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THEME 4 – 25/2003

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The construction industry in the EU

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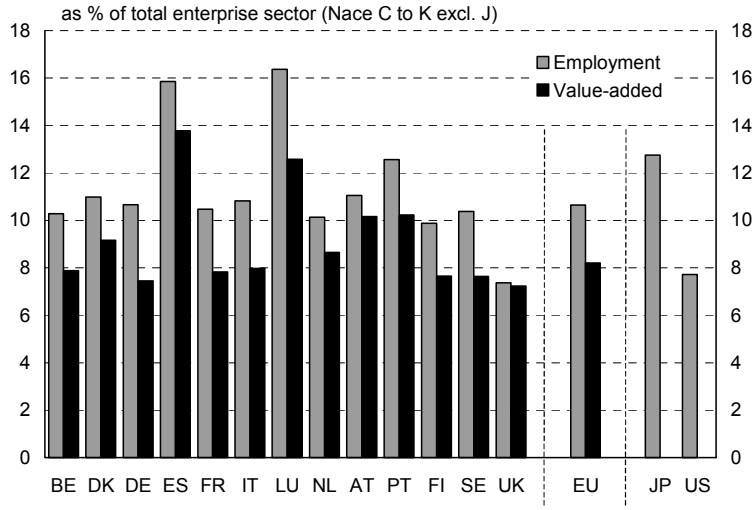
Close to 10 million people were employed in the construction industry (NACE Section F) in the EU in 2000, according to the Structural Business Statistics (SBS). This represents almost 11% of the total number employed in the enterprise sector (see methodological notes), a larger proportion than in the US (around 8%) but a smaller one than in Japan (13%). Construction accounts for a smaller share of value-added in the EU than of employment – only just over 8% of the total generated in the enterprise sector in 2000 – reflecting the relatively low level of productivity per person employed (Graph 1).

Graph1

Employment and value-added in construction as % of total enterprise sector in Member States, 2000



EL, IE: n.a.; NL: 1999; JP: 2001; DE, ES, LU, NL: total enterprise sector estimated based on 1998 and 1999 data.
Source: Eurostat; Japan Statistics Bureau; US Bureau of Labour Statistics.

The importance of the sector in the enterprise economy varies greatly across the Union. It is of most importance for both employment and value-added in Spain and Luxembourg and of least importance in the UK, despite the fact the latter was the main contributor to EU value-added in civil engineering and the renting of equipment (Table 1).

Table 1: Importance of construction in the EU and Member States, 2000

Sector	Total EU employment (in 1000)	Total EU value-added (in bn EUR)	Main contributor to EU value-added	Member State in which this sector is most important	Member State in which this sector is least important
Site preparation (45.1)	289.1	11.6	France	Finland	UK
Civil engineering (45.2)	5 222.6	187.2	UK	Spain	France
Building installation (45.3)	2 492.9	80.0	Germany	Luxembourg	Portugal
Building completion (45.4)	1 908.8	54.6	Germany	Denmark	Portugal
Renting of equipment (45.5)	51.2	2.6	UK	Netherlands	Germany
Construction (F)	9 964.5	335.9	Germany	Spain	UK
Total enterprise sector (C to K excl. J)	93 653.9	4 097.3	---	---	---

Notes: EL, IE: n.a.; NL: 1999. Member State in which sector is most/least important: see methodological notes for details
Source: Eurostat, unless otherwise mentioned.

Employment and value-added concentrated in building and civil engineering

Just over half of all those employed in the construction industry in the Union worked in the building and civil engineering sector (NACE 45.2) in 2000 (the construction of buildings and of roads and other kinds of infrastructure). This was also the largest sector in terms of value-added. Variations in the importance of the building and civil engineering sector is the main source of differences in the size of the construction industry as a whole across the EU (Table 2). In Spain, therefore, where construction contributed most to jobs and value-added, the sector accounted for 10% of the total employed in the enterprise sector as a whole. In the UK, it accounted for only just over 4%. Most of the others employed in construction worked in building installation (NACE 45.3, i.e. electrical cabling, plumbing and insulation) and completion (NACE 45.4, e.g. plastering and painting), which together were responsible for just under 5% of total enterprise employment in the EU. Relatively few people, therefore, were employed in other construction activities.

In terms of the type of product or service produced by the industry, around 26% of those employed in construction in the EU in 2000 were involved in building new houses, 30% in non-residential building, 19% in civil engineering projects and 25% in maintenance and renovation, according to trade association data (FIEC).

At the same time, a significant number of people across the EU were employed in real estate and renting, a service activity closely linked to construction.

In 2000, some 1.7 million people in the Union, or just under 2% of all those employed in the enterprise sector, worked in real estate and renting (NACE 70) (Graph 2). In Sweden and the UK, this service activity was around 30% of the size of construction in terms of employment and in Denmark and France, over 20% of the size. On the other hand, in Belgium, Luxembourg, Austria and Portugal, this activity accounted for only around 1% of total enterprise employment and the number employed amounted to only some 10% or less of the total employed in construction.

Graph 2
Importance of employment in real estate and construction activities in Member States, 2000

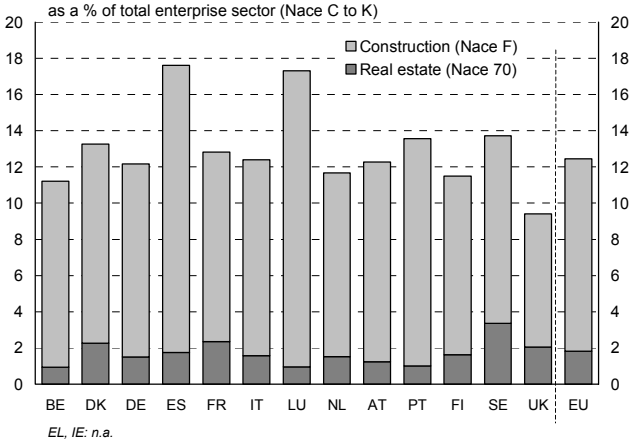


Table 2: Share of construction in total enterprise sector employment, 2000

	BE	DK	DE	ES	FR	IT	LU	NL	AT	PT	FI	SE	UK	EU
Employment (as % of total enterprise sector)														
Site preparation (45.1)	0.3	0.2	0.2	0.5	0.6	0.2	0.3	0.3	0.3	0.2	0.9	0.8	0.1	0.3
Buildings, civil engineering (45.2)	5.1	4.6	5.0	9.9	4.4	5.7	8.8	5.2	5.5	9.3	5.4	4.8	4.3	5.6
Building installation (45.3)	2.5	3.0	3.1	3.0	2.6	3.0	4.2	2.8	3.2	2.0	2.4	3.1	1.8	2.7
Building completion (45.4)	2.3	3.3	2.4	2.5	2.8	1.9	3.1	1.7	2.1	1.1	1.0	1.6	1.1	2.0
Renting of equipment (45.5)	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.1	0.1	0.1	0.1
Construction (F)	10.3	11.0	10.7	15.8	10.5	10.8	16.4	10.1	11.0	12.6	9.9	10.4	7.4	10.6

Notes: EL, IE: n.a. NL: 1999; DE, ES, LU, NL: total enterprise sector estimated based on 1998 and 1999 data. EU aggregate based on available Member States. Total enterprise sector covers Nace sections C to K excluding J.

Large numbers of self-employed with small firms dominating

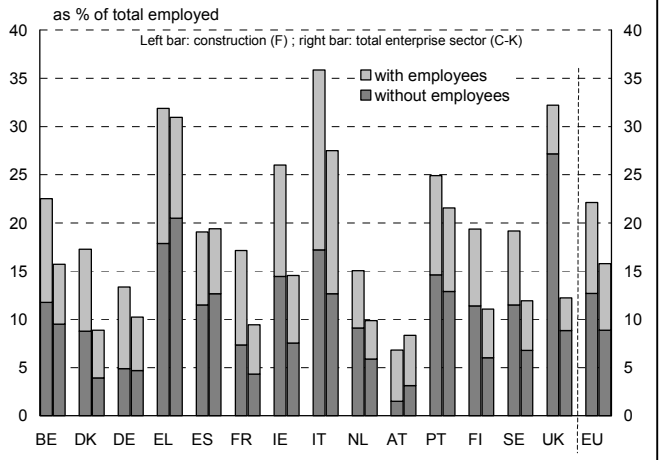
A relatively large number of those working in construction tend to be self-employed rather than employees. According to the EU Labour Force Survey (LFS), the self-employed represented some 22% of the total number employed in the construction industry in 2001 as compared with under 16% of the total employed in the enterprise sector as a whole (Graph 3). Many of these worked on their own, sub-contracting their labour to construction companies, and as such did much the same job as paid employees, though often at lower cost because of a saving in social contributions and with inferior terms and conditions of employment. In the EU as a whole, some 58% of the self-employed had no employees and these accounted for almost 13% of total employment in the industry, as against 9% for the enterprise sector as a whole.

In Greece, Italy and the UK, over 30% of the work force in construction were self-employed, in the former two countries, reflecting in part the relatively large number of very small firms, in the UK, the large numbers working on their own account (the self-employed without any employees representing over 27% of the total number working in construction). By contrast, only 7% of the construction work force were self-employed in Austria slightly less than in the enterprise sector as a whole, the only country in the EU apart from Spain where this was the case. Moreover, relatively few of the self-employed in Austria had no employees (only around 20% of the total number), whereas in other Member States apart from Germany and to a lesser extent France, the proportion was around half or more.

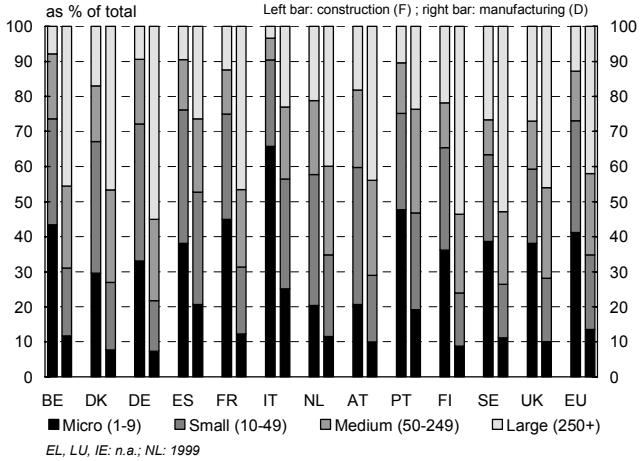
As perhaps implied by the relatively large number of self-employed, the construction industry throughout the Union is dominated by small firms. In 2000, 41% of all those employed in the industry in the EU worked in micro-sized firms with less than 10 persons employed (Graph 4). A further 32% worked in firms with between 10 and 49 persons employed. Only just over a quarter of those working in construction were, therefore, employed in firms larger than this and only 13% in large enterprises with 250 or more workers. The latter is less than a third of the proportion employed in large enterprises in manufacturing, while the proportion employed in small firms in construction is over twice the proportion in manufacturing.

The relative number of people employed in small firms in construction, as in manufacturing, is particularly high in Italy, where they accounted for 90% of the work force in 2000, with micro-sized firm of under 10 people accounting for two-thirds. Although the importance of small firms is lower in other Member States, firms with under 50 workers were responsible for over 55% of employment and in all apart from the UK and Sweden, large enterprises were responsible for under a quarter of the total employed.

Graph 3
Self-employed with and without employees in construction and in the enterprise sector, 2001



Graph 4
Division of employment by size of enterprise in construction and in manufacturing, 2000



Productivity in construction below that in other market activities

As implied by the share of construction in overall employment and value-added, value-added per person employed in construction was significantly lower than in other activities. In 2000, it averaged only 80% of the level in the enterprise sector overall and was lower than in either industry or services (Table 3). This reflects the limited scope for mechanisation and for increasing the capital intensity of production in many parts of the industry, despite the growth of prefabrication (i.e. a move from the building-site to the factory). Investment per worker, according to the SBS, was, therefore, less than half the level in manufacturing in 2000 in most of the countries for which data are available. The only activity within construction with a higher level of productivity than in other parts of the enterprise sector was the renting of equipment, in which relatively few people are employed.

A similar picture is evident in Member States. In all countries, value-added per person in construction was below that in the enterprise sector as a whole, though in the UK, the difference was marginal. In all countries, apart from the UK and Austria, the level was below that in market services as well as that in industry, the extent of the difference being especially large in Germany, France, Luxembourg and Sweden (over 20% below the level in services in each case).

Table 3: Value-added per person employed in construction, 2000

	BE	DK	DE	ES	FR	IT	LU	NL	AT	PT	FI	SE	UK	EU
Value-added per person employed (in 1000 EUR)														
Site preparation (45.1)	47.3	38.0	39.2	33.3	38.9	36.0	43.8	42.4	47.8	23.3	47.3	44.8	59.8	40.0
Civil engineering (45.2)	40.1	45.3	38.7	25.1	34.9	30.5	48.5	41.0	47.8	17.4	42.9	42.0	51.9	35.8
Building installation (45.3)	39.7	39.9	31.1	21.4	34.7	24.9	43.4	35.9	37.6	13.9	39.6	43.8	45.3	32.1
Building completion (45.4)	31.6	34.6	29.5	16.9	31.0	18.0	37.2	35.0	38.6	9.5	36.1	34.0	45.9	28.6
Renting of equipment (45.5)	71.1	64.9	41.4	46.7	54.7	33.1	48.5	51.8	77.9	24.8	57.1	48.0	51.3	50.3
Construction (F)	38.4	40.7	34.5	23.4	34.1	26.9	45.0	38.8	43.2	16.2	42.0	41.6	49.5	33.7
Total enterprise sector (C to K)	50.1	48.8	49.3	27.0	45.5	36.5	58.6	45.5	46.9	20.0	54.3	56.6	50.5	43.7
Total industry (C, D, E)	71.3	60.1	56.3	41.9	54.7	45.8	71.6	68.0	60.9	21.8	72.2	66.2	70.1	55.3
Total services (G, H, I, K)	42.0	44.6	47.0	26.8	42.7	32.0	58.7	39.7	40.3	19.6	43.7	52.7	43.9	39.9

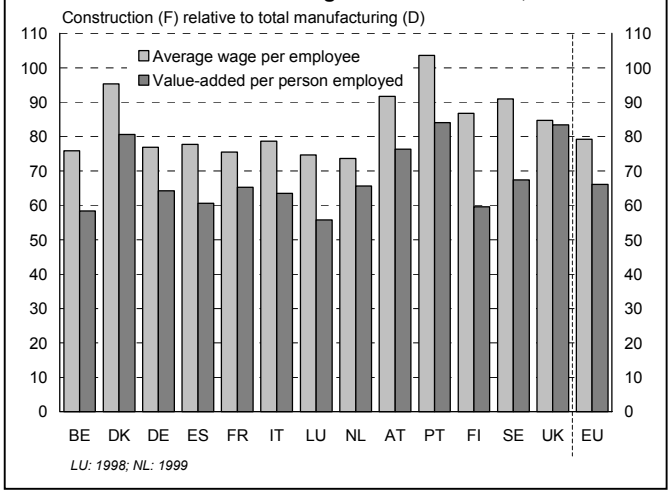
Notes: EL, IE: n.a. NL: 1999; DE, ES, LU, NL: total enterprise sector estimated based on 1998 and 1999 data. EU aggregate based on available Member States. Total enterprise sector covers NACE sections C to K excluding J.

Wages in construction lower than in manufacturing

The relatively low level of labour productivity in construction is reflected in relatively low wage levels. In 2000, average wages per employee in construction in the EU were 20% lower than in total manufacturing and, apart from Portugal, lower in all Member States (Graph 5). This, however, is less than the difference in average labour productivity, or value-added per person employed, which implies that the share of wages in value-added was higher in construction than in manufacturing. Once again this was the case in all Member States, though less so in the UK than elsewhere. The relatively high share of wages in value-added means that the share going to capital – or the return to investment – is lower in construction than in manufacturing. This, however, is only to be expected given the relatively small amount of capital used in production, which, as noted above, partly explains the relatively low level of labour productivity in construction. The lower capital-intensity of production in construction than in manufacturing, therefore, is a factor underlying both the lower productivity and the higher wage share.

Graph 5

Wage and productivity per employee in construction and in manufacturing in Member States, 2000

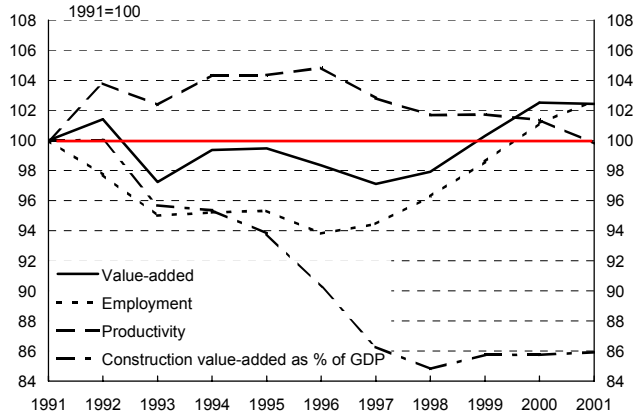


Little growth of value-added or productivity but some growth of jobs

An indication of developments in the construction industry over time can be obtained from national accounts data divided by industrial branch. According to these data, value-added in construction in the EU, measured at constant prices, was only slightly higher in 2001 (only 2% or so) than 10 years earlier at the beginning of the 1990s (Graph 6). Despite some recovery from falls in value-added in 1993 and again in 1996 and 1997, growth was relatively modest in the latter part of the 1990s and came to an end in 2001. The net output of the construction industry in the Union has, therefore, failed to keep pace with GDP, which in 2001 was some 23% higher than 10 years earlier. The share of construction in overall value-added in the EU economy has, therefore, tended to decline over the past decade from just over 6% in 1991 to just under 5½% in 2001. This decline in most countries occurred predominantly during the recession years of the early 1990s.

Graph 6

Evolution of value-added, employment and productivity in construction in the EU, 1991-2001



Value-added in constant prices.
Source: Eurostat, national accounts (theme 2)

Despite the very low growth of value-added in construction, the number employed in the industry in the Union was almost 3% higher in 2001 than in 1991, implying that value-added per person employed, or productivity, remained largely unchanged over this period. Indeed, after rising slightly in the early part of the 1990s, productivity seems to have fallen since 1996 back to the level of 5 years earlier.

The low growth in value-added in construction in the EU over the 1990s, however, was not common to all Member States. In Spain and Austria, value-added at constant prices was over 20% higher in 2001 than 10 years before, while in Luxembourg and Portugal, it was around 40% higher and in Greece, almost 40% higher as compared with 1995 (Table 4). In Italy, on the other hand, it was unchanged and in Germany, France, Finland and Sweden, it was down significantly. The decline in recent years has been especially marked in Germany, where after the large increase in activity in the new Länder following unification, value-added in construction fell by 17% between 1995 and 2001. This decline is the major reason for the fall in the share of construction in total value-added in the EU over this period. Excluding Germany, the construction share of value-added in GDP, therefore, remained broadly unchanged between 1995 and 2001. In 7 Member States, the share was higher in 2001 than in 1995, most especially in Greece, Spain, Finland and Portugal, though only in the latter was it higher in 2001 than in 1991.

Productivity developments have also differed between countries but in most of them there has been little tendency for productivity to increase. In 6 of the 10 Member States for which a comparison can be made, value-added per person employed was either much the same in 2001 as 10 year earlier or lower. In only 4 of the 14 Member States for which there are data for the second half of the 1990s – Greece, Luxembourg, Austria and Portugal – did value-added per person employed increase significantly between 1995 and 2001 (by more than 1% a year). In all countries, apart from Germany and France, however, value-added in constant prices grew over this period.

Growth of value-added, even if relatively modest, combined with productivity remaining largely unchanged or falling, has been associated with some rise in employment in most Member States since the mid-1990s. Only in Germany, where value-added fell markedly between 1995 and 2001 (by 17% as the boom in construction in the new Länder came to an end) and Austria, where productivity increased by around 2% a year, was the number employed in construction lower in 2001 than in 1995. (It was also lower in Portugal in 1998 than in 1995 reflecting strong productivity growth, but no data are available after 1998.)

Table 4: Value-added, employment and productivity in construction, 1991-2001

Index, 1991=100

	BE	DK	DE	EL	ES	FR	IT	LU	NL	AT	PT	FI	SE	UK	EU
Share of construction value-added in GDP															
1991	100	100	100	:	100	100	100	100	100	100	100	100	100	100	100
1995	96	95	113	100	87	92	83	88	94	107	116	64	65	84	94
2001	95	101	80	120	100	81	79	83	102	101	134	84	60	86	86
Value-added at constant prices															
1991	100	100	100	:	100	100	100	100	100	100	100	100	100	100	100
1995	102	101	110	100	94	91	91	108	95	117	109	72	85	98	99
2001	112	112	93	139	124	85	100	137	111	122	141	92	88	112	102
Number employed															
1991	100	100	100	:	:	100	100	:	100	100	:	100	100	100	100
1995	106	102	115	100	100	89	94	100	101	110	100	65	75	79	95
2001	110	113	93	113	138	92	101	108	120	103	96	85	79	98	103
Value-added per person employed															
1991	100	100	100	:	:	100	100	:	100	100	:	100	100	100	100
1995	96	98	96	100	100	102	97	100	94	106	100	110	114	124	104
2001	102	100	100	123	96	93	99	113	92	118	122	109	111	115	100

Note: IE: n.a.; LU: Figures for 2001 for number employed and value-added per person relate to 2000.
PT: Figures for 2001 for number employed and value-added per person relate to 1998.

An EU trade surplus in construction services but exports relatively small

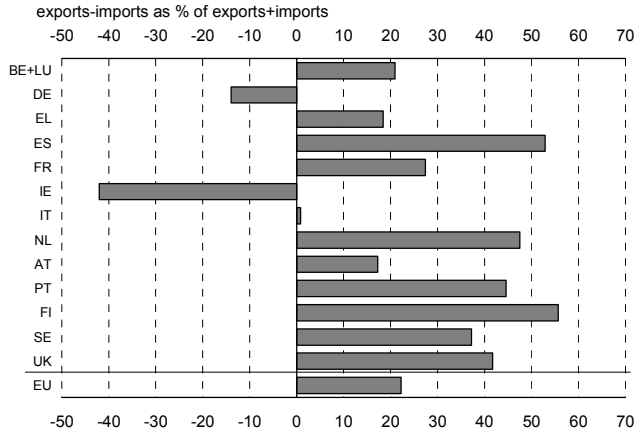
Although the output of the construction industry is difficult to export as such (i.e. buildings cannot easily be transported from one place to another), construction does contribute to EU exports in the form for the most part of sales of services and expertise to other countries. The exports involved, however, are limited, not only by the nature of the product produced but also by the fact that construction carried out by subsidiaries of multinational companies resident in the country concerned – i.e. direct investors – is excluded (see Methodology for what is included). Data on income flows from the balance of payments accounts give an indication of the scale of exports of construction services in relation to other exports of services and of the scale of imports. (It should be emphasised that data on trade in services, if only because of their 'invisible' nature, tends to be more uncertain than data on trade in goods.)

In 2001, EU exports of construction services to the rest of the world accounted for just over 3% of total service exports, only half the level in 1995 (Table 5). This was about a third higher than the share of construction in EU imports of services in both years, implying, since EU trade in services was in small surplus, a significant surplus in trade in construction (Graph 7). Trade in construction services between Member States was much smaller in relation to overall trade in services than trade with other countries.

Exports of construction services, though not insignificant in relation to total service exports, are small in relation to the total income from exports if goods and services are aggregated together. Services, therefore, account for only around a quarter of the total income of the EU from exports – a share which has remained much the same over recent years – implying that the contribution of construction to the total amounted to under 1% in 2001.

Graph 7

Trade balance in construction services in Member States, 2001



DK: n.a.; IE: 1999

Source: Eurostat, BOP (theme 2)

The scale of exports of construction services varies between Member States, but only in the Netherlands and Finland did exports in 2001 account for more than 5% of total exports of services. In Germany, Greece, Italy, Sweden and the UK, exports of construction services declined significantly relative to total exports of services between 1995 and 2001. Nevertheless, with the exception of Germany and Ireland, all Member States had a trade surplus in construction, in most cases, a significant one.

Table 5: Exports and imports of construction services and of total services in Member States, 1995 and 2001

	BE+LU	DE	EL	ES	FR	IE	IT	NL	AT	PT	FI	SE	UK	Extra-EU	Intra-EU
Construction as % of															
exports of services															
1995	1.7	6.4	4.1	1.2	3.7	3.4	5.3	6.8	2.6	2.8	3.7	15.4	3.8	6.4	3.3
2001	1.8	4.1	1.1	1.3	3.5	1.4	2.8	6.0	2.0	2.1	6.8	2.8	0.1	3.2	2.0
imports of services															
1995	2.2	4.6	1.9	1.2	1.5	3.0	2.6	3.5	2.4	3.1	0.7	14.2	4.2	4.2	
2001	1.3	3.4	1.3	0.7	2.6	1.9	2.8	2.1	1.5	1.1	1.4	1.2	0.1	2.1	
Total services as % of															
exports of goods and services															
1995	18.6	13.6	68.7	30.0	23.2	10.1	20.5	21.6	33.6	25.5	15.9	16.3	24.0	24.4	30.7
2001	20.9	13.3	64.7	33.0	21.6	29.4	19.2	19.4	32.9	25.4	11.9	22.4	28.6	24.6	30.3
imports of goods and services															
1995	18.5	21.8	16.8	16.1	19.8	26.8	23.7	23.1	27.6	16.7	25.8	21.0	20.1	24.1	
2001	19.3	22.3	28.1	18.4	17.8	60.2	20.2	21.7	31.6	13.8	21.1	26.9	22.6	24.1	

Note: DK: n.a.; IE: 1999 . Extra-EU exports and imports correspond to EU trade with the rest of the world; intra-EU imports represent imports by Member States from the other Member States. It is equivalent to intra-EU exports.

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

SYMBOLS

":" not available or confidential.

DEFINITIONS

Enterprise sector covers NACE sections C to K excluding J in this publication - which is the basic scope of the Structural Business Statistics.

Division of employment and value-added by sector of activity

Employment and value-added in the Structural Business Statistics (SBS) are divided into sectors of activity according to the NACE Rev.1 system of classification. This categories activity by section (1-letter codes), sub-section (2-letter codes), division (2-digit codes), groups (3-digit codes) and classes (4-digit codes). Construction activities are included under Section F. They include the following divisions and groups:

45	Construction
45.1	Site preparation
45.2	Building of complete constructions or parts thereof; civil engineering
45.3	Building installation
45.4	Building completion
45.5	Renting of construction or demolition equipment with operator

Real estate activities are included under section K, division 70.

Number of persons employed: defined as the total number of persons who work in the observation unit (inclusive of working proprietors and partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams). It includes part-time workers, seasonal workers, apprentices and home workers who are on the pay roll. The observation unit for aggregating data is the enterprise, which is defined as '*the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources*'.

Self-employed: The data are taken from the EU Labour Force Survey, which classifies persons according to their professional status, distinguishing between self-employed working alone and those having employees of their own. Self-employed persons with employees are defined as persons who work in their own business, professional practice or farm for the purpose of earning a profit, and who employ at least one other person.

Value-added: Value-added measured at factor cost, which is the gross income from operating activities after adjusting for operating subsidies and indirect taxes (including value-added tax).

Degree of specialisation: The Member State in which construction is most important is the one in which the share of total enterprise sector value-added accounted for by construction is highest in relation to the average share in the EU. The Member State in which construction is least important is the one where it is lowest. Because of uncertain data for Luxembourg and Ireland, these two countries have been excluded from the ranking.

Exports and imports of construction services: Trade in construction services relates to work performed by enterprises resident in one country on construction projects in another country. Trade consists, on the one hand, of the construction services provided abroad and, on the other, of the goods and services purchased in carrying out construction projects. Services are divided between *construction abroad* and *construction in the compiling economy*. Exports, therefore, are made up of income from construction abroad and the goods and services purchased in the domestic economy by companies resident abroad in undertaking construction projects in the domestic economy. Projects carried by subsidiaries, branches or associates of non-resident enterprises (direct investors) are excluded.

Data sources

Structural Business Statistics (SBS): collected within the framework of Council regulation on structural business statistics (Council Regulation (EC, EURATOM) No. 58/97 of December 1996. The SBS Regulation governs the transmission of data to Eurostat from the reference year 1995 onwards and, in principle, covers all market activities in sections C to K and M to O of NACE Rev. 1, but, in practice, the data available are confined to NACE Rev. 1 sections C to K, excluding section J, financial services. For further information, visit:
http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main_en.html

The SBS data used in the analysis are taken from the SBS\ENTER_MS series which covers all enterprises from 1995 onwards (though the data are less complete and less accurate for the years before 1999). The data available for Greece cover only enterprises with 20 persons or more employed and are, therefore, not included in the series. The data used for the employment size of enterprise are taken from the SBS\CONST _MS series (theme 4 - Industry,Trade,Services).

National accounts: based on the European System of Accounts (ESA95) by branch of activity and used here to analyse the evolution of employment, value-added and GDP over time. National accounts data can be found in NewCronos under theme 2 - Economy and Finance.

EU Labour Force Survey (LFS): a survey of private households which provides data on the population living in these by nationality and by work status as well as by sex and age. The main focus is on employment, unemployment and inactivity and the various aspects of these, including the sector of activity in which people are employed and their professioanl status.

Balance of Payments (BOP): provides harmonised data on international trade in services with detailed geographical breakdown of flows (imports, exports and balance). BOP data can be found in New Cronos under theme 2 - Economy and Finance.

FIEC: European Construction Industry Federation.

Further information:

- **Databases**

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