92nd EUROCONSTRUCT Country Report Winter 2021





European Construction, Market Trends Until 2020

ORGANISER



CONFERENCE PARTNERS







UNDER THE PATRONAGE OF





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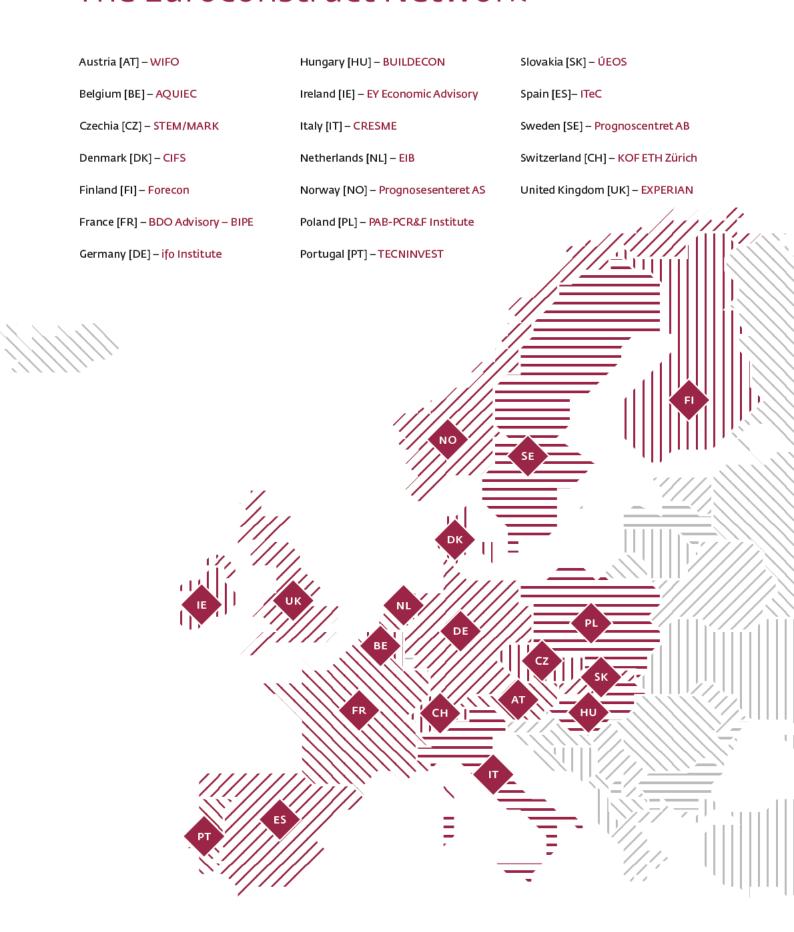
This Summary Report has been written and prepared by the EUROCONSTRUCT network from the country reports of the 19 EUROCONSTRUCT member institutes.

Design by FARM Studio (farm.co.hu) Editing by Buildecon (buildecon.com)

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The Euroconstruct Network



European Construction Business Research And Forecasting Group

www.euroconstruct.org

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- Summer 2021 Vienna (Austria)
- Winter 2021 Verona (Italy)
- Summer 2022 Warsaw (Poland)

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the east area, in particular the United Hates and the United Elogation, where the American which

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3. Housing Market

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4. Non-residential Market

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Source: elaboration CRESME on Istat data

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APPENDIX - DEFINITIONS

Table 1

- Population, Households: number of people or households at the beginning of the year Source: National Institute of Statistics for years 2015-2020 (2020 is still preliminary). Data for the forecast period derive from CRESME DEMO/Si system.
- Unemployment rate: It is the average at the end of the year of the rates of the four quarters of the year. Source: survey of the National Institute of Statistics and CRESME estimates for the forecast period.

Table 2 and 4

- The absolute value figures for construction/output in all tables include VAT, Do it Yourself and illegal production
- Source: data are CRESME estimates and forecasts based on different sources

Table 3

- 1+2 family dwellings include both semi-detached and terraced houses, while flats are dwellings inside multi-storey buildings, with more than two flats
- Housing stock: at the end of year
- Second homes: include homes used for holidays, or for secondary uses, or which are used for short periods. Vacancies are also included
- Vacancies: homes that are not used at all
- Home ownership rate: % of the total occupied housing stock. We have to consider the contractual forms defined by "altro titolo di godimento" which in 2011 are quantified as 11% of total occupied dwellings. These forms of occupying the property do not involve any forms of rent payments.
- Data include illegal production (estimated also for permits)
- Source: data are CRESME estimates and forecasts based on different sources

Table 4a

- Education buildings: public and private schools, universities
- Health: hospitals, public and private clinics
- Industrial: sheds, buildings for industrial or artisan activities,
- Storage building: buildings for logistics
- Offices: administrative and business buildings
- Commercial: shops, shopping centres, stores, tourist buildings
- Agricultural: agricultural buildings including those with residential functions
- Miscellaneous: military, cemeteries and other kinds of buildings

Table 4b

- Other transport includes underground railways, tramways, other urban transport systems, harbours and airports
- Table 5
- Stock: % change in real terms is meant as the % change of stock as percentage of GDP (Source National Institute of Statistics)
- Private consumption, public consumption, etc: at market prices, VAT included (Source: National Accounts).
- VAT rates are variables (4% for primary goods, 22% for the others, except the case of temporary deduction as the one for the purchase of R&M materials)

IT Ì

Country/Pays/Land: Italy Table 1 MAIN DEMOGRAPHIC AND ECONOMIC INDICATORS PRINCIPAUX INDICATEURS DÉMOGRAPHIQUES ET ÉCONOMIQUES STRUCT WICHTIGE DEMOGRAPHISCHE UND ÖKONOMISCHE INDIKATOREN Forecast Outlook Est. 2018 2019 2020 2021 2022 2023 2024 Population ('ooos) **Population** Bevölkerung Households ('ooos) Ménages Haushalte Unemployed ('ooos) Chômeurs Arbeitslose Unemployment rate (%) Taux de chômage Arbeitslosenquote Change of GDP Variation du PIB Veränderung des BIP (% change in real terms) Consumer prices (% change) Prix à la consommation Verbraucherpreise Construction prices (% change) 1) Prix de la construction **Baupreise** Short term interest rate 2) Taux d' intérêt à court terme Kurzfristiger Zinssatz Long term interest rate 3) Taux d' intérêt à long terme Langfristiger Zinssatz

- 1) Refers to new construction only.
- 2) 3-month interbank rate (or equivalent).
- 3) 10-year government bonds (or equivalent).

	untry/Pays/Land: Italy				CONSTRUCTION BY TYPE PAR TYPE D'OUVRAGE BAUPRODUKTION NACH BAUARTEN								
		Volume											
		mill. euro ¹⁾				Est.	Forecast		Outlook				
		2020	2018	2019	2020	2021	2022	2023	2024				
Residential construction	New												
Logement Wohnungsbau	Renovation												
womiungsbau	Total												
	New												
Non-residential construction Bâtiments non résidentiels übriger Hochbau	Renovation												
	Total												
	New												
Building Bâtiment Hochbau	Renovation												
	Total												
	New												
Civil engineering Génie civil Tiefbau	Renovation												
	Total												
TOTAL CONSTRUCTION OUTPUT													
		2020				Est.	Fore	casts	Outlook				
		Volume mill. tons	2018	2019	2020	2021	2022	2023	2024				
Domestic cement consumption Consommation intérieure de cir Inländischer Zementverbrauch													

Renovation covers repair and maintenance, refurbishment and reconstruction.

1) At 2020 prices, excluding taxes.

Country/Pays/Land: Italy								Table 3		
EUROCONS	RESIDENTIAL CONSTRUCTION CONSTRUCTION DE LOGEMENTS WOHNUNGSBAU									
		Thousands dwellings								
					Forecast		Outlook			
		2018	2019	2020	2021	2022	2023	2024		
	1+2 family dwellings Individuels 1+2-Familienhäuser									
Building permits Logements autorisés Baugenehmigungen	Flats Collectifs Mehrfamilienhäuser									
	Total									
	1+2 family dwellings Individuels 1+2-Familienhäuser									
Housing starts Logements commencés Baubeginne	Flats Collectifs Mehrfamilienhäuser									
	Total	80						-		
	1+2 family dwellings Individuels 1+2-Familienhäuser									
Housing completions Logements terminés Baufertigstellungen	Flats Collectifs Mehrfamilienhäuser									
	Total									
Housing stock Logements existants Wohnungsbestand	Total	-						310		
	thereof second homes dont résid. secondaires davon Zweitwohnungen									
	thereof vacancies dont inoccupés davon leerstehend									
part	rre of family dwellings (%) des maisons individuelles Anteil 1+2-Familienhäuser							-		
Home ownership rate ¹⁾ Taux de propriétaires occup Wohneigentumsquote	ants									

¹⁾ Cf. Appendix to the individual country report.

Country/Pays/Land: Italy Table 4a NEW NON-RESIDENTIAL CONSTRUCTION (PUBLIC AND PRIVATE) CONSTRUCTION NEUVE NON RÉSIDENTIELLE (PUBLIQUE ET PRIVÉE) NEUER NICHTWOHNHOCHBAU (ÖFFENTLICH UND PRIVAT) % change in real terms (volume) Volume m2 x 1000 mill. euro¹) Forecast Outlook Est. 2020 2020 2018 2019 2020 2021 2022 2024 **Buildings for education** Bâtiments de l'éducation et de la recherche Gebäude des Bildungswesens **Buildings for health** Bâtiments de santé Gebäude des Gesundheitswesens Industrial buildings **Bâtiments industriels** Industriegebäude Storage buildings Bâtiments de stockage Lagergebäude Office buildings Bureaux Bürogebäude Commercial buildings Commerces Geschäftsgebäude Agricultural buildings Bâtiments agricoles Landwirtschaftsgebäude Miscellaneous Autres **Sonstiges** TOTAL

¹⁾ At 2020 prices, excluding taxes.

Country/Pays/Land: Italy	Country/Pays/Land: Italy Table 4b										
EUROCONST	RUCT	TOTAL CIVIL ENGINEERING ENSEMBLE DU GÉNIE CIVIL TIEFBAU INSGESAMT									
		% change in real terms (volume) Volume									
		mill. euro ¹⁾				Est.	Forecast		Outlook		
		2020	2018	2019 2020		2021	2022	2023	2024		
Transport infrastructure Infrastructures de transport Verkehrsinfrastruktur	Roads Réseau routier Straßen										
	Railways Voies ferrées Bahnanlagen										
Übrige V	Other transport Autres réseaux erkehrsinfrastruktur										
	Total										
Telecommunications Télécommunications Telekommunikation											
Energy works Réseaux d'énergie Energieversorgung											
Water works Réseaux d'eau Wasserversorgung											
Other Autres Sonstiges											
TOTAL				F							

¹⁾ At 2020 prices, excluding taxes.

Country/Pays/Land: Italy Table 5											
EUROCONSTRUCT	GROSS DOMESTIC PRODUCT PRODUIT INTÉRIEUR BRUT BRUTTOINLANDSPRODUKT										
	Volume										
	bill. euro¹)				Est.	Forecast		Outlook			
	2020	2018	2019	2020	2021	2022	2023	2024			
Private consumption ²⁾ Consommation privée Privater Verbrauch											
Public consumption Consommation publique Staatsverbrauch	-										
Gross fixed capital formation Formation brute de capital fixe Bruttoanlageinvestitionen Total of which construction											
Stocks (contribution as % of GDP) ³⁾ Variations de stocks Vorratsveränderungen											
Exports Exportations Exporte											
Imports Importations Importe											
GDP PIB BIP											

Standard National Accounts, gross figures.

- 1) At 2020 prices
- 2) Including final consumption expenditure of NPISH's, ISBLM inclus, einschließlich POoE.
- 3) Including net aquisitions of valuables, net aquisitions d'objets de valeur inclus, inkl. Nettozugang an Wertsachen.

GENERAL DEFINITIONS

The following notes describe which are the most common definitions of the concepts of the Euroconstruct report among the different countries. These definitions do not apply literally to each of the 19 countries, so readers are encouraged to check the specific methodological notes of each country in order to identify the possible deviations from these standards that may apply to that particular market.

Macroeconomic

- Population and households: as of January 1st.
- **Unemployed:** figures based on labour force surveys that also include jobseekers that do not register at the employment offices.
- Unemployment rate: as percent of total labour force.
- **Construction prices:** annual change rate of sales prices, not construction costs.

Construction Output

Production is calculated according to branch definition, including not just works done by construction firms, but also works done by all firms that execute construction work regardless of the industry group they belong to. It also includes:

- Services provided by public bodies in the case that fees are involved.
- The builders' own effort, like do-it-yourself works.
- Works done by unregistered firms (black economy) should be included.

VAT or any other sales tax are not included.

Production value of a **building** project, residential and non-residential, includes:

- Project development.
- Planning and engineering works, architects.
- Plot work up.
- Construction work on the building including all intermediate products (building materials, transport cost, energy, use of machinery and equipment etc.)
- Installations work (electrical, plumbing, glazing, paintings and wallpaper, lifts etc.)
- Public fees (for building permits etc.)
- Financial costs, like interest and fees on construction loans (external funding)
- Fees to estate agents
- Transaction costs, if any
- Advertisement costs, if any

Production of **civil engineering** in general follows the same rules, so the value of investments (and maintenance) in civil engineering includes all intermediate products and not only the civil engineering part.

Residential

This category includes:

- Permanent residences
- Second homes or holiday homes owned by households.
- Building objects considered as auxiliary of the main residential object, such as garages, outhouses or other annexes.

The 1+2 family dwellings category includes:

- Detached or semi-detached houses that contain one or two dwellings (for example, a main dwelling plus one bed-sit, basement flat etc.)
- Farmhouses that contain one or two dwellings.

The **flats** category is for residential buildings that contain three or more dwellings, including the following cases:

- Row houses, linked houses and terraced houses.
- Multi-dwelling buildings of more than one storey, free-standing or linked.
- Residences and service residences for the elderly and other social groups, when the health care aspect is not dominant (otherwise they are categorised as nursing homes and accounted as non-residential)
- · Student homes.
- Other residential buildings for communities.
- Dwellings in non-residential buildings.

A **second home** is defined as any dwelling of the residential categories (1+2 families or flats), that is only in use temporarily as a holiday or leisure residence. Second homes also include cottages, huts, shacks, chalets, etc.

When second homes are a market product that is different from permanent homes (design, size...) and that market is big enough to be noticeable, and statistics allow them to be distinguished from permanent homes, they may be excluded from the figures for permits, starts or completed dwellings. However, they still are included in stock figures. Investments in second homes are also included in residential construction.

A residential building is considered **completed** when either a temporary permission to use the building is given by the competent authority, or when a certificate for completion is issued by the competent authority. This certificate should be given when final documentation about the building and a declaration from the builder that the building is completed is available.

Non-residential

This category includes every other building that is not considered residential. The following cases are also treated as non-residential:

- Buildings for temporary residential use that have a commercial purpose, for instance hotels, hostels, motels and holiday homes for rent by businesses/public bodies.
- Homes for the elderly with manned facilities and nursing services.

Non-residential surface is measured as utility floor space, which is the floor area measured within the outer walls.

The category of **buildings for education** includes the facilities (also playgrounds) for:

- Pre-school, kindergartens.
- Primary and secondary education.
- Higher education, including laboratories and research facilities.

The category of buildings for health includes:

- Hospitals.
- Clinics, doctor's offices, medical centres, emergency clinics.
- Health and social services centres, health stations
- · Nursing homes.
- Residence and home with nursing and medical care.
- Buildings for rehabilitation, sanatoriums
- Other long-stay hospitals and primary health buildings.

The category of **industrial buildings** includes:

- Factory buildings.
- · Workshops.
- Treatment plants, pumping stations, transformer stations that can be considered buildings.

The category of **storage buildings** includes:

- · Warehouses.
- Cold storage warehouses.
- · Silo buildings and other specialised storage.

The category of **office buildings** includes:

- Buildings for bureaucratic purposes, town halls.
- Banks.
- · Post offices.
- · Buildings for the media.

The category of **commercial buildings** includes:

- Shopping centres, department stores.
- Detached shops.
- · Service stations.
- Other wholesale and retail trade buildings.
- Hotels, hostels, motels, pensions.
- Holiday camps, tourist chalets, apartment lodging buildings, camping huts, holiday bungalows.
- Restaurant buildings and derivatives: food kiosks, cafés, canteens, etc.
- Parking garages.
- · Fair and congress buildings.

 Buildings related to transport infrastructures such as railway stations and underground stations, airport terminals, air traffic control towers, telecommunication buildings, etc.

The category of **agricultural buildings** includes:

- Buildings for animals, granaries, fruit and vegetable storage, agricultural silos, buildings for hay/grain drying
- Greenhouses.
- Works buildings used for fishery and hunting, including fish farms, fishery boat-houses and sheds.

The category of **miscellaneous buildings** includes:

- Non-residential space in residential buildings.
- Buildings for entertainment: cinemas, theatres, concert halls, opera houses, discotheques.
- · Museums and art galleries.
- Libraries.
- · Zoological and botanical gardens.
- Sports halls, ice arenas, indoor swimming pools, fitness centres and Buildings for other sports.
- Community centres, local meeting halls not for bureaucratic uses.
- Buildings for religious use: churches, chapels, houses of worship, parish houses, crematoriums, cemetery chapels, chapels of repose, convents, monasteries.
- · Monuments.
- · Prison buildings.
- Police stations.
- Fire stations, ambulance stations.
- Building for emergency preparedness: air-raid shelters, bunkers.
- Lighthouse buildings, pilot stations, radar facilities.
- Public toilets.

Renovation with change of use

Sometimes building renovation is related to a change of end use: from residential to non-residential buildings and vice versa. When a non-residential building is transformed to a residential building, the value of this production is included in residential renovation. And vice versa.

Civil Engineering

The category of **transport infrastructure** includes:

- Construction of roads and streets, including bridges and tunnels.
- Railways include also tramways and undergrounds, also with bridges and tunnels.
- "Other" collects airports and airfields, harbours, ports, breakwaters and moles, canals, etc.

The category of **energy** includes infrastructures for:

• Generating energy: power plants and power stations that can not be considered buildings, dams

for hydroelectric power production, wind farms, wave farms.

• Delivering energy: power transmission lines, gas supply lines.

The category of water works includes infrastructures for water supply, sewer and waste water transport and treatment; either for drinking water, irrigation, industrial water or river flow maintenance.

The category of **other civil engineering** includes infrastructures for agriculture, forestry and fishery, civil engineering facilities for the industry **that can**

not be considered buildings, outdoor sports and leisure facilities (for example, amusement parks).

Gross Domestic Product

To be comparable to the rest of the figures in Table 5, gross fixed capital formation in construction is measured at market prices, in contrast to the measure used in Tables 2, 4a and 4b that considers output at production prices, that is, without sales taxes (or sales subsidies).

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