

Brussels, 19 November 2025

Stabilisation deepens across European Consulting Engineering amid robust demand

“With clear signs of market stabilisation and sustained activity in core sectors such as energy and transport/infrastructure, the European consulting engineering industry continues to demonstrate resilience,” says Henrik Garver, Chair of EFCA’s Economic Environment Committee and CEO of the Danish Association of Consulting Engineers (FRI), introducing the Autumn 2025 edition of EFCA’s Barometer report.

The EFCA Market Index has risen by 1.2 points, pointing to a slightly more positive outlook than in spring 2025. More than half of the participating countries report stable or improving market conditions, reflecting a gradual normalisation after several years of volatility. Order books remain exceptionally strong, with an average of 10.2 months of secured work, close to the post-pandemic peak. Profitability continues to hold firm; while easing slightly compared to 2023, the European average of 7.0% remains significantly above long-term trends.

The Barometer confirms that energy and transport/infrastructure remain the leading drivers of demand, fuelled by Europe’s ongoing clean energy transition, defence-related investment, and large-scale infrastructure programmes. Buildings, industry and water markets show mixed but generally stable conditions, with notable regional differences. Employment has shown a robust rebound, with the EFCA Employment Index surging by 71.2 points, approaching 2024 levels. While a moderate decrease is expected for early 2026, most countries forecast stable or modestly rising staff levels, indicating that the industry remains confident in the medium-term outlook.

Despite the positive momentum, several structural challenges persist. For the fourth consecutive year, the shortage of qualified staff is the industry’s leading concern. Rising labour costs have sharply increased in importance, becoming the second most cited challenge, followed by bureaucracy and political uncertainty. Issues such as lack of projects and late payments also feature among the sector’s top concerns. Nevertheless, companies across Europe express continued confidence in stable turnover and margins in the months ahead.

The Autumn 2025 EFCA Barometer draws on responses from 23 national associations, representing 85% of EFCA’s membership. It provides a timely and detailed snapshot of current market trends, employment developments and the structural challenges shaping Europe’s consulting engineering landscape.

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EDITOR’S NOTE

EFCA has member associations in 27 countries and is the sole European federation representing the business interests of professional engineering consultancy and related services, a sector that employs more than one million staff in Europe.