

Construction in Italy – Key Trends and Opportunities to 2021

<https://marketpublishers.com/r/CFBFF534AD6EN.html>

Date: September 2017

Pages: 85

Price: US\$ 1,495.00 (Single User License)

ID: CFBFF534AD6EN

Abstracts

SYNOPSIS

Following a weak performance during the review period (2012–2016) on the back of the economic recession, expanding public debt and high unemployment rates, the Italian construction industry is expected to recover and register positive growth over the forecast period (2017–2021).

The industry's expansion over the forecast period is expected to be supported by the government's efforts to revamp economic growth through investments in infrastructure, and energy and utilities construction projects. Additionally, positive developments in the country's manufacturing, retail and tourism sectors are also expected to support the industry's growth.

The government's efforts to boost foreign direct investments are also expected to bode well for the industry over the forecast period. In real terms, the industry's output value is expected to rise from a compound annual growth rate (CAGR) of -2.97% between 2012 and 2016 to growth of 1.75% per annum from 2017 to 2021.

SUMMARY

Timetric's Construction in Italy – Key Trends and Opportunities to 2021 report provides detailed market analysis, information and insights into the Italian construction industry, including:

The Italian construction industry's growth prospects by market, project type and

construction activity

Critical insight into the impact of industry trends and issues, and the risks and opportunities they present to participants in the Italian construction industry

Profiles of the leading operators in the Italian construction industry

SCOPE

This report provides a comprehensive analysis of the construction industry in Italy. It provides:

Historical (2012-2016) and forecast (2017-2021) valuations of the construction industry in Italy using construction output and value-add methods

Segmentation by sector (commercial, industrial, infrastructure, energy and utilities, institutional and residential) and by sub-sector

Breakdown of values within each project type, by type of activity (new construction, repair and maintenance, refurbishment and demolition) and by type of cost (materials, equipment and services)

Detailed profiles of the leading construction companies in Italy

REASONS TO BUY

Identify and evaluate market opportunities using Timetric's standardized valuation and forecasting methodologies.

Assess market growth potential at a micro-level with over 600 time-series data forecasts.

Understand the latest industry and market trends.

Formulate and validate strategy using Timetric's critical and actionable insight.

Assess business risks, including cost, regulatory and competitive pressures.

Evaluate competitive risk and success factors.

KEY HIGHLIGHTS

With an aim to develop the overall infrastructure in Puglia and Basilicata regions, the Italian government announced plans to invest EUR7.1 billion (US\$7.9 billion) under the Operational Program 2014–2020. Accordingly, the government will implement various transport, energy and educational infrastructure projects until 2020.

Though the effect of economic recession continued to weigh on the housing prices in 2016, a gradual recovery could be observed over the forecast period, which can be attributed to the government's efforts to restore growth in the housing sector through tax incentives on the purchases of residential properties. Timetric projects the residential construction market to post a forecast-period CAGR of 2.89% in nominal terms, following negative growth during the review period.

In order to upgrade the country's transport infrastructure, in July 2015 the European Union (EU) launched the Operational Program for Infrastructure and Networks in Italy, which included plans to invest EUR1.8 billion (US\$2.0 billion) to develop various rail, road and port infrastructure projects in the country by 2020.

The government's focus on the development of the country's broadband network is expected to contribute to the expansion of the telecommunications infrastructure category over the forecast period. In line with the EU's target to provide internet access to all households in every European country, in March 2015, the government announced plans to invest EUR6.0 billion (US\$6.7 billion) until 2020 to deploy internet networks with a minimum speed of 30.0mbps across the country.

To accelerate the pace of foreign investments in the country's manufacturing sector, the government launched the 'Industry Plan 4.0' in February 2017. Under this, the government announced plans to offer various tax incentives to foreign manufacturers, including a 50.0% tax credit on all the research and development investments, which will be made in the country between 2017 and

2020.

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Contents

1 EXECUTIVE SUMMARY

2 INDUSTRY OUTLOOK

- 2.1 Commercial Construction
- 2.2 Industrial Construction
- 2.3 Infrastructure Construction
- 2.4 Energy and Utilities Construction
- 2.5 Institutional Construction
- 2.6 Residential Construction

3 KEY ISSUES AND DEVELOPMENTS

4 MARKET DATA ANALYSIS

- 4.1 Construction Output and Value Add
 - 4.1.1 Construction output by project type
 - 4.1.2 Construction output by cost type
 - 4.1.3 Construction output by activity type
 - 4.1.4 Construction value add by project type
- 4.2 Commercial Construction
 - 4.2.1 Commercial construction output by project type
 - 4.2.2 Commercial construction output by cost type
 - 4.2.3 Commercial construction output by activity type
 - 4.2.4 Commercial construction value add by project type
- 4.3 Industrial Construction
 - 4.3.1 Industrial construction output by project type
 - 4.3.2 Industrial construction output by cost type
 - 4.3.3 Industrial construction output by activity type
 - 4.3.4 Industrial construction value add by project type
- 4.4 Infrastructure Construction
 - 4.4.1 Infrastructure construction output by project type
 - 4.4.2 Infrastructure construction output by cost type
 - 4.4.3 Infrastructure construction output by activity type
 - 4.4.4 Infrastructure construction value add by project type
- 4.5 Energy and Utilities Construction
 - 4.5.1 Energy and utilities construction output by project type

- 4.5.2 Energy and utilities construction output by cost type
- 4.5.3 Energy and utilities construction output by activity type
- 4.5.4 Energy and utilities construction value add by project type
- 4.6 Institutional Construction
 - 4.6.1 Institutional construction output by project type
 - 4.6.2 Institutional construction output by cost type
 - 4.6.3 Institutional construction output by activity type
 - 4.6.4 Institutional construction value add by project type
- 4.7 Residential Construction
 - 4.7.1 Residential construction output by project type
 - 4.7.2 Residential construction output by cost type
 - 4.7.3 Residential construction output by activity type
 - 4.7.4 Residential construction value add by project type

5 COMPANY PROFILE: SALINI IMPREGILO SPA

- 5.1 Salini Impregilo SpA – Company Overview
- 5.2 Salini Impregilo SpA – Business Description
- 5.3 Salini Impregilo SpA – Main Services
- 5.4 Salini Impregilo SpA – History
- 5.5 Salini Impregilo SpA – Company Information
 - 5.5.1 Salini Impregilo SpA – key competitors
 - 5.5.2 Salini Impregilo SpA – key employees

6 COMPANY PROFILE: ASTALDI SPA

- 6.1 Astaldi SpA – Company Overview
- 6.2 Astaldi SpA – Business Description
- 6.3 Astaldi SpA – Main Services
- 6.4 Astaldi SpA – History
- 6.5 Astaldi SpA – Company Information
 - 6.5.1 Astaldi SpA – key competitors
 - 6.5.2 Astaldi SpA – key employees

7 COMPANY PROFILE: MAIRE TECNIMONT SPA

- 7.1 Maire Tecnimont SpA – Company Overview
- 7.2 Maire Tecnimont SpA – Business Description
- 7.3 Maire Tecnimont SpA – Main Services

- 7.4 Maire Tecnimont SpA – History
- 7.5 Maire Tecnimont SpA – Company Information
 - 7.5.1 Maire Tecnimont SpA – key competitors
 - 7.5.2 Maire Tecnimont SpA – key employees

8 COMPANY PROFILE: IMPRESA PIZZAROTTI & C. SPA

- 8.1 Impresa Pizzarotti & C. SpA – Company Overview
- 8.2 Impresa Pizzarotti & C. SpA – Business Description
- 8.3 Impresa Pizzarotti & C. SpA – Main Services
- 8.4 Impresa Pizzarotti & C. SpA – History
- 8.5 Impresa Pizzarotti & C. SpA – Company Information
 - 8.5.1 Impresa Pizzarotti & C. SpA – key competitors
 - 8.5.2 Impresa Pizzarotti & C. SpA – key employees

9 COMPANY PROFILE: SOCIETA INIZIATIVE AUTOSTRADALI E SERVIZI SPA

- 9.1 Societa Iniziative Autostradali e Servizi SpA – Company Overview
- 9.2 Societa Iniziative Autostradali e Servizi SpA – Main Services
- 9.3 Societa Iniziative Autostradali e Servizi SpA – History
- 9.4 Societa Iniziative Autostradali e Servizi SpA – Company Information
 - 9.4.1 Societa Iniziative Autostradali e Servizi SpA – key competitors
 - 9.4.2 Societa Iniziative Autostradali e Servizi SpA – key employees

10 APPENDIX

- 10.1 What is this Report About?
- 10.2 Definitions
- 10.3 Methodology
- 10.4 Contact Timetric
- 10.5 About Timetric
- 10.6 Timetric's Services
- 10.7 Disclaimer

List Of Tables

LIST OF TABLES

Table 1: Italian Construction Output by Project Type (EUR Million), 2012–2016

Table 2: Italian Construction Output by Project Type (EUR Million), 2016–2021

Table 3: Italian Construction Output by Cost Type (EUR Million), 2012–2016

Table 4: Italian Construction Output by Cost Type (EUR Million), 2016–2021

Table 5: Italian Construction Output by Activity Type (EUR Million), 2012–2016

Table 6: Italian Construction Output by Activity Type (EUR Million), 2016–2021

Table 7: Italian Construction Value Add by Project Type (EUR Million), 2012–2016

Table 8: Italian Construction Value Add by Project Type (EUR Million), 2016–2021

Table 9: Italian Commercial Construction Output by Project Type (EUR Million), 2012–2016

Table 10: Italian Commercial Construction Output by Project Type (EUR Million), 2016–2021

Table 11: Italian Commercial Construction Output by Cost Type (EUR Million), 2012–2016

Table 12: Italian Commercial Construction Output by Cost Type (EUR Million), 2016–2021

Table 13: Italian Commercial Construction Output by Activity Type (EUR Million), 2012–2016

Table 14: Italian Commercial Construction Output by Activity Type (EUR Million), 2016–2021

Table 15: Italian Commercial Construction Value Add by Project Type (EUR Million), 2012–2016

Table 16: Italian Commercial Construction Value Add by Project Type (EUR Million), 2016–2021

Table 17: Italian Industrial Construction Output by Project Type (EUR Million), 2012–2016

Table 18: Italian Industrial Construction Output by Project Type (EUR Million), 2016–2021

Table 19: Italian Industrial Construction Output by Cost Type (EUR Million), 2012–2016

Table 20: Italian Industrial Construction Output by Cost Type (EUR Million), 2016–2021

Table 21: Italian Industrial Construction Output by Activity Type (EUR Million), 2012–2016

Table 22: Italian Industrial Construction Output by Activity Type (EUR Million), 2016–2021

Table 23: Italian Industrial Construction Value Add by Project Type (EUR Million),

2012–2016

Table 24: Italian Industrial Construction Value Add by Project Type (EUR Million), 2016–2021

Table 25: Italian Infrastructure Construction Output by Project Type (EUR Million), 2012–2016

Table 26: Italian Infrastructure Construction Output by Project Type (EUR Million), 2016–2021

Table 27: Italian Infrastructure Construction Output by Cost Type (EUR Million), 2012–2016

Table 28: Italian Infrastructure Construction Output by Cost Type (EUR Million), 2016–2021

Table 29: Italian Infrastructure Construction Output by Activity Type (EUR Million), 2012–2016

Table 30: Italian Infrastructure Construction Output by Activity Type (EUR Million), 2016–2021

Table 31: Italian Infrastructure Construction Value Add by Project Type (EUR Million), 2012–2016

Table 32: Italian Infrastructure Construction Value Add by Project Type (EUR Million), 2016–2021

Table 33: Italian Energy and Utilities Construction Output by Project Type (EUR Million), 2012–2016

Table 34: Italian Energy and Utilities Construction Output by Project Type (EUR Million), 2016–2021

Table 35: Italian Energy and Utilities Construction Output by Cost Type (EUR Million), 2012–2016

Table 36: Italian Energy and Utilities Construction Output by Cost Type (EUR Million), 2016–2021

Table 37: Italian Energy and Utilities Construction Output by Activity Type (EUR Million), 2012–2016

Table 38: Italian Energy and Utilities Construction Output by Activity Type (EUR Million), 2016–2021

Table 39: Italian Energy and Utilities Construction Value Add by Project Type (EUR Million), 2012–2016

Table 40: Italian Energy and Utilities Construction Value Add by Project Type (EUR Million), 2016–2021

Table 41: Italian Institutional Construction Output by Project Type (EUR Million), 2012–2016

Table 42: Italian Institutional Construction Output by Project Type (EUR Million), 2016–2021

Table 43: Italian Institutional Construction Output by Cost Type (EUR Million), 2012–2016

Table 44: Italian Institutional Construction Output by Cost Type (EUR Million), 2016–2021

Table 45: Italian Institutional Construction Output by Activity Type (EUR Million), 2012–2016

Table 46: Italian Institutional Construction Output by Activity Type (EUR Million), 2016–2021

Table 47: Italian Institutional Construction Value Add by Project Type (EUR Million), 2012–2016

Table 48: Italian Institutional Construction Value Add by Project Type (EUR Million), 2016–2021

Table 49: Italian Residential Construction Output by Project Type (EUR Million), 2012–2016

Table 50: Italian Residential Construction Output by Project Type (EUR Million), 2016–2021

Table 51: Italian Residential Construction Output by Cost Type (EUR Million), 2012–2016

Table 52: Italian Residential Construction Output by Cost Type (EUR Million), 2016–2021

Table 53: Italian Residential Construction Output by Activity Type (EUR Million), 2012–2016

Table 54: Italian Residential Construction Output by Activity Type (EUR Million), 2016–2021

Table 55: Italian Residential Construction Value Add by Project Type (EUR Million), 2012–2016

Table 56: Italian Residential Construction Value Add by Project Type (EUR Million), 2016–2021

Table 57: Salini Impregilo SpA, Key Facts

Table 58: Salini Impregilo SpA, Main Services

Table 59: Salini Impregilo SpA, History

Table 60: Salini Impregilo SpA, Key Employees

Table 61: Astaldi SpA, Key Facts

Table 62: Astaldi SpA, Main Services

Table 63: Astaldi SpA, History

Table 64: Astaldi SpA, Key Employees

Table 65: Maire Tecnimont SpA, Key Facts

Table 66: Maire Tecnimont SpA, Main Services

Table 67: Maire Tecnimont SpA, History

Table 68: Maire Tecnimont SpA, Key Employees

Table 69: Impresa Pizzarotti & C. SpA, Key Facts

Table 70: Impresa Pizzarotti & C. SpA, Main Services

Table 71: Impresa Pizzarotti & C. SpA, History

Table 72: Impresa Pizzarotti & C. SpA, Key Employees

Table 73: Societa Iniziative Autostradali e Servizi SpA, Key Facts

Table 74: Societa Iniziative Autostradali e Servizi SpA, Main Services

Table 75: Societa Iniziative Autostradali e Servizi SpA, History

Table 76: Societa Iniziative Autostradali e Servizi SpA, Key Employees

Table 77: Timetric Construction Market Definitions

List Of Figures

LIST OF FIGURES

Figure 1: Italian Construction Output (Real US\$ 2010, Million), 2012–2021

Figure 2: Growth Matrix for Construction Output in Italy (US\$ Million), 2012–2021

Figure 3: Italian Construction Output by Project Type (EUR Million), 2012–2021

Figure 4: Italian Construction Output by Cost Type (EUR Million), 2012–2021

Figure 5: Italian Construction Output by Activity Type (EUR Million), 2012–2021

Figure 6: Italian Construction Value Add by Project Type (EUR Million), 2012–2021

Figure 7: Italian Commercial Construction Output by Project Type (EUR Million), 2012–2021

Figure 8: Italian Commercial Construction Output by Cost Type (EUR Million), 2012–2021

Figure 9: Italian Commercial Construction Output by Activity Type (EUR Million), 2012–2021

Figure 10: Italian Commercial Construction Value Add by Project Type (EUR Million), 2012–2021

Figure 11: Italian Industrial Construction Output by Project Type (EUR Million), 2012–2021

Figure 12: Italian Industrial Construction Output by Cost Type (EUR Million), 2012–2021

Figure 13: Italian Industrial Construction Output by Activity Type (EUR Million), 2012–2021

Figure 14: Italian Industrial Construction Value Add by Project Type (EUR Million), 2012–2021

Figure 15: Italian Infrastructure Construction Output by Project Type (EUR Million), 2012–2021

Figure 16: Italian Infrastructure Construction Output by Cost Type (EUR Million), 2012–2021

Figure 17: Italian Infrastructure Construction Output by Activity Type (EUR Million), 2012–2021

Figure 18: Italian Infrastructure Construction Value Add by Project Type (EUR Million), 2012–2021

Figure 19: Italian Energy and Utilities Construction Output by Project Type (EUR Million), 2012–2021

Figure 20: Italian Energy and Utilities Construction Output by Cost Type (EUR Million), 2012–2021

Figure 21: Italian Energy and Utilities Construction Output by Activity Type (EUR Million), 2012–2021

Figure 22: Italian Energy and Utilities Construction Value Add by Project Type (EUR Million), 2012–2021

Figure 23: Italian Institutional Construction Output by Project Type (EUR Million), 2012–2021

Figure 24: Italian Institutional Construction Output by Cost Type (EUR Million), 2012–2021

Figure 25: Italian Institutional Construction Output by Activity Type (EUR Million), 2012–2021

Figure 26: Italian Institutional Construction Value Add by Project Type (EUR Million), 2012–2021

Figure 27: Italian Residential Construction Output by Project Type (EUR Million), 2012–2021

Figure 28: Italian Residential Construction Output by Cost Type (EUR Million), 2012–2021

Figure 29: Italian Residential Construction Output by Activity Type (EUR Million), 2012–2021

Figure 30: Italian Residential Construction Value Add by Project Type (EUR Million), 2012–2021

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