



Invest in
BUILDING and CONSTRUCTION
in Emilia-Romagna

Invest in BUILDING and CONSTRUCTION in Emilia-Romagna


Published in September 2024

The regional companies in construction industry have become **international leaders** in terms of product quality and design innovation and are at the cutting-edge as regards research into materials and production technologies.

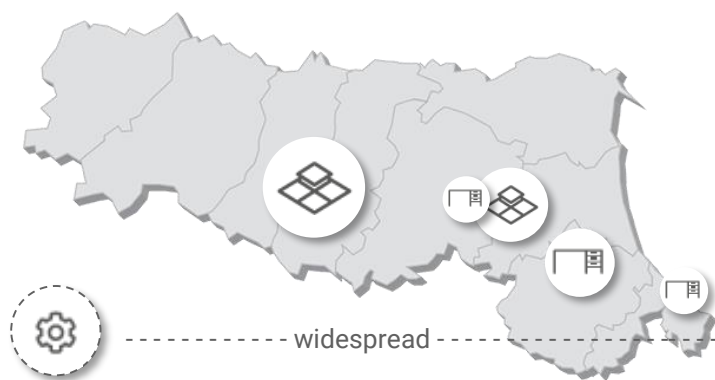
MAIN SPECIALIZATIONS

 tiles and ceramics

 furniture and wood products

 **Machinery** (ceramics machinery, earth moving machinery, cranes and hoisting equipment, building material and shutters)

HIGH CONCENTRATION OF EMPLOYEES



INNOVATION ECOSYSTEM

Clust-ER association including research centres, companies and training institutes

- **Clust-ER BUILD** - The Building and Construction cluster of Emilia-Romagna region
- **Clust-ER URBAN** – The Urban Economy cluster of Emilia-Romagna region

INTERNATIONAL TRADE FAIRS

Cersaie, Saie, Tecna, InOut, Geofluid, Restauro, Key, Ecomondo, Pipepilne & Gas Expo, GIC, Asphaltica, R2B, Accadueo - H2o

KEY FACTS

380,347 employees (2023)

150,013 local units (2023)

6.3 billion € export (2023)

1.8 billion € import (2023)

92% of Italian exports of ceramics/clay building materials comes from Emilia-Romagna

SOME BRANDS

CERAMICS	CONSTRUCTION & INFRASTRUCTURES
 CERAMICS OF ITALY  MARAZZI  FIORIM  DELCONCA  atlas concorde  PANARIAgroup  GRESMALT  CASALGRANDE FADANA  LAMINAM  IRIS CERAMICA GROUP  imola  SICIS  EMIL CERAMICA  CÆSAR CERAMICHE  ABK	 PIZZAROTTI  cmb  cefla  iren  STE  GETEC  Bonatti  Consorzio Innoova  ITI IMPRESA GENERALE  C.M.C.  GARG  KR  INTEGRA
FURNITURE WOOD	MACHINERY
 poltron.esofa  KASTAMONU  PAOLO CASTELLI  Marinelli  ATL GROUP  dorelan  CASADEI PALLETS  SAIB  iRS  lo tre ARREDAMENTI	 SAGMI  HIRB  MANITOU  MAGNI  IMMERGAS  IMI ORTON  SAMPIERANA  INTERPUMP HYDRAULICS  BOLZONI GROUP  DIECI  scm group  HYVA
SERVICES	BUILDING PRODUCTS
 mca  SAIND INGEGNERIA  Galileo  Policreo  OPEN PROJECT	 SHERWIN-WILLIAMS  RENNER  Laterite  Wienerberger  Paver  SCRIGNO  SMALTICERAM  PRISMA

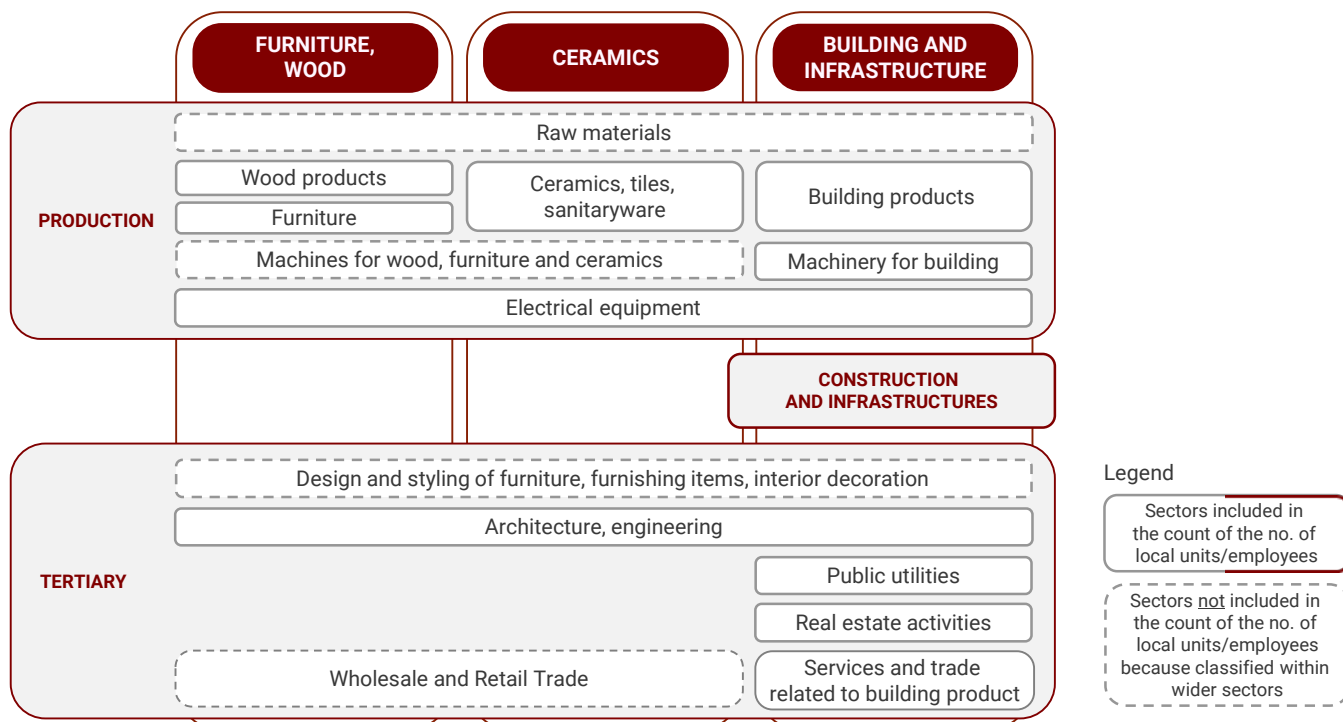
And many others

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SECTORS & VALUE CHAINS

Source: Infocamere 2023, integrated by Istat 2021
Data processing by ART-ER

Within the regional 'building and construction' system, **three main value chains** can be identified: **wood and furniture, ceramics for building, building and infrastructures**.



Note - Besides 'machinery for building', manufacturing of other industrial machines related to building and construction (e.g. wood, ceramics) is also very relevant in Emilia-Romagna but is classified within wider sectors focused on mechanical engineering and not on building and construction (so not included in the following figures). See also "[Invest in mechanical engineering in Emilia-Romagna](#)".

THE BUILDING AND CONSTRUCTION CLUSTER IN EMILIA-ROMAGNA - 2023

Sectors	No. Local Units	No. Employees
Production	11611	95619
Ceramic products	708	18276
Building products	5719	36510
Furniture and wood products	3514	13536
Machinery for building	931	19179
Electrical equipment	739	8118
Construction and infrastructures	71612	140891
Tertiary	66790	143837
Public utilities	3482	17531
Real Estate activities	29935	23057
Architectural and engineering firms*	18036	26199
Other services related to building/construction	4092	49017
Retail trade of building products	4318	10594
Wholesale trade of building products	6927	17439
Total	150,013	380,347

Source: Infocamere 2023 - * Integrated by Istat ASIA 2021 - Data processing by ART-ER

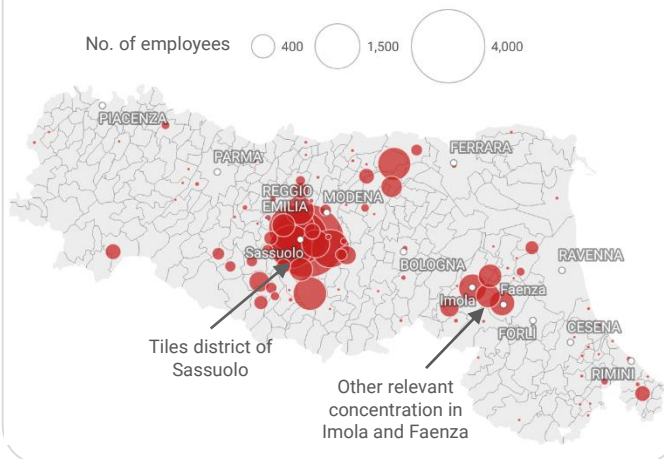
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TERRITORY

Source: Infocamere 2023, integrated by Istat 2021
Data processing by ART-ER

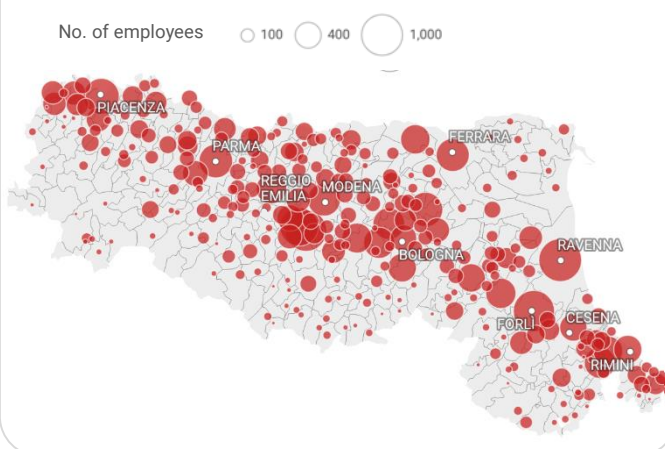
CERAMIC PRODUCTS 18,276 EMPLOYEES

No. of employees ○ 400 ○ 1,500 ○ 4,000



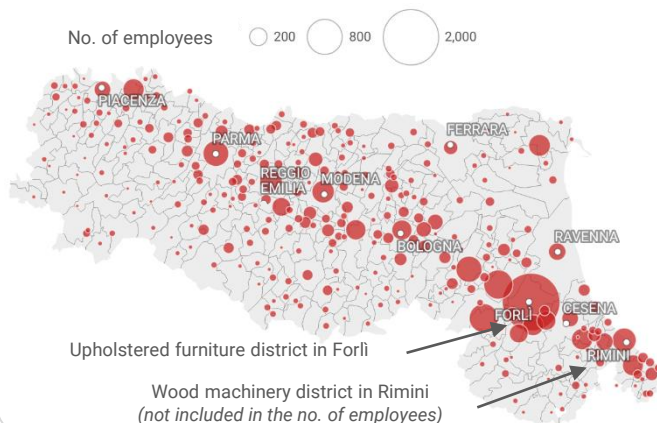
BUILDING PRODUCTS 36,510 EMPLOYEES

No. of employees ○ 100 ○ 400 ○ 1,000



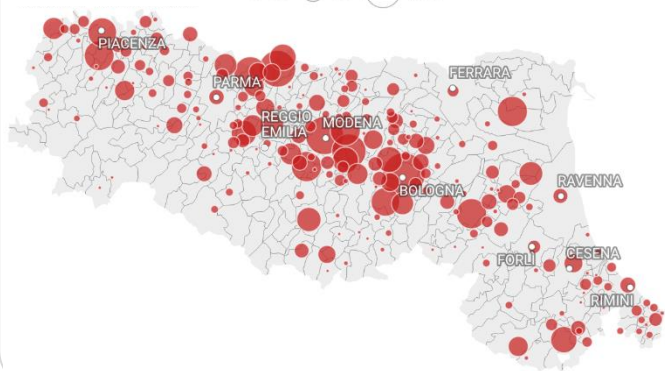
WOOD AND FURNITURE 13,536 EMPLOYEES

No. of employees ○ 200 ○ 800 ○ 2,000



MACHINERY FOR BUILDING, ELECTRICAL EQUIPMENT 27,297 EMPLOYEES

No. of employees ○ 100 ○ 400 ○ 1,000



CONSTRUCTION 140,891 EMPLOYEES

No. of employees ○ 900 ○ 3,500 ○ 9,000



See also:

MUNICIPALITIES IN EMILIA-ROMAGNA - [LINK](#)

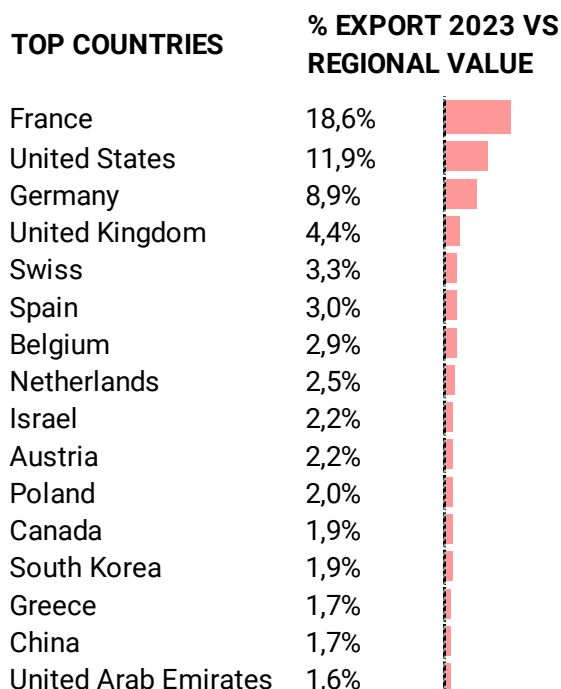
The tool provides a focus on each regional municipality, union of municipalities, province/metropolitan city, with information about no. of employees and local units for each regional key sector, including «building and construction».

EMILIA-ROMAGNA, IMPORTS-EXPORTS OF BUILDING AND CONSTRUCTION - 2023



The regional 'building and construction' sector is **strongly export oriented** with a balance of trade of more than 4.5 billion euros (exports minus imports).

WHERE WE EXPORT



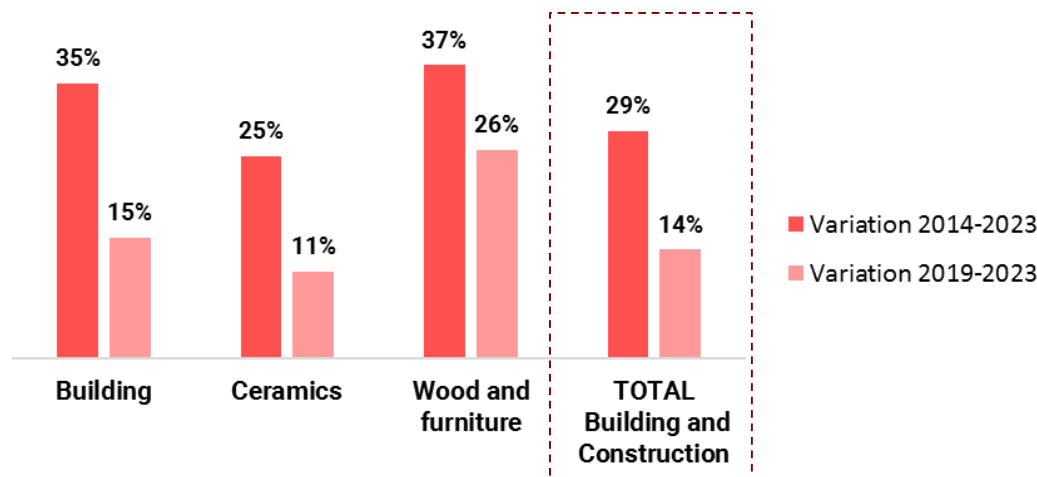
SOME REGIONAL SPECIALIZATIONS vs ITALIAN VALUE

Sector	Export 2023 (million euros)	% vs the national value
Terracotta Building Materials (including tiles)	4111	91,9%
Paints, Varnishes and Enamels, Printing Inks and Synthetic Adhesives	472	16,8%
Metal Building Elements	297	12,4%
Non-Metallic Mineral and Abrasive Products n.e.c.	121	10,3%
Concrete, Cement and Gypsum Products	120	14,7%

There is a **strong specialization in the ceramics sector for building (92% of the national total)**

TREND OF THE EXPORTS

The exports of the whole 'building and construction' sector showed a growth of +29% in the 2014-23 period, and +14% in the 2019-2023 period, confirming a strong increase with respect to the pre-covid data.



INTERNATIONAL FAIRS

INTERNATIONAL TRADE FAIRS IN EMILIA-ROMAGNA RELATED TO BUILDING AND CONSTRUCTION



CERSAIE - www.cersaie.it/en
International Exhibition of Ceramic Tile and Bathroom Furnishings

Where: Bologna (Bologna Fair)
Key figures: 99,319 visitors in 2023 of which 47,634 from abroad



SAIE - www.saiebologna.it/en
The Building Fair. Design, construction, plant engineering

Where: Bologna (Bologna Fair)
Key figures: 37,642 visitors (2022)



TECNA - www.tecnaexpo.com
International Exhibition of Technologies and Supplies for Surfaces

Where: Rimini (Rimini Expo Centre)
Key figures: 18,550 visitors in 2022, 45% from abroad



InOut - www.inoutexpo.it
The Contract Community, both indoor and outdoor

Where: Rimini (Rimini Exhibition Centre)
Key figures: 1st edition in 2024



GEOFLUID - www.geofluid.it/
Drilling and Foundations

Where: Piacenza (Piacenza Expo)
Key figures: 15,000 visitors in 2023



RESTAURO - www.salonedelrestauro.com
International restoration trade show

Where: Ferrara (Ferrara Fair)
Key figures: delegations from 16 foreign countries (2024)



PIPELINE & GAS EXPO - www.pipeline-gasexpo.it/en/
The Utility Construction Show

Where: Piacenza (Piacenza Expo)
Key figures: 60 exhibitors in 2024



GIC Italian Concrete Days - www.gic-expo.it
Exhibition & conference dedicated to the concrete and masonry industries

Where: Piacenza (Piacenza Expo)
Key figures: over 6,000 visitors in 2024



H2O Accadueo - www.accadueo.com
International event for the water sector supply chain

Where: Bari (in collaboration with Bologna Fair). **Key figures:** about 800 visiting companies in 2023



ASPHALTICA - www.asphaltica.it
International Exhibition of technologies and solutions for road paving, safety, infrastructures and services

Where: Bologna (Bologna Fair)
Key figures: about 40,000 visitors in 2023 (including SaMoTer expo)



R2B Research to Business - www.rdueb.it
Exhibition of Research and Skills for Innovation

Where: Bologna (Bologna Fair)
Key figures: over 2,500 visitors in 2024

SOME IMPORTANT FOREIGN DIRECT INVESTMENTS (FDI) IN THE BUILDING AND CONSTRUCTION SECTORS IN EMILIA-ROMAGNA

Company	Investor	Country of Origin	Type of business
CERAMIC PRODUCTS			
MARAZZI GROUP / EMILCERAMICA	MOHAWK INDUSTRIES INC.	USA	Ceramic tiles
ASCOT GRUPPO CERAMICHE / SANTA MARIA / CERAMICHE SERRA	VICTORIA PLC	UK	
BUILDING PRODUCTS			
SHERWIN-WILLIAMS ITALY / INVER	SHERWIN-WILLIAMS CO	USA	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
ELANTAS EUROPE	ALTANA AG	Germany	
RENNER ITALIA	RENNER HERMANN SA	Brazil	
INDUSTRIA CHIMICA REGGIANA I.C.R.	PPG INDUSTRIES INC	USA	
WIENERBERGER	WIENERBERGER AG	Austria	Bricks for residential property
MACHINERY AND ELECTRICAL EQUIPMENT			
MANITOU COSTRUZIONI INDUSTRIALI	MANITOU B.F.	France	Handling/building machinery
MARINI	MR JEAN-CLAUDE FAYAT	France	Equipment for road construction
TEREX OPERATIONS ITALY	TEREX CORP.	United States	Materials handling and processing
HIAB ITALIA	CARGOTEC OYJ	Finland	On-road load handling equipment, intelligent services, smart and connected solutions
ORTON S.R.L.	IMI PLC	UK	Manufacture of metal & rubber valves
VOSSLOH-SCHWABE ITALIA	FIDELIUM PARTNERS	Germany	Lighting solutions
WOOD AND FURNITURE			
KASTAMONU ITALIA	KEAS HOLDING B.V.	Netherlands	Panels and laminate flooring
S.A.I.B. SOCIETA' AGGLOMERATI INDUSTRIALI BOSI	MFE VERMÖGENSVERWALTUNG PRIVATSTIFTUNG	Austria	Panels/chipboards
CLUB HOUSE ITALIA SPA	HAWORTH UK HOLDINGS LIMITED	UK	Luxury furniture

Focus: REAL ESTATE

Emilia-Romagna is a great location for new investments and offer properties with different features and characteristics for plants, offices, R&D centers, logistic centres, innovative start-ups, etc.

INVEST IN EMILIA-ROMAGNA REAL ESTATE

Invest in Emilia-Romagna Real Estate is the website dedicated to strategic real estate opportunities on the regional territory - managed by ART-ER on behalf of the Emilia-Romagna Region and in collaboration with local territorial entities - providing information and support free of charge.

LINK:

realestate.investinemiliaromagna.eu



BROCHURE “INVESTMENT OPPORTUNITIES”

This publication includes a wide offer of properties in Emilia-Romagna, promoted by the regional territories. The selection that you find here has been imagined and developed with the goal of bringing an interesting and varied presentation of the investment opportunities available in the region.

LINK:

www.investinemiliaromagna.eu/sites/default/files/2024-03/Emilia-romagna-Brochure-2024_web.pdf



EMILIA-ROMAGNA AT MIPIM (CANNES)

Emilia-Romagna is present at Mipim in Cannes (France) – one of the world's leading real estate market events - highlighting some of the territory's leading real estate opportunities.

The investment opportunities presented concern various sectors. In 2024 the focus was on: innovation parks & advanced services, student housing and mixed use, industry, hospitality and commercial.

The projects are presented in collaboration with the local public administrations.

LINK:

www.mipim.com



INNOVATION ECOSYSTEM (1)

Clust-ER ASSOCIATIONS

The regional Clust-ERs are associations of public and private organisations: companies, research centres and training institutes that share skills, ideas and resources to support the competitiveness of the sector. Together with the Technopoles and the **High Technology Network** laboratories (see also page 8), they are one of the key players in the regional innovation ecosystem.



Clust-ER BUILD - BUILDING AND CONSTRUCTION build.clust-er.it/en

Among the value chains: Conservation and enhancement of historical and artistic heritage, Energy efficiency and sustainability in buildings, Security of buildings and civil infrastructure, Instruments to support virtuous pathways of triggering regenerative dynamics



Clust-ER URBAN - URBAN ECONOMY en.art-er.it/clust-er-urban-economy

Working groups include: Mobility and territory, Fair and inclusive city, Tourism and cities, Regional law on the urban economy

HIGH TECHNOLOGY NETWORK - BUILDING AND CONSTRUCTION

LINK - DISCOVER INDUSTRIAL RESEARCH IN 'BUILDING AND CONSTRUCTION'



LABORATORIES AND INNOVATION CENTRES

- [Centro Ceramico](#) – R&D on industrial ceramics
- [CertiMaC](#) - Building Materials Testing Laboratory
- [CIRI EDILIZIA E COSTRUZIONI](#) – R&I on building and construction
- [CRICT](#) – R&D and services for Construction and Territory
- [EN&TECH](#) – R&D and TT on sustainability and energy efficiency of buildings, lighting and domotics
- [LARCOICOS](#) – R&D and TT on construction
- [Studio MM](#) – Materials engineering
- [TEKNEHUB](#) – R&D on built heritage, building installation systems, indoor, energy sources, hydrogeological resources, Human Centered products.

OTHER RESEARCH INSTITUTES

- [CNR ISSMC](#) Ceramic materials

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INNOVATION ECOSYSTEM (2)

UNIVERSITIES

A selection of the degree courses in the region

DEGREE-MASTER COURSES	UNIVERSITY (LINK TO DEPARTMENT OR COURSE)	GRADUATES IN 2023*
Architecture, Building-Construction Engineering, Landscape design, Construction and territorial management	Bologna , Unibo Cesena , Unibo Ravenna 1 , Unibo Ravenna 2 , Ferrara 1 , Ferrara 2 (specialization school), Modena-Reggio Emilia , Parma , Piacenza	404 (n.a. for Piacenza)
Materials / Civil / Environmental Engineering	Bologna , Ferrara 1 , Ferrara 2 , Modena and Reggio Emilia , Parma 1 , Parma 2 , Parma 3	602
Design of Industrial Products, Advanced Design	Bologna 1 , Bologna 2 , Ferrara	301
Geology, Earth Sciences	Bologna , Ferrara 1 , Ferrara 2 , Modena-Reggio Emilia 1 , Modena Reggio Emilia 2 , Parma , Parma 2	152
Cultural heritage	UNIBO Ravenna 1 , UNIBO Ravenna 2	123

* Source MIUR, data processing ART-ER – Data consider only the four universities of Bologna (with campuses also in Cesena, Ravenna and Rimini), Ferrara, Modena and Reggio Emilia, Parma. Specialization schools are not included

HIGHER TECHNICAL INSTITUTES (ITS)

FOUNDATION	LINK – WHERE
ITS TEC - TERRITORY, ENERGY, BUILD	www.itstec.it - Ferrara, Ravenna, Bologna, Modena
ITS - TURISMO BENESSERE	www.itsturismoebenessere.it/ - Rimini, Bologna, Cesena, Imola

TRAINING INSITUTES

Many regional training institutes are part of the Clust-ER Associations (see also page 8)

MEMBERS OF THE CLUST-ER	LINK
Clust-ER BUILD	build.clust-er.it
Clust-ER URBAN	urban.clust-er.it

ENTREPRENEURAL ASSOCIATIONS

NAME and LINK	SECTOR
Confindustria Ceramica	Ceramics
ANCE Emilia-Romagna	Construction
CNA Costruzioni Emilia - Romagna	Construction

INNOVATION POLICIES

RESULTS OF THE REGIONAL SMART SPECIALISATION STRATEGY S3 BUILDING AND CONSTRUCTION, 2014 - JUNE 2024

- 1,895 funded R&D projects
- 515 million € of total investment
- 333 million € of public funds

INTERNATIONAL TALENTS IN E-R

WEBSITE INTERNATIONALTALENTS.ART-ER.IT



Click for more info on the **Construction sector**

investinemiliaromagna@art-er.it
www.investinemiliaromagna.eu