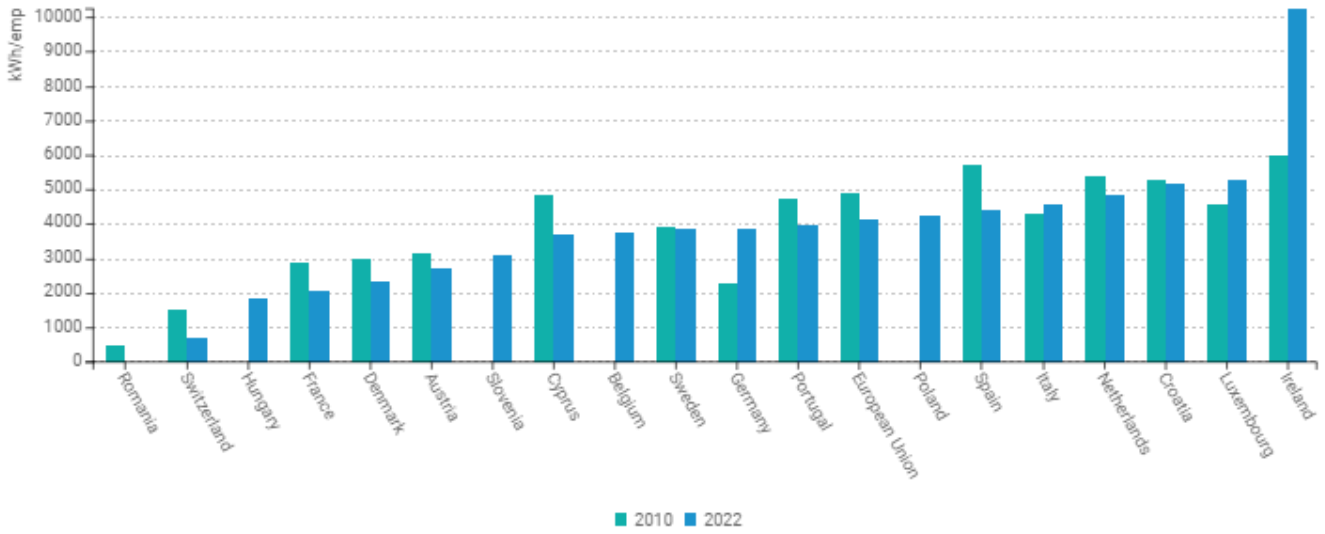


Electricity consumption by branch

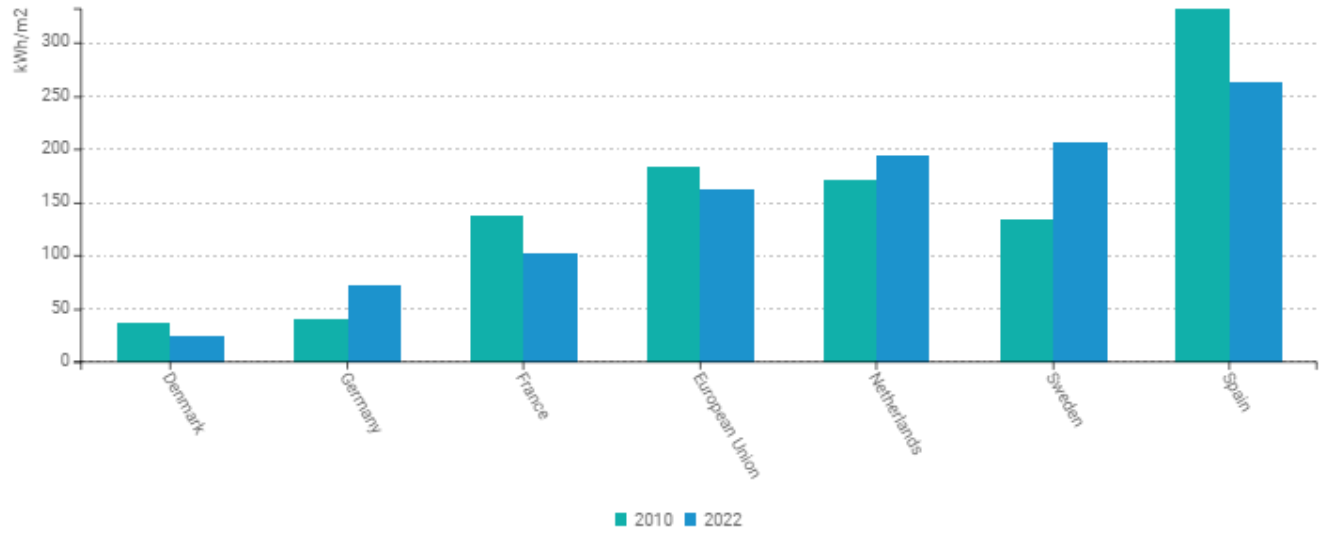
Electricity consumption in offices

- Decrease in electricity consumption per employee in offices at EU level and in most countries of the sample. Electricity consumption per m² in offices decreases at EU level, although there are significant discrepancies between MS.

Electricity consumption per employee in offices



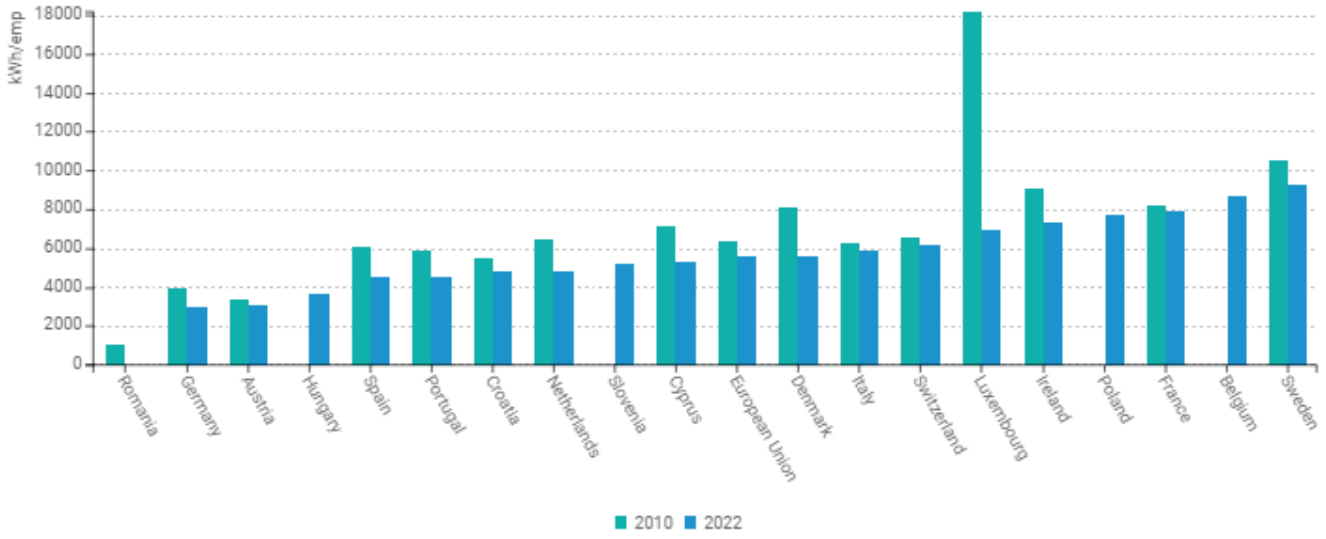
Electricity consumption per m² in offices



Electricity consumption in trade (wholesale and retail)

- Decrease in electricity consumption per employee in trade at EU level and in most countries of the sample.

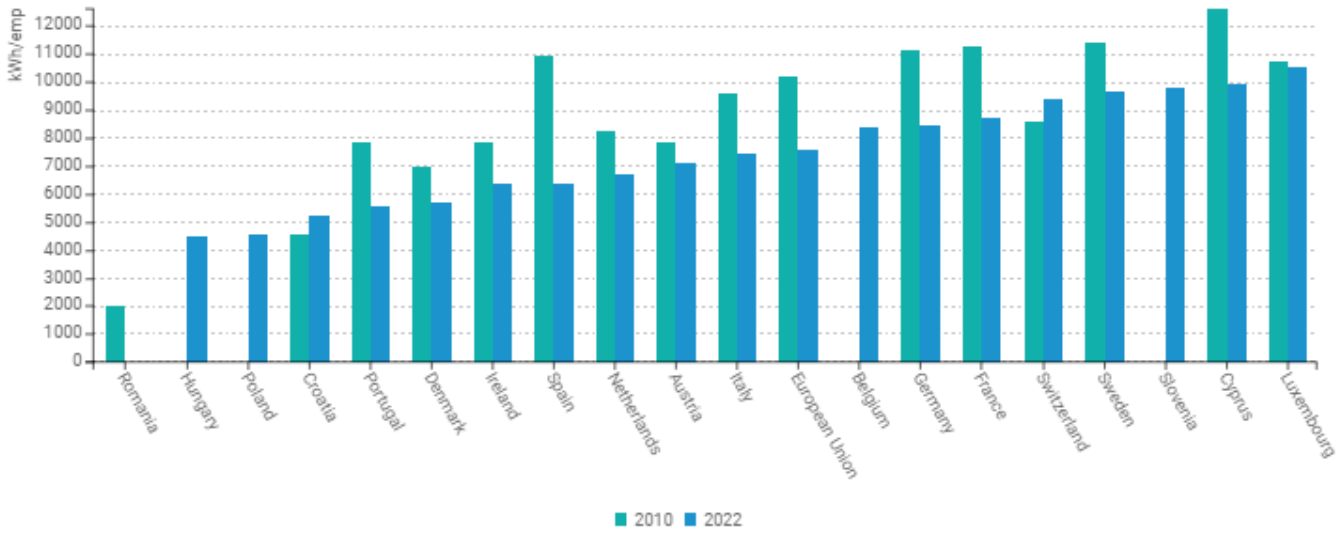
Electricity consumption per employee in trade



Electricity consumption in hotels and restaurants

- Decreasing electricity consumption per employee in hotels and restaurants at EU level and in most countries of the sample.

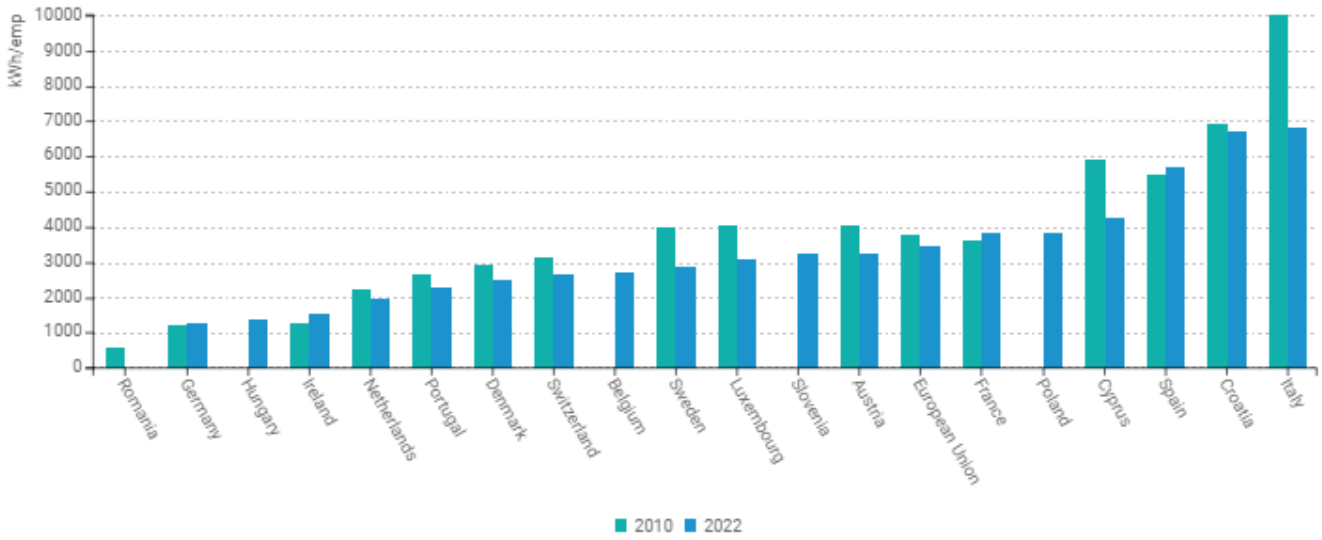
Electricity consumption per employee in hotels and restaurants



Electricity consumption in the health sector

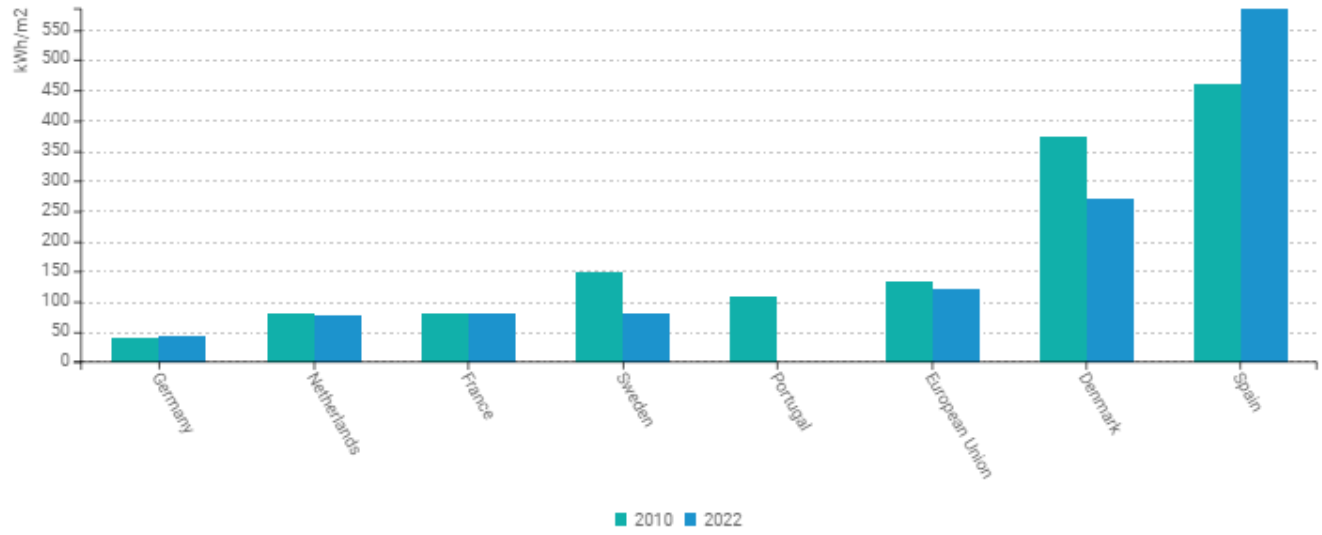
- Electricity consumption per employee in the health sector slightly decreased at EU level since 2010 (-8%) but shows significant discrepancies between countries, with a 32% decrease in Italy and a 22% increase in Ireland.

Electricity consumption per employee in health



- Electricity consumption per m² decreases at EU level and in most countries of the sample.

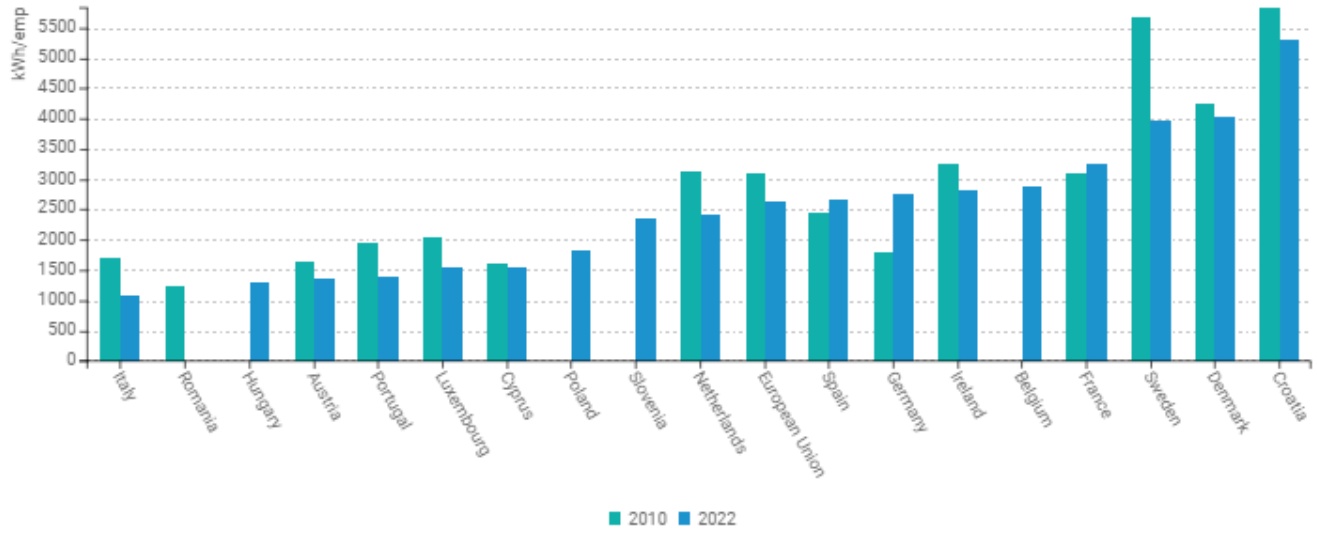
Electricity consumption per m² in health



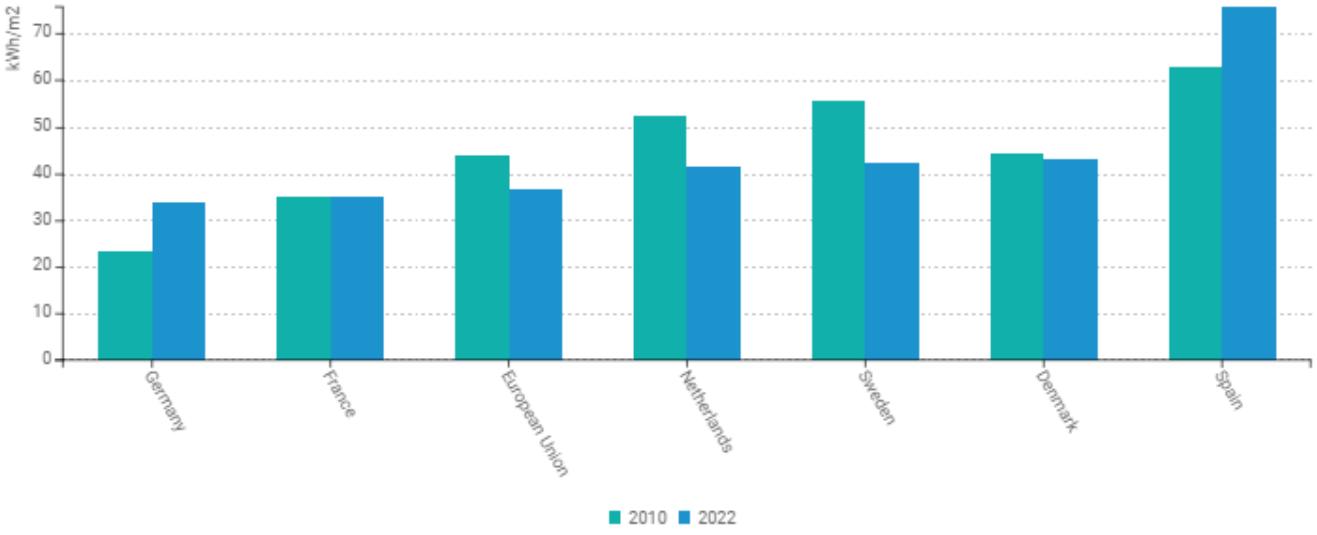
Electricity consumption in education

- Electricity consumption per employee in education has decreased at EU level. Significant disparities between EU countries with the largest decrease in Italy (-36%) and the largest increase in Germany (+53%).
- Significant disparities in electricity consumption per m² in the sample of countries.

Electricity consumption per employee in education



Electricity consumption per m² in education

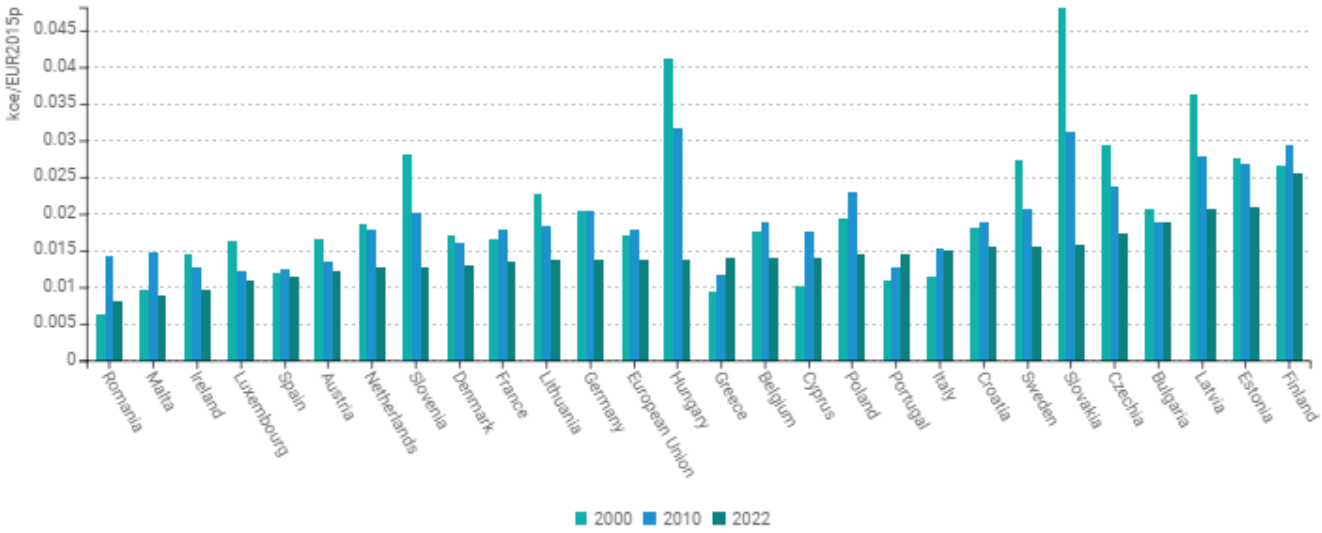


Energy intensity trends

Energy intensity of service sector in EU

- Decreasing energy intensity at EU level since 2010 (-2.1%/year) after a slight increase (+0.4%/year) until 2010, but varying trends among Member States.
- Increasing energy intensity in 5 countries between 2000 and 2022, especially in Greece, Cyprus and Portugal where it increased by over 1.3%/year. While energy intensity has decreased in almost all MS since 2010, it has kept its increasing trend observed before in Greece and Portugal during this period. This is probably linked to tourism and a larger diffusion of air conditioning.

Energy intensity

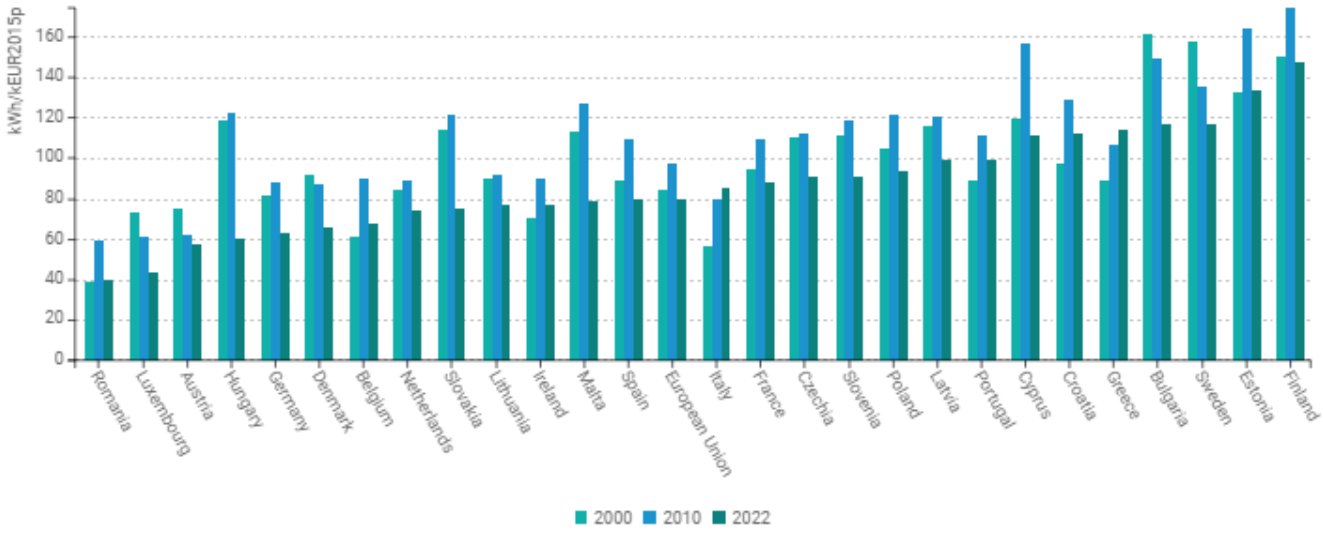


Note: Energy consumption at normal climate.

Electricity intensity trends in EU countries

- Decreasing electricity intensity at EU level (-1.7%/year) since 2010, following an upward trend between 2000 and 2010 (+1.5%/year).
- Similar trend in most EU MS, apart from few exceptions: Luxembourg, Austria, Denmark, Bulgaria, and Sweden have been on a downward trend over the whole period, and Italy and Greece have seen increasing intensity since 2000 (+1.9%/year and +1.2%/year respectively).

Electricity intensity



Electricity intensity trends