



Camera di Commercio
Udine

Centro Studi - Ufficio Statistica e Prezzi

Construction, Building and Plants Market in the Economy of the Province of Udine



April
2017

Companies in Numbers (December 31, 2016)

Development of building projects (residential and non-residential)

BUILDING CONSTRUCTION (F41)
N° of companies: 2,136

CIVIL ENGINEERING (F42)
N° of companies: 81

Construction of roads and motorways, of rail and metropolitan lines, of bridges and tunnels, construction of public utilities for the transport of fluids, electricity and telecommunications, construction of hydraulic works, of other civil engineering works

Demolition and preparation of building yard, installation of electrical installations, plumbing and other construction and installation work, final works such as plastering and laying in work of fixtures, coatings, coverings

SPECIAL BUILDING WORKS (F43)
N° of companies: 4,657

Source: elaboration on InfoCamere data

Economic Weight on the Province of Udine Economy

	Building and Construction	Total economy (**)	% Building and Construction
Companies (December 31, 2016)	7,570	54,856	13.8%
Added Value at basic prices (in MEur)	776.43	13,752.43	5.6%
Workers	15.2 thousand	234 thousand	6.5%

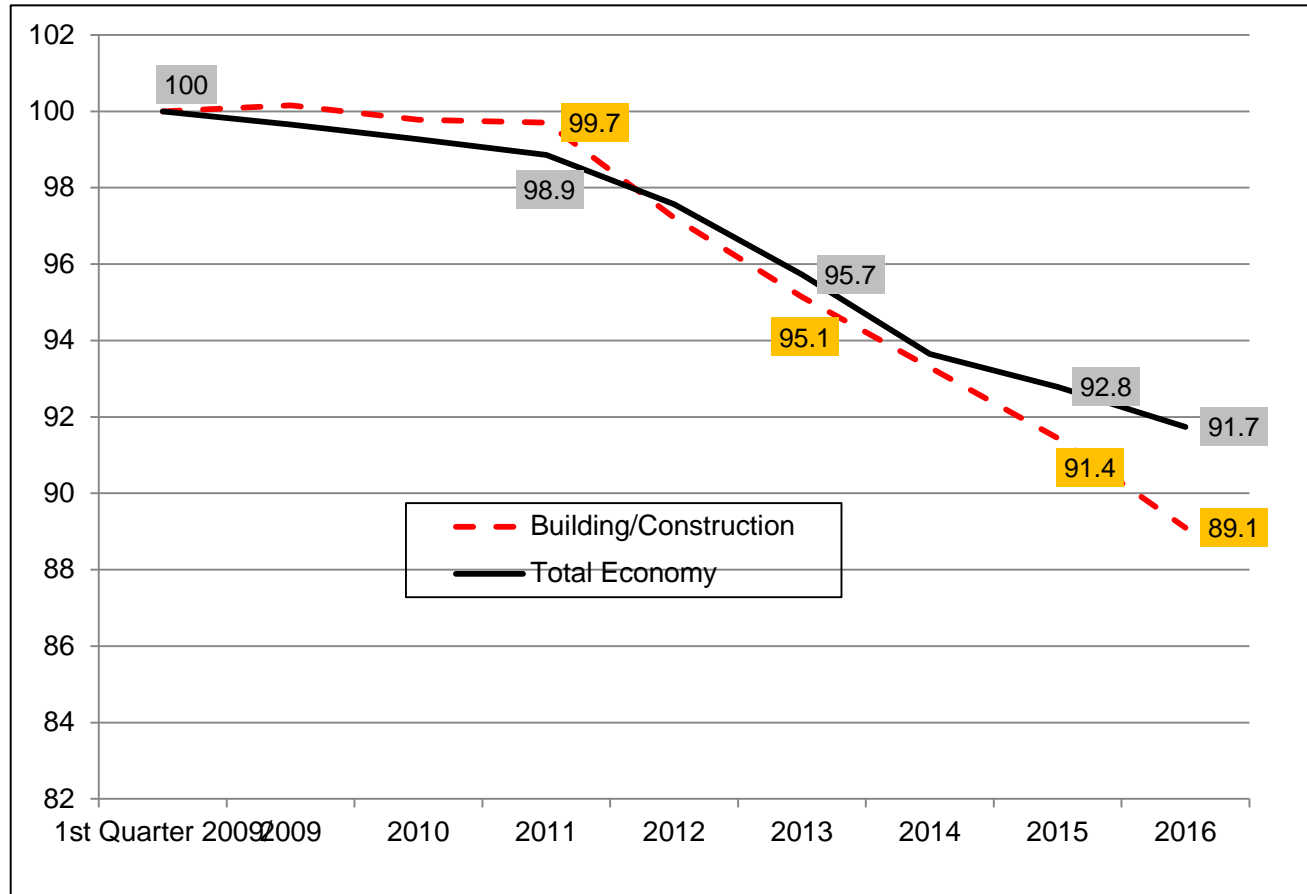
(**) *Public Administration excluded*

Source: elaboration on ISTAT and InfoCamere data



Business performance of the construction companies compared to the total of the economy.

(Index numbers: 1st quarter 2009 = 100, "before the crisis")



In 2016 in the province of Udine there were 6,874 companies; their number had sunk by 10.9% (-841) as compared to Spring 2009

Source: elaboration on InfoCamere data

Handicraft Companies in the Province of Udine

Many handicraft businesses work in the
construction market:

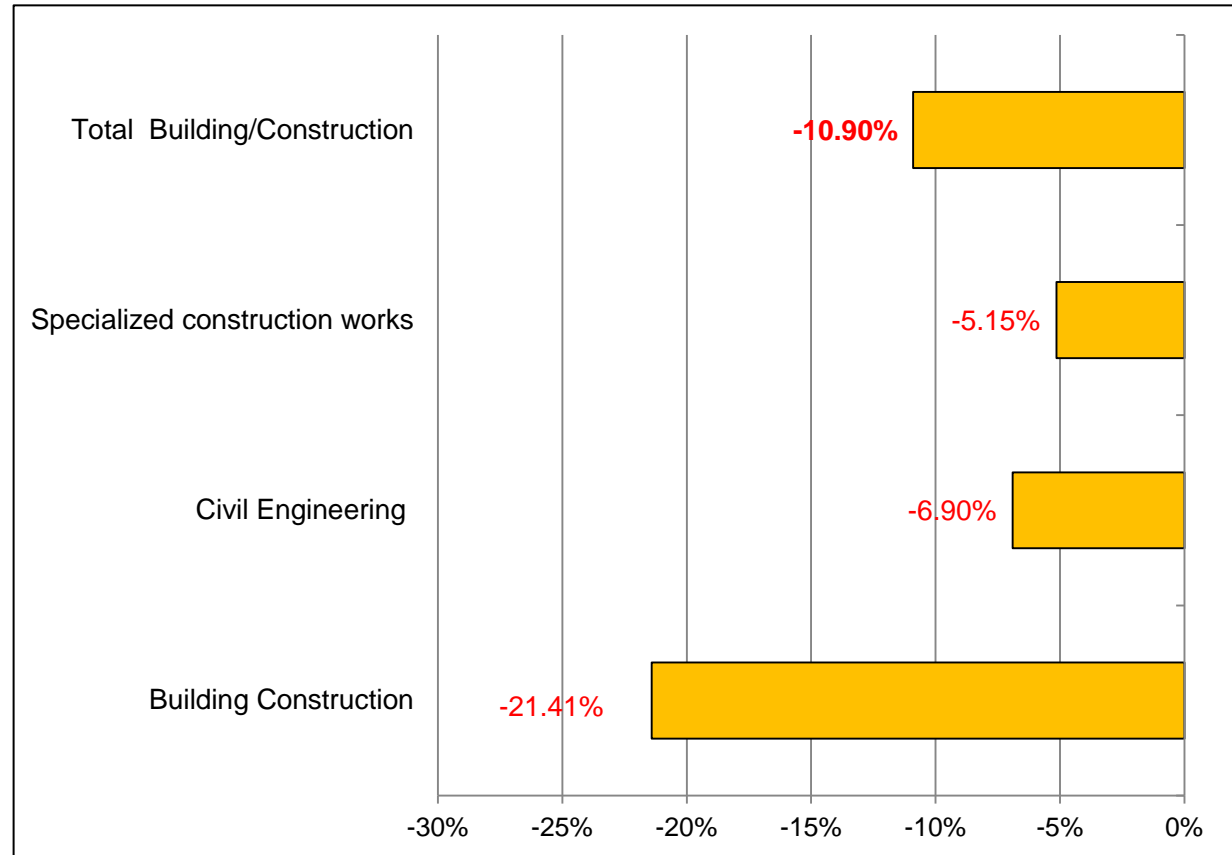
there are **5,532** handicraft companies in the
construction sector in the Province of Udine,
equal to a **80.5%** share of the whole sector
(**6,874** active companies)

Source: InfoCamere data processing

% Variation of active companies (2009 "before the crisis" - 2016)

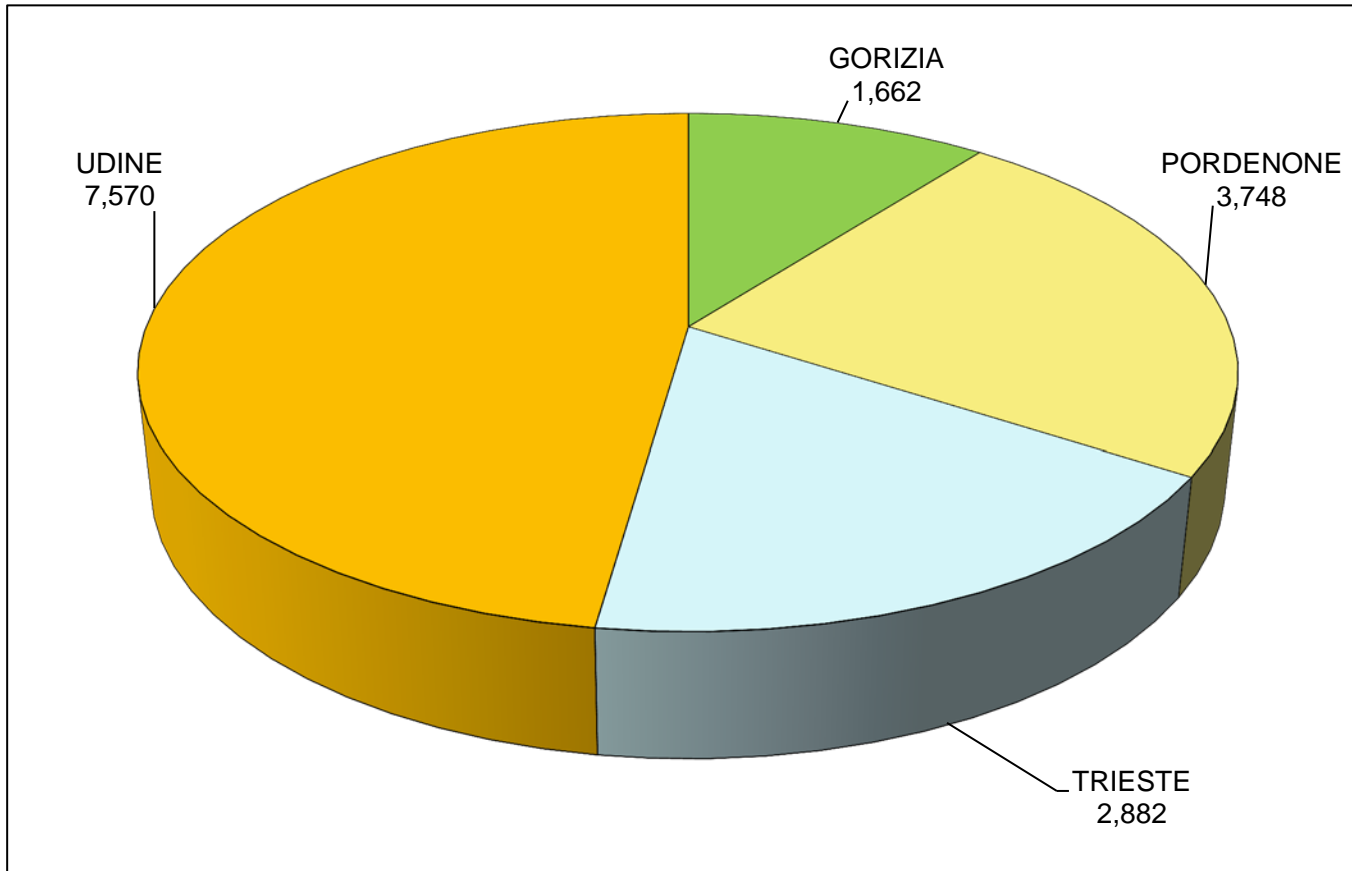
The number of "building construction" companies (real estate projects and construction of residential and non-residential buildings) fell by -21.4% .

The number of companies in the field of "specialized construction works (demolition, site preparation, plant engineering, building finishing), and of civil engineering firms also sank (-5.2% and -6.9% respectively).



Source: elaboration on InfoCamere data

Distribution by Province of the Region (December 31, 2016)



Source: elaboration on InfoCamere data

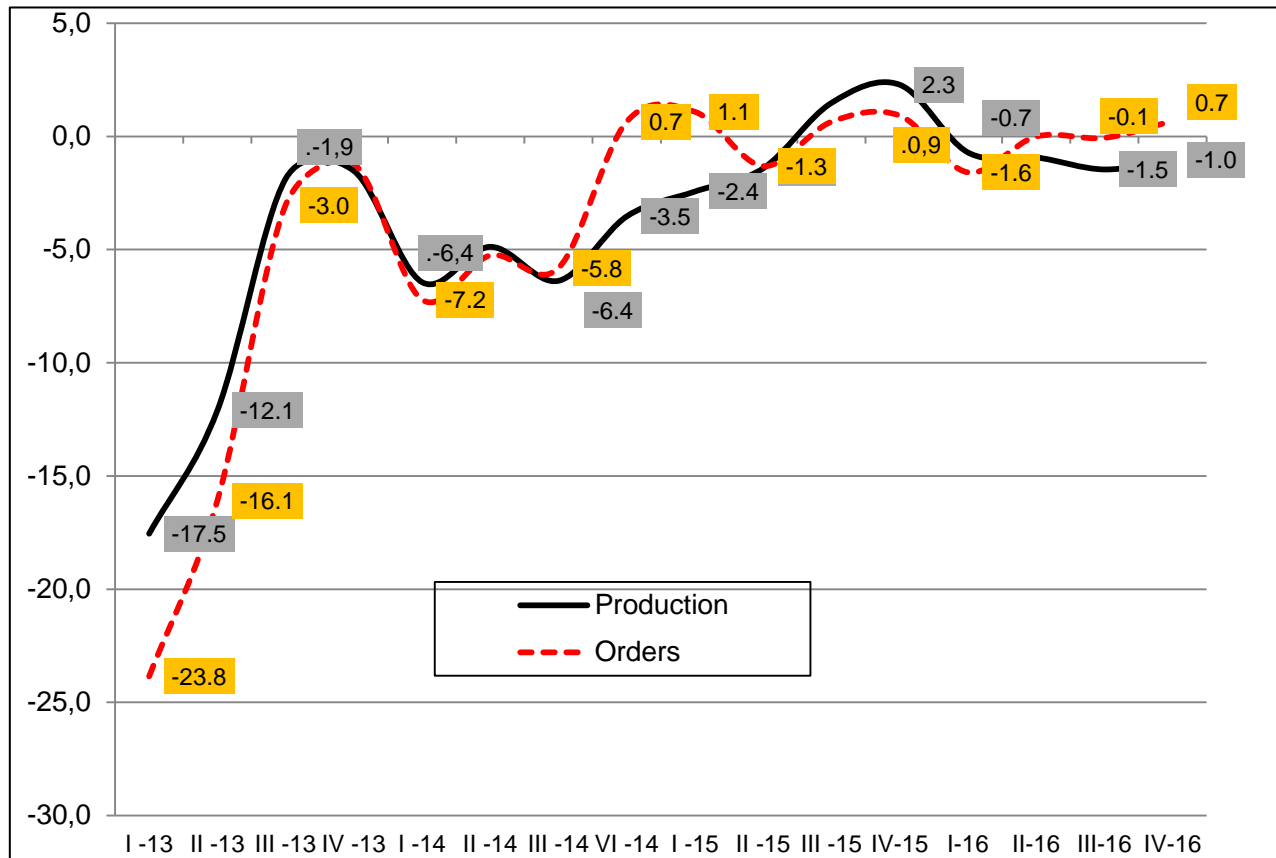


Municipalities with a greater presence of companies in the "Building-Construction" sector (December 31, 2016)

	Municipality	N° of companies	% on the economy
1	Udine	1,191	11.2%
2	Latisana	316	20.0%
3	Codroipo	203	13.2%
4	Tavagnacco	191	12.3%
5	Cervignano del Friuli	154	13.4%
6	Gemona del Friuli	152	15.3%
7	Tolmezzo	132	12.7%
8	Tarcento	132	19.8%
9	Lignano Sabbiadoro	129	6.6%
10	Buja	129	18.7%

Source: elaboration on InfoCamere data

Economic Trend of the Construction market in Friuli Venezia Giulia: Production and Orders



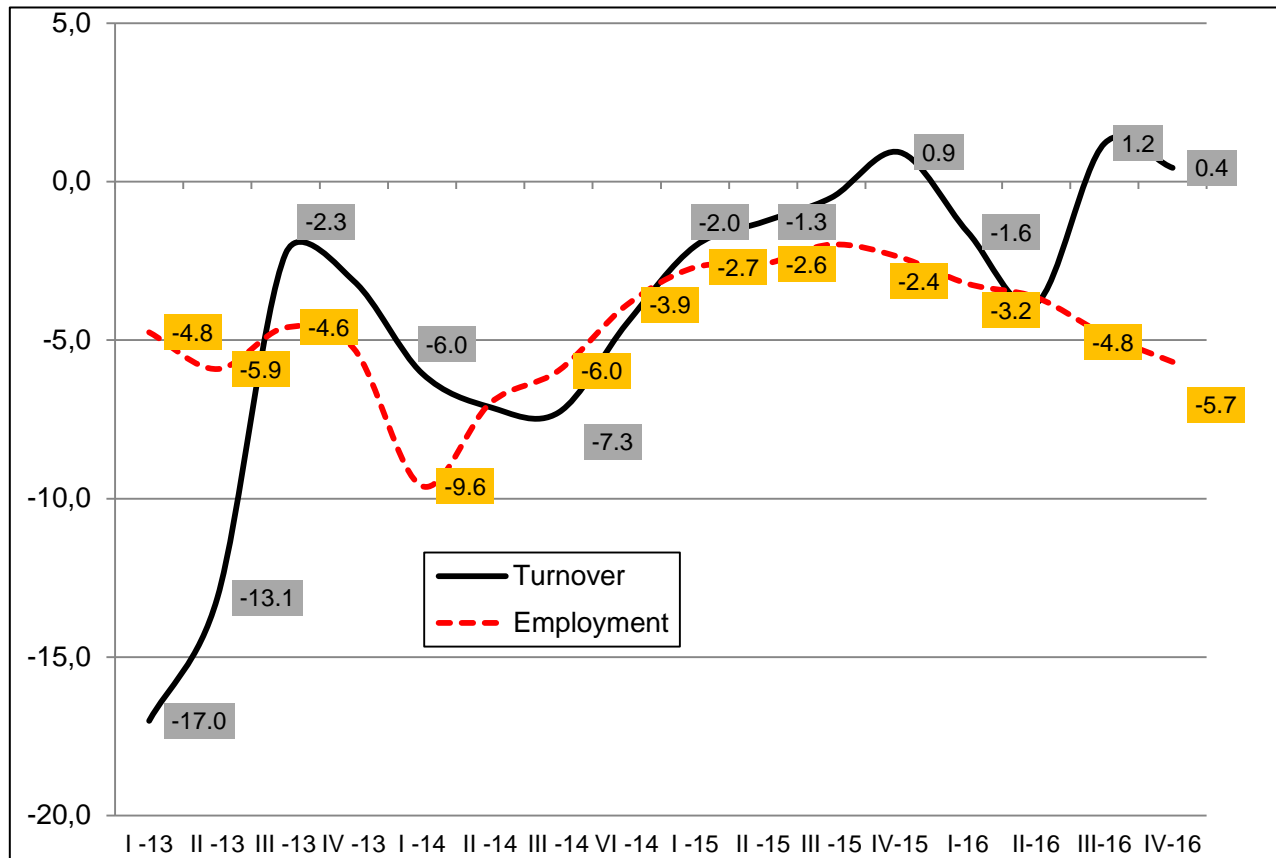
Source: Unioncamere FVG

2016
variations over the same quarter of the previous year

Negative production values for all four quarters (-0.7%, -0.9%, -1.5% and -1%).

Positive order values only in the fourth quarter (-1.6%, stable in the 2nd and 3rd quarters and + 0.7% in the October to December quarter).

Economic Trend of the Construction market in Friuli Venezia Giulia: Turnover and Employment



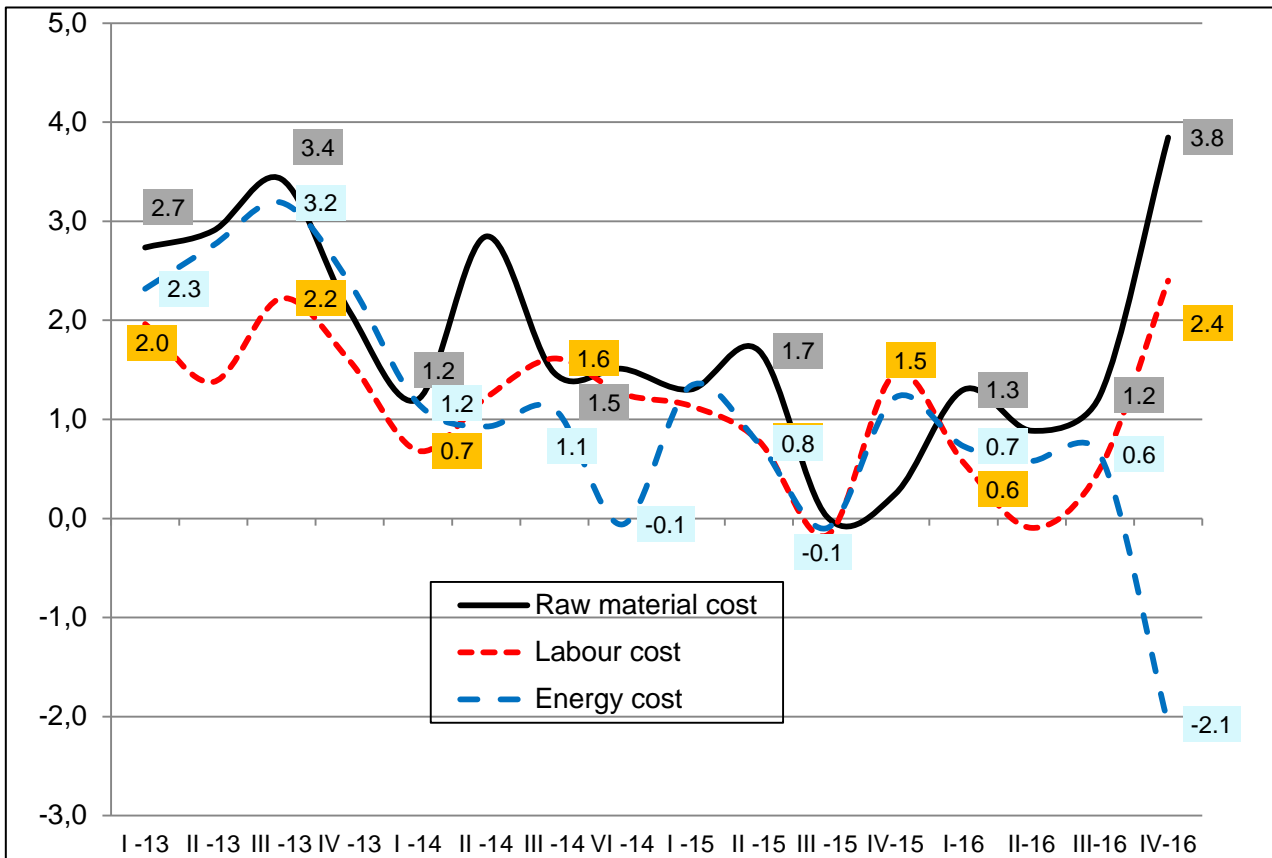
Source: Unioncamere FVG

2016
variations over the
same quarter of the
previous year

*Negative Employment
values for all four
quarters (-3%, -3.6%, -
4.8% and -5.7%).*

*Positive Turnover
values only in the
second quarter (-1.6%
and -3.8% in the 1st
and 2nd quarter, +
1.2% and + 0.4% in the
3rd and 4th quarter),*

Economic Trend of the Construction market in Friuli Venezia Giulia: Costs

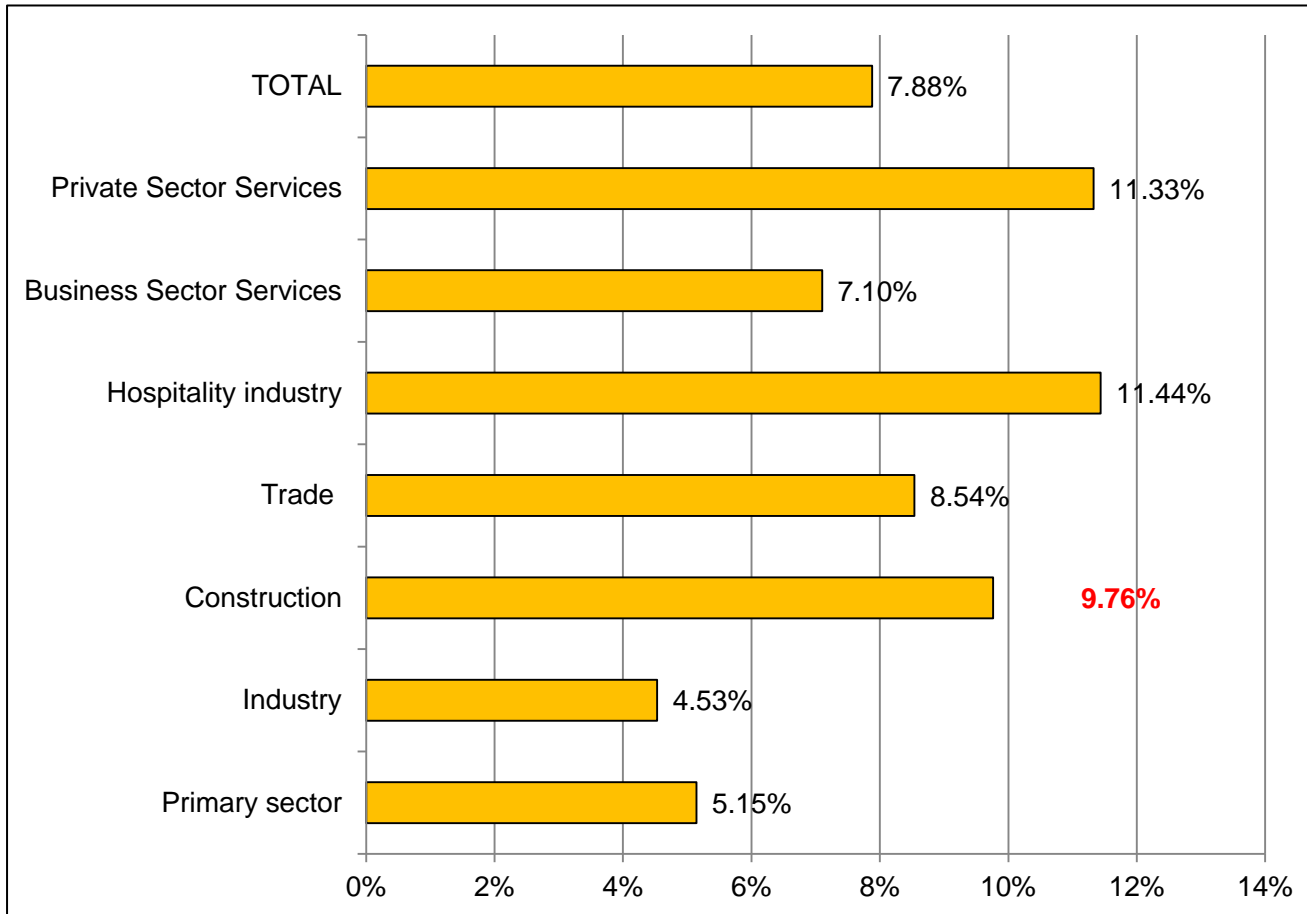


2016
variations over the same
quarter of the previous
year

Source: Unioncamere FVG processing data



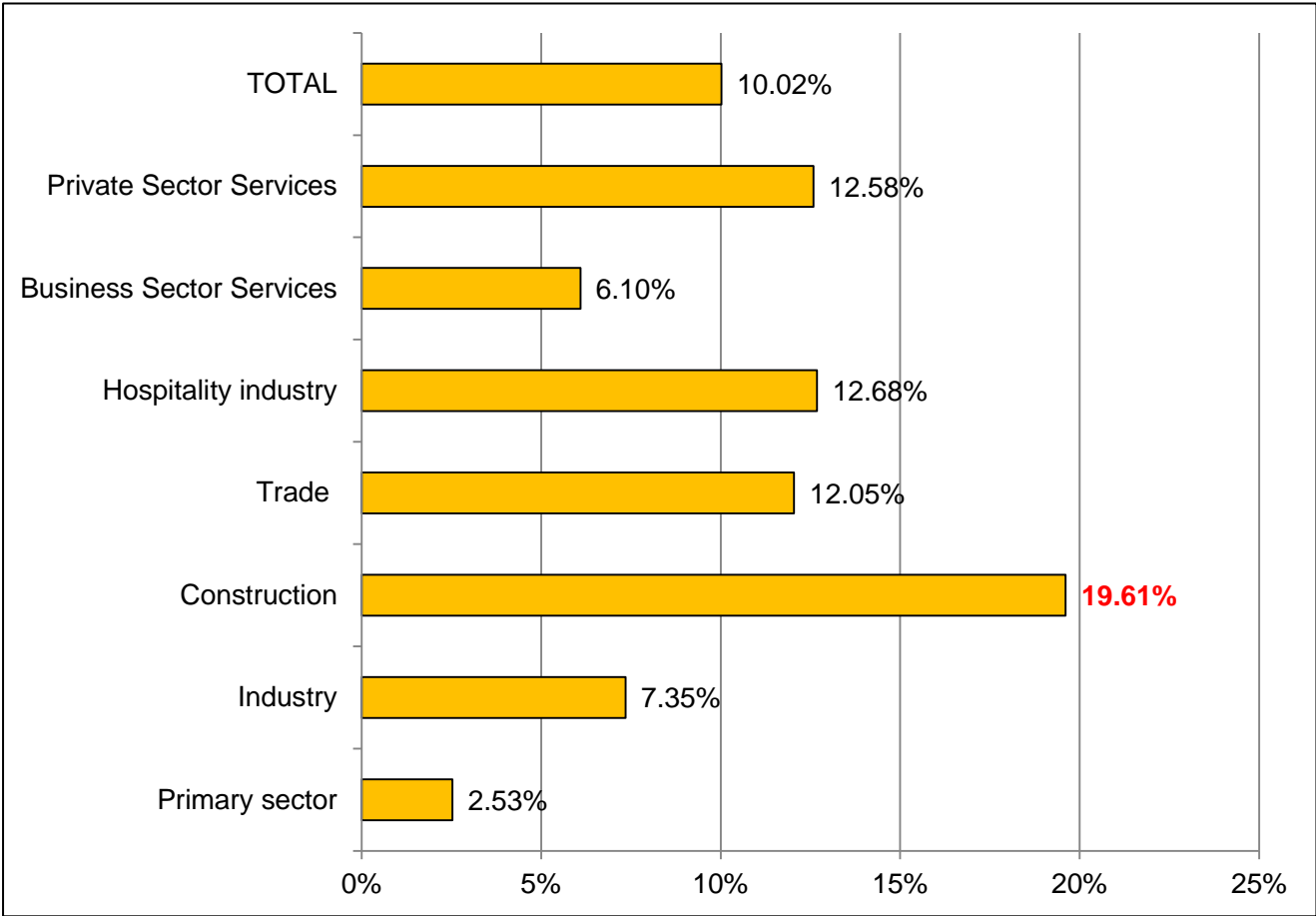
Weight of "Young" companies active on the total of the economic sector



Young company:
enterprise headed
by people under
35 years.

Source: elaboration on
InfoCamere data

Weight of “Foreign” companies active on the total of the economic sector of the Province of Udine

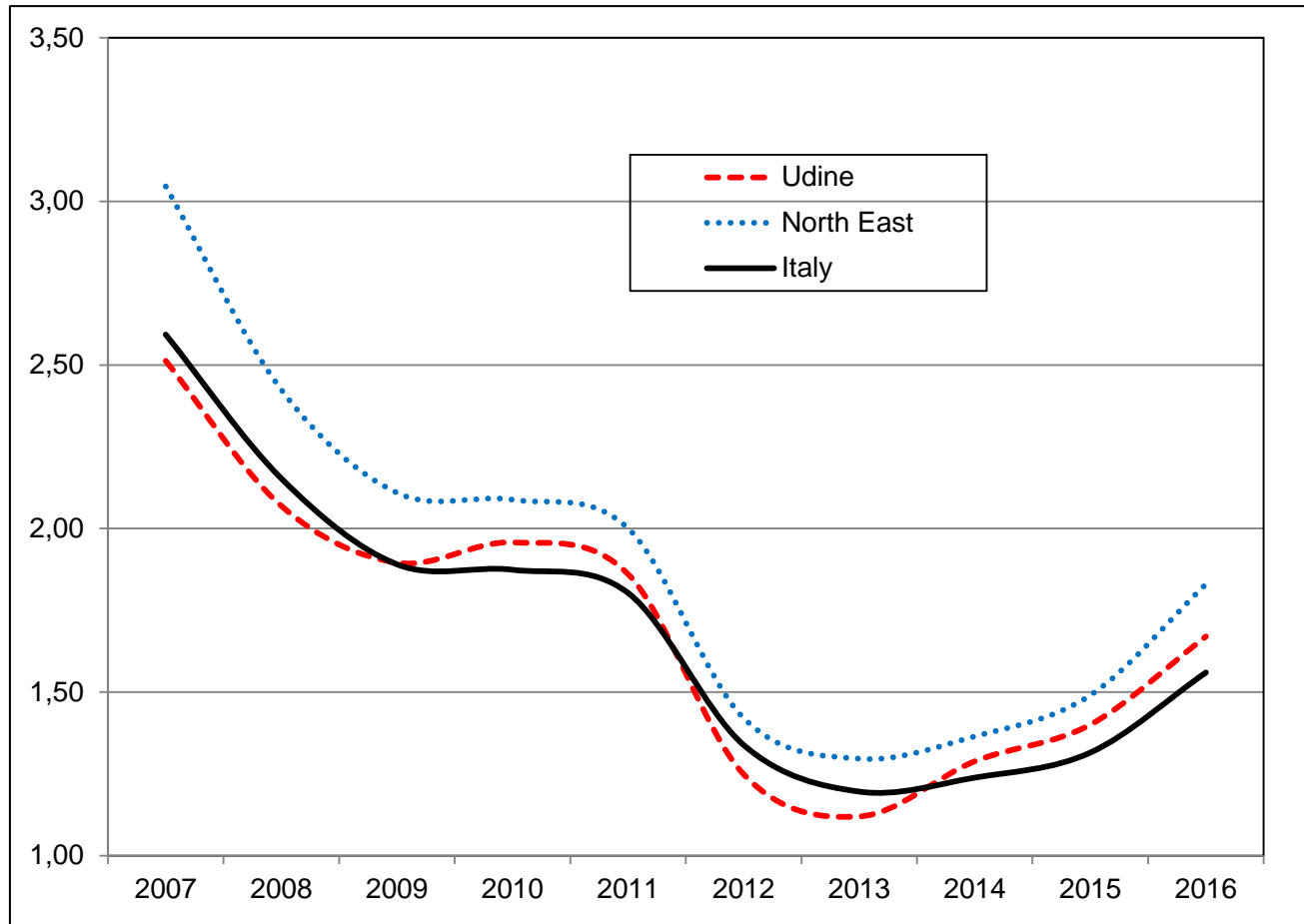


Foreign company:
enterprise headed by
people with foreign
citizenship or
stateless.

Source: elaboration on InfoCamere data



Trend of Real Estate Market (residential): Intensity index



Source: The Italian Ministry of Economy and Finance – The Italian Revenue Agency

The Real Estate Index - **IMI** is the ratio between

NTN (“Normalized Number of Transaction” i.e. the number of transactions weighed with respect to the percentage of property subject to transaction) and

Stock (i.e. the number of real estate units reported in the public register);

The purchase of property rights is "counted" for each real estate unit taking into account the share of the property subject to a transaction. This means that if a real estate unit is sold for a fraction of its share, for example 50%, it is not counted as a transaction, but as 0.5 transactions



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