

Informations *Rapides*

26 octobre 2018 - n° 282



■ Quarterly business survey in civil engineering – October 2018

In October 2018, the economic climate keeps improving in civil engineering

According to the business managers surveyed in October 2018, the economic climate in civil engineering has improved compared to the previous quarter. The civil engineering professionals are confident: all the balances of opinion stand well above their long-term average.

Business managers' opinion on their past and expected activity improves

In October 2018, more business managers than in July have indicated an increase in their activity over the last three months, mainly due to private-sector projects. The corresponding balance of opinion has increased again and stands far above its long-term average. Otherwise, slightly more business managers than in July forecast an increase in their activity over the next three months. The corresponding balance is stable for both types of customers, public sector and private sector, and remains in both cases well above its long-term average. Furthermore, business managers deem that their order books remain well filled; the corresponding balance of opinion remains largely above its long-term average.

The lack of workforce remains felt

In October 2018, the obstacles to production increase due to workforce shortage have slightly diminished. Indeed, 49% of businesses have indicated being hampered because of workforce shortage, that is slightly less than in the previous quarter but still largely more than the long-term average (15%).

Employment prospects improve again

More business managers than in July 2018 plan to increase their workforce in the next few months. The corresponding balance has improved again in October and stands far above its long-term average.

Public works economic outlook

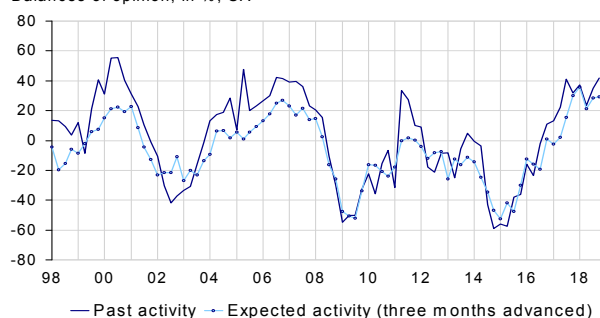
Balances of opinion, in %, SA					
	Mean*	Jan. 18	April 18	July 18	Oct. 18
Past activity	-5	37	23	35	42
- public-sector project	-11	23	14	29	30
- private-sector project	-10	32	24	25	36
Expected activity	-13	21	29	29	32
- public-sector project	-16	17	22	23	23
- private-sector project	-15	16	24	22	22
Opinion on order books	-25	14	10	19	19
Obstacles to production increase because of workforce shortage (in %)	15	40	38	51	49
Expected workforce	-14	29	31	33	37

Note: the balances of opinion by customer may differ from the balance of the whole, because sometimes the firms do not distinguish public-sector project and private-sector project.

* Mean since January 1981 Sources: FNTF and INSEE

Activity tendency in civil engineering

Balances of opinion, in %, SA



For further information

The balance of opinion is the difference between the percentage of responses "increase" and the percentage of responses "decrease".

- Additional information (long series, methodology, links, etc.) is available on the web page of this indicator: <https://www.insee.fr/en/statistiques?debut=0&theme=30&conjoncture=12>
- Historical data are available on the BDM : <https://www.insee.fr/en/statistiques/series/102874976>
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Next publication: 26 January 2019 at 12:00