

Invest in HOUSING in Emilia-Romagna



The **housing system** has a significant presence in the regional economy and includes the productive sectors which carry out the designing, construction and furnishing of buildings, and also includes the production of highly technological machinery necessary for such business activities and related services.

Investors in housing can count on a network of suppliers of quality products and services which are used to being part of a network, centres working specifically on innovation, internationally known trade fairs and specialized human resources.

The regional ceramic sector is considered a leader not only on a national level but internationally too.

Invest in quality, high technology and advanced services

The regional building and tiling industries have achieved very high quality and productivity levels thanks also to the synergies they have created with manufacturing businesses which produce supporting machinery and advanced technology. Services available in the architectural and engineering fields are spread all over the region and represent an important resource in the form of highly qualified consultancy services. Furnishing products from the region are well known for the quality of their design and materials, whilst the large number of companies in the construction sector represent good support for those who want to invest in the building industry. The creativity of artisans from the Emilia-Romagna region can be seen even in niche markets such as that of artistic ceramics.

The housing cluster on an international level

Ceramics from our region to the value of 3,291 million Euros are exported all over the world every year. However, the entire cluster is known at an international level: the 10 trade fairs that are held in the region cover the various sectors involved in housing and have a strong participation from foreign operators in the field and not only represent an important meeting point for those who want to invest in the region but also contribute to the growing affirmation of the quality of products and services for the building and furnishing industries.

Invest in local Specialization

The business structure is made up of over 92,000 companies. In some areas, the specialized productive vocations are organized in districts with a high concentration of local businesses: one such case is the "ceramics district" in the area around Sassuolo (Modena). A high concentration of people employed in the housing cluster in general are to be found in Modena, Bologna and Reggio Emilia.

LEADING FACTORS

- 76.2% of national exports of ceramics are from our region
- 10 internationally known trade fairs
- The cluster employs over 294 thousand people
- Production of high quality furniture and furnishings
- Synergy with the advanced mechanics industry
- Advanced architectural and engineering services
- High quality niche markets such as artistically made ceramics

SOME COMPANIES FROM THE REGION

CERAMICS



WOOD, FURNITURE AND FURNISHINGS



BUILDING INDUSTRY



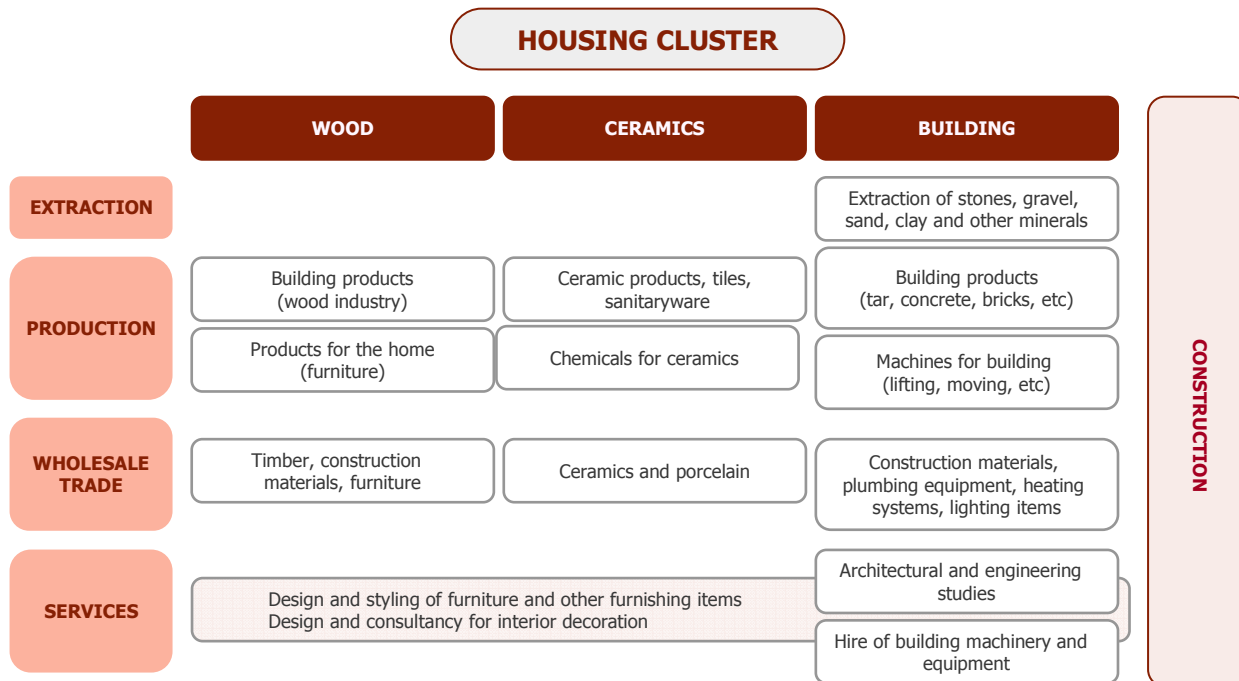
SERVICES





The housing cluster: the structure and its sectors

The companies that form the housing cluster are spread throughout the region and have been organized according to a logical system of cluster production: this means that the businesses involved tend to cover all the phases of production from start to finish by creating a successful operating system amongst themselves. Within the housing system we can single out **three sub-clusters: wood, ceramics and building**, to which we must add the **construction** macrosector which covers the preparation of building sites, the construction of buildings, the installation of services and the completion of works. This last sector is made up of 50% of those employed in the entire cluster.



Companies and the number employed

The housing cluster and sub-clusters: local units and the number employed (absolute values and quotas)
 Databank Istat-Asia 2006

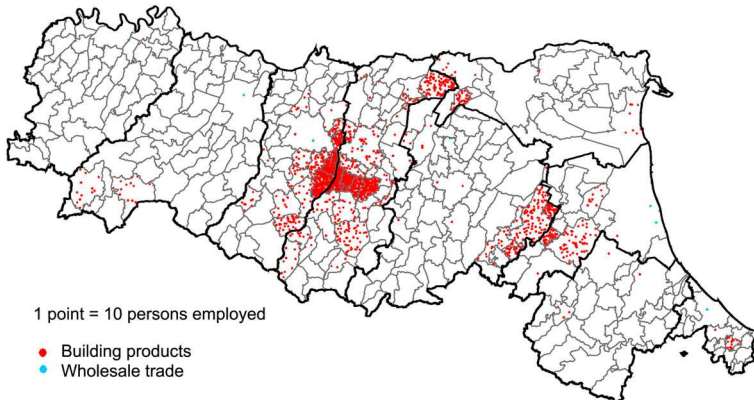
Sub-Clusters	Macrosectors	Local units	Quota of Local units in the entire cluster	Number employed	Quota of number employed in the entire cluster
WOOD AND FURNITURE	Building products	3,095	3.4%	16,755	5.7%
	Products for the home (furniture manufacturing...)	2,150	2.3%	12,519	4.2%
	Wholesale trade	4,245	4.6%	6,750	2.3%
	Total Sub-Cluster	9,490	10.3%	36,023	12.2%
CERAMICS	Building products (tiles, sanitaryware,...)	787	0.9%	28,902	9.8%
	Wholesale trade	69	0.1%	268	0.1%
	Total Sub-Cluster	856	0.9%	29,170	9.9%
BUILDING	Extraction businesses	264	0.3%	1,518	0.5%
	Building products (bitumen, tar, bricks, concrete, glass etc.)	3,547	3.8%	27,084	9.2%
	Building and construction machinery (lifting and moving,...)	1,025	1.1%	20,758	7.0%
	Wholesale trade (plumbing equipment, heating, lighting items,...)	2,129	2.3%	12,375	4.2%
	Services (architectural, engineering,...)	15,905	17.3%	20,264	6.9%
	Total Sub-Cluster	22,870	24.8%	82,000	27.8%
CONSTRUCTION					
	Total Sub-Cluster	58,943	64.0%	147,368	50.0%
Total HOUSING CLUSTER		92,159 companies		294,561 number employed	



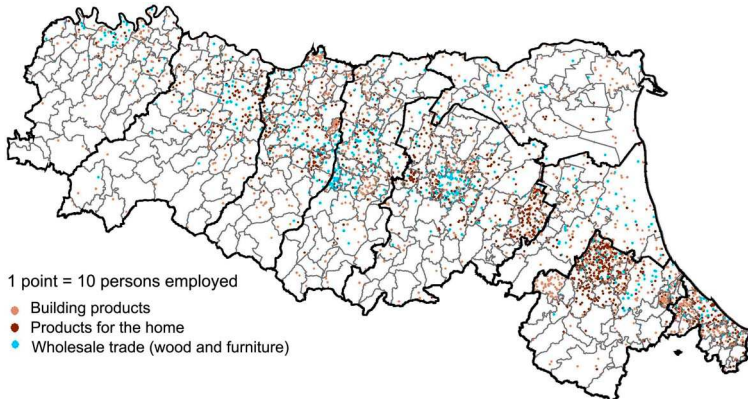
The regional housing cluster

The number employed and local units are equally divided between the main sub-clusters: ceramics, wood and furniture, and building

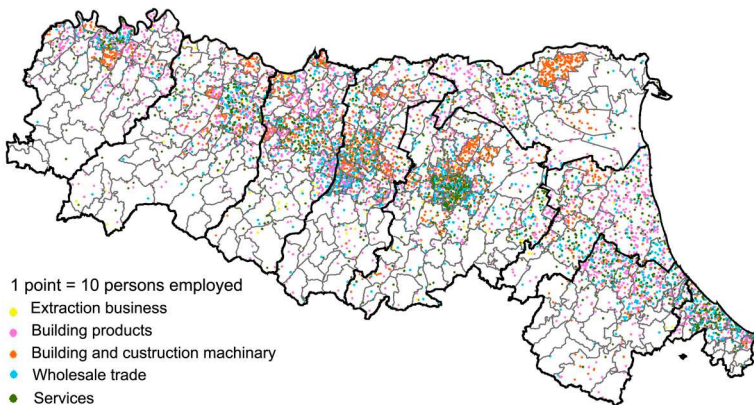
Housing cluster – Number employed in the ceramic sub-cluster in 2006



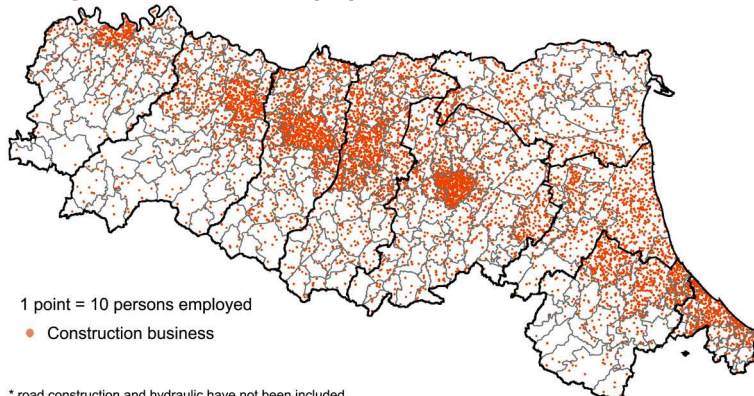
Housing cluster – Number employed in the wood and furniture sub-cluster in 2006



Housing cluster – Number employed in the building sub-cluster in 2006



Housing cluster – Number employed in the construction sector in 2006



* road construction and hydraulic have not been included

Districts and areas with higher concentrations of number employed

Sub-cluster Ceramics

- High concentration in the area known as the **ceramics district**, between the provinces of **Modena** and **Reggio Emilia** (Sassuolo, Fiorano, Castellarano, Casalgrande, Castelvetro, Rubiera) with around 60% of the number employed and 44% of local units
- Followed by the province of Ravenna (Faenza in particular) and Bologna

Sub-cluster Wood and Furniture

- A larger concentration in the **Bologna** area (**Imola** in particular) and **Modena**
- Followed by Reggio Emilia and Forlì-Cesena

Sub-cluster Building

- Higher concentration levels in **Bologna**, **Modena**, **Reggio Emilia** and **Copparo (FE)** working in particular on the manufacturing of machinery

Sub-cluster Construction

- Spread all over the region, with higher concentrations in **Bologna** and **Reggio Emilia** followed by **Parma**, **Ravenna** and **Modena**



The housing cluster on an international level

Exports

Databank: Istat - Coeweb

In 2006, the regional housing sector exported around 4,603 million Euros of goods (23.4% of the national housing and 9.4% of the regional export). Exports from the "ceramic sector" in our region amounted to 76.2% of the national total (Databank: Istat - Coeweb).

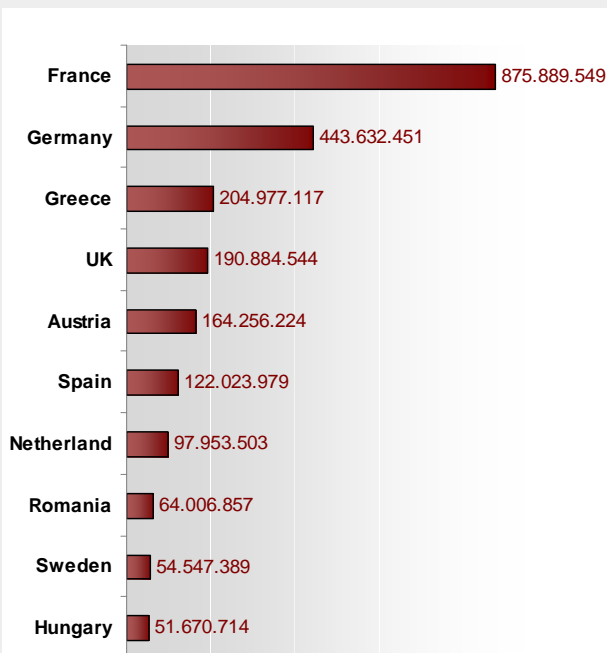
Where we export to

Percentage of total exports per destination – 2008

Percentage of total exports per destination – 2008				
European Union 27	Other European Countries	North America	East Asia	
61.1%	12.7%	12.1%	3.5%	
Oceania and other territories	Central-South America	North Africa	Other African countries	Other countries
1.5%	1.4%	1.1%	1.1%	5.7%

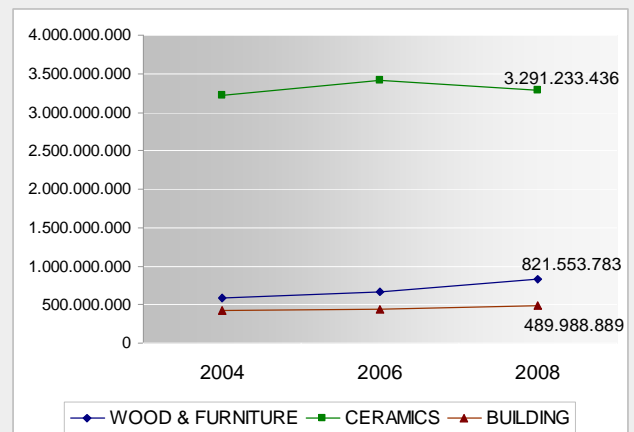
The main destination of our exports is Europe. Figures of exports to North America are also to be noted.

The main EU countries we export to All figures given in Euros – 2008



Export trends

The variations over the long period and over the last few years show that the growth in exports has been mainly sustained by "ceramics" which make up 71.5% of exports from the cluster.



The building sector has a lower inclination towards exports. Ceramics sector had a slight dip in the last two-year period but the general trend is still positive. Wood and furniture sector shows the highest level of growth over the long term.











Housing Cluster – Variation in % of exports

	2004-2008	2004-2006	2006-2008
Wood and Furniture	+38.5%	+13.0%	+22.5%
Ceramics	+2.0%	+5.8%	-3.6%
Building	+16.9%	+6.7%	+9.6%
TOTAL for the housing cluster	+8.6%	+6.9%	+1.6%



The housing cluster on an international level

International Trade Fairs

	CERSAIE www.cersaie.it	International salon of ceramics for architecture and bathroom sanitaryware held at the Bologna Fair. 176,000 square meters of exhibition space with 1,037 exhibitors, 82,422 visitors of which 28% are foreign (mainly from Europe and Asia). (Data 2009)
	SAIE www.saie.bolognafiere.it	International salon for the building industry which numbers 1,530 exhibitors in 2009 (of which 320 from abroad) and over 166,000 professional visitors working in the sector (of which 6.876 are from abroad). Held at the Bologna fair.
	SAIENERGIA www.saienergia.bolognafiere.it	Renewable Energy and Energy Efficiency. Among the sectors of goods covered: heating and air-conditioning, the production of electrical energy, etc.
	TECNARGILLA www.tecnargilla.it	International salon of Technology and Supply to the Ceramic and Brick industry held at the Rimini Fair. 80,000 square meters of exhibition space, over 31,000 visitors (39% from abroad), 700 exhibitors (data 2008).
	QUADRUMSACA www.quadrumsaca.com	Rods, Frames, Graphics and Technology at the Bologna Fair. 5,855 visitors (1,912 foreign ones who come from 72 countries) in 2009.
	TECHNODOMUS www.technodomus.it	Salon of Industry, Wood for building industry and furniture held at the Rimini fair. With 25.000 m ² of exhibition space, 140 expositors and over 18,000 visitors (data 2009).
	EDILSHOW www.edilshow.it	Salon for the building industry held at the Piacenza fair. With 69 expositors and an exhibition space of 10,000 square meters (data 2009)
	LA CASA IMMAGINATA www.casa.piacenzaexpo.it	Salon of furniture held at the Piacenza fair.
	ECO CASA & IMPRESA www.ecocasa.re.it	Exhibition & Conference on sustainable architecture, saving energy, economy and environment. 140 exhibiting companies, 12,500 square metres of exhibition space with 25,000 visitors (data 2009).
	HABITAT www.habitatfiera.it	Fair for furniture and housing solutions at the Ferrara fair. 23.800 visitors and 216 expositors in 2009

Top Investors

Some important foreign investors in housing in Emilia-Romagna (Source: Reprint, 2006)

Companies	Investors	Country of Origin	Type of business
CERAMICHE ATLAS CONCORDE SPA	BNP-PARIBAS SA	France	Manufacturing of ceramic tiles
WIENERBERGER BRUNORI SRL	WIENERBERGER ZIEGELINDUSTRIE	Austria	Bricks for residential property
MANITOU COSTRUZIONI INDUSTRIALI SRL	MANITOU B.F.	France	Construction of Lifts
CASTELLI SPA	HAWORTH INC.	United States	Office furniture
HERMANN SRL	VAILLANT GMBH	Germany	Wall mounted gas boilers
TEREX ITALIA SRL	TEREX CORP.	United States	Hydraulic self-moving crane trucks
EUREC SRL	IMERYS SA	France	Wholesale trade of clay and raw materials for the ceramic industry
OVA G. BARGELLINI SPA	SCHNEIDER ELECTRIC SA	France	Lighting products
LAUFEN DURAVIT ITALIA SRL	GRUPPO ROCA	Spain	Building products
SAINT-GOBAIN WEBER	GRUPPO SAINT-GOBAIN	France	Building products



Facilities available to businesses in housing in Emilia-Romagna

University and Training Courses

Degree Courses

University of Bologna

- Architecture Faculty - www.arch.unibo.it
- Three year course in Building engineering - www.ing.unibo.it
- Three year course in Chemistry for materials and technology for ceramics - www.fci.unibo.it

University of Modena and Reggio Emilia - www.unimore.it

- Degree course in Materials Engineering

University of Ferrara - www.unife.it

- Degree course in Architecture
- Degree course in Materials Engineering

Specialization Courses

• Course in Functional management of energy in the ceramic tiles industry. School of Rheology, specifically dedicated to the ceramic sector.

At the **Centro Ceramico Bologna** - www.cencerbo.it

• Specialized courses organized by the **ISTEC – The Institute of Science and Technology for Ceramic Materials**, such as a course in perfecting "Mosaic: Archeometry, Technology and Conservation." www.istec.cnr.it/eventi.htm

Professional Institutes

• **Istituto Statale d'Arte per la ceramica (I.S.A.)** "Gaetano Ballardini" in Faenza (Ra), which spreads and promotes the tradition of hand made and industrially manufactured ceramics

• **Istituto Superiore per le Industrie Artistiche (I.S.I.A.)**. Courses on computer aided and manual techniques regarding the planning, designing, and communication of industrially made objects and products, including ceramics - www.isia.it

• **Istituto Istruzione Professionale Lavoratori Edili (IIPLE)** run by the Provincia di Bologna. Professional level training courses for those working in the building sector - www.edili.com

Research and Innovation

High Technology Network – Building Platform

ASTER – <http://htn.aster.it>

CENTRO CERAMICO – Laboratory that studies the possibilities of using nano-structured materials when working on the functionality of ceramic products. The centre carries out activities involved in industrial development.

CIRI Edilizia e costruzioni - UNIBO

- Innovative technologies for restoration
- Manufacturing and management of building heritage: sustainability, safety and energy efficiency
- Fluid dynamics for energy and environmental applications

EN&TECH - UNIMORE

- Materials and system for improvement of energy efficiency in buildings.
- Lighting and domotics
- Efficient energy conversion

TekneHub - UNIFE

Restoration and cultural heritage. Links with materials, energy, environment and ICT sectors.

LARCO - ICOS

Research Laboratory that works on safe, sustainable and efficient manufacturing.

NEREA - (NEtwork per il REstauro Avanzato - Network for Advanced Restoration) Laboratory that works on qualifying and assessing cultural heritage restoration projects based on historical and monumental interests

Consortiums and Associations in the Sector

AGENZIA POLO CERAMICO DI FAENZA – Works on the development and innovation of the Faenza ceramic district www.agenziapoloceramico.it

ASSOPIASTRELLE – National Association of producers of ceramic tiles and refractory materials www.assopiastrelle.it

BIOECOLAB – Works on Sustainable Urban Buildings www.bioecolab.it

CERFORM – Runs training activities and a consultancy for the industrial ceramic sector www.cerform.it

CONSORZIO DECORATORI ARTISTICI CERAMICI (Cerarte)
- Works on promoting and improving ceramics at a high technical and aesthetic level www.cerarte.it

CUPAL – Consortium to promote exports of a group of 22 companies from the region which manufacture upholstered furniture and furnishing accessories www.cupal.it

ENTE CERAMICA FAENZA – Works on promotional activities, research initiatives, exhibitions, information and communication of this sector www.enteceramica.it

NUOVA QUASCO – Works on the implementation and management of informative systems. Observers of the supply and quality of building in the building sector www.nuovaquasco.it

Invest in Housing in Emilia-Romagna

For further information:



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