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Monthly business survey in the building industry – April 2013

The economic climate stays unfavourable in building industry in April 2013

According to the business leaders surveyed in April 2013, the situation stays unfavourable in building industry: the synthetic indicator of business climate win a point but stays below its long-term average. The turning-point indicator is in the unfavourable zone.

Activity remains deteriorated

The business leaders consider that their activity remains deteriorated in the recent period. The business leaders stay pessimistic about their activity in the next months.

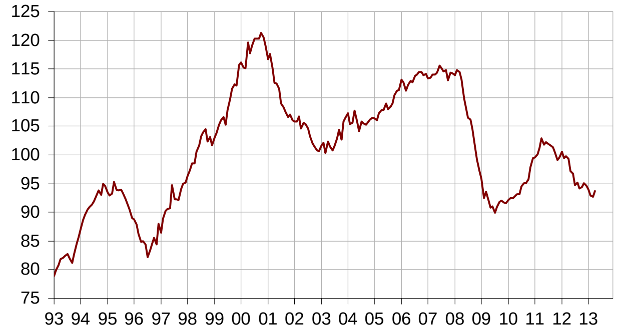
The general business outlook, which translate the business leader's opinions about the general evolution in the sector, are below their long term average.

Decreasing employment

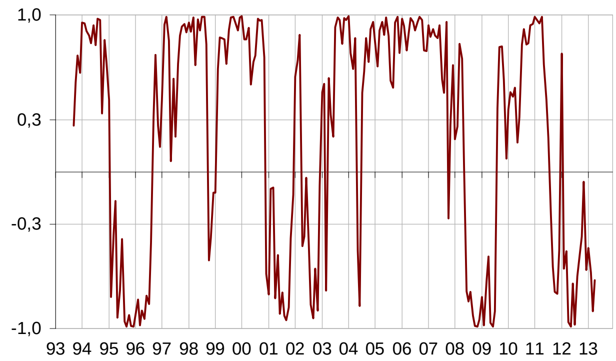
Employment in the building industry is grim: the balances of opinion corresponding to past employment and expected employment are significantly below their long-term average.

Business climate synthetic indicator

standardized with mean equal to 100 and a standard deviation equal to 10



Turning-point indicator



Lecture : close to 1 (respectively -1), it indicates a favorable climate (respectively unfavorable).

Building industry economic outlook

Balances of opinion, in %, SA

	Mean*	Jan. 13	Feb. 13	March 13	April 13
Business climate	100	94	93	93	94
Past activity	–2	–19	–22	–26	–27
Expected activity	–5	–24	–22	–22	–22
Gen. business outlook	–17	–44			–50
Past employment	–2	–15	–18	–16	–11
Expected employment	–2	–14	–16	–17	–12
Opinion on order books	–19	–41	–41	–43	–44
Order books (in month)	5,2	7,0	7,1	7,1	7,2
Productive capacity utilisation rate	89,0	87,3	87,3	86,6	86,1
Obstacles to production increase (in %)	34	19	18	18	18
- Because of workforce shortage(in %)	15,9	5,6	4,4	3,9	4,3
Recruiting problems (in %)	60	46			48
Expected prices	–12	–30	–29	–33	–39
Cash-flow position	–8	–18			–25
Repayment period	28	38			47

* Mean since september 1993.

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Order books are again considered as significantly lower than normal

In April, business leaders are almost as numerous as in March to consider their order books lower than normal. The corresponding balance of opinion is in a level inferior to its long-term average.

The April's order books could provide 7.2 months of work with full-time staff.

Productive capacity underused again

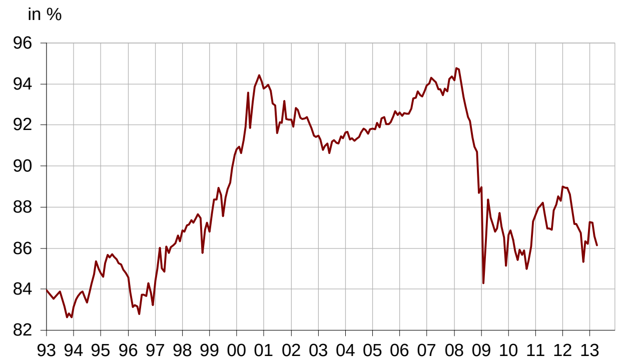
The productive capacity utilisation rate is slightly declining and stays below its long-term average. At the same time, one business leader out of five declare having difficulties to increase his activity. A little less than one business leader out of two continue to feel recruiting problems; this ratio is inferior again to its long-term average.

Prices not very dynamic

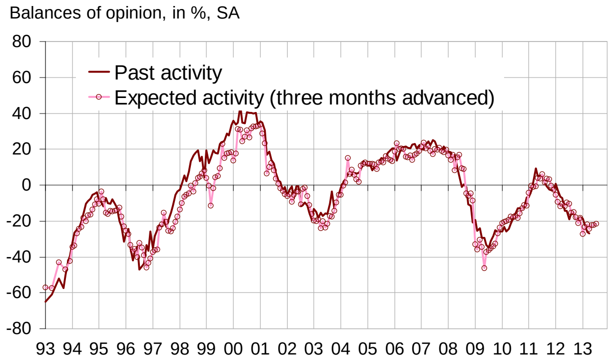
In April, business leaders are more numerous than in March to indicate price downturns. The corresponding balance of opinion remains sharply inferior to its long-term average.

According to business leaders, the cash-flow position of the overall sector would deteriorate and the repayment period would get longer.

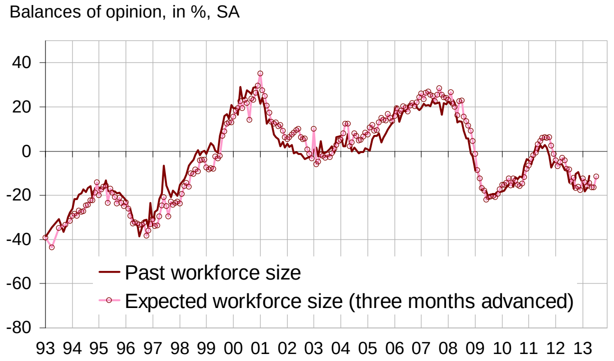
Productive capacity utilisation rate



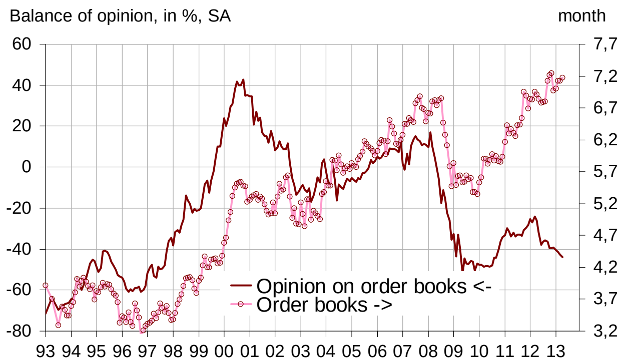
Activity tendency in the building industry



Workforce size tendency in the building industry



Order books



For further information:

- The balance of opinion is calculated as the difference between the percentage of response «increase» and the percentage of response « decrease ».

- Additional information (long series, methodology, links…) are available on the HTML page of this indicator: http://www.insee.fr/en/themes/info-rapide.asp?id=56
- Historical data are available on the BDM: G1273, G1276, G1274.
- Press contact: bureau-de-presse@insee.fr

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