

OSSERVATORIO CONGIUNTURALE 2024

sull'industria delle costruzioni

30 GENNAIO 2024



ANCE

ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



IL SETTORE DELLE COSTRUZIONI NELL'ECONOMIA ITALIANA

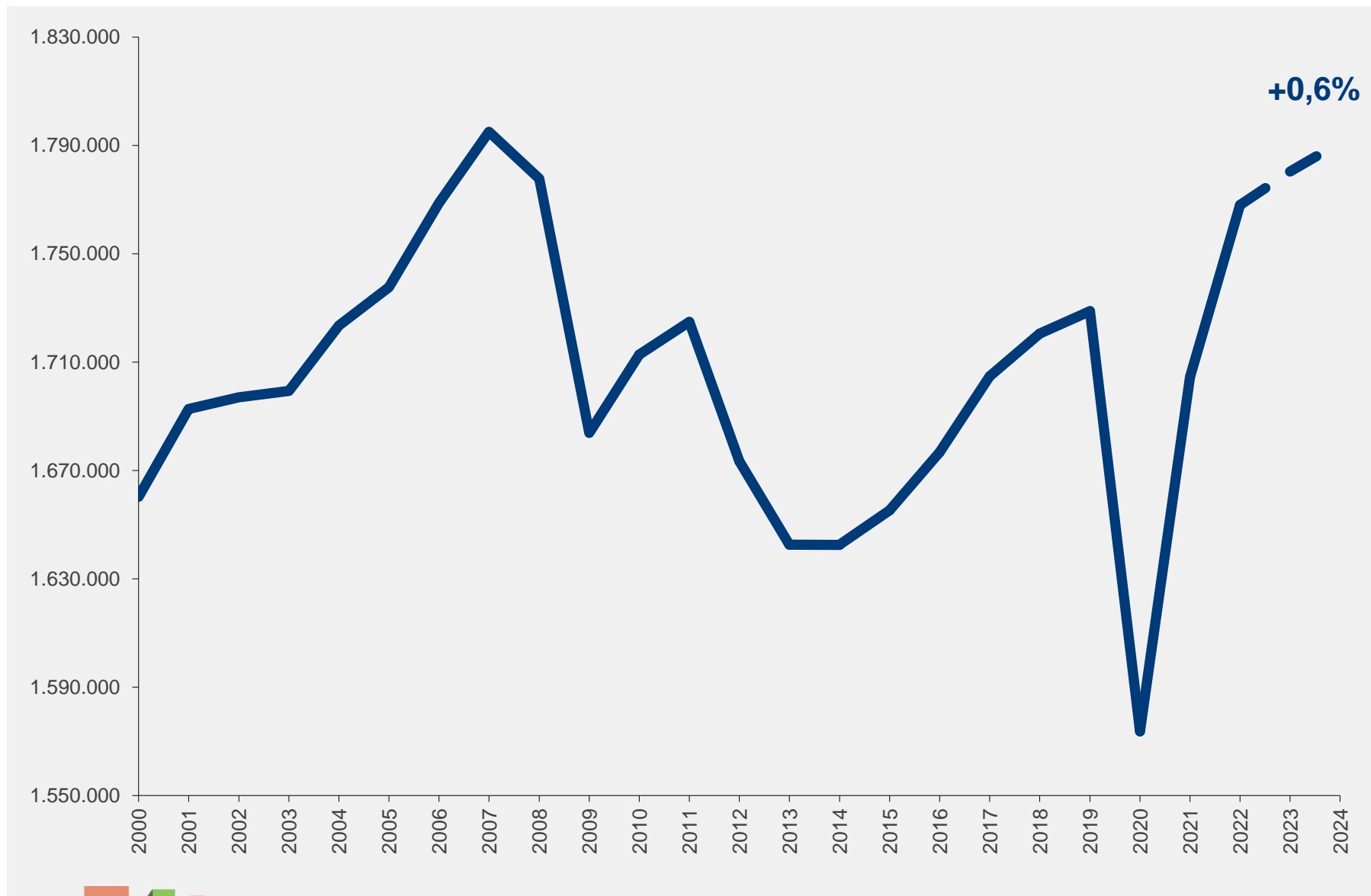
ANCE

ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



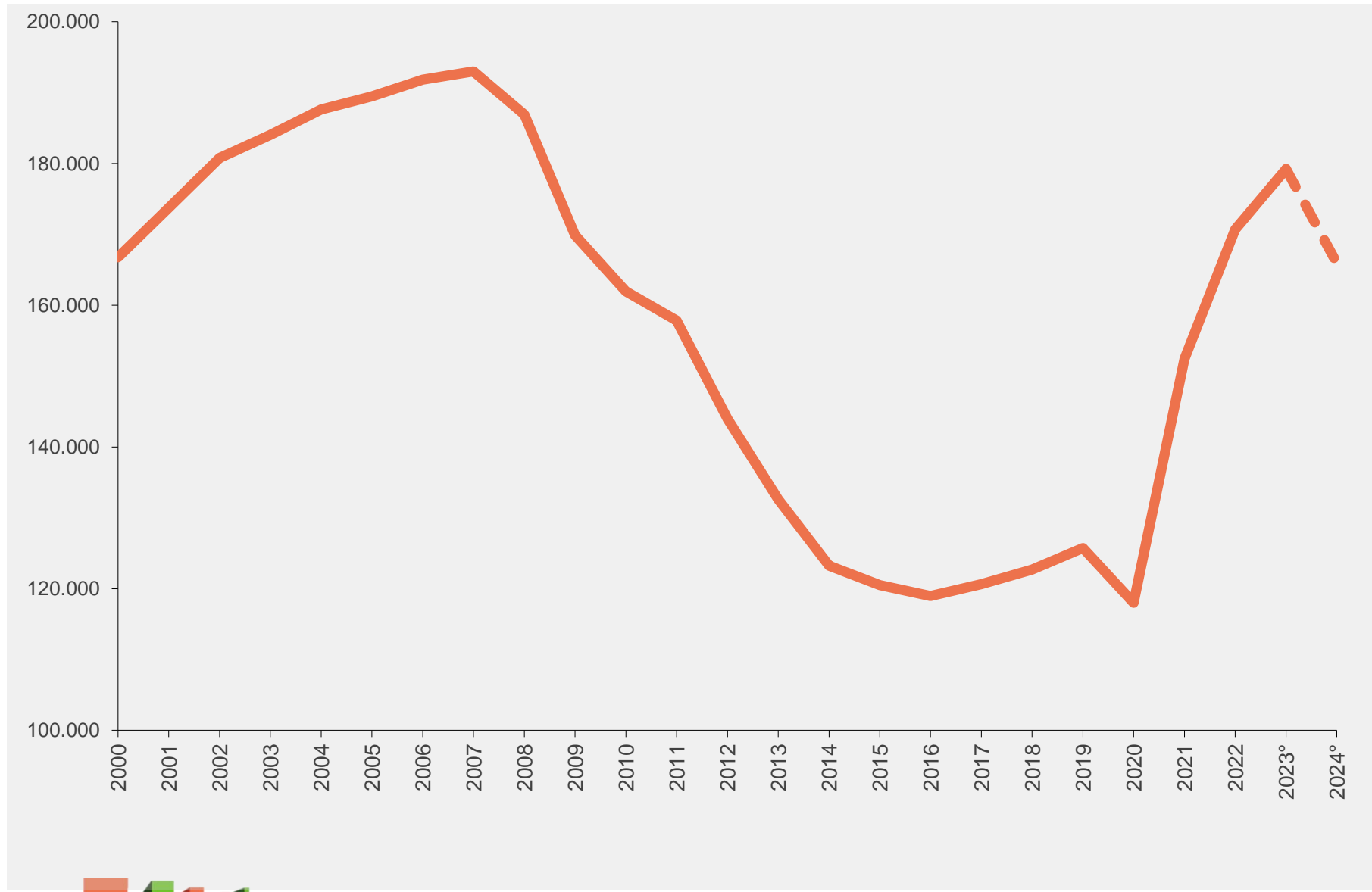
Prodotto Interno Lordo

Milioni di euro 2015



Investimenti in costruzioni

Milioni di euro 2015

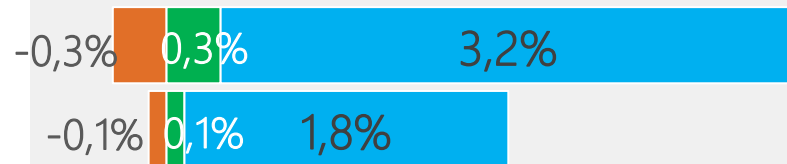


Il contributo delle costruzioni al PIL: anni 2021 e 2022



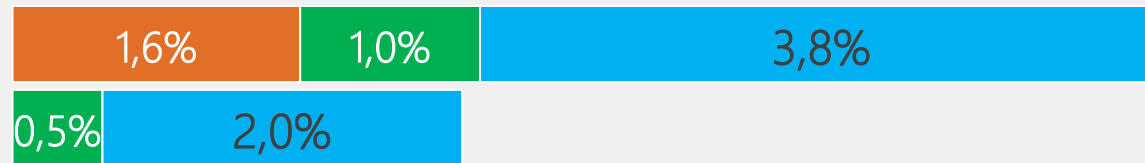
+8,3%

+3,7%



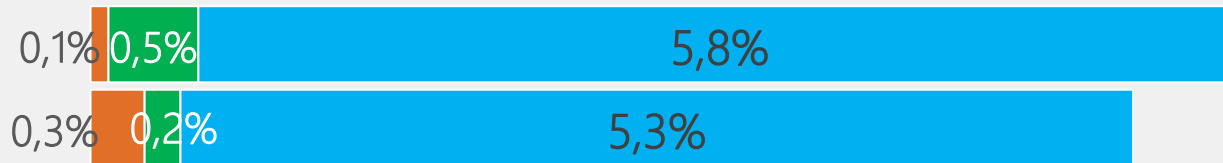
+3,2%

+1,8%



+6,4%

+2,5%



+6,4%

+5,8%

costruzioni

altri investimenti

altri contributi

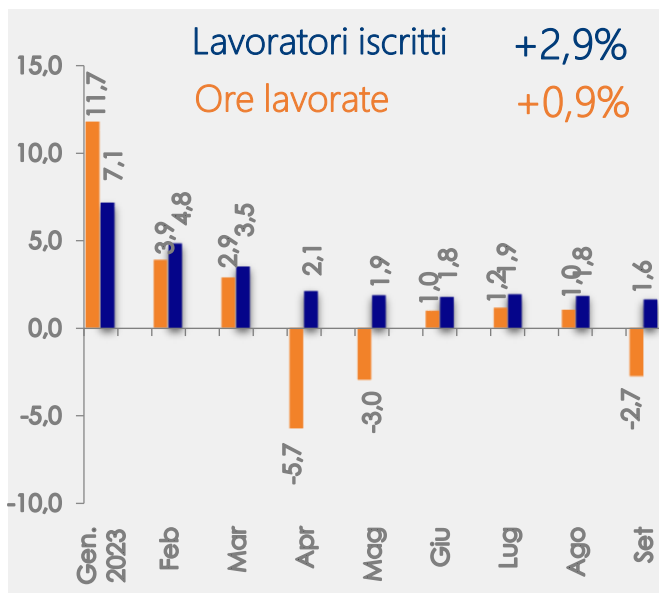


Produzione nelle costruzioni

(indice Istat)

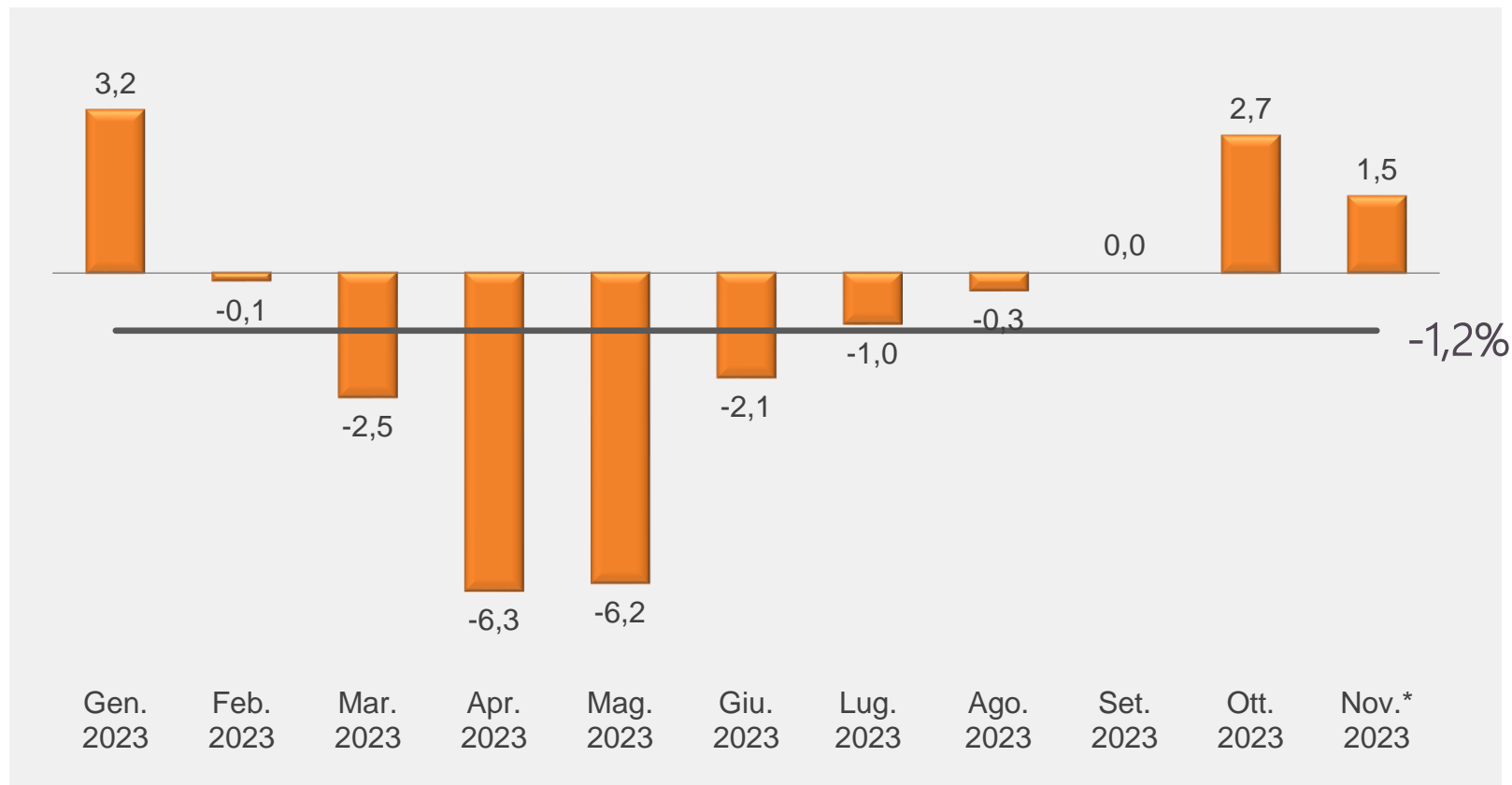
Ore lavorate e lavoratori iscritti

(CNCE - 113 casse edili /edilcasse)



■ Ore lavorate

■ Lavoratori iscritti



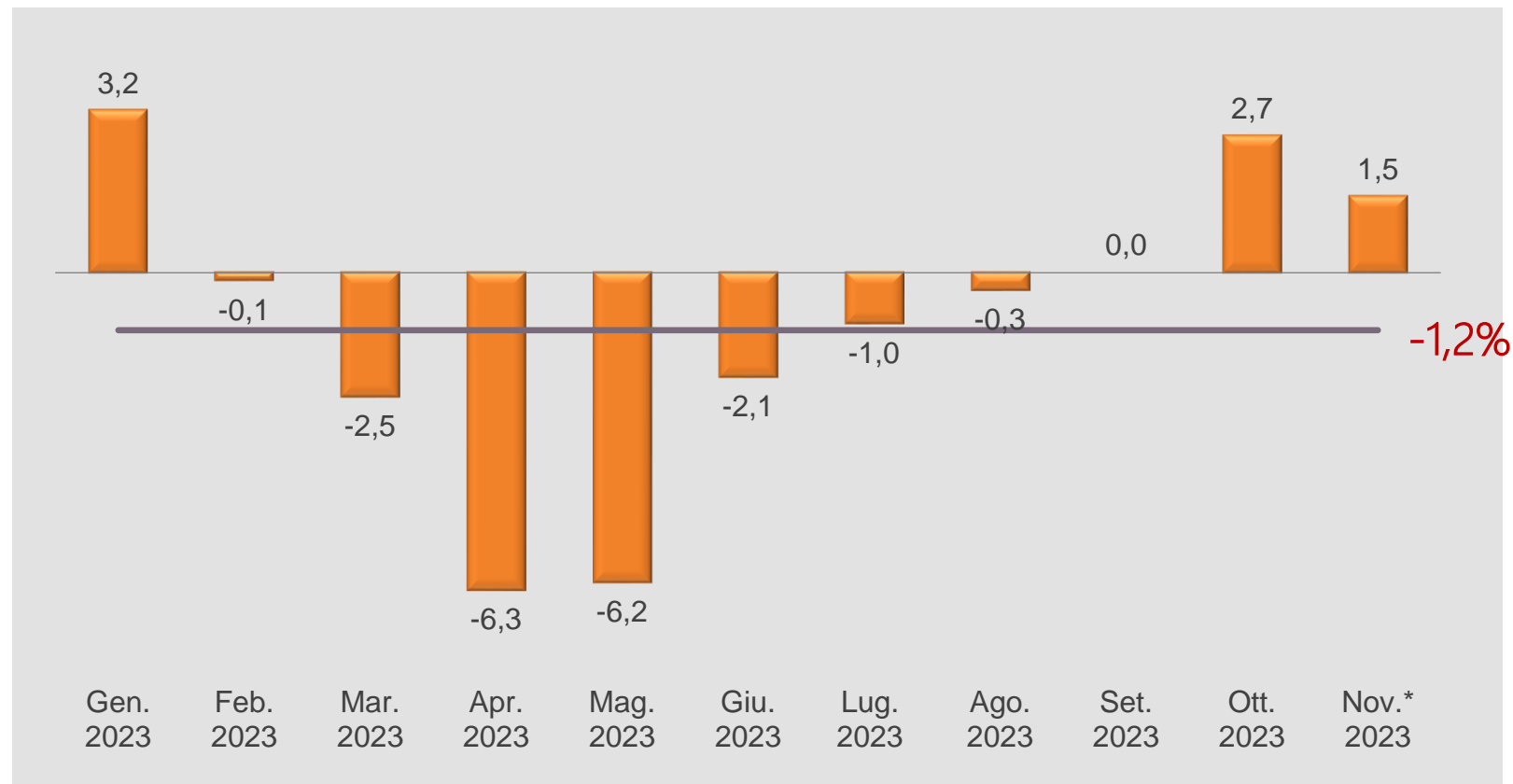
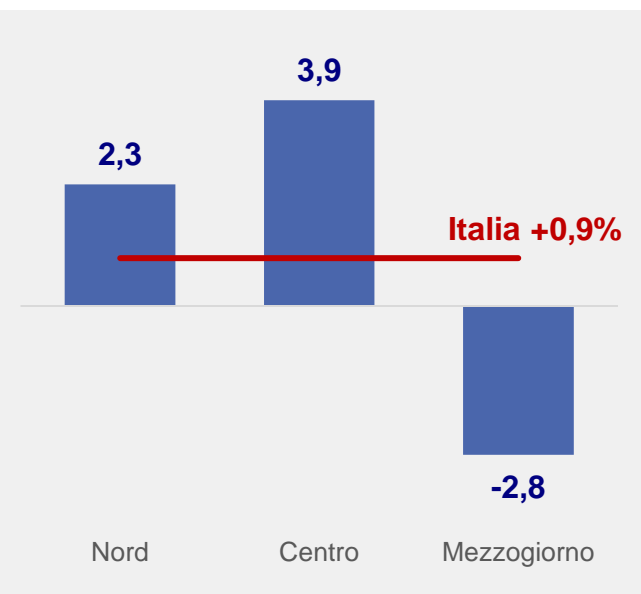
*dato provvisorio



Produzione nelle costruzioni (indice Istat)

Ore lavorate

(CNCE - 113 casse edili /edilcasse)



*dato provvisorio



A large, bold, blue number '2' is positioned on the left side of the image. It is set against a background of orange and white diagonal stripes. The number has a slight shadow effect, giving it a 3D appearance.

Un mercato in trasformazione

ANCE

ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



I comparti nel 2023

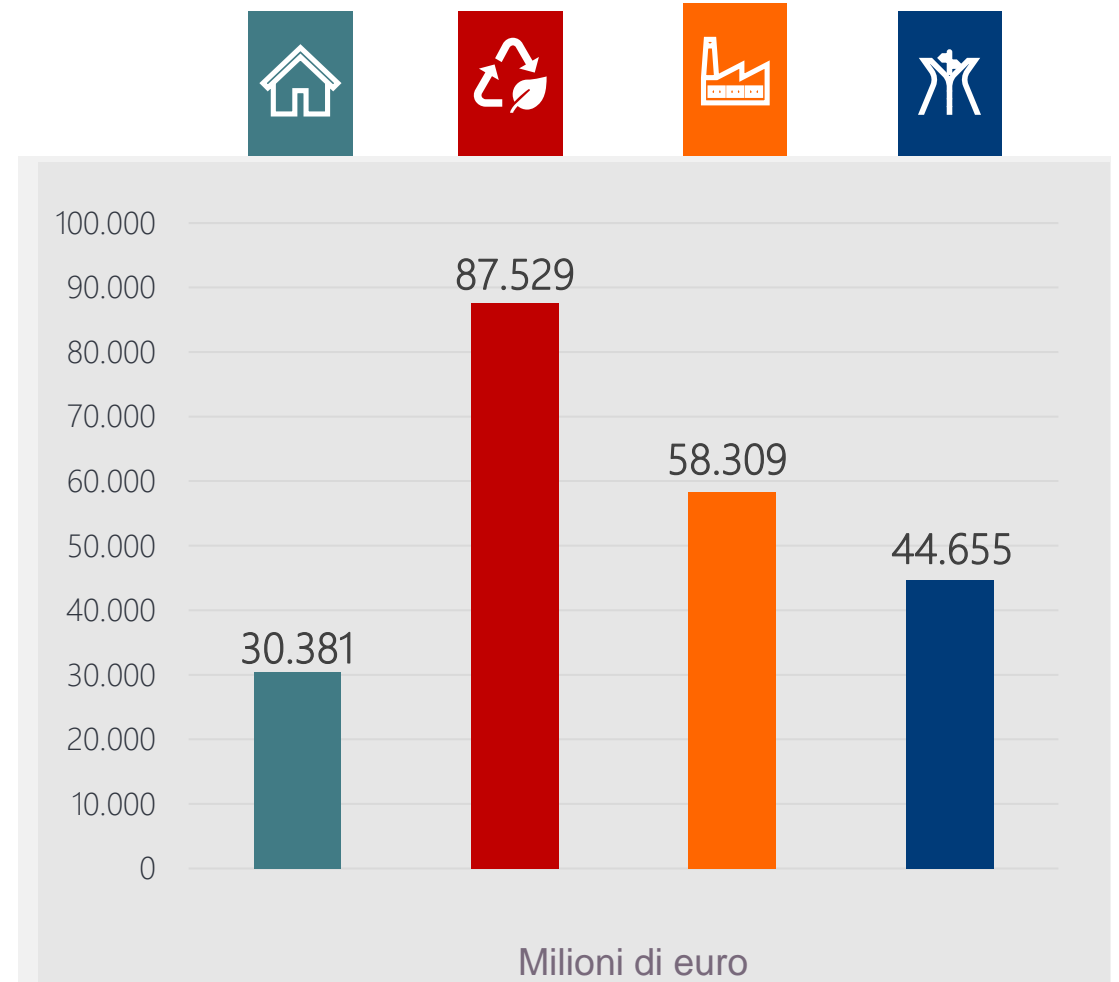
 **+5,0%**
Investimenti in costruzioni

 **+1,3%**
Nuove abitazioni

 **+0,5%**
RIQUALIFICAZIONE

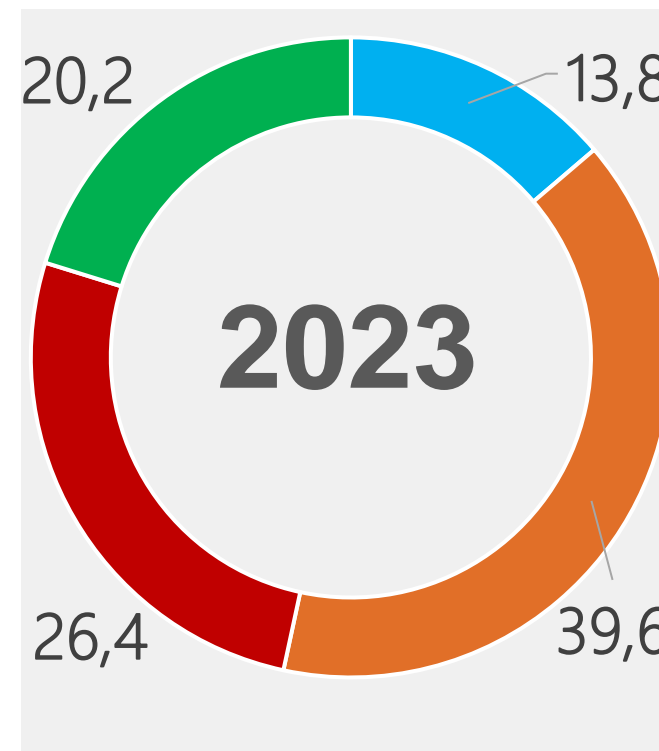
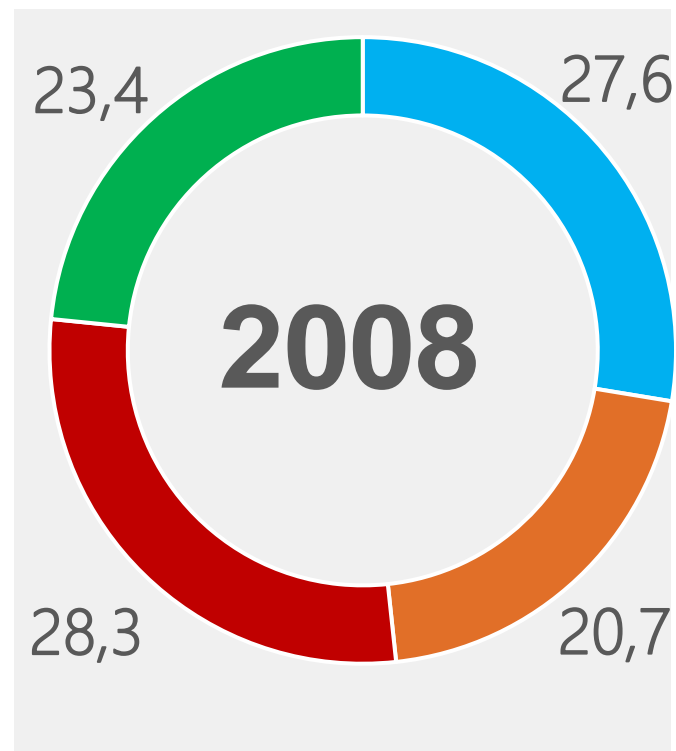
 **+5,0%**
NON RESIDENZIALE PRIVATO



 **+18,0%**
OPERE PUBBLICHE





Investimenti in costruzioni per comparto

Valori percentuali



 Nuove abitazioni
 Riqualficazione abitazioni

 Edilizia non residenziale privata
 Opere pubbliche

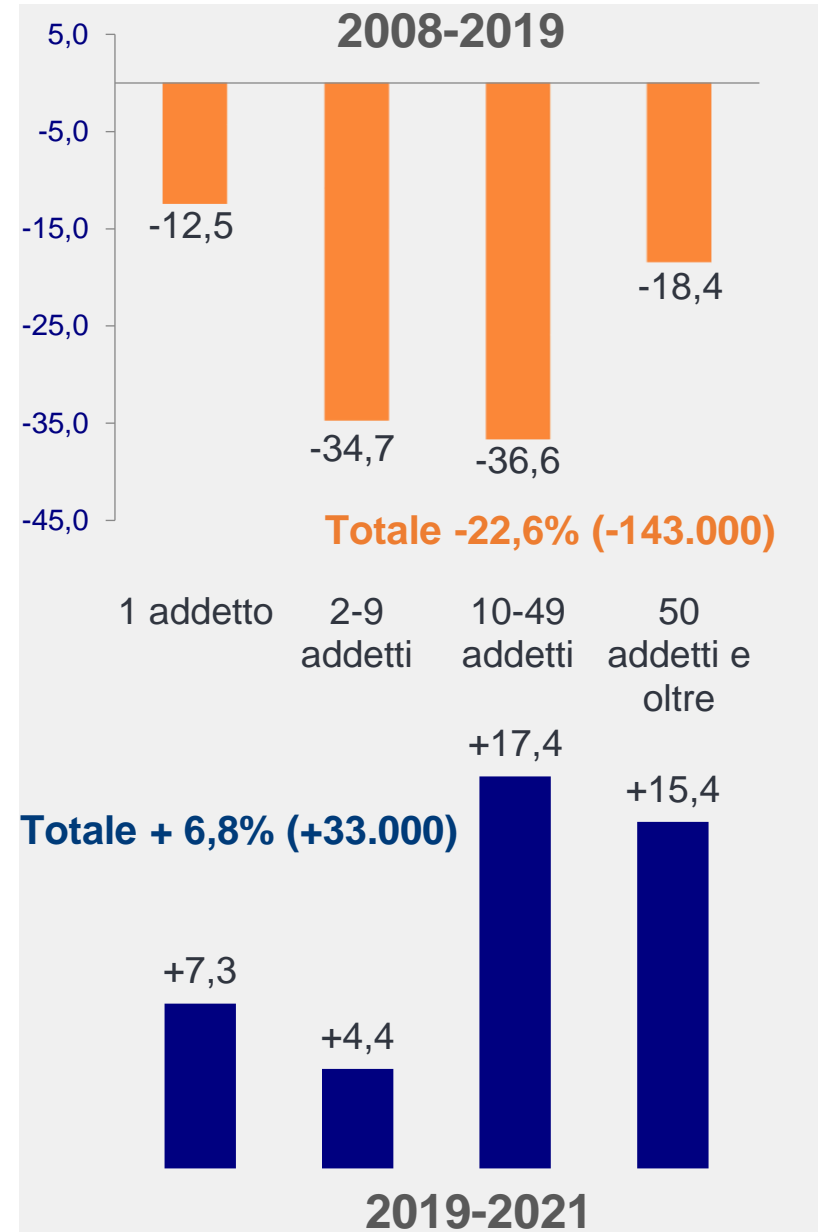
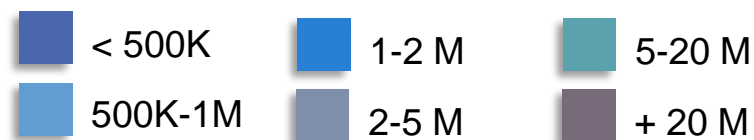
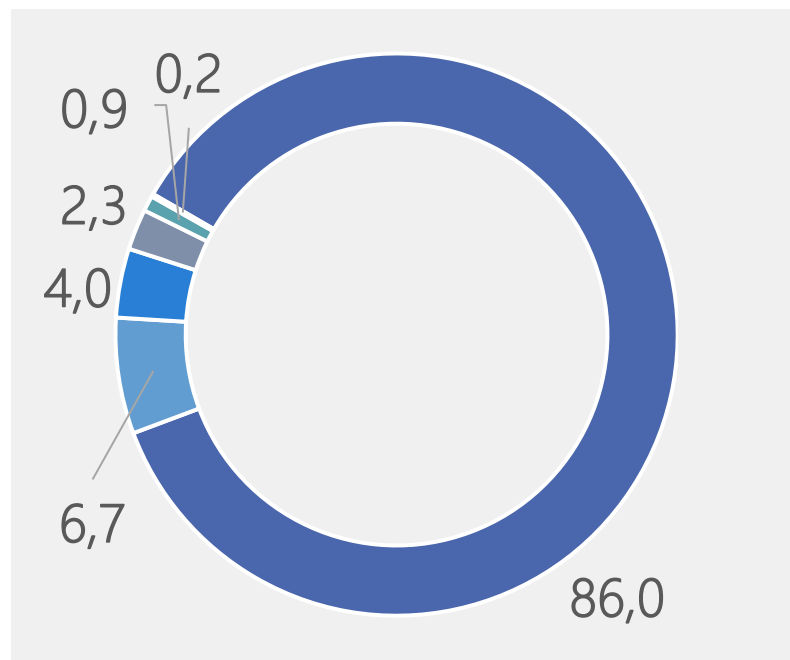
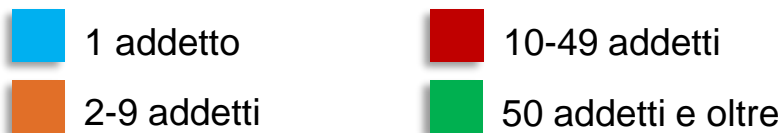
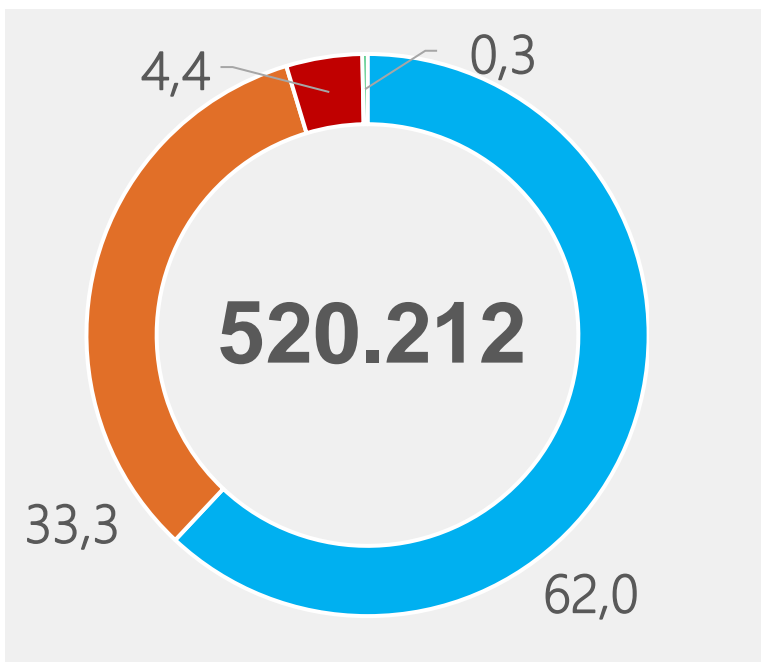


Imprese del settore delle costruzioni

Valori percentuali

Classi di addetti

Fatturato



3

Il mercato immobiliare

ANCE

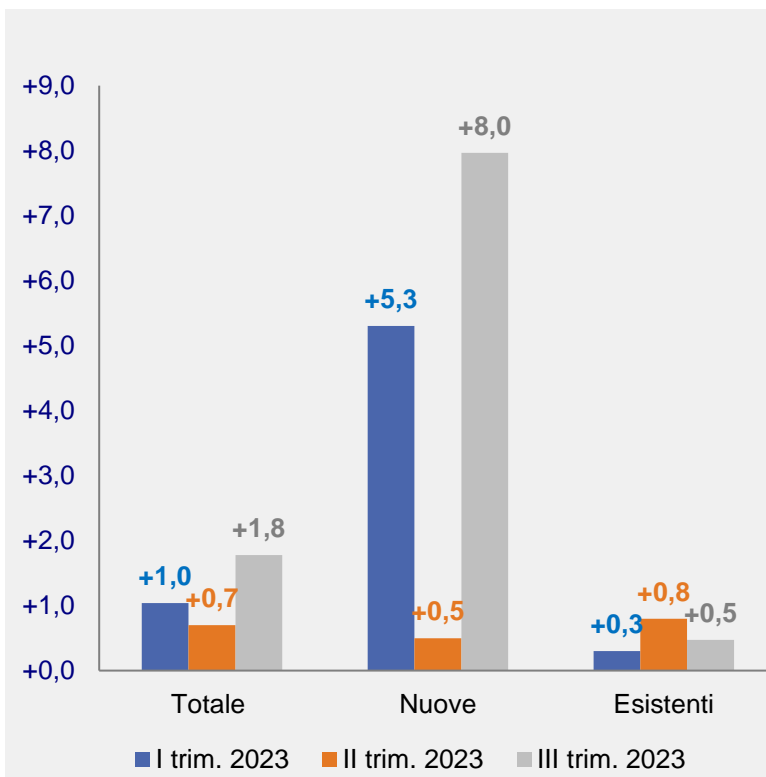
ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



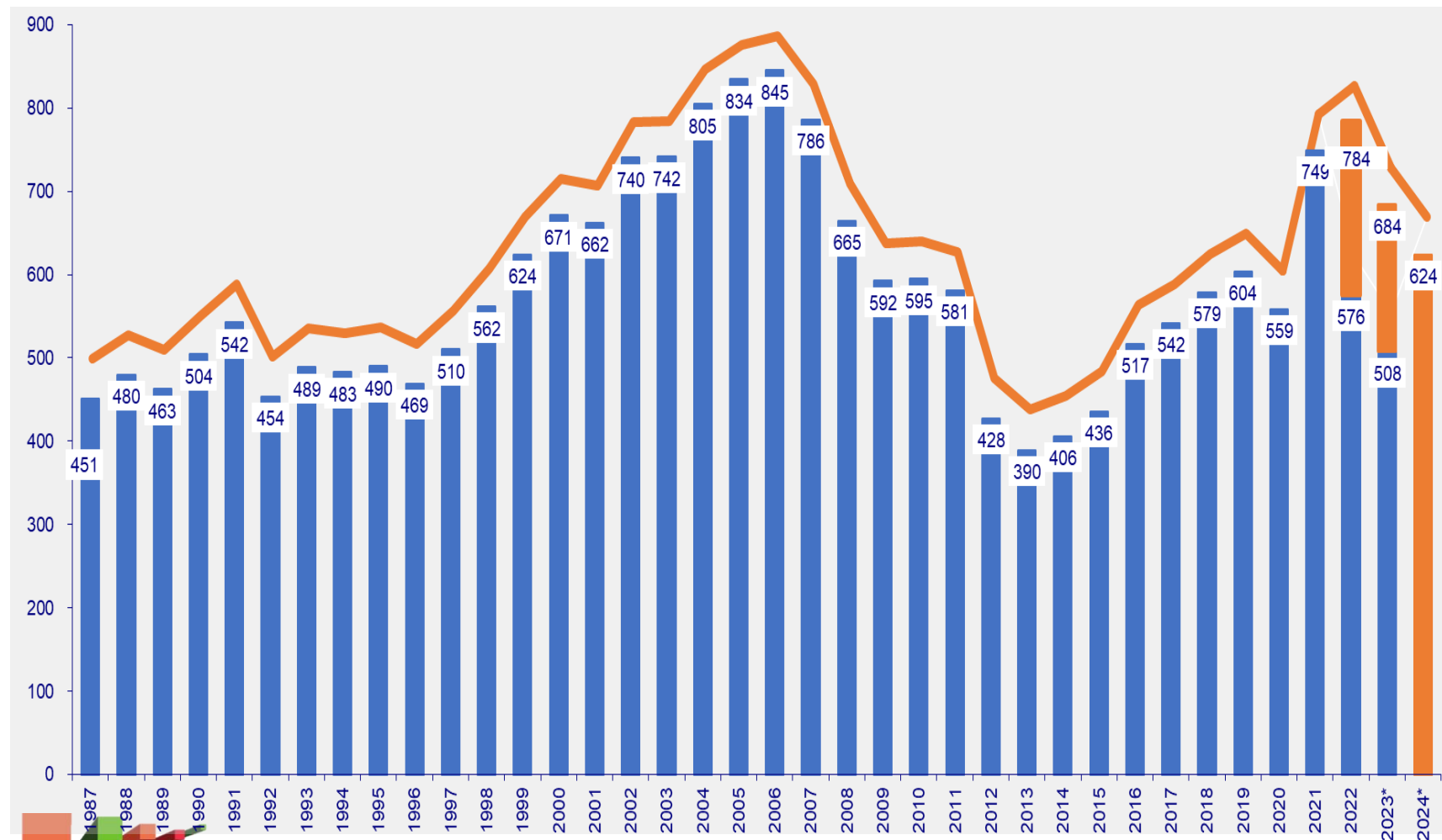
Mercato immobiliare residenziale

Compravendite

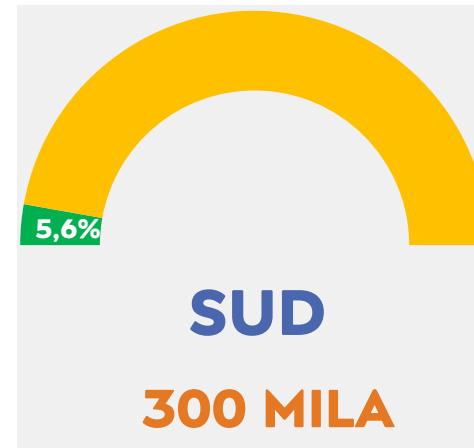
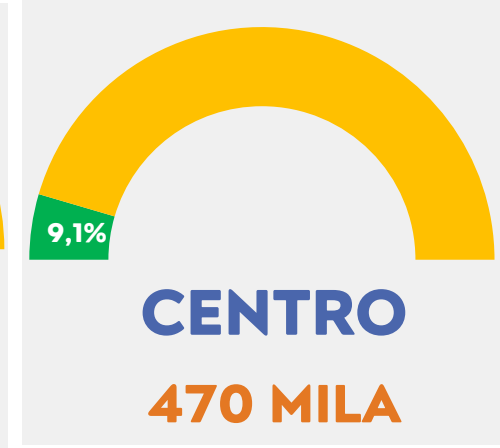
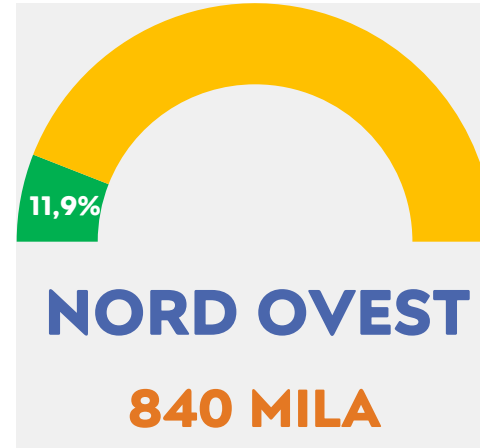
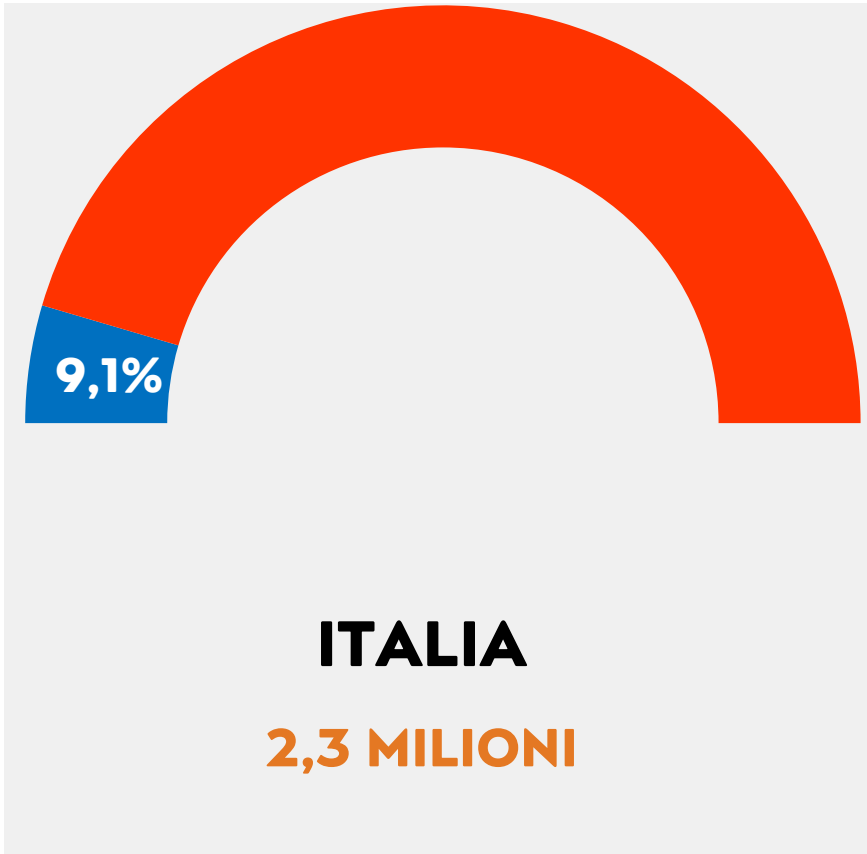
Prezzi



Livelli alti per il mercato immobiliare



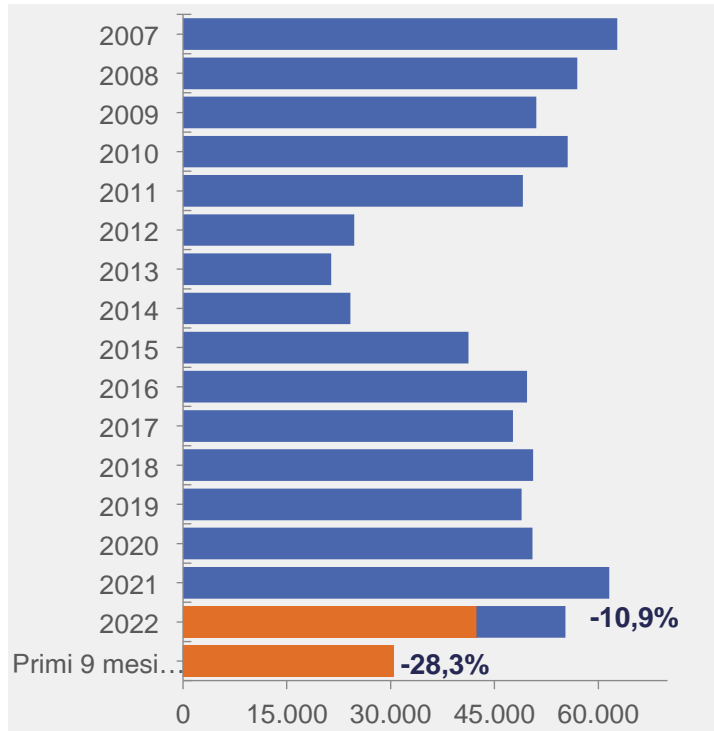
Il desiderio di cambiamento delle famiglie



Difficile l'accesso al credito

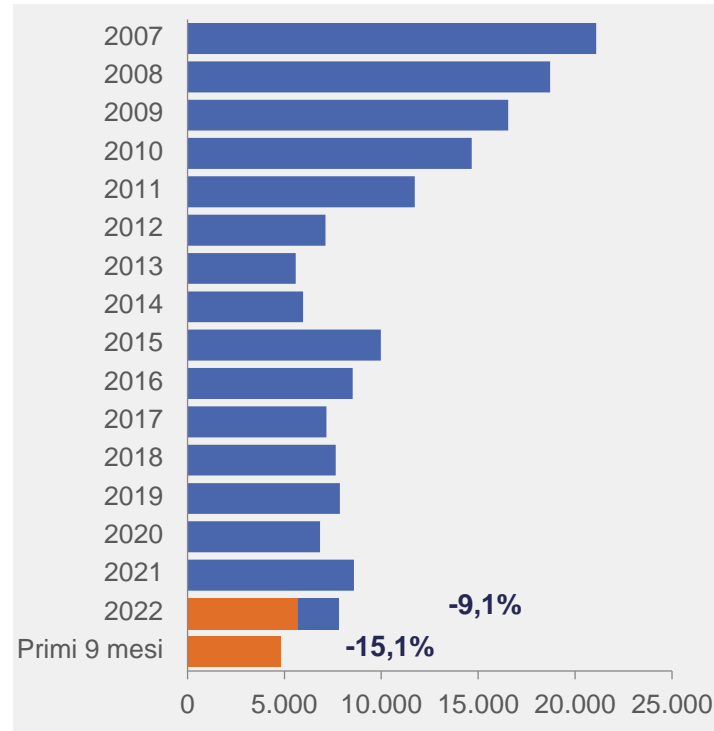
Mutui erogati per

acquisto abitazioni



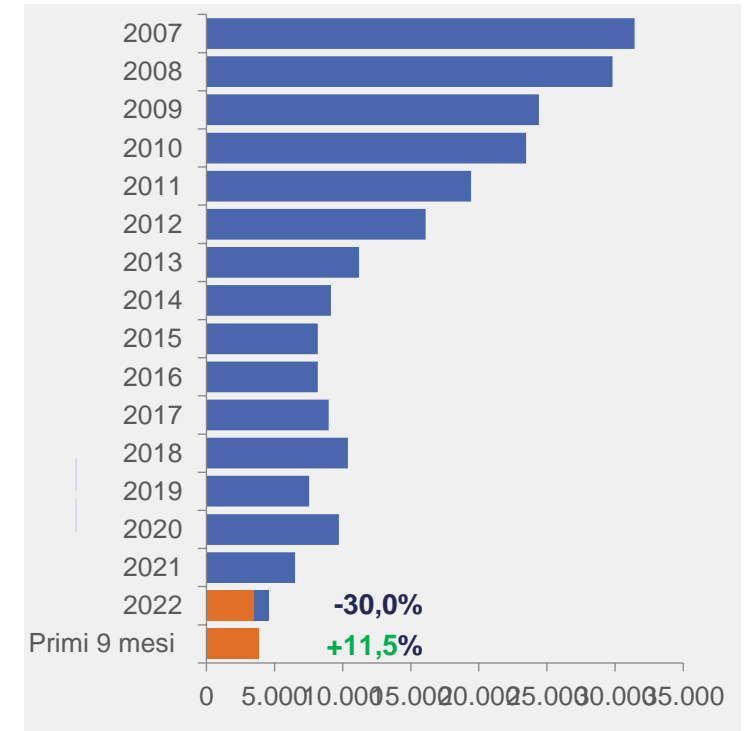
-28,3%

investimenti residenziali



-15,1%

investimenti non residenziali

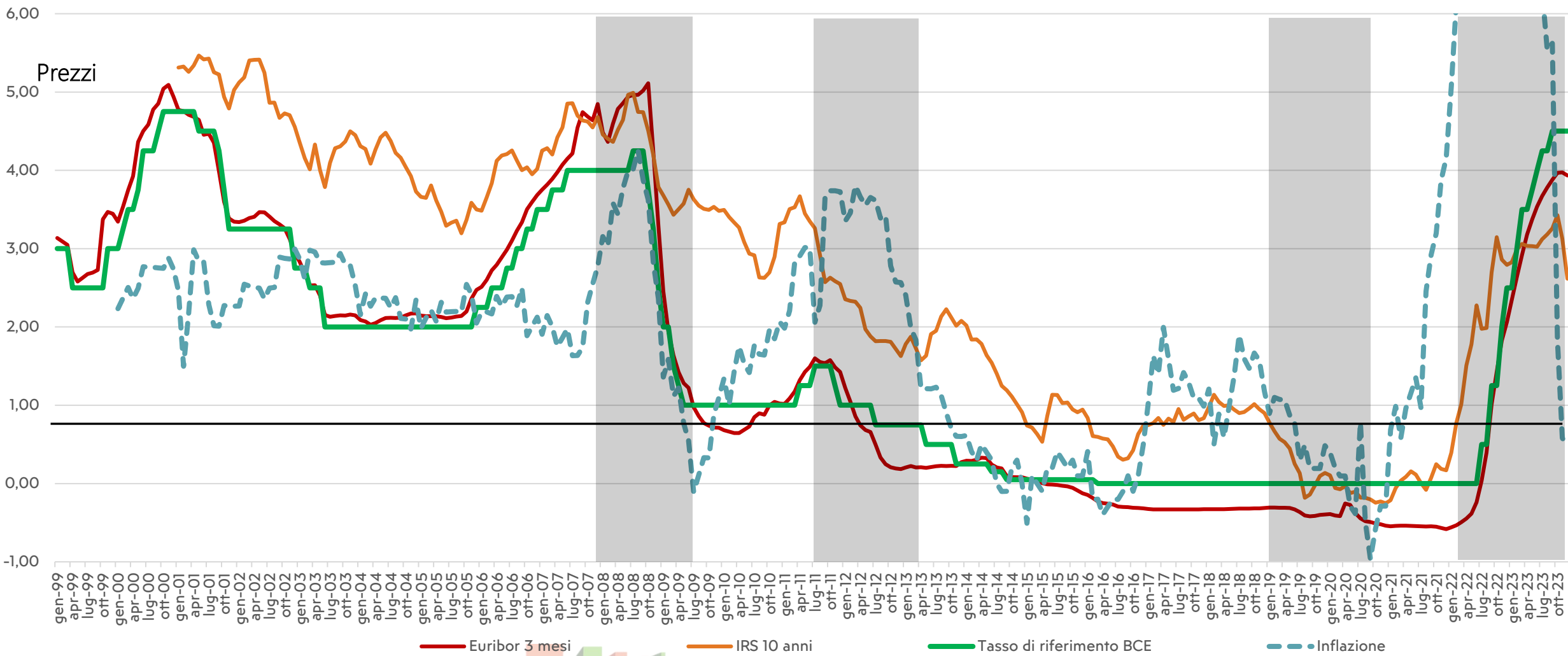


+11,5%



Il ritorno della politica monetaria

Andamento dei tassi d'interesse e inflazione (valori %) - Periodo 1999-2023

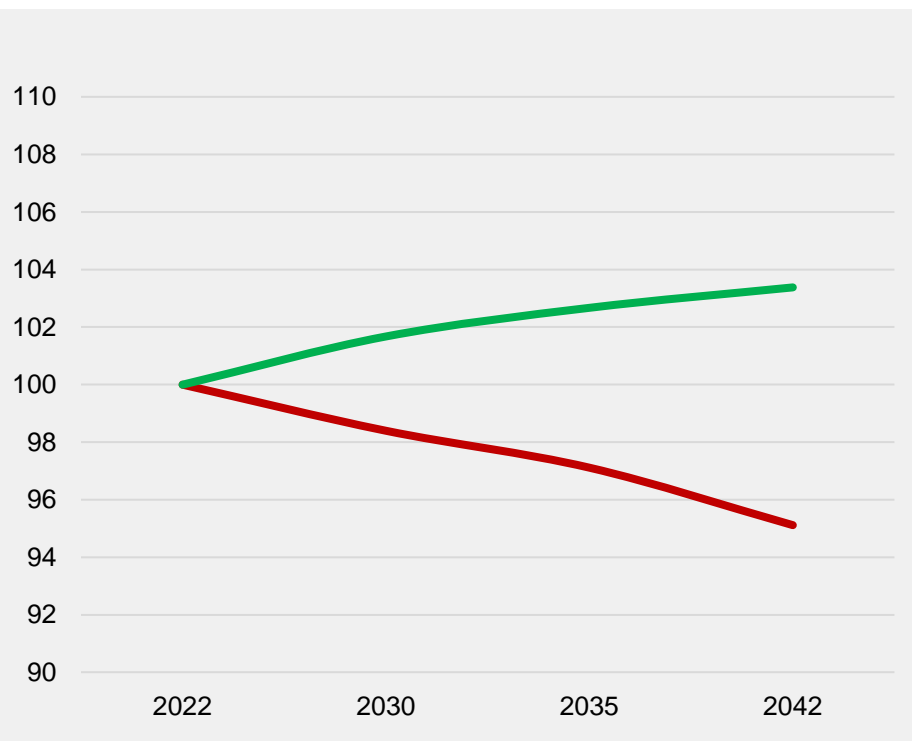


Popolazione e famiglie residenti in Italia

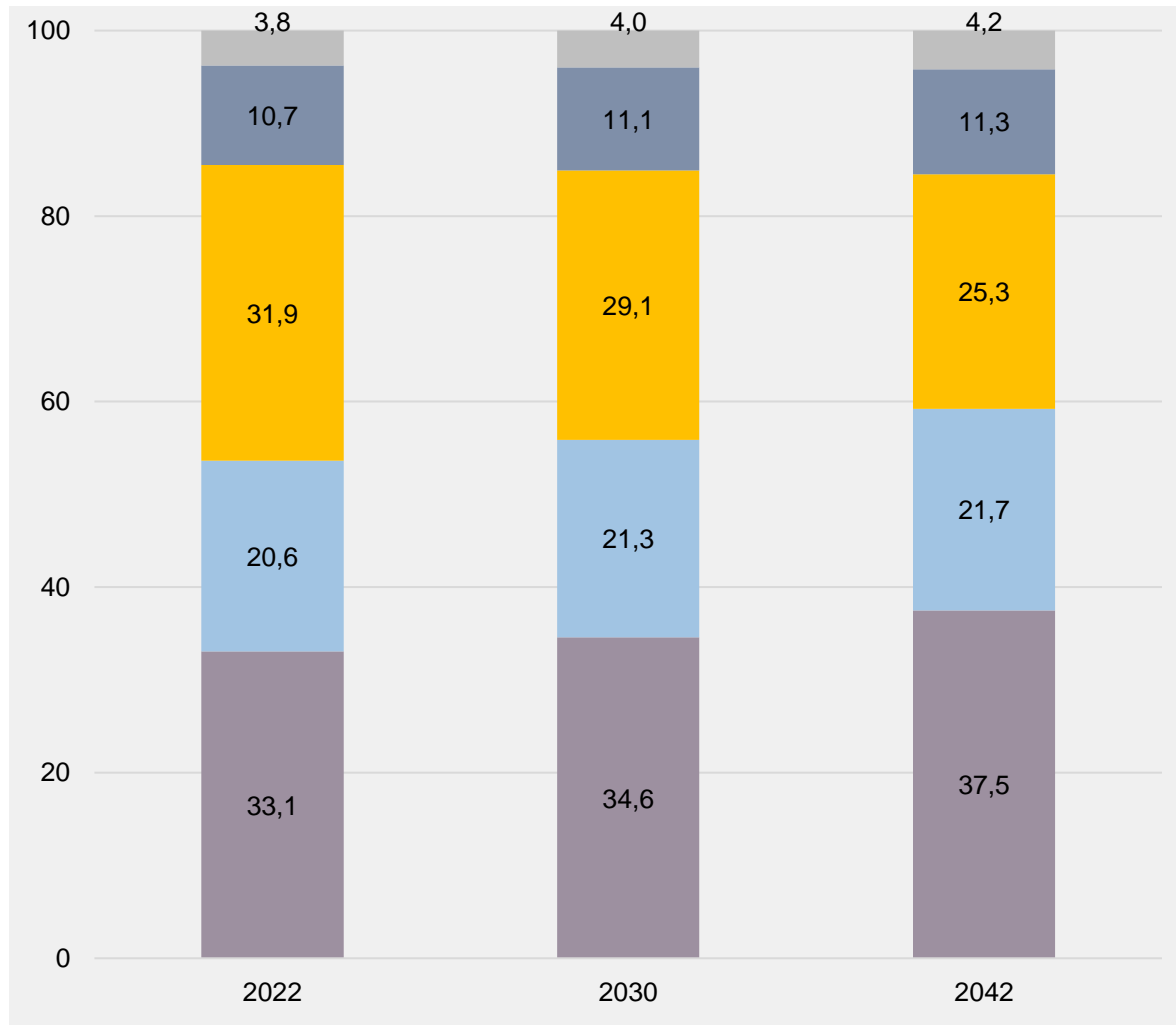
Valori percentuali

Per tipologia

Popolazione e famiglie



■ Popolazione ■ Famiglie



■ Persone sole ■ Coppie senza figli ■ Altro tipo
 ■ Genitori soli ■ Coppie con figli



4

La riqualificazione immobiliare

ANCE

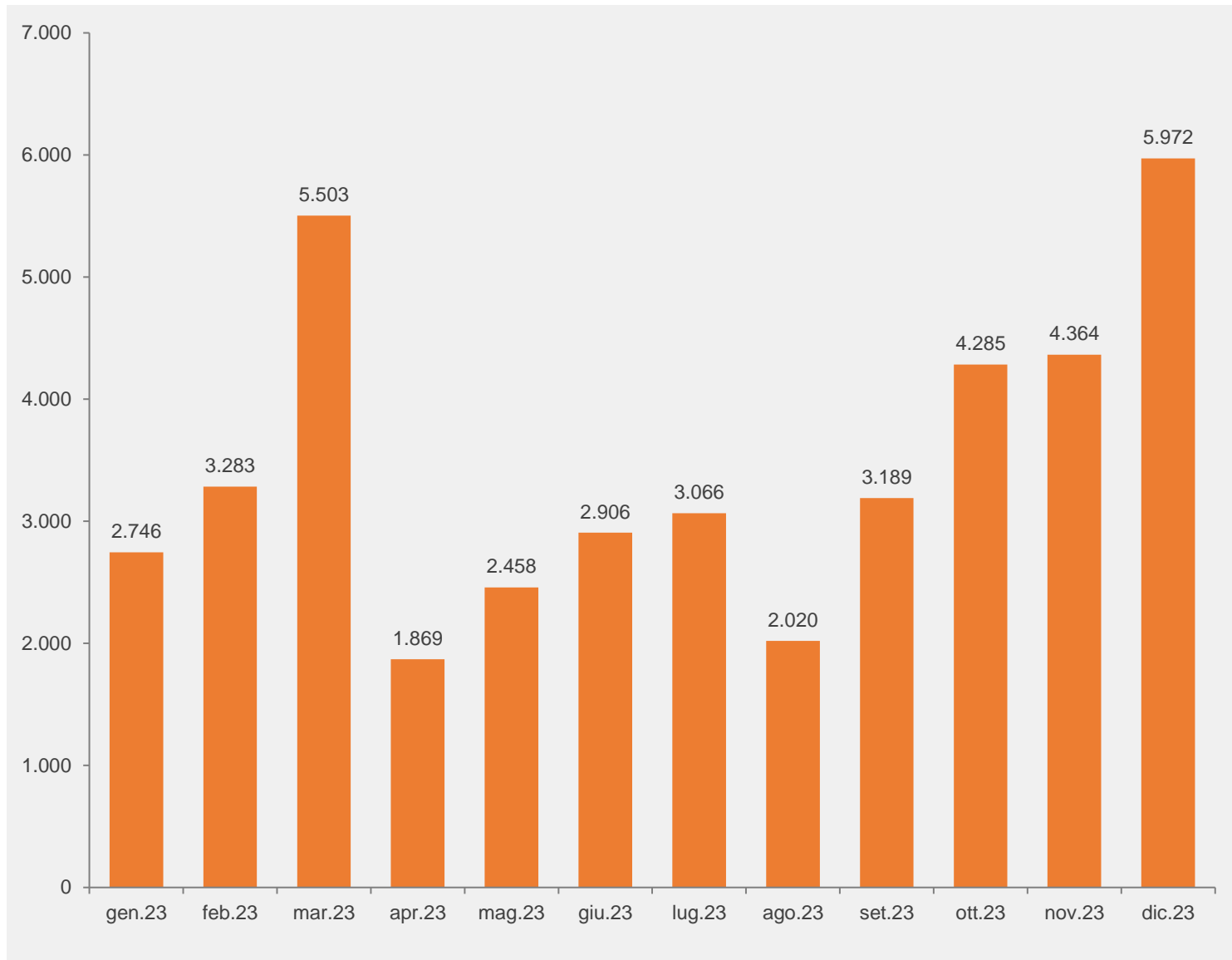
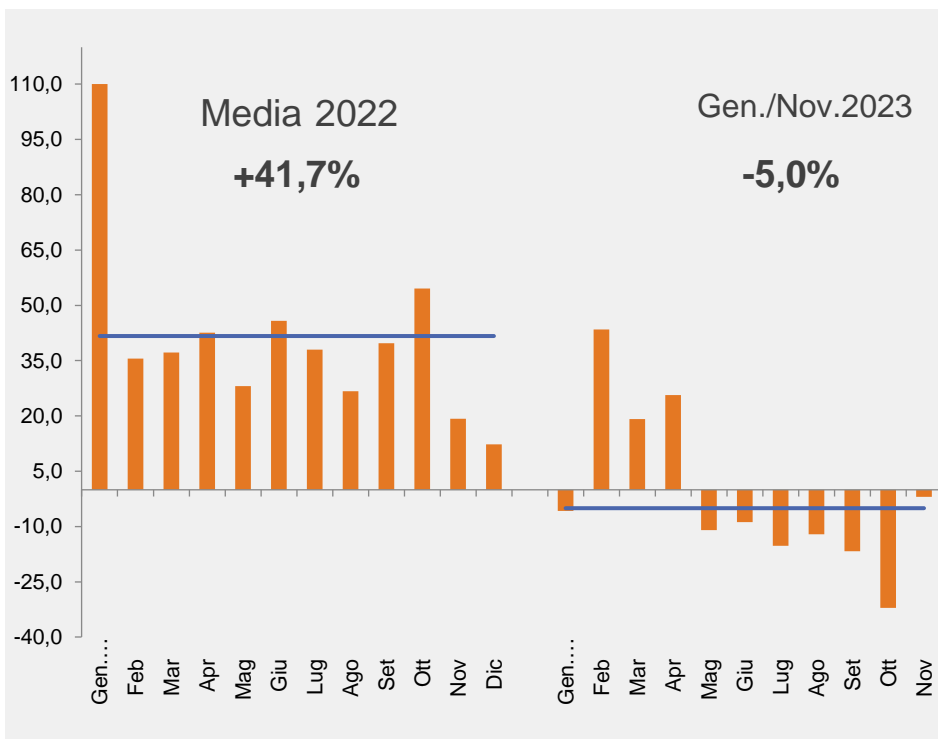
ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



I bonus per la riqualificazione immobiliare

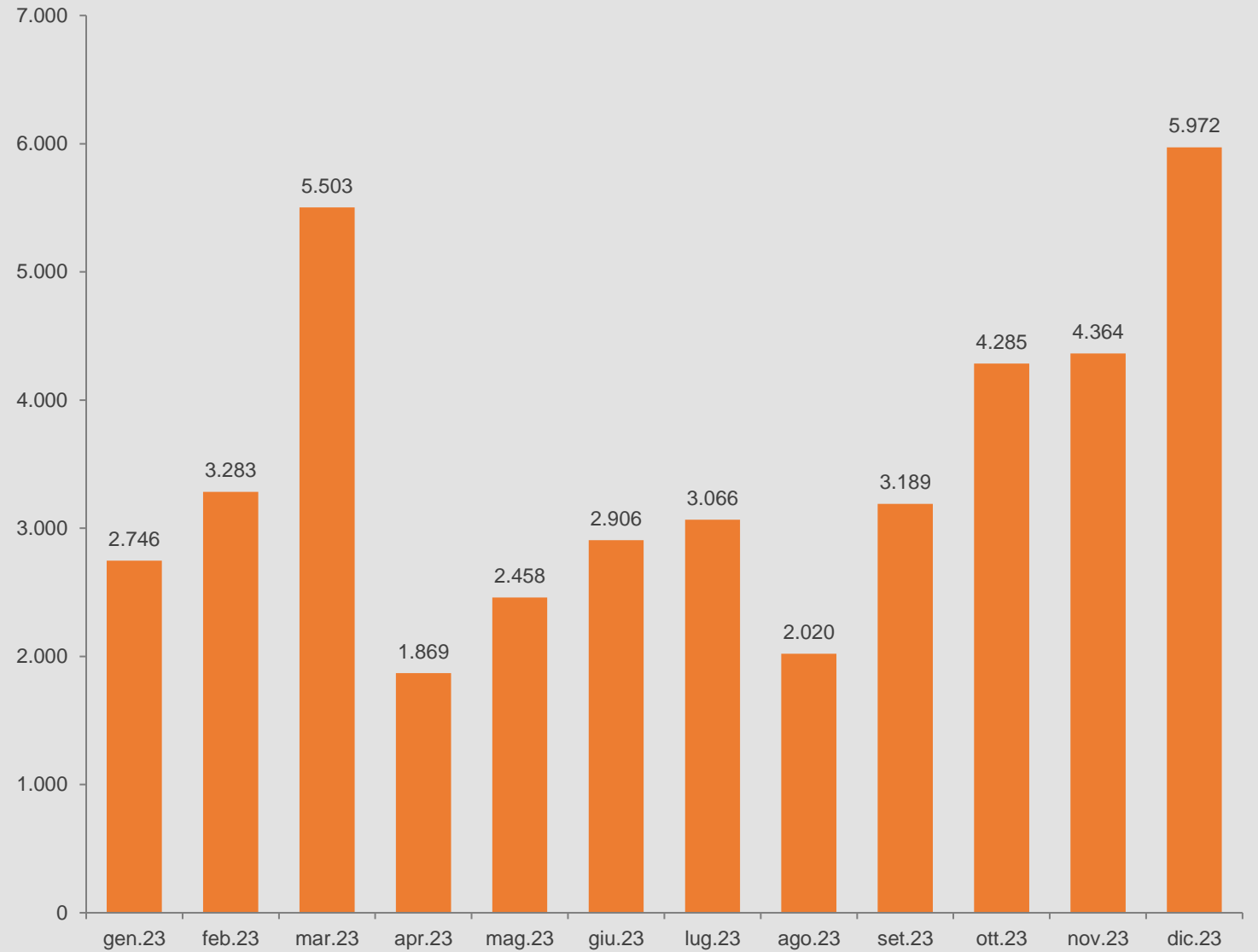
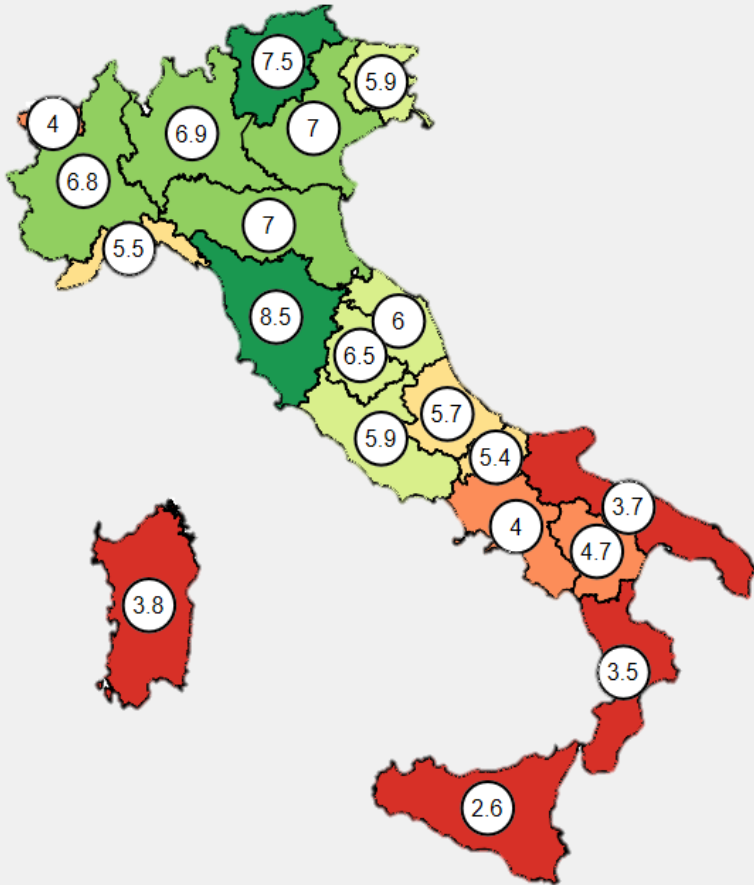
Superbonus

Riqualificazione



I bonus per la riqualificazione immobiliare

Superbonus



A large, stylized number '5' is the central focus of the left side of the image. It is composed of two main colors: a dark blue for the top and bottom horizontal strokes, and a bright orange for the vertical stroke and the middle horizontal bar. The number is set against a background of faint, light-colored architectural and data-related graphics, including lines and shapes that suggest a modern, technical environment.

Le infrastrutture

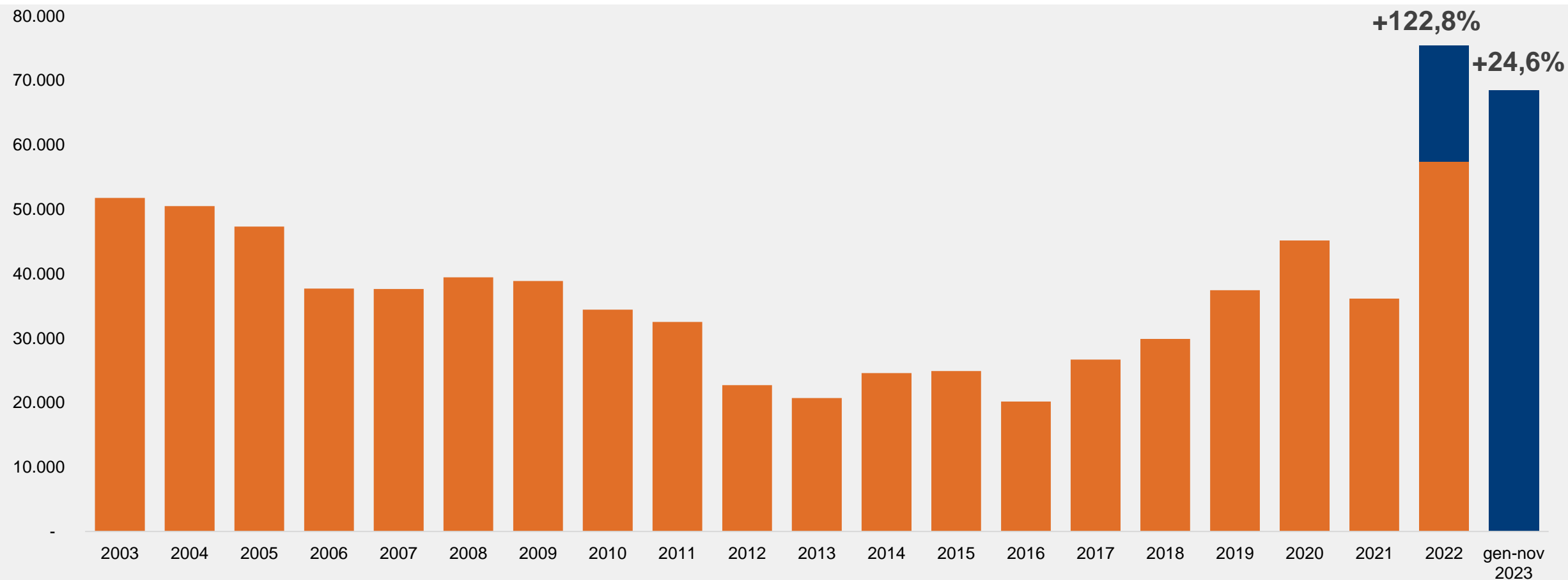
ANCE

ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



Bandi di gara (importo)

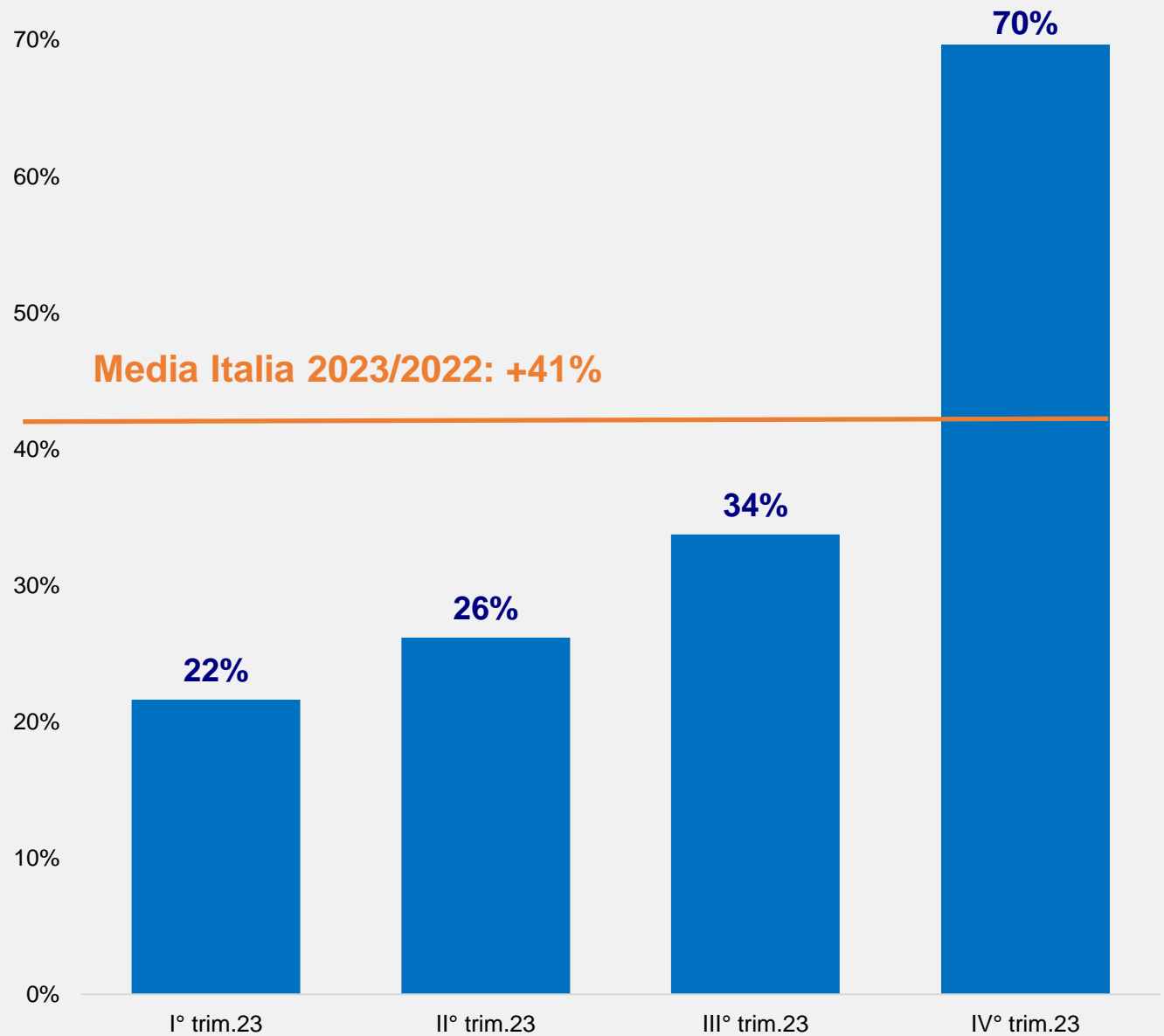
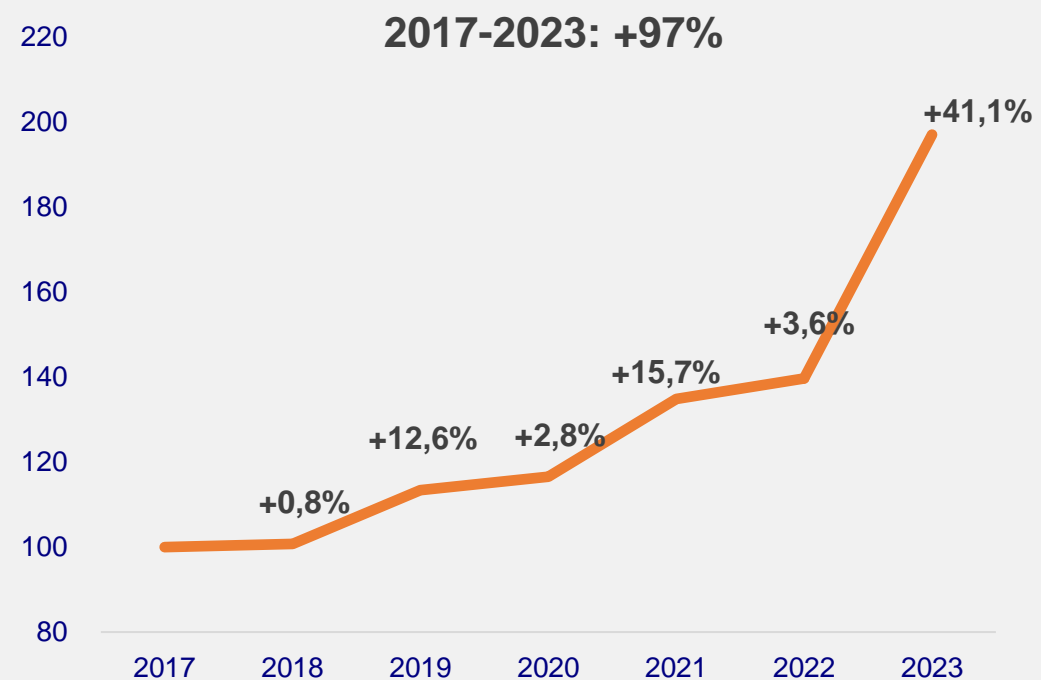
Secondo l'ANAC, il 35% del valore complessivamente bandito nel 2023 è attribuibile a gare PNRR



La spesa dei Comuni

Spesa nel 2023

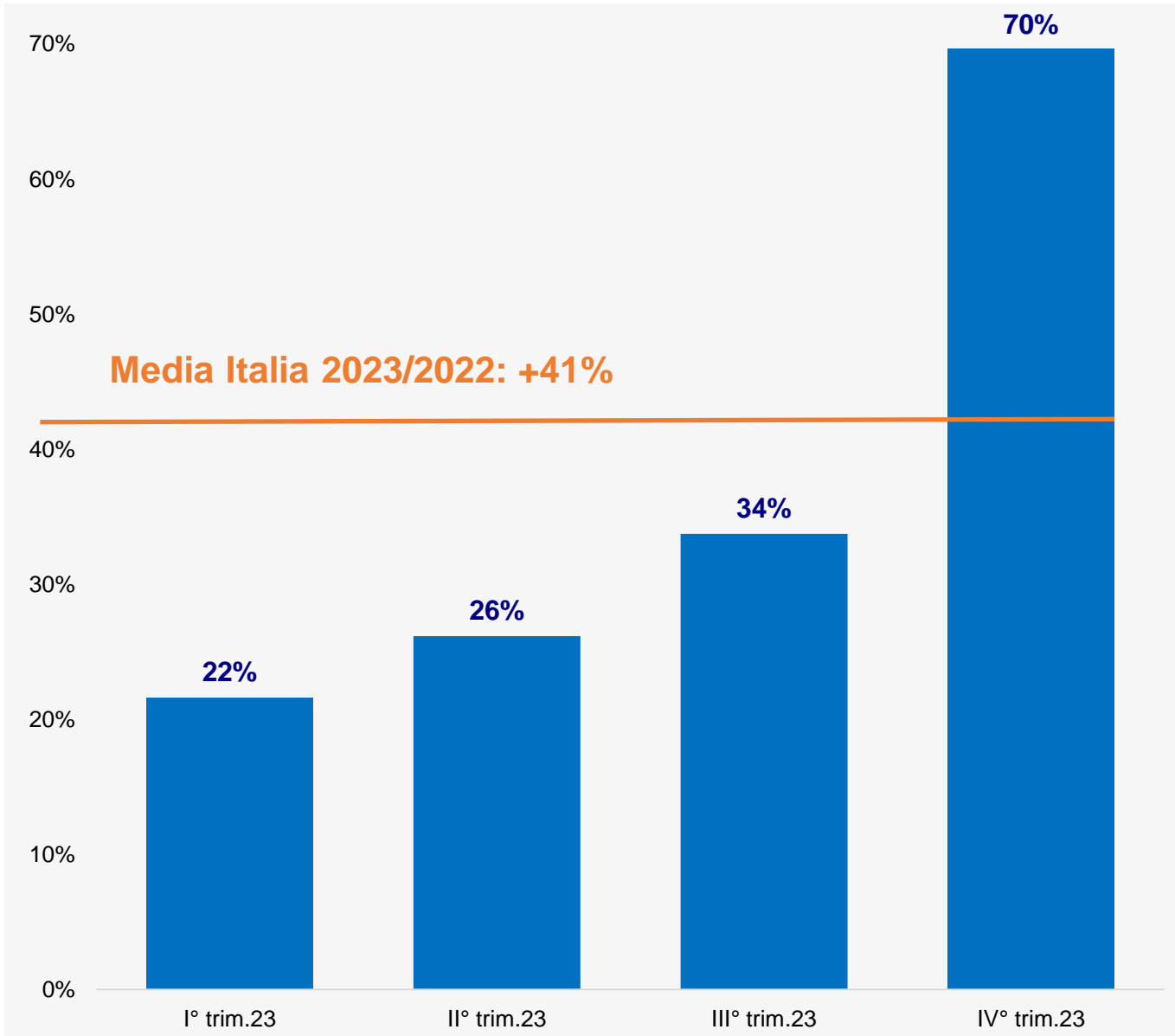
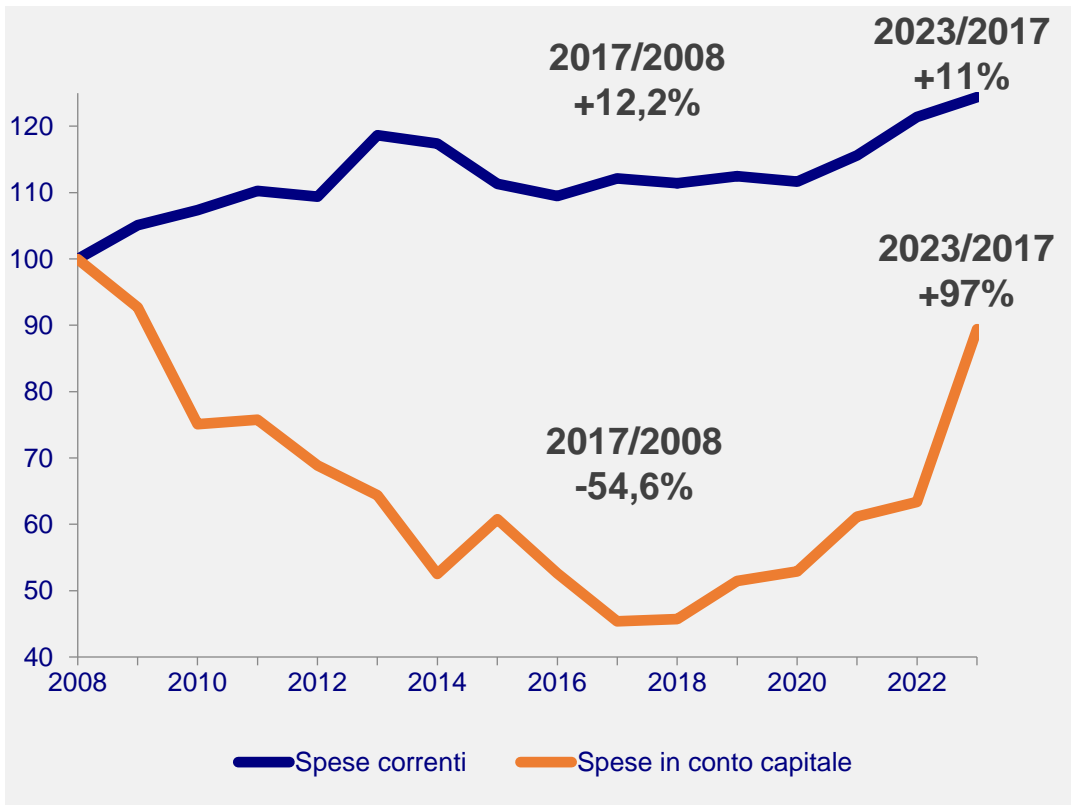
Spesa in c/capitale dei comuni (2017=100)



La spesa dei Comuni

Spesa nel 2023

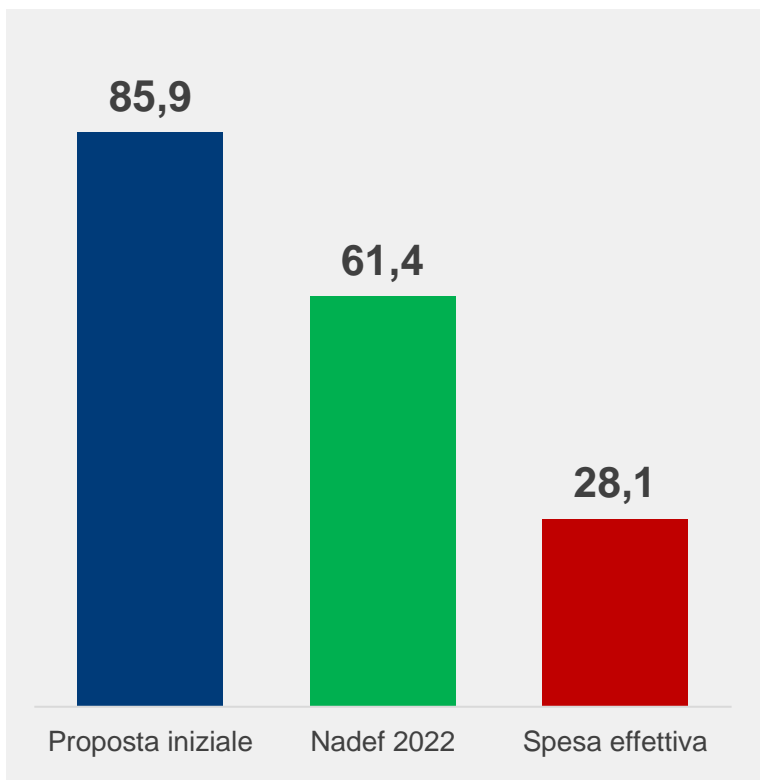
Andamento Spesa in c/capitale dei comuni (2008=100)



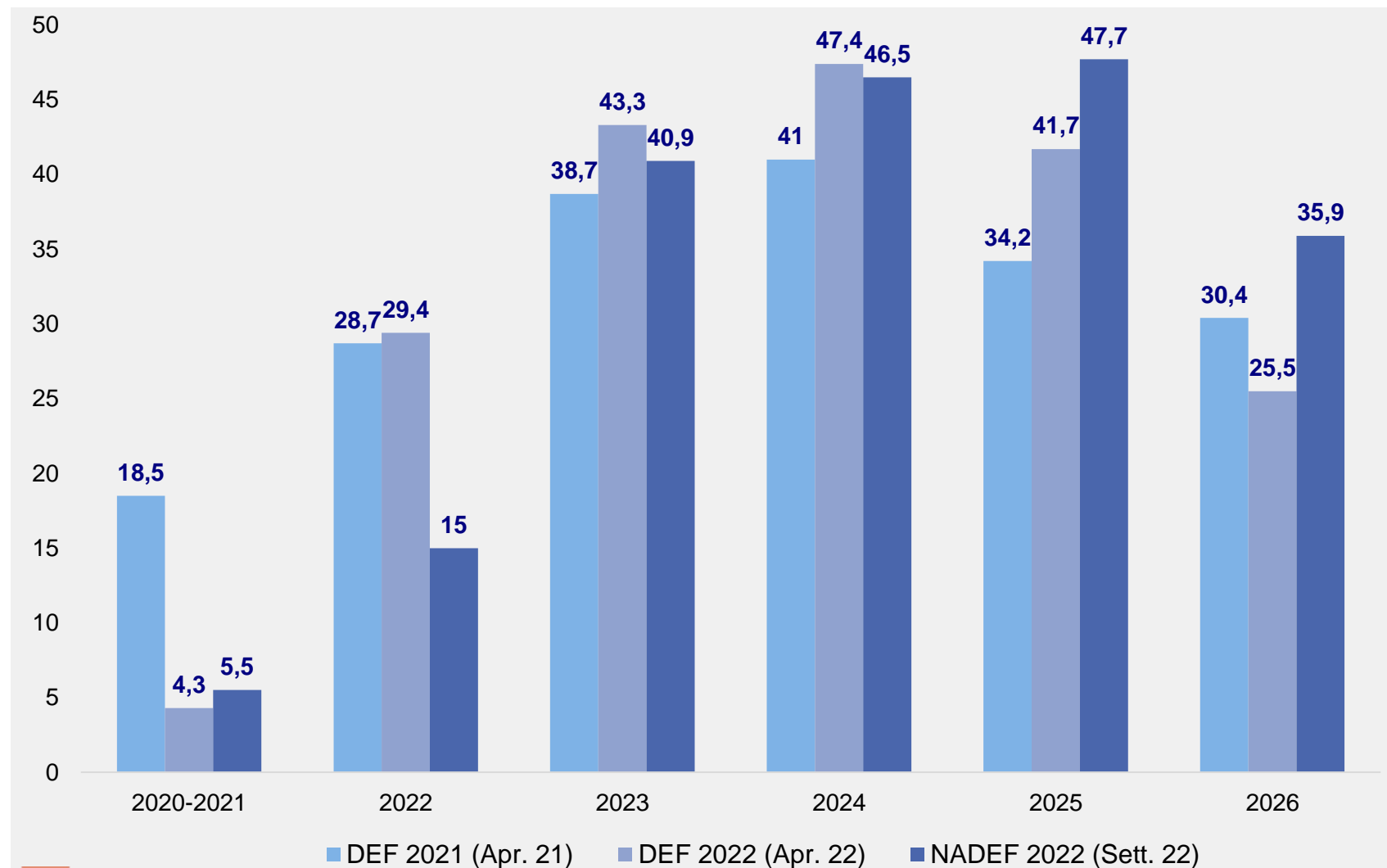
II PNRR

Previsioni di spesa (Mld €)

Spesa programmata vs effettiva (Mld€)



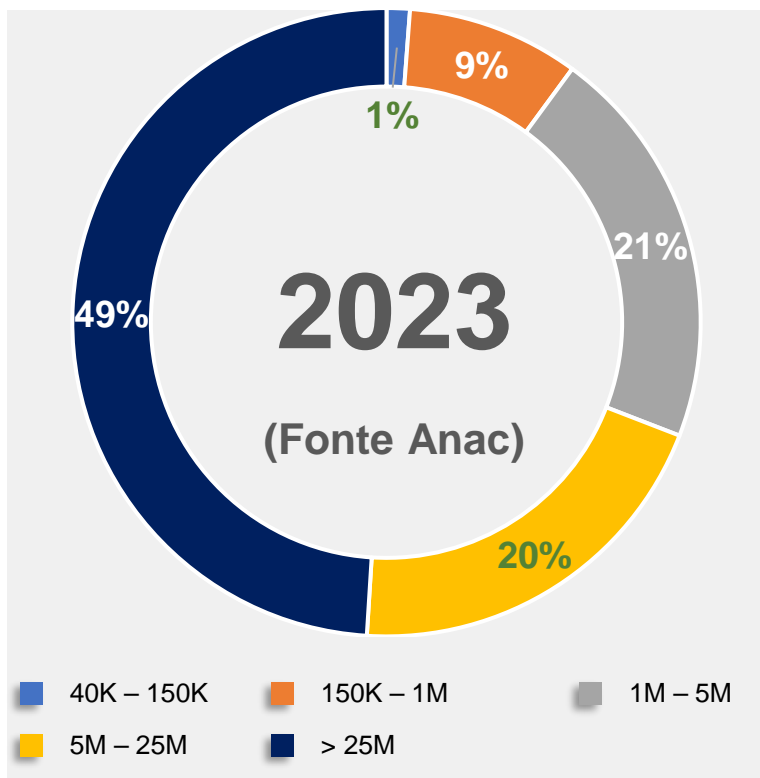
II PNRR per lo sviluppo



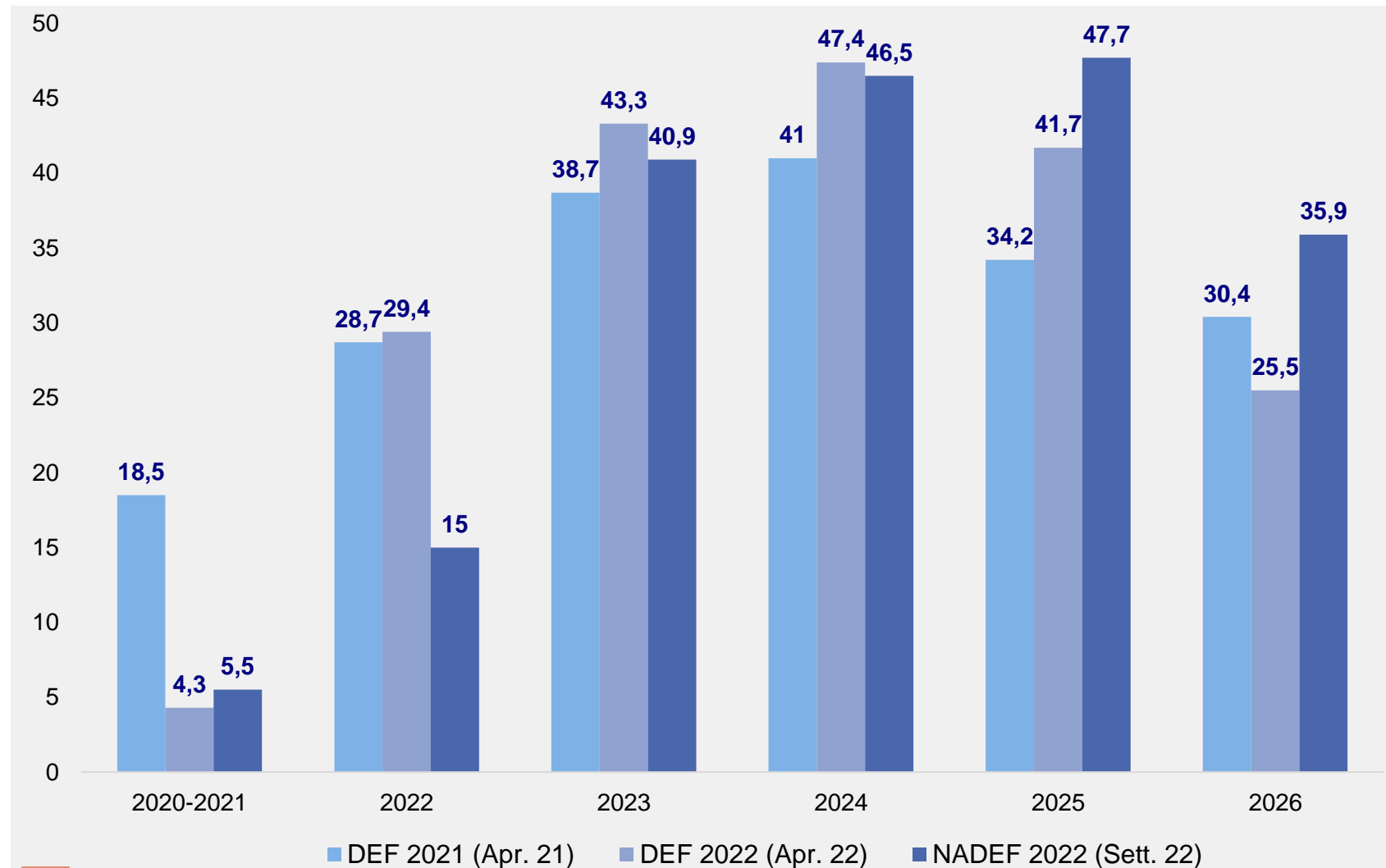
II PNRR

Previsioni di spesa (Mld €)

Bandi/inviti
Ripartizione per importo



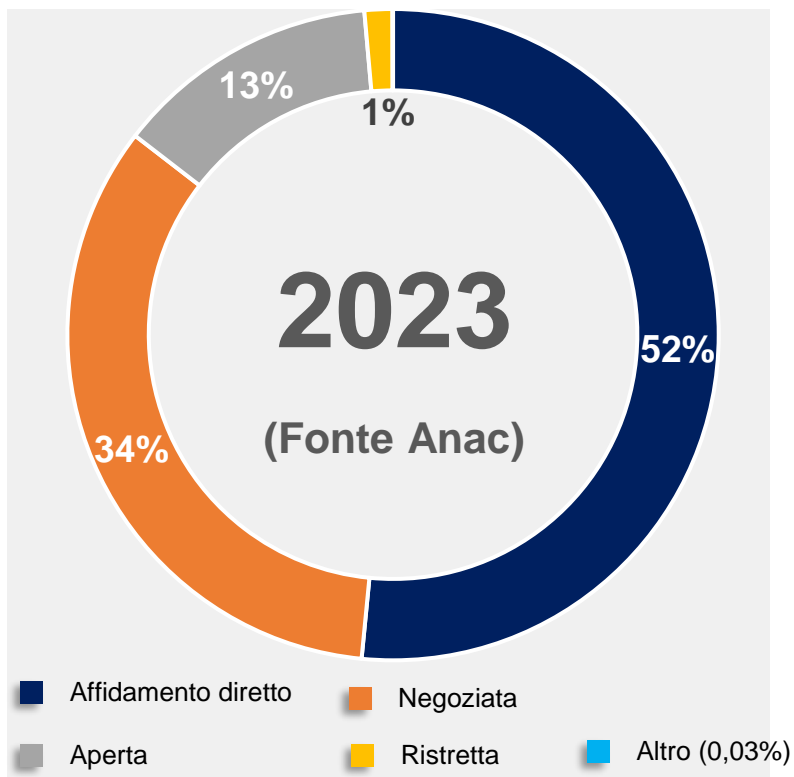
II PNRR per lo sviluppo



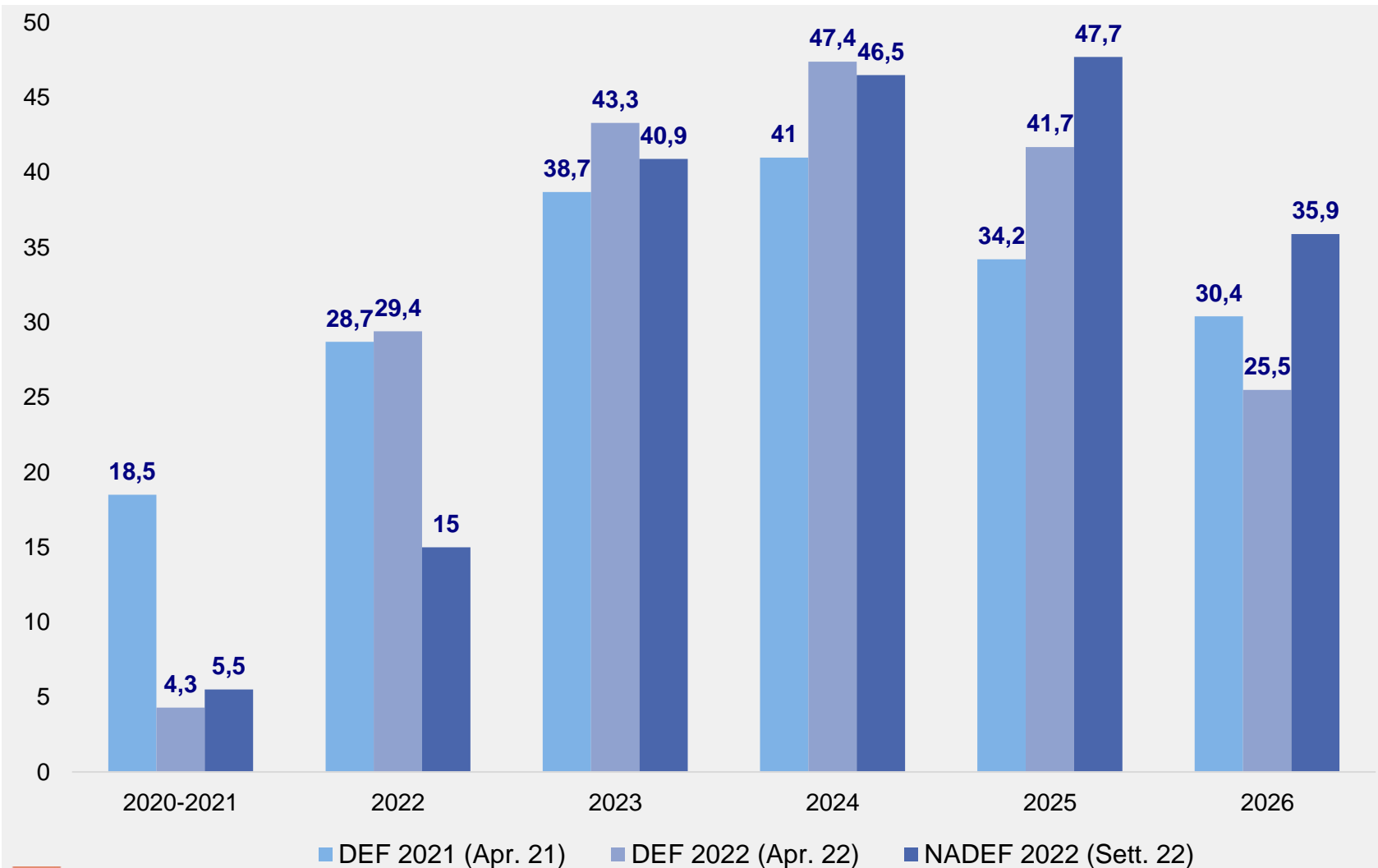
II PNRR

Previsioni di spesa (Mld €)

Bandi/inviti
Procedura di scelta contraente (numero)



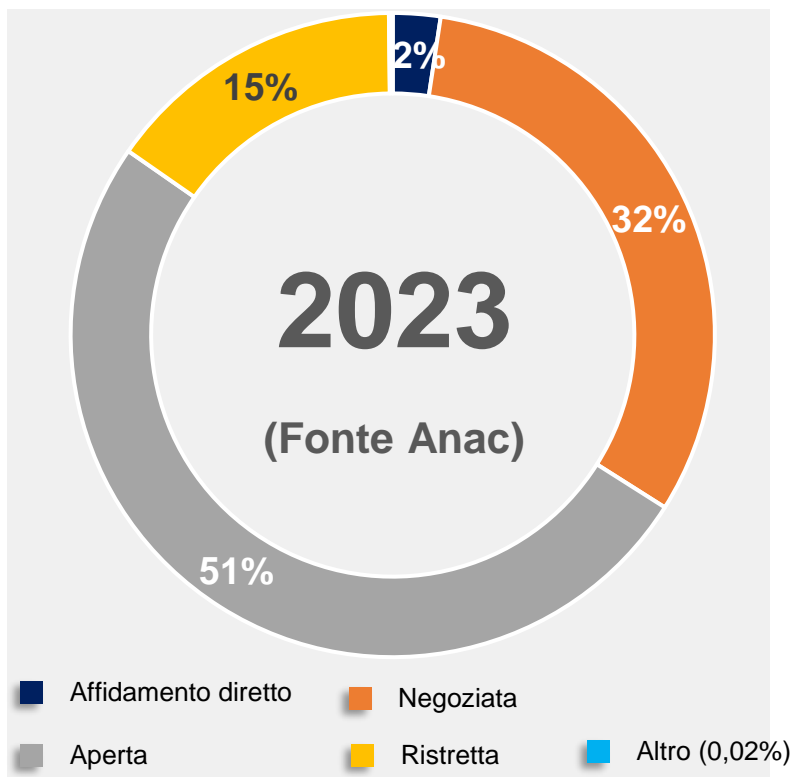
II PNRR per lo sviluppo



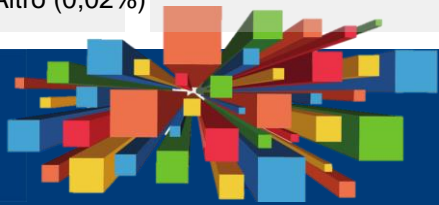
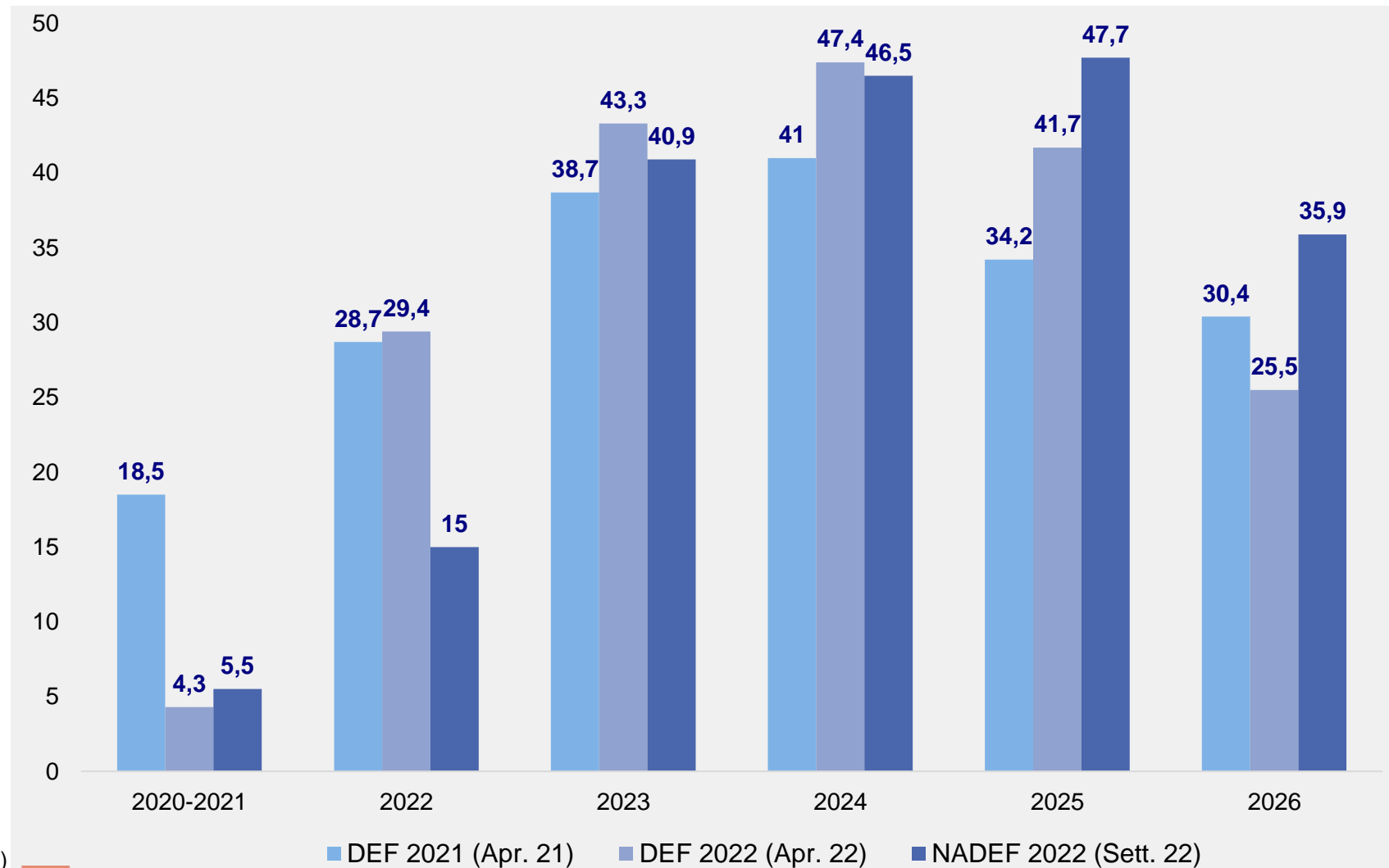
II PNRR

Previsioni di spesa (Mld €)

Bandi/inviti
Procedura di scelta contraente (importo)



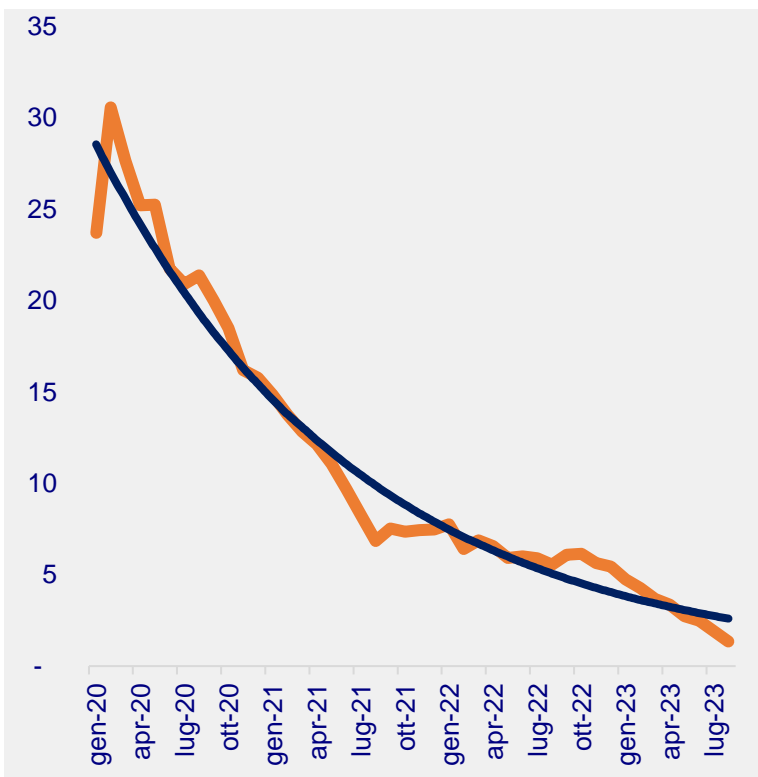
II PNRR per lo sviluppo



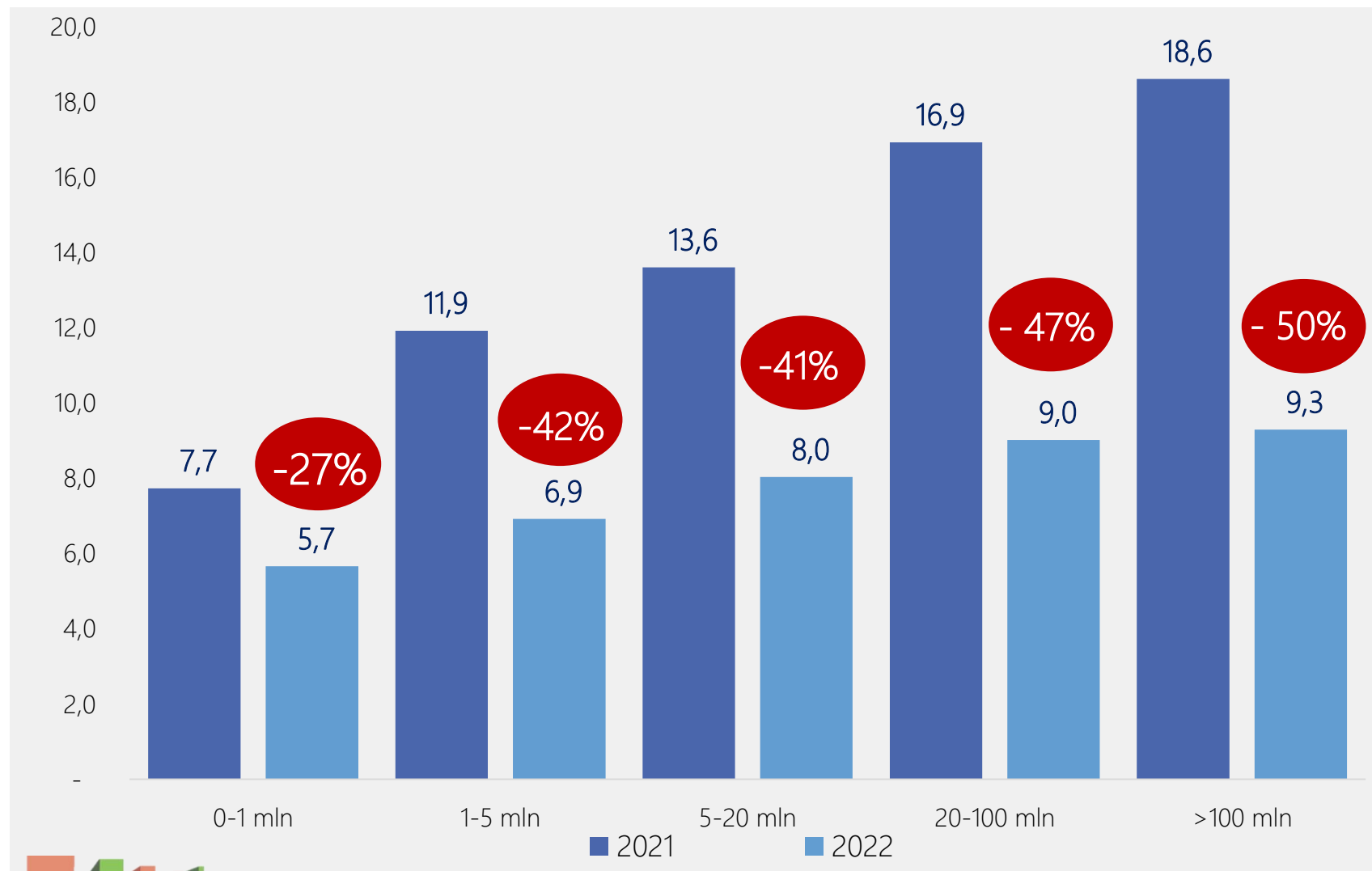
II PNRR

Tempi per fasce d'importo

Publicazione bando e inizio lavori
(mesi)



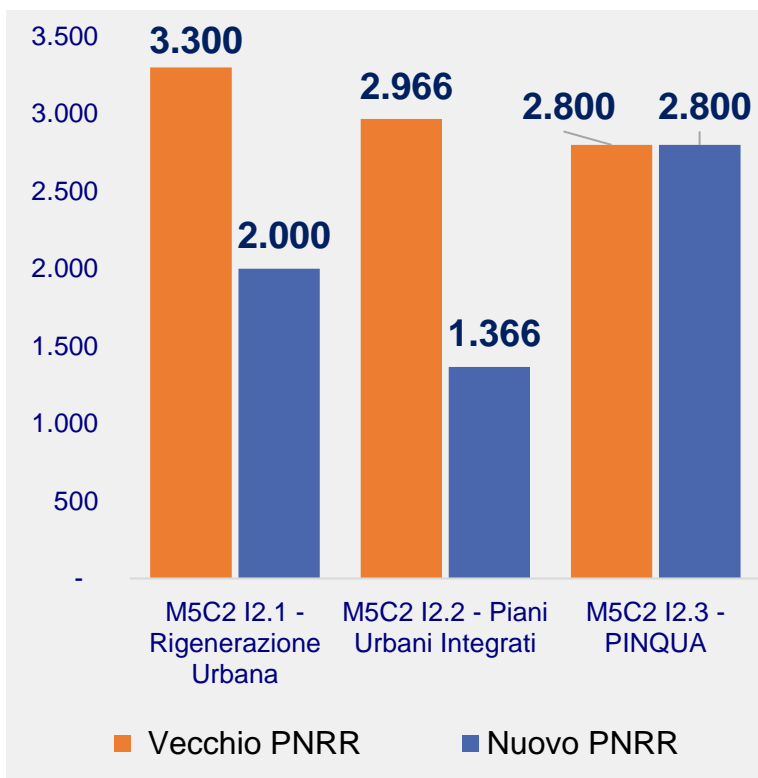
Ridotti i tempi di apertura dei cantieri



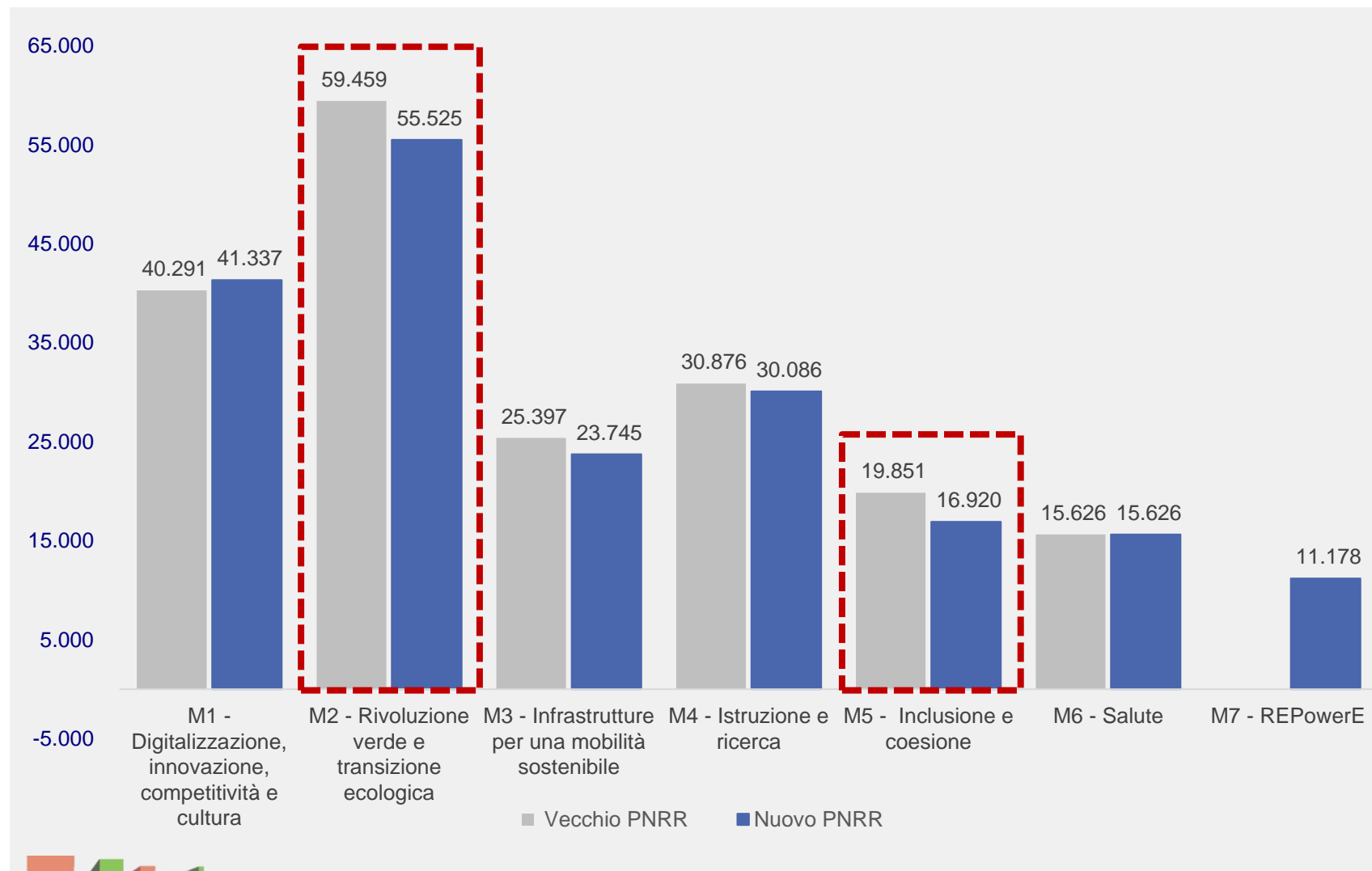
II PNRR

Ripartizione per Missione

Il caso della Missione 5



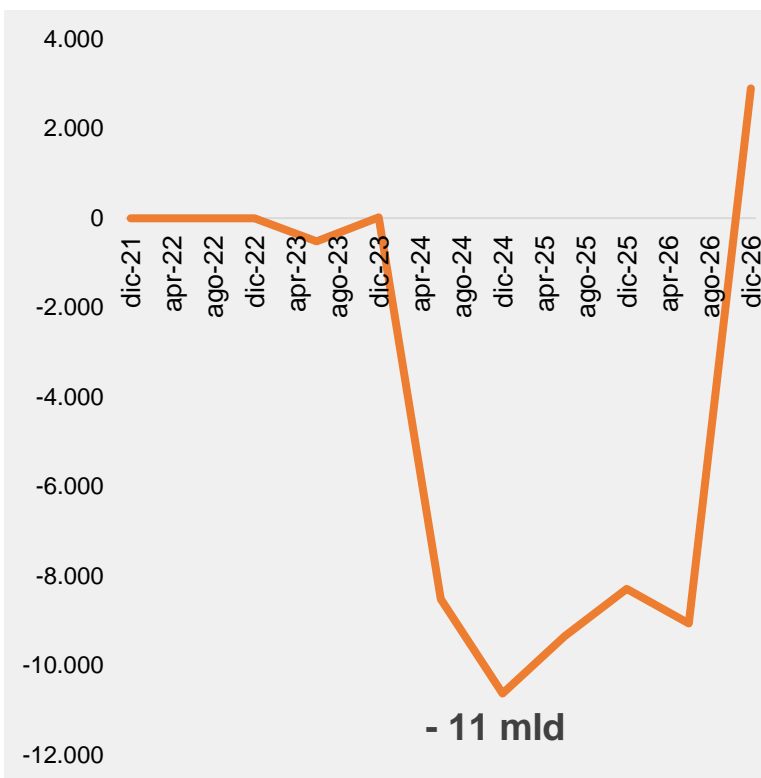
La revisione del PNRR



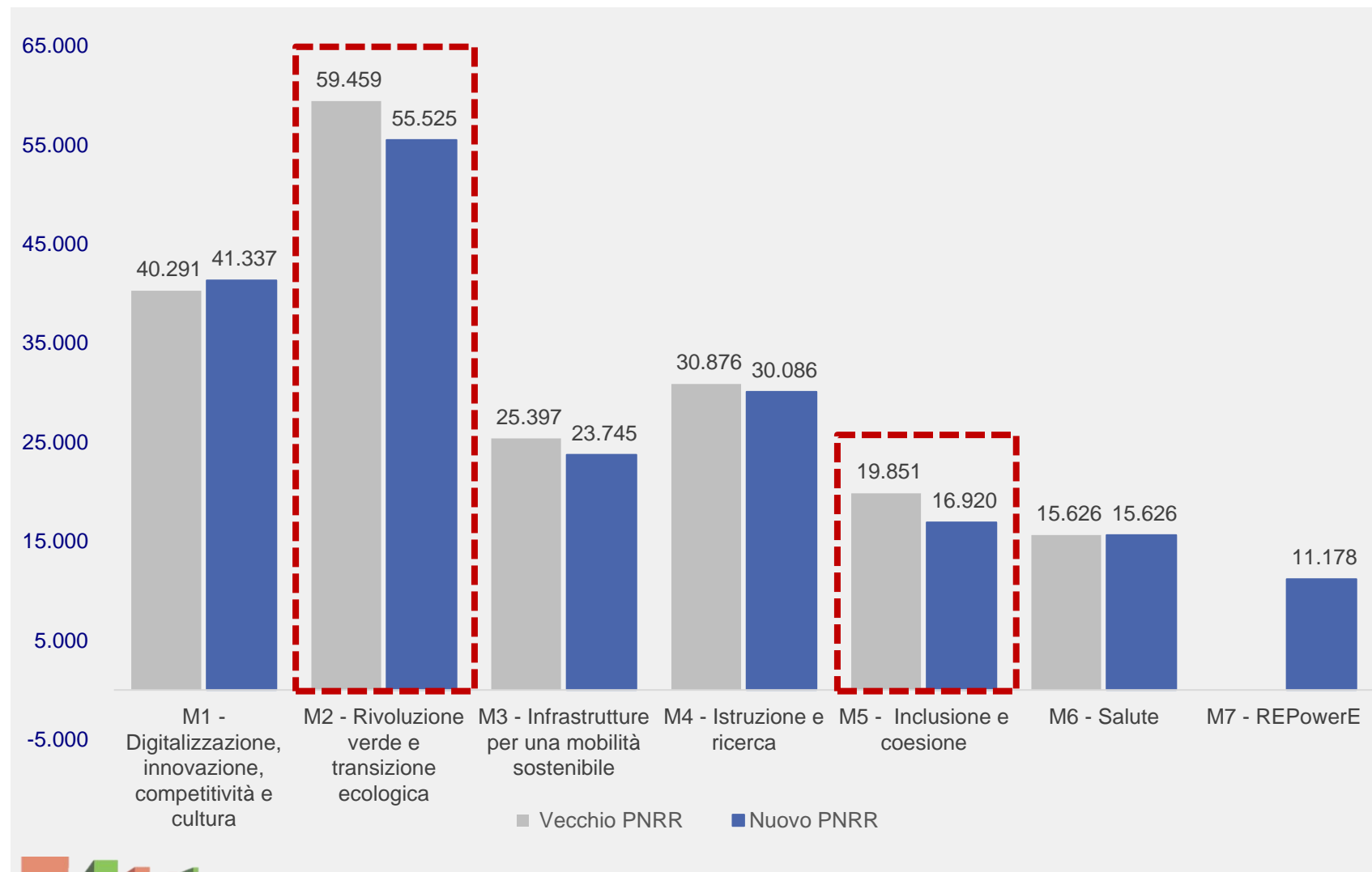
II PNRR

Ripartizione per Missione

La mancanza di cassa (mld cumulati)



La revisione del PNRR



6

Le previsioni per il 2024


ANCE

ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI



Le previsioni per il 2024

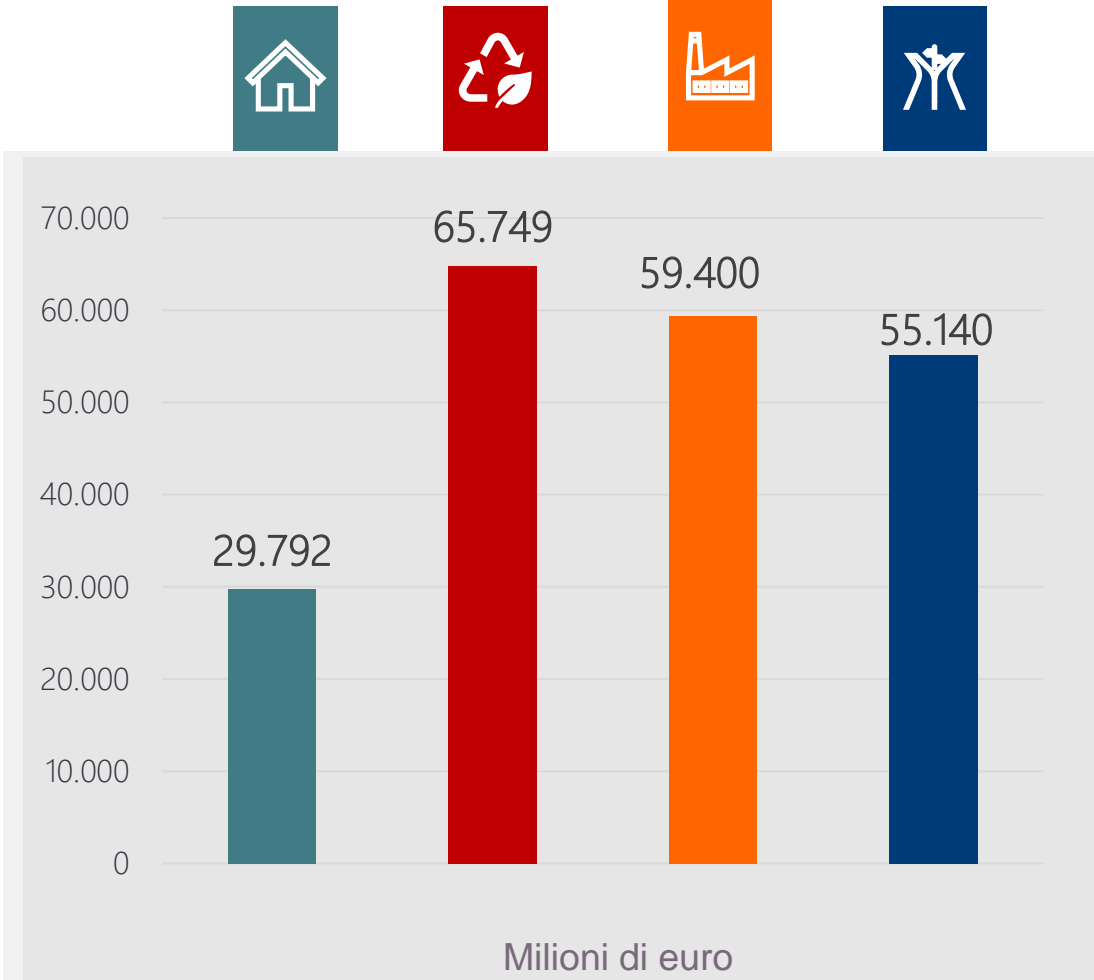
 **-7,4%**
Investimenti in costruzioni

 **-4,7%**
Nuove abitazioni

 **-27,0%**
RIQUALIFICAZIONE

 **-1,0%**
NON RESIDENZIALE PRIVATO

 **+20,0%**
OPERE PUBBLICHE





Una nuova politica per gli investimenti

ANCE

ASSOCIAZIONE NAZIONALE
COSTRUTTORI EDILI

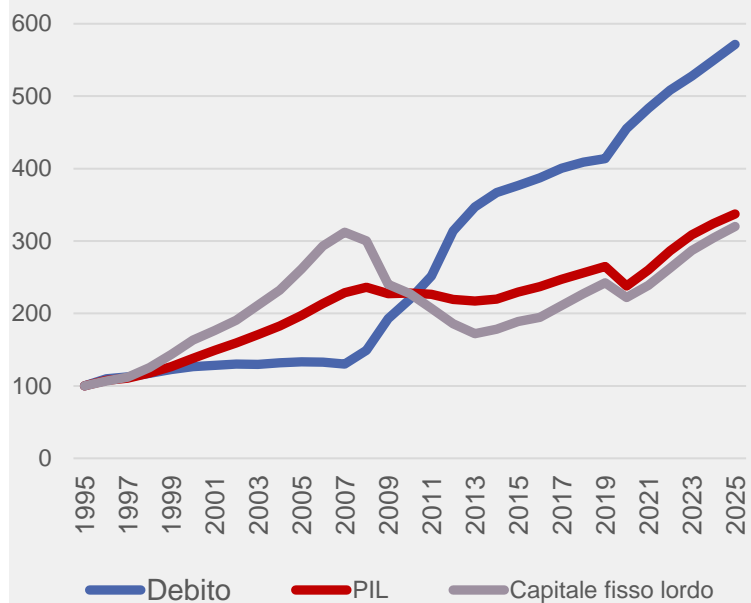


Una politica fiscale europea

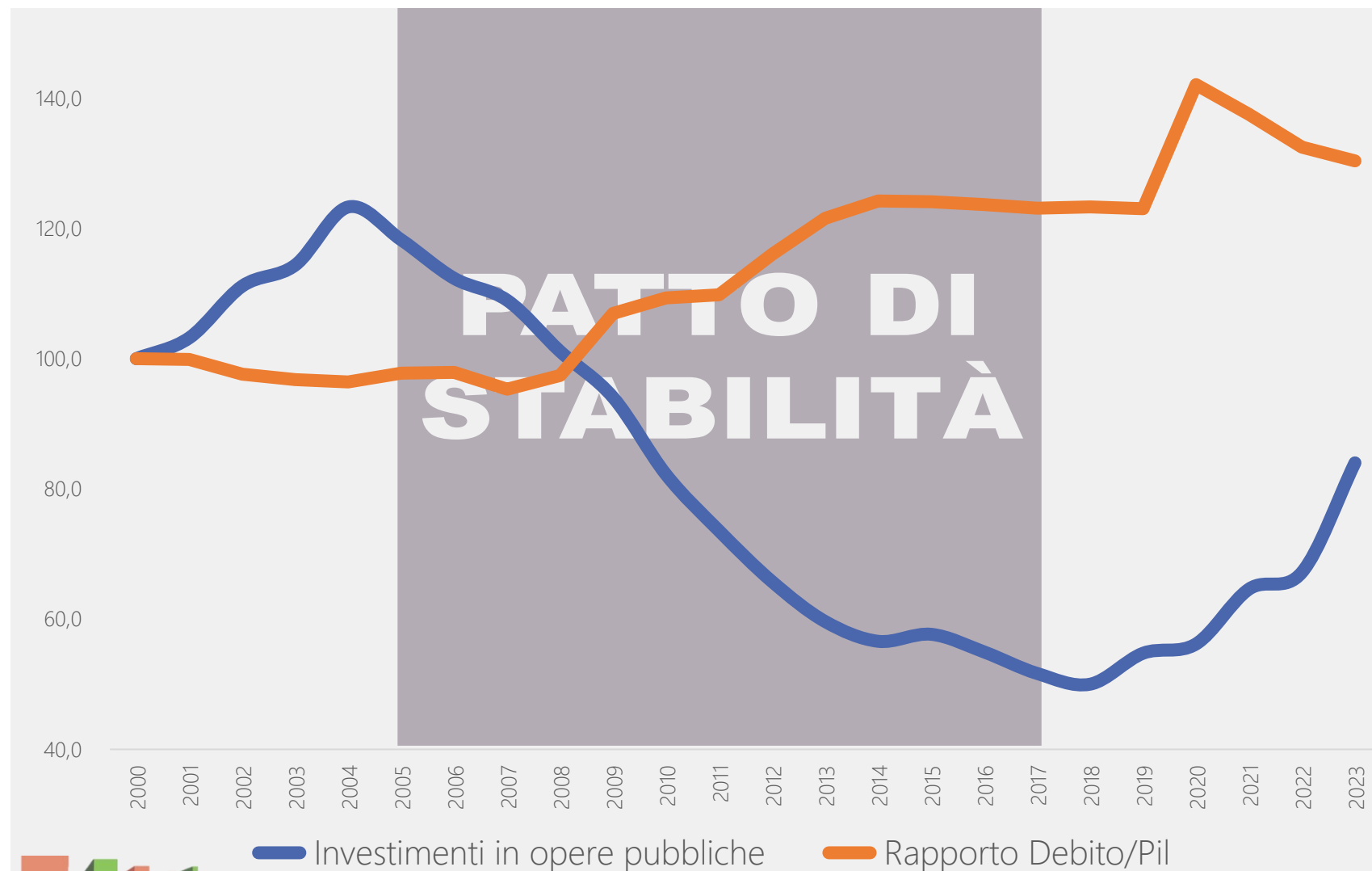
...

...

Spagna



Il rischio dell'austerità

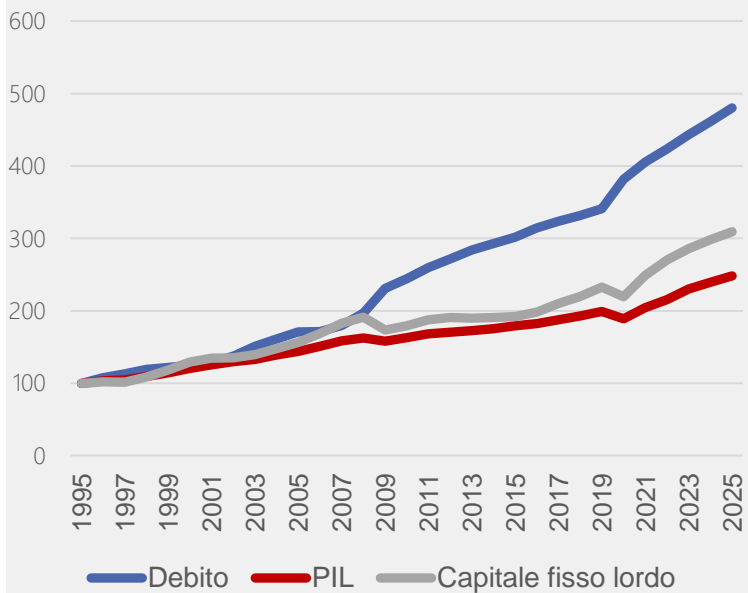


Una politica fiscale europea

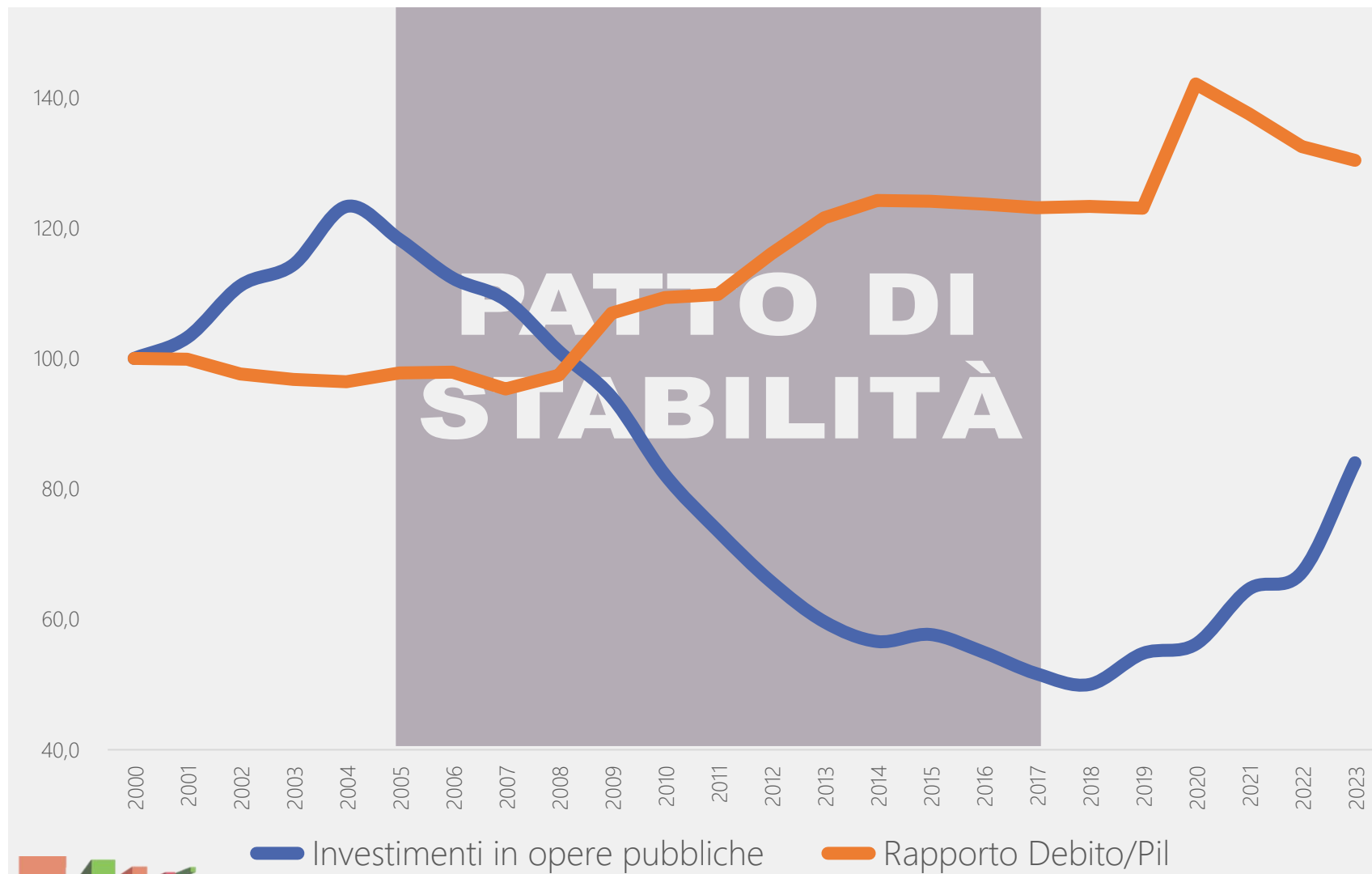
...

...

Francia



Il rischio dell'austerità



Una politica fiscale europea

...

...

Il rischio dell'austerità

Italia

