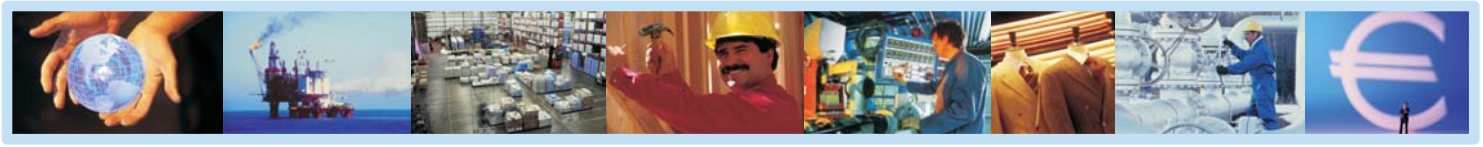
REGIONE DEL VENETO

Statistica flash

April 2009 - Special edition

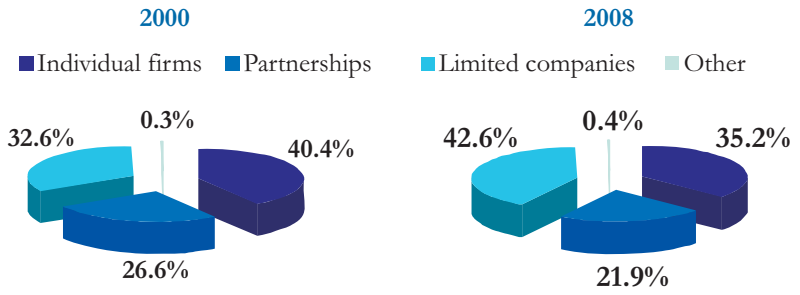


A PRODUCTIVE VENETO: THE ENGINEERING INDUSTRY

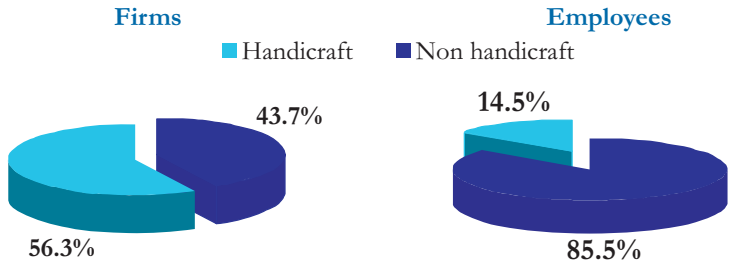
DYNAMICS AND GEOGRAPHICAL DISTRIBUTION OF FIRMS

	Number	% variation compared to the previous year	% variation compared to 2000	% share of the Veneto total
Active firms 2008	6,173	1.7	3.2	1.3
Employees 2005	80,082	-0.3	-2.5	4.9

Firms by kind of ownership: % share Veneto



Handicraft firms: % share Veneto - Year 2008



Survival rate (*) of active firms in the sector. Veneto - Years 2002:2005

years of survival

active year	2003	2004	2005
2002	93.2	88.2	82.8
2003	100.0	94.0	88.0
2004		100.0	93.3

survival after three years
survival after two years
survival after one year

(*) Survival rate at a given time t+n: % ratio of the number of active firms at time t and the survivors in t+n and number of firms active at time t

Economic aggregates

	Value (mln euros)	% share of Veneto total	% share the Italian sector
Value added 2006	5,340.7	4.3	15.7
Investments 2005	980.0	3.2	16.1

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on InfoCamere and Istat-Asia data

An analysis of the structure as well as the sectorial and geographical dynamics of the engineering industry of Veneto that includes the production of machinery, mechanical equipment and engineered plants has been carried out by bringing together a number of statistical and administrative sources referring to various timeframes. We particularly exploited the great array of resources of the Istat archive "Asia-Unità Locali" (Statistical Archive of Active Firms), which allows a relatively up to date study of active engineering firms. Currently there are regional data for the period between 2002 and 2005.

The firms of the engineering sector in Veneto make up 12.7% of the national engineering industry.

Their average size in 2005 was 13.6 employees per local unit, nearly 10 above the total regional average and 4 more than the average size of the manufacturing sector (9.4 employees).

In this sector the share of small firms (individual enterprises) was less significant than in other sectors. Their decline in number over time in favour of an increase in the number of limited companies has become very clear.

From the analysis the survival of the cohort of active firms in 2002 into the following years points to the greater stability of this sector than other kinds of firms in Veneto: nearly 83% of the firms active in 2002 were still active in 2005 (79.4% for firms in Veneto in general).

From the economic point of view engineering produced 4.3% of the total wealth of Veneto and contributed 15.7% of the wealth of the sector on the national level. Adjusted by inflation, it is estimated that there was a substantial increase in added value in both the long term, 2000-2006, and over the last two-year period.

Weflash

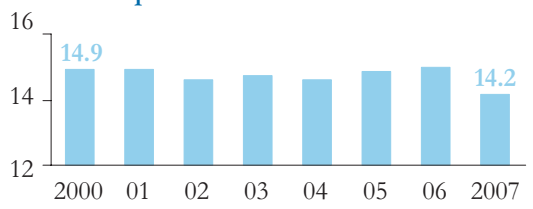
also available
- Veneto in figures 2007 -2008
- Update of the Tourism database 2008

http://www.regione.veneto.it/statistica

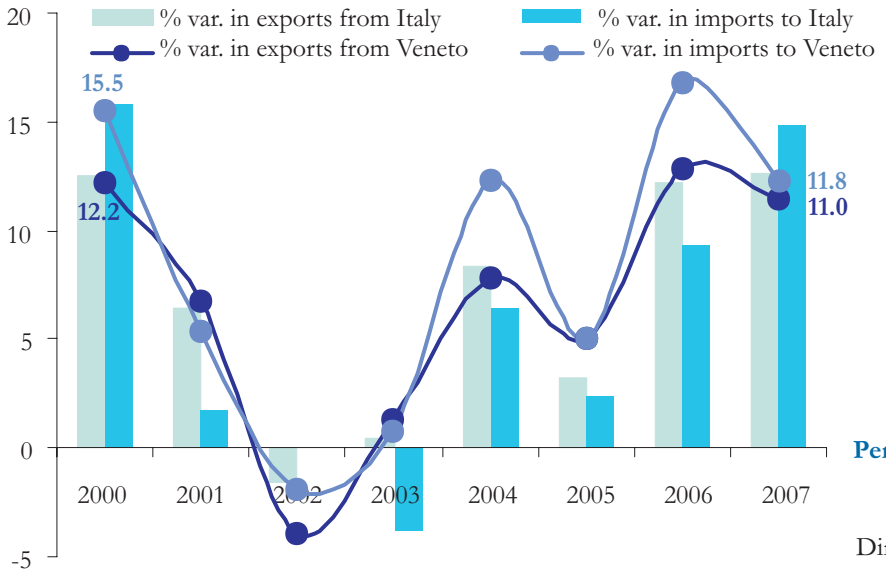
Foreign trade in engineering products

	Value (mln euros)	% variation compared to the previous year	% variation compared to 2000	% share compared to the total for Veneto	% share compared to the sector in Italy
Export 2007	11,137.9	11.0	47.7	22.0	14.2
Import 2007	3,038.3	11.8	60.6	7.6	10.7

La quota di mercato estero della meccanica rispetto all'Italia - Anni 2000:2007

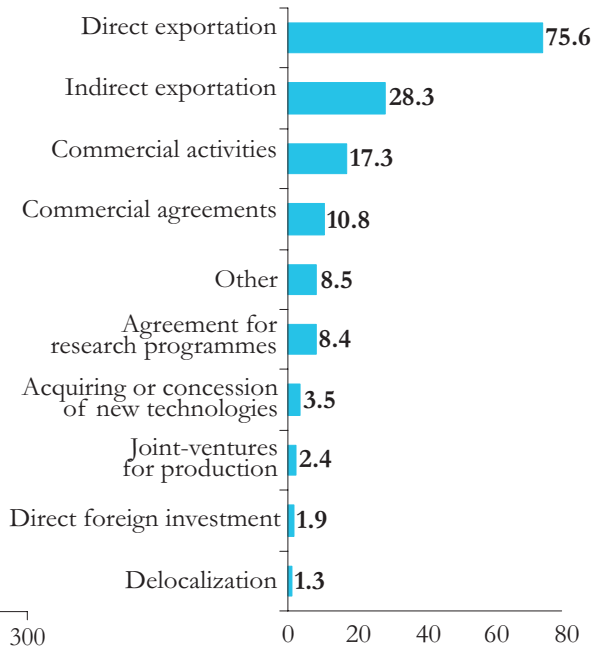


The foreign market share of the engineering sector. Veneto - Years 2000:2007

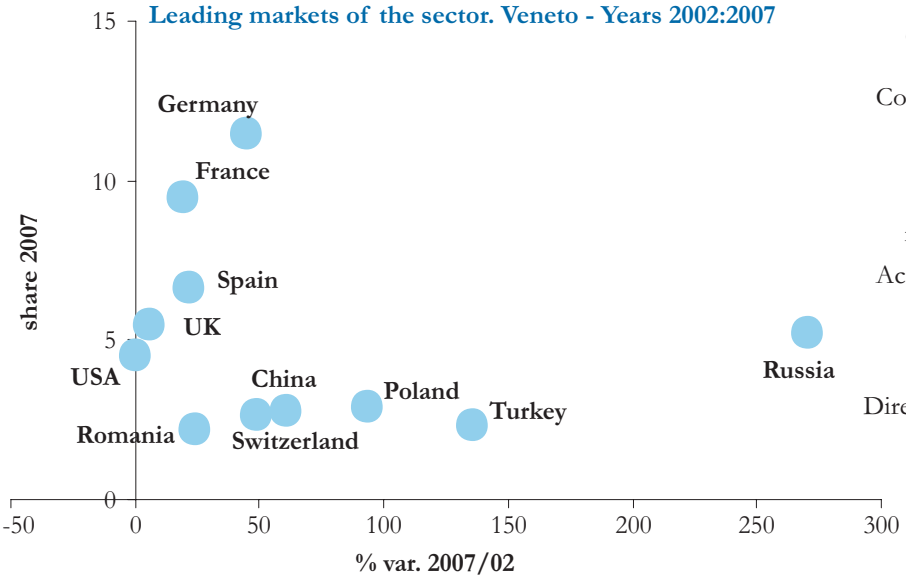


Foreign trade in engineering products has increased considerably, boasting a 14.2% share of the national value and representing one of the leading products of exports from Veneto in international markets.
The leading markets were Germany, France and Spain, but Russia, Turkey and Poland were growing rapidly.

Percentage of firms of the engineering sector by kind of foreign trade. Veneto - Year 2008

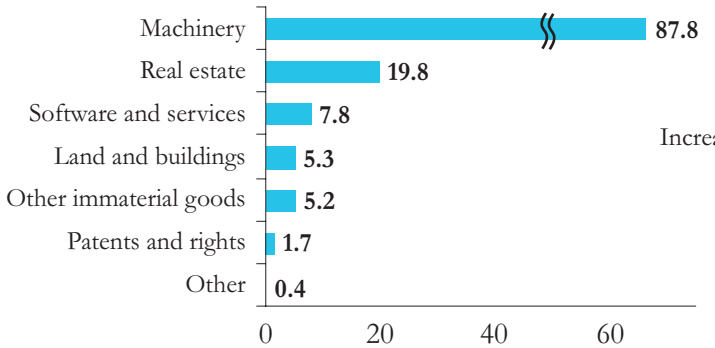


Leading markets of the sector. Veneto - Years 2002:2007

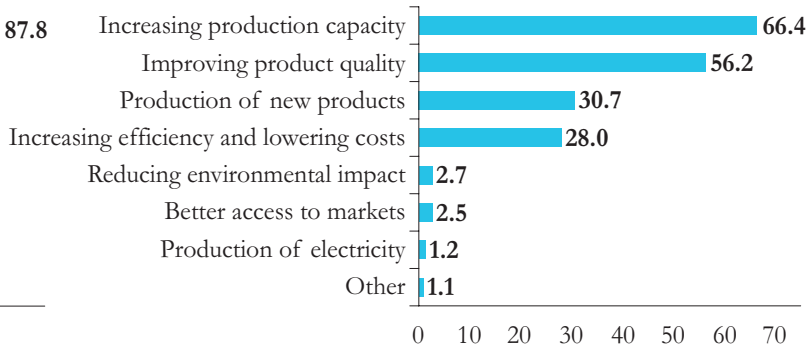


Investments in the sector (*)

Percentage of engineering sector firms by kind of investments made. Veneto - Year 2008



Percent of engineering firms by objectives for which the investments were made. Veneto - Year 2008

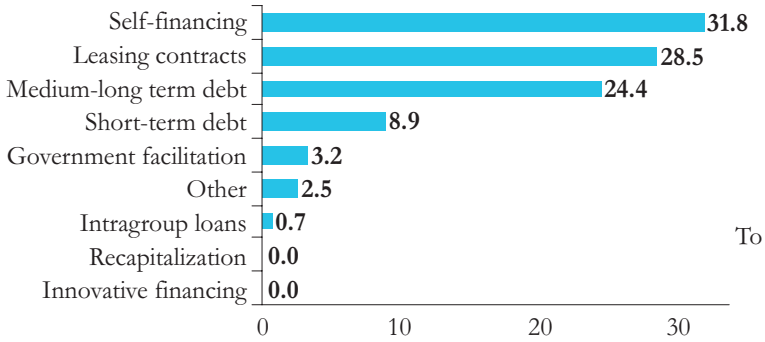


(*) Multiple answers possible

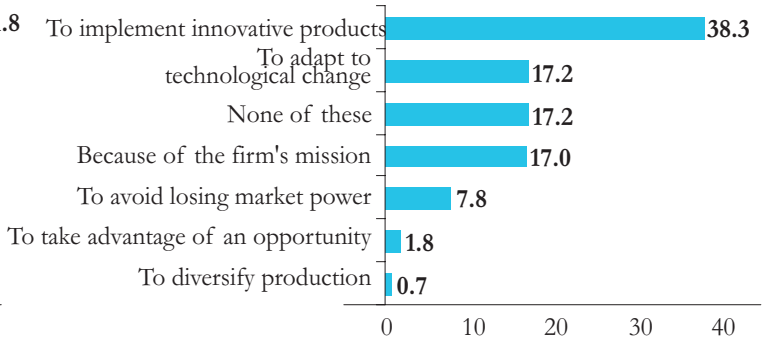
Percent of engineering firms by objectives for which the investments were made. Veneto - Year 2008

Financial channels and innovation in the engineering sector (*)

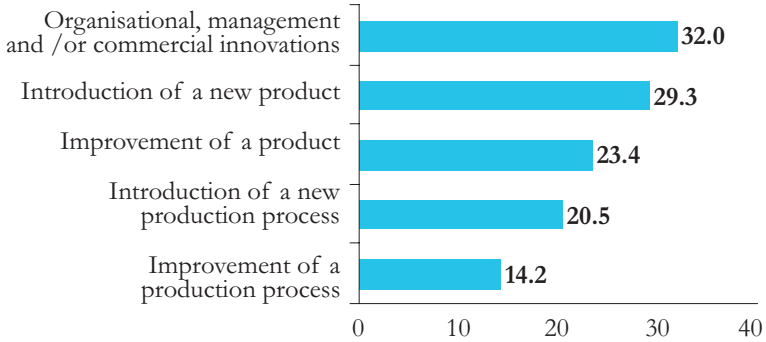
Percentage of firms of the engineering sector by types of financial channels used for making investments. Veneto - Year 2008



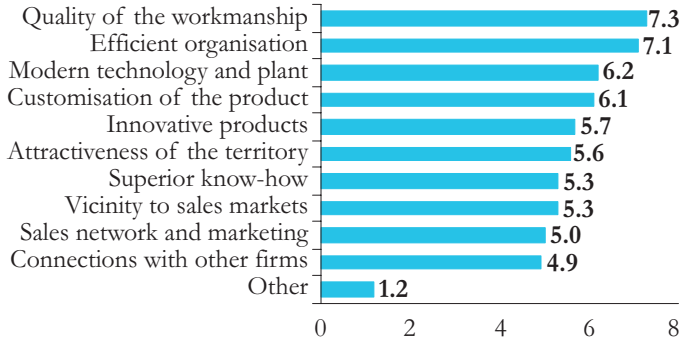
Percentage of firms of the engineering sector by the reasons why they do research and development. Veneto - Year 2008



Percentage of firms of the engineering sectors by the innovations introduced in the three year period 2005-07. Veneto – Year 2008



Average score given to the main factors of a firm's competitive advantage in the engineering sector. Veneto - Year 2008 (Ratings from 1 to 10)



(*) Multiple answers possible

47% of the firms of the sector have made investments in 2008, predominantly in machinery to increase their production capacity. First among the channels used for finance was self-financing followed by leasing contracts and medium-long term debt.
16.2% of the firms of the sector were involved in research and development, 38.3% of them did so to create innovative products as well as to keep up with technological progress.
In the three year period 2005-07, 60% of the firms made innovations, mainly in terms of structural improvements inside the enterprise, probably in order to adapt to the globalization of markets.
Of the factors decisive for competitive advantage, quality of workmanship was in first place.

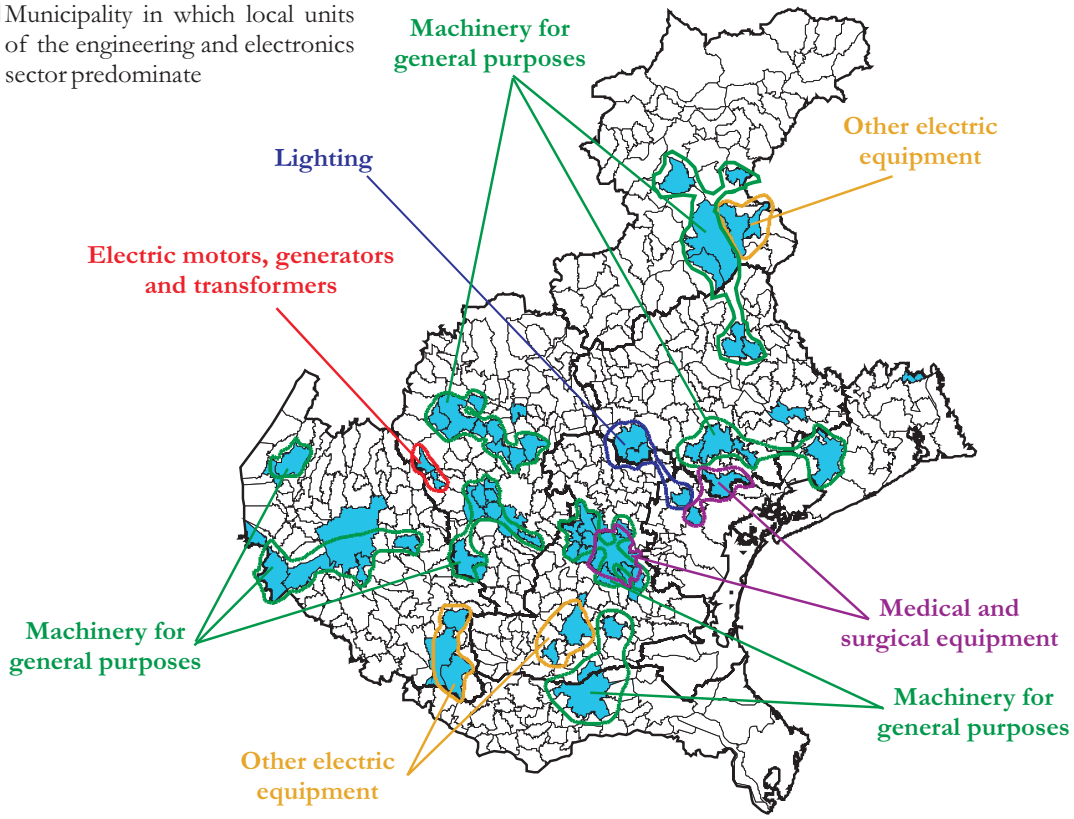
Geographical analysis

	No of firms 2008	No of local units	% share of local units	No of employees in local units	% share employees in local units	Rate of employment potential (*)	% share of exports 2007	Density	Productive potential
Belluno	194	207	3.4	4,223	5.1	19.9	4.4	0.1	1.0
Padova	1,322	1,354	22.0	18,224	21.8	20.5	25.2	0.6	1.5
Rovigo	205	199	3.2	2,247	2.7	9.2	1.8	0.1	0.8
Treviso	1,165	1,152	18.7	19,335	23.1	22.8	25.5	0.5	1.4
Venezia	494	514	8.3	4,541	5.4	5.5	3.9	0.2	0.6
Verona	1,100	1,024	16.6	12,093	14.5	13.9	15.7	0.3	1.2
Vicenza	1,693	1,712	27.8	22,957	27.5	27.4	23.4	0.6	2.0
Veneto	**6,173**	**6,162**	**100.0**	**83,619**	**100.0**	**17.6**	**100.0**	**0.3**	**1.3**

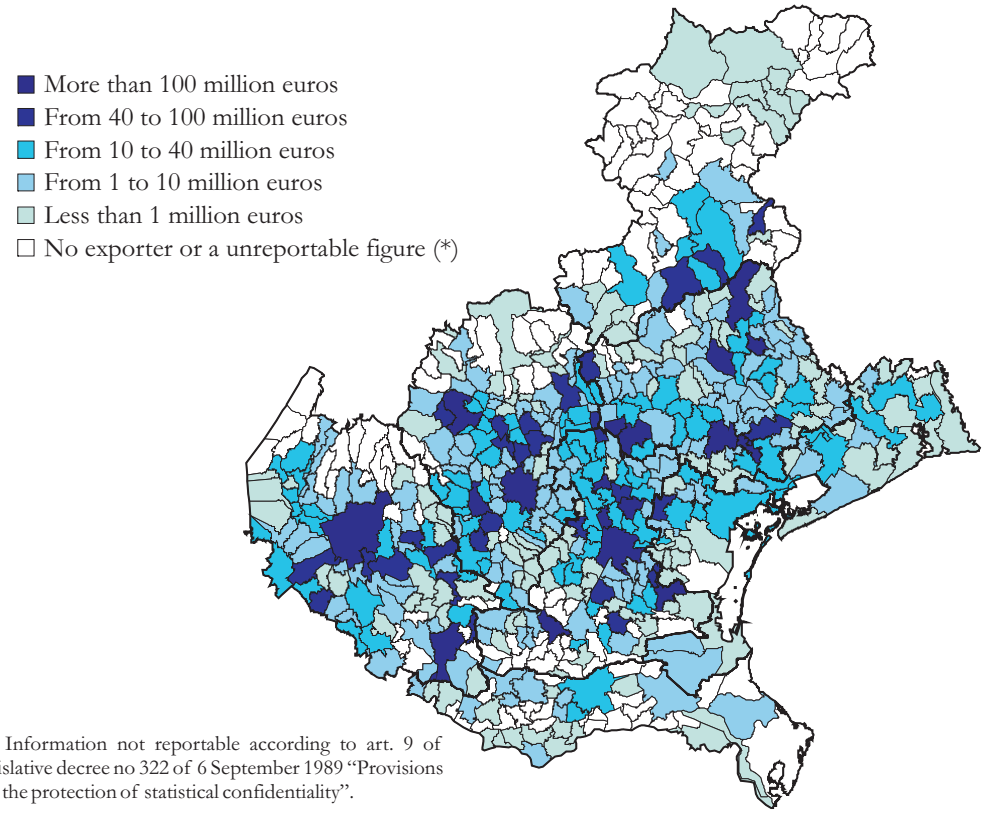
Rate of employment potential: No of employees in local units / resident pop. * 100
Density: No of local units / area in km2
Productive potential: No of local units / resident pop. * 100

Source: Processing by Regione Veneto - Direzione Sistema Statistico Regionale on Indagine MET, InfoCamere and Istat-Asia 2005

Map of productive density of automated engineering and electronics sectors by municipality



The value of exports in the engineering sector by municipality



(*) Information not reportable according to art. 9 of legislative decree no 322 of 6 September 1989 "Provisions for the protection of statistical confidentiality".

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on Istat-Asia 2005 data.

L'analisi territoriale mostra una specializzazione settoriale di alcune province: sono Vicenza, Padova e Treviso quelle con il più alto numero di unità locali nel settore, Verona presenta il più rilevante numero di addetti, ma è Treviso la maggior esportatrice. La disponibilità produttiva più elevata si registra a Vicenza: 2 unità locali nel comparto ogni 1000 abitanti.

La mappa delle concentrazioni produttive individua i comuni in cui prevale il numero di unità locali nei settori meccanica ed elettronica rispetto a tutti gli altri. Si è considerato l'insieme delle attività meccaniche ed elettroniche per le molteplici interazioni di filiera produttiva tra questi due settori.

Sono 68 su 581 i comuni dove tali attività risultano preponderanti. Si evidenziano tante piccole aree di specializzazione in particolari attività: "motori, generatori e trasformatori elettrici", "apparecchiature elettriche", "apparecchi medicali e chirurgici". Vi sono zone nelle quali le imprese sono classificate in modo generico come produttrici di "macchine di impiego generale" che coincidono in realtà con aree distrettuali riconosciute a livello internazionale, come ad esempio quella della "meccatronica" di Vicenza e del "condizionamento e refrigerazione industriale" di Padova.

Attraverso un incrocio di archivi è stato possibile ricostruire la mappa degli operatori con l'estero a livello comunale che individua la presenza di una massiccia e diffusa attività di export soprattutto a ridosso della dorsale est-ovest della regione e attorno ai capoluoghi di provincia.

In accordance with Regional Law no. 8 of 2002, Ufficio di Statistica della Regione Veneto gathers, analyses and disseminates statistical information for the benefit of the region. The processed data herein is the patrimony of the entire region and is published in brochures as well as on the Regione Veneto website at **www.regione.veneto.it/statistica**.

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