

Dinamiche congiunturali, produttività e lavoro nelle principali imprese della provincia di Pesaro

Scenario economico

- L'economia internazionale
- Le principali indagini congiunturali

I bilanci d'impresa

- I risultati d'esercizio
- Redditività e produttività
- Lavoro
- Confronto con altre indagini

Economia mondiale

Nel 2012-13 rallenta; l'Italia entra in recessione e vi rimane per tutto il 2013.

PIL

Mondo
Area Euro
Italia

2010

2011

2012

2013

5,2

3,9

3,2

3,0

2,0

1,6

-0,7

-0,5

1,7

0,4

-2,4

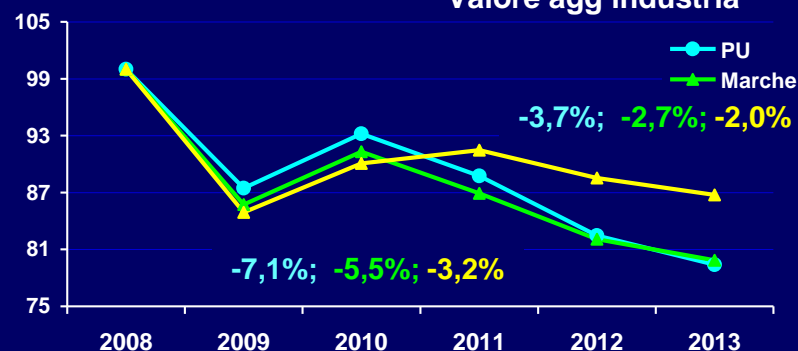
-1,9

Economia locale - Si contrae il valore aggiunto in particolare nell'industria; Vendite e produzione in forte calo nel 2012 con moderata recupero nella seconda metà del 2013

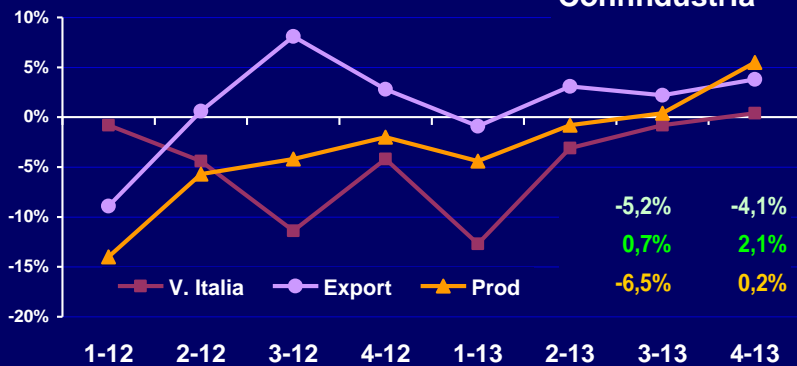
Valore agg totale



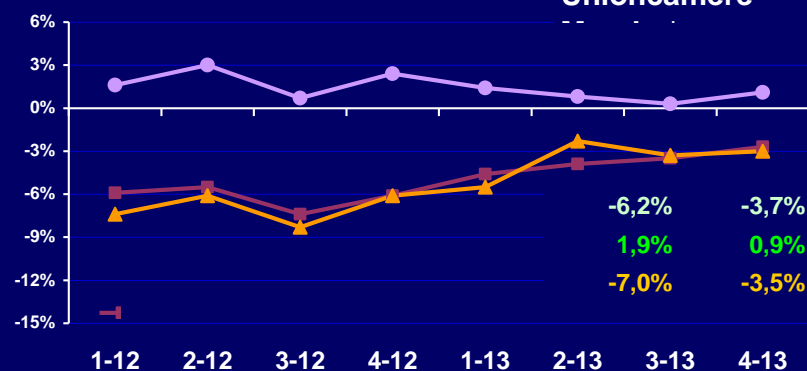
Valore agg industria



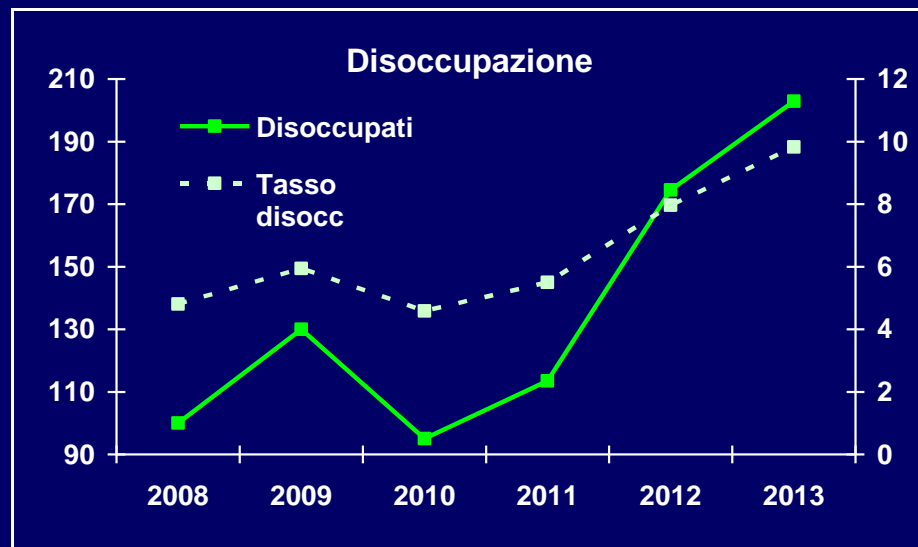
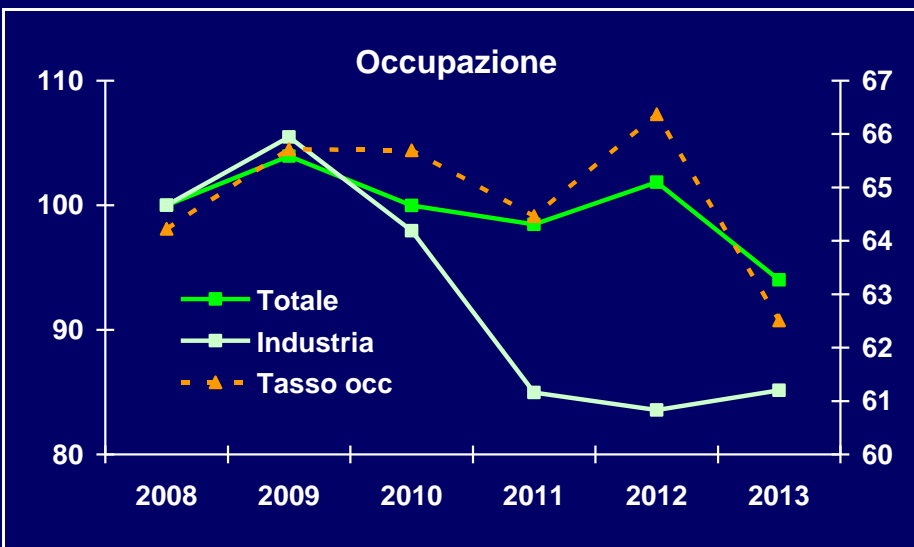
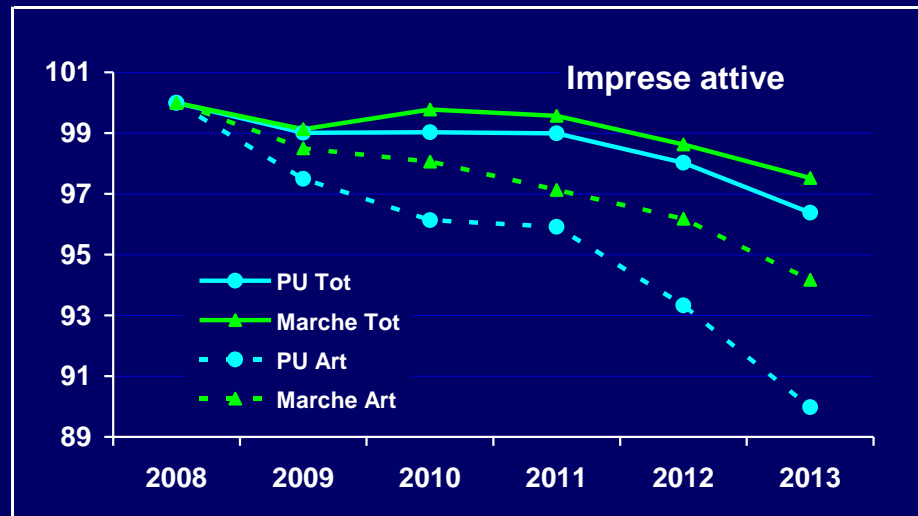
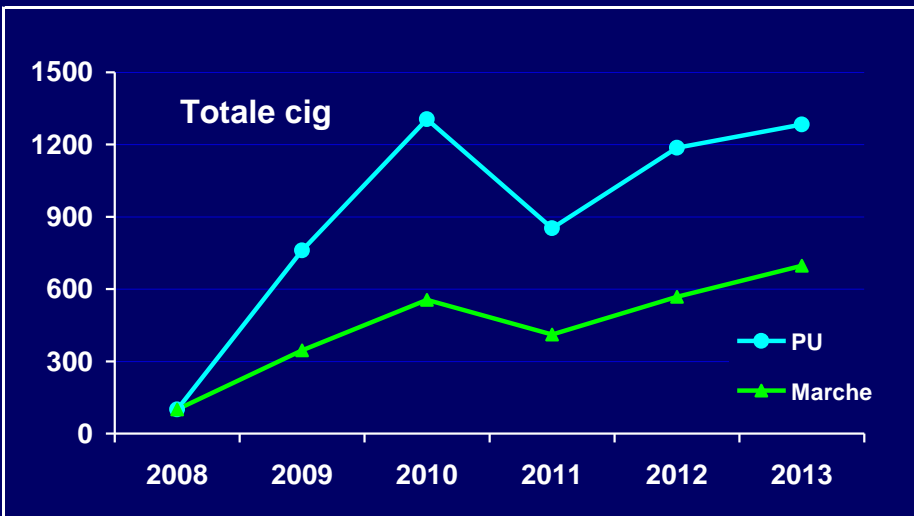
Confindustria



Unioncamere

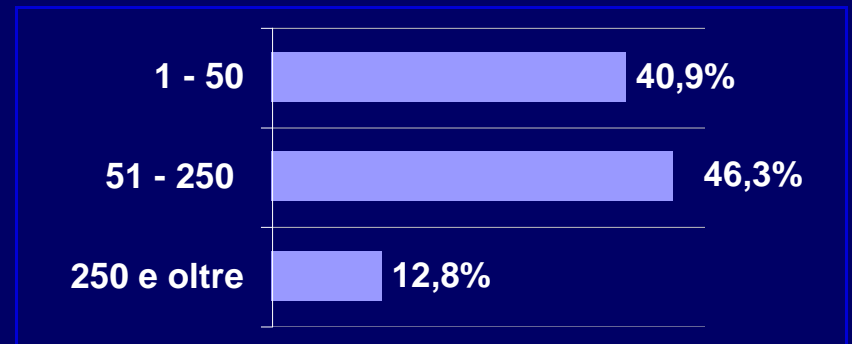
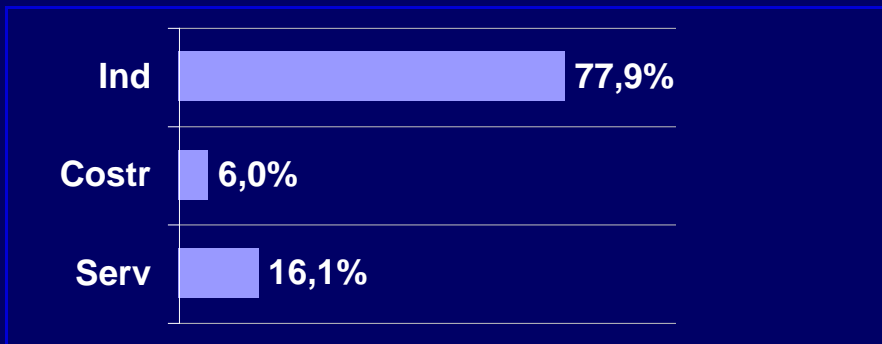


Economia locale - Aumenta il ricorso agli ammortizzatori sociali; calano le imprese attive specie le artigiane; nel 2013 crolla l'occupazione (-7,3%) e continua ad aumentare la disoccupazione



Il campione di imprese

Settore	Valori	%	Classe addetti	Valori	%
Alimentare	4	2,7%	1-20	20	12,9%
Tessile abbigliamento	10	6,7%	21-50	41	26,5%
Legno mobile	36	24,2%	1 - 50	61	40,9%
Chimica gomma plastica	4	2,7%	51-100	48	31,0%
Minerali non metalliferi	9	6,0%	101-250	21	13,5%
Meccanica	52	34,9%	51 - 250	69	46,3%
Altre industrie	1	0,7%	250 e oltre	19	12,8%
Totale manifatture	116	77,9%	Totale complessivo	149	
Costruzioni	9	6,0%	Occupazione 18.123 pari al 16,3%		
Totale servizi	24	16,1%			
Totale complessivo	149				



I bilanci d'impresa:

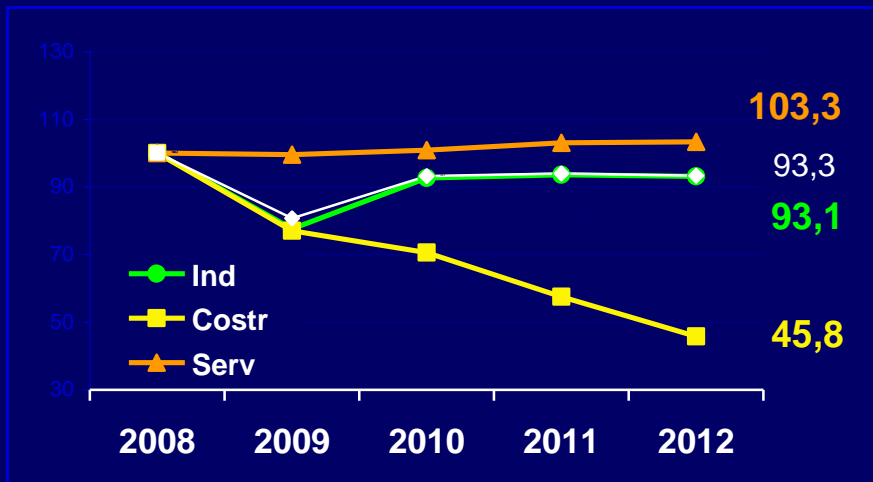
La determinazione del reddito

- Ricavi
- Valore della produzione
- Valore aggiunto
- Reddito operativo
- Gestione finanziaria
- Utile / perdite d'esercizio
- Investimenti
- Indicatori di redditività: Roe e Roi
- Occupazione e organici

Ricavi

3,2 mld

Var. 2011/12 -0,7%



Ind: -0,5%

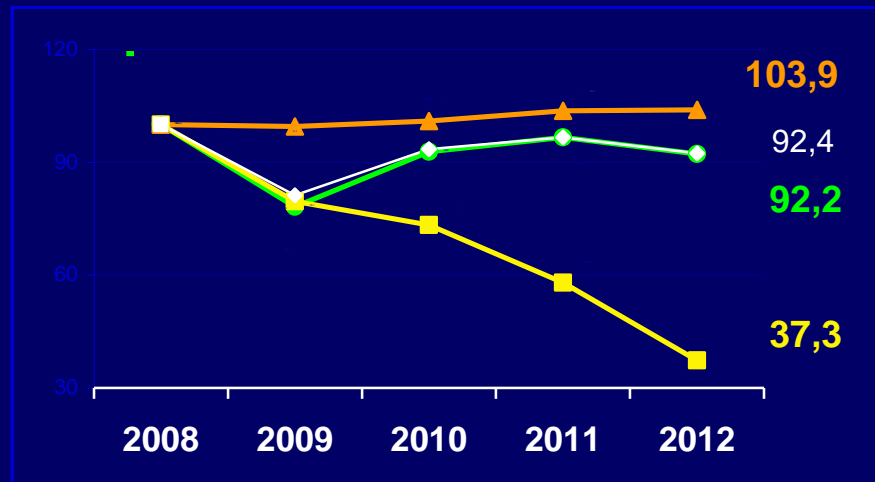
Costr: -20,4%

Serv: 0,2%

Valore produzione

3,5 mld

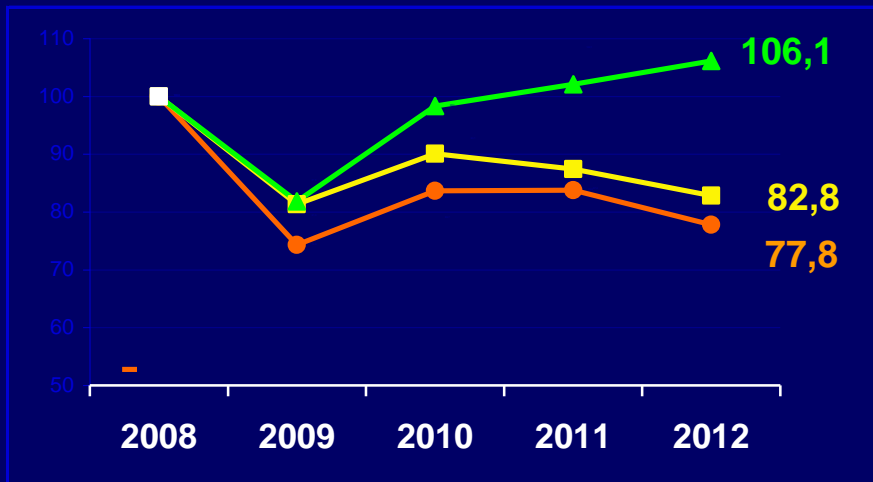
Var. 2011/12 -4,4%



Ind: -4,6%

Costr: -35,7%

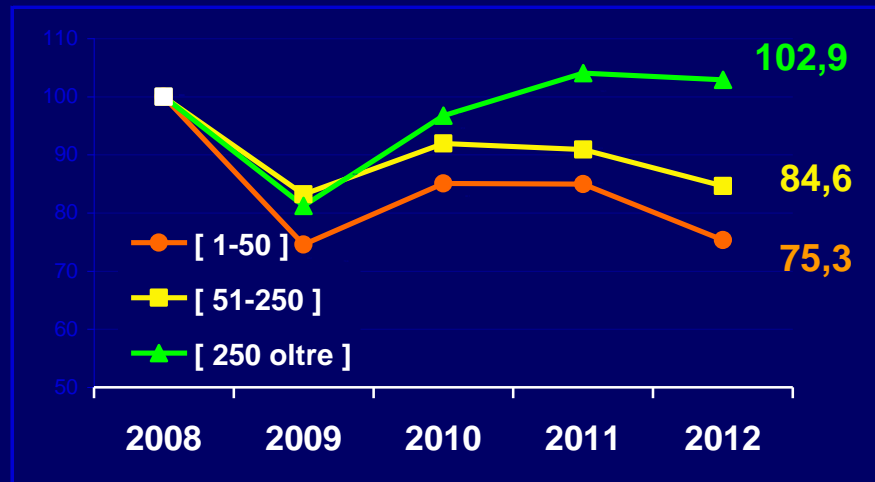
Serv: 0,2%



1 - 50: -7,2%

51 - 250: -5,3%

250 oltre: 3,9%



1 - 50: -11,3%

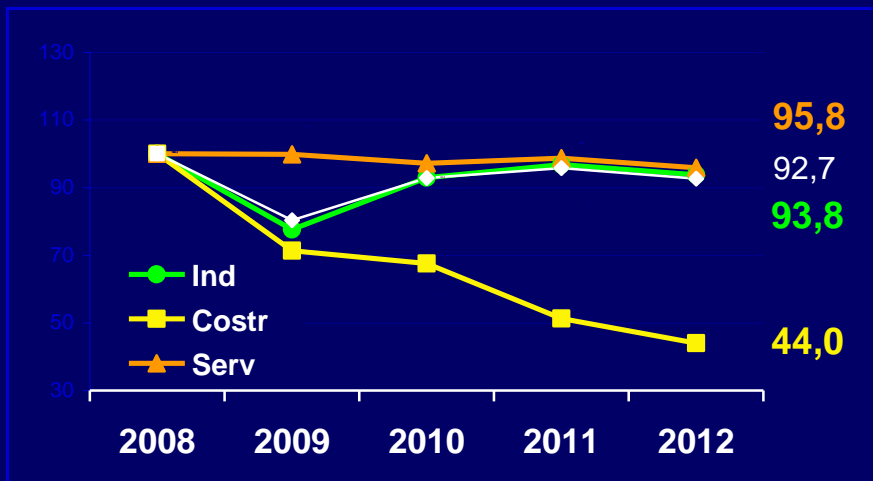
51 - 250: -7,0%

250 oltre: -1,1%

Costi operativi

2,5 mld

Var. 2011/12 : -3,2%



Ind: -3,1%

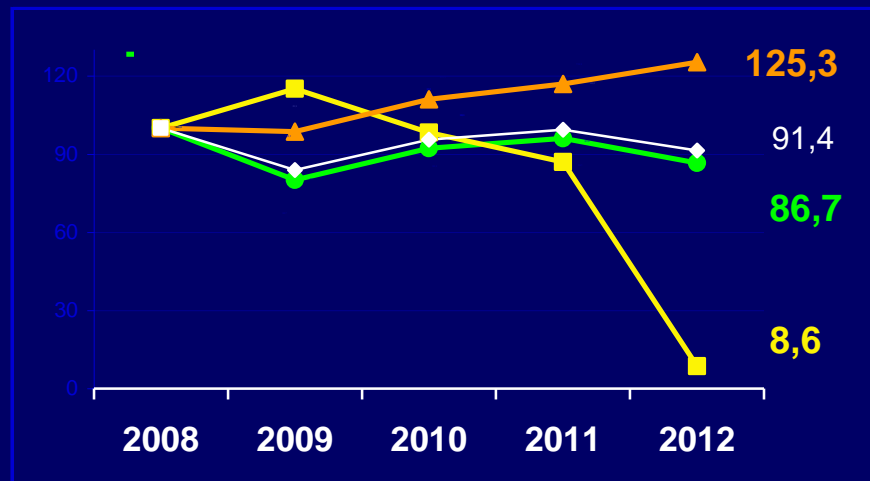
Costr: -14,3%

Serv: -2,9%

Valore aggiunto

753 mln

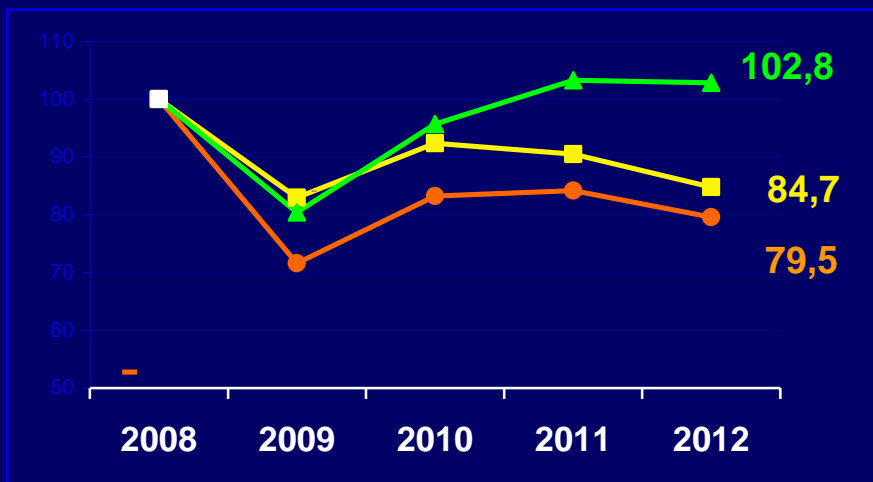
Var. 2011/12 : -8,0%



Ind: -9,8%

Costr: -90,1%

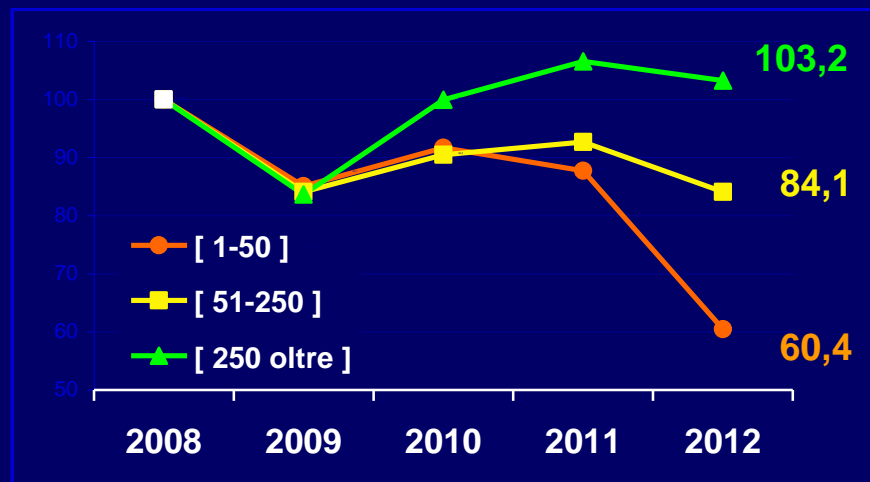
Serv: 7,1%



1 - 50: -5,5%

51 - 250: -6,3%

250 oltre: -0,4%



1 - 50: -31,1%

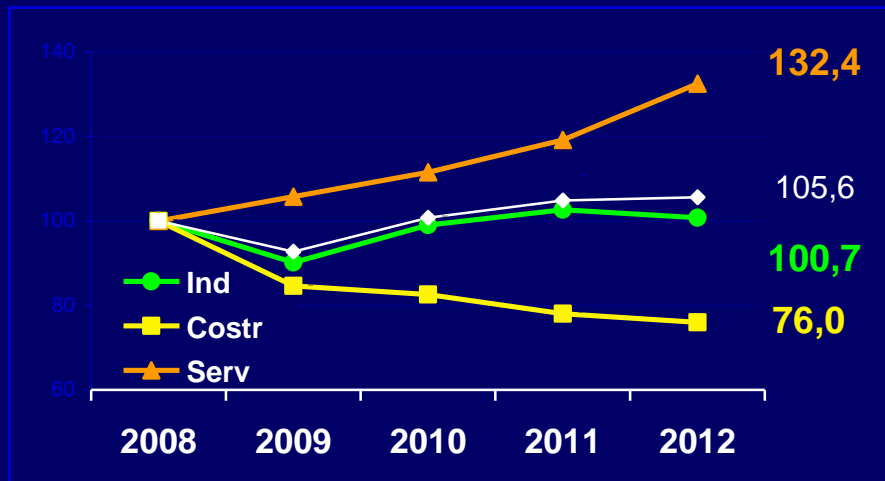
51 - 250: -9,2%

250 oltre: -3,1%

Costo lavoro

611 mln

Var. 2011/12 : 0,7%



Ind: -1,9%

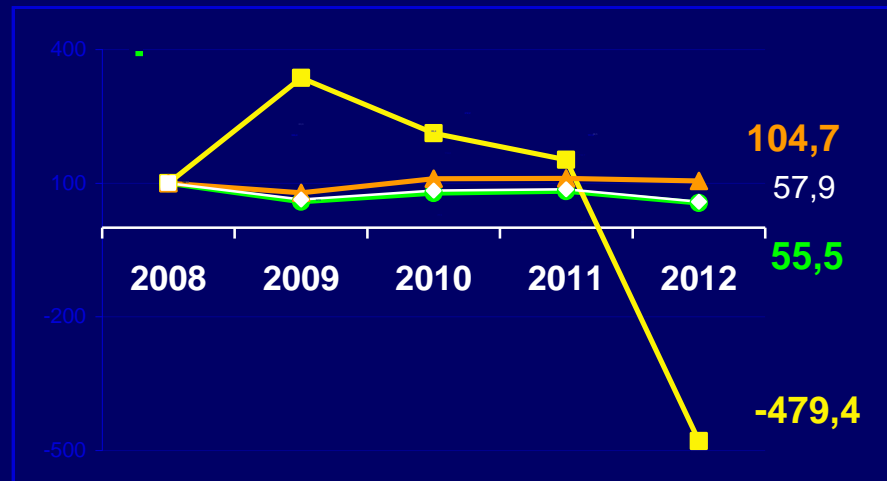
Costr: -2,6%

Serv: 11,2%

Margine operativo I.

142 mln

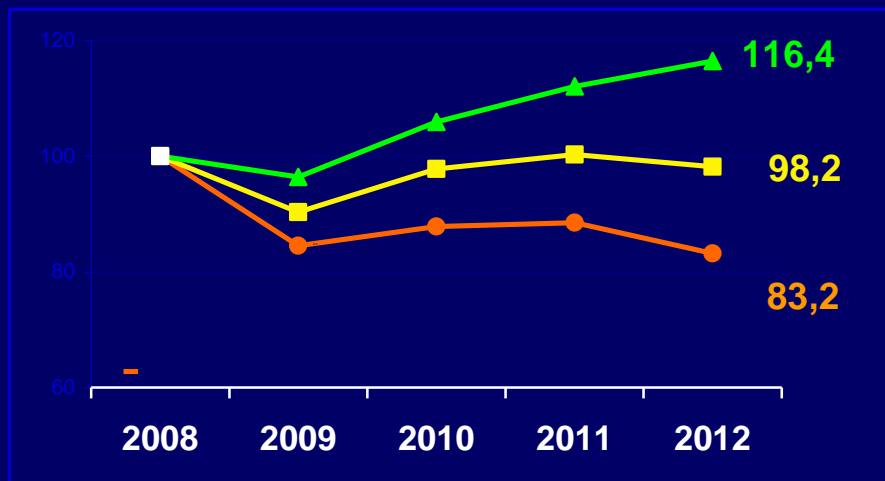
Var. 2011/12 : -33,0%



Ind: -32,0%

Costr: -415,7%

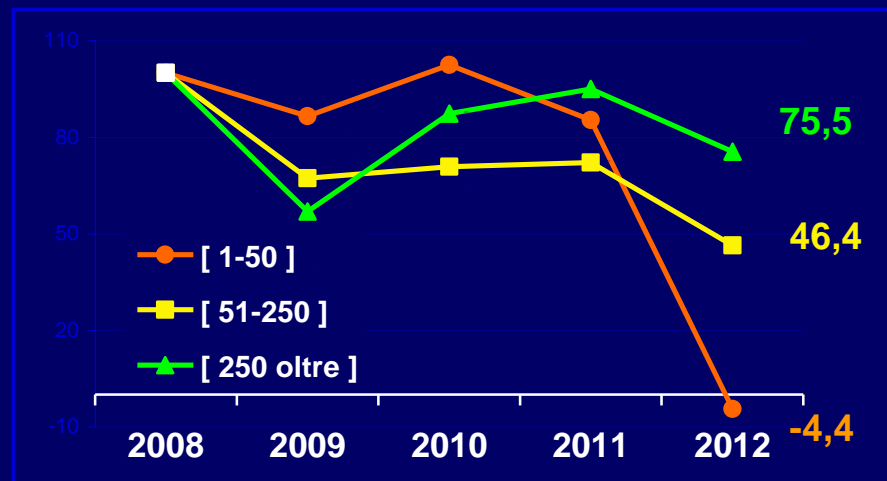
Serv: -5,4%



1 - 50: -6,0%

51 - 250: -2,1%

250 oltre: 3,9%



[1 - 50]: -105,2%

[51 - 250]: -35,7%

[250 oltre]: -20,5%

Reddito operativo

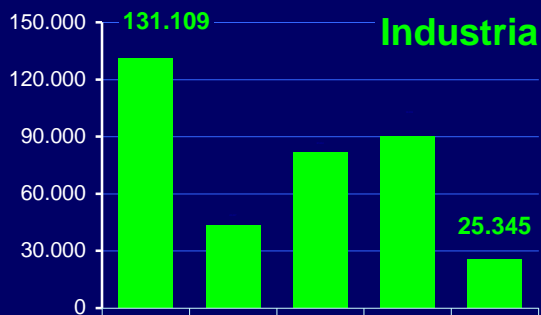
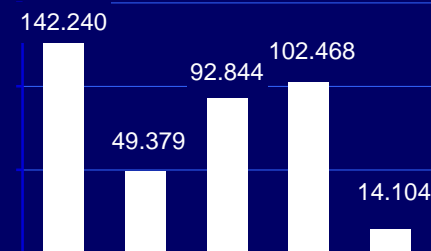
€ 14.104

Indica la differenza tra il valore della produzione e il totale dei costi sostenuti per ottenerla al netto delle gestioni non caratteristiche.

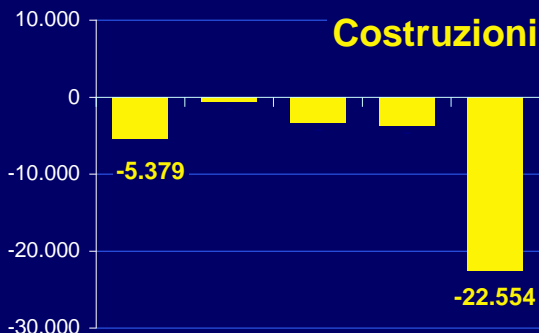
Var 2011/12: -86,2%

Var 2008/12: -90,1%

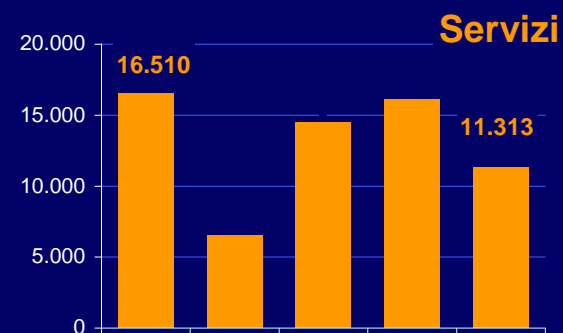
Var 2012/max: -90,1%



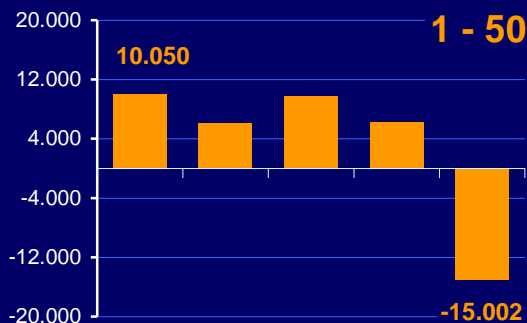
Var 2011/12: -80,7%



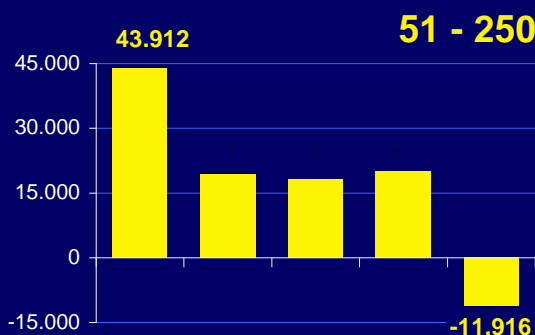
Var 2011/12: -509,7%



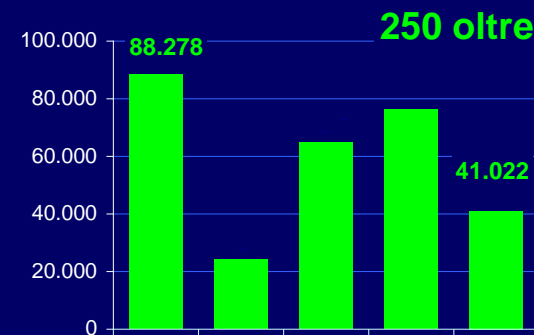
Var 2011/12: -29,6%



Var 2011/12: -341,6%



Var 2011/12: -159,7%



Var 2011/12: -46,2%

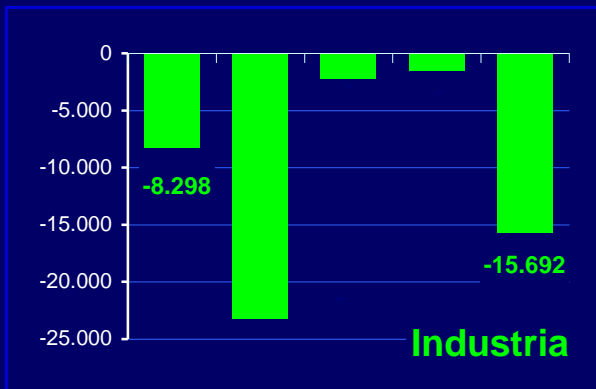
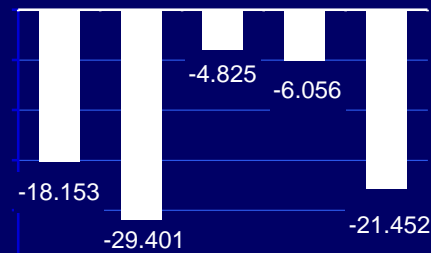
Gest. Finanziaria

-€ 21.452

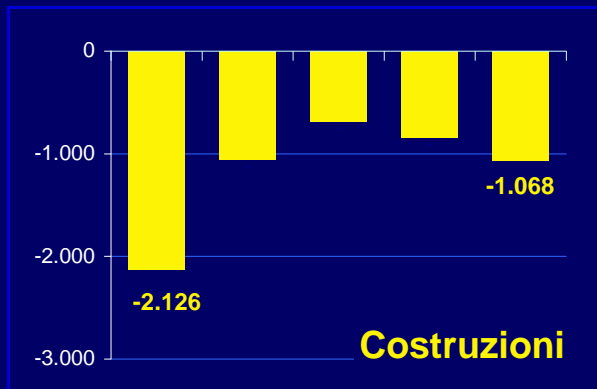
Var 2011/12: -254,2%

Var 2008/12: -18,2%

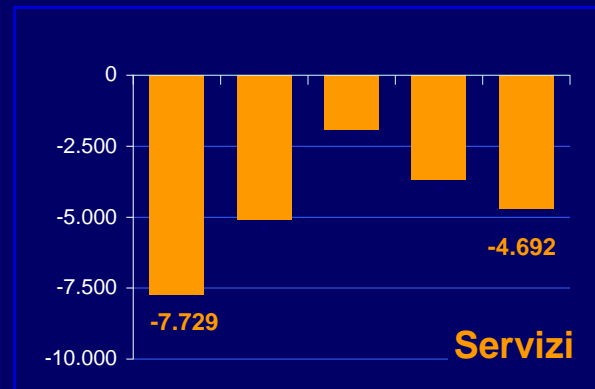
Var 2012/max: -344,6%



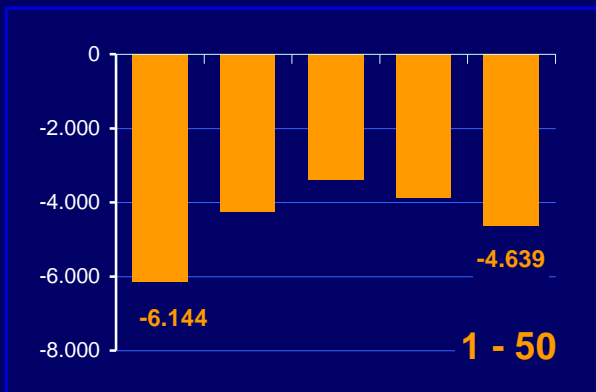
Var 2011/12: -922,9%



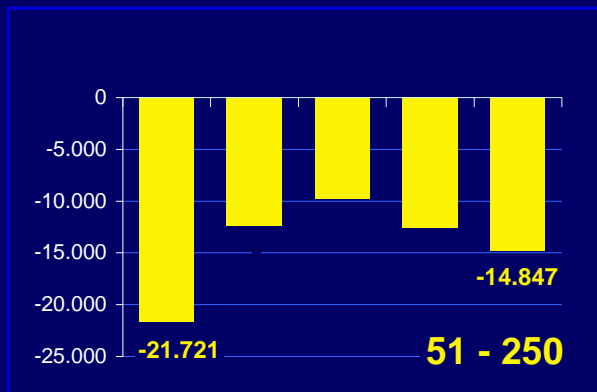
Var 2011/12: -26,2%



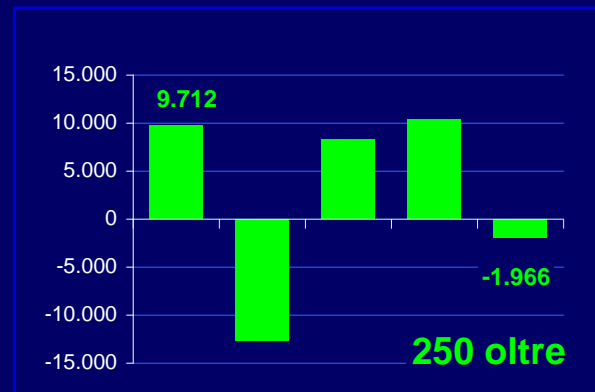
Var 2011/12: -27,6%



Var 2011/12: -19,5%



Var 2011/12: -18,1%



Var 2011/12: -118,9%

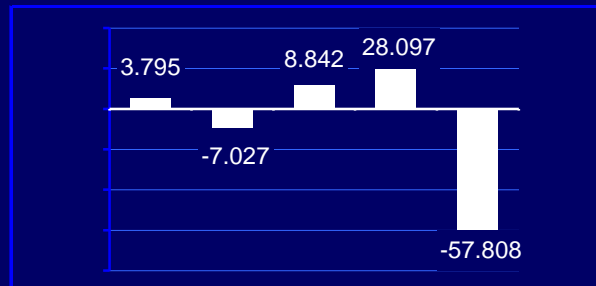
Utili / perdite

-€ **57.808**

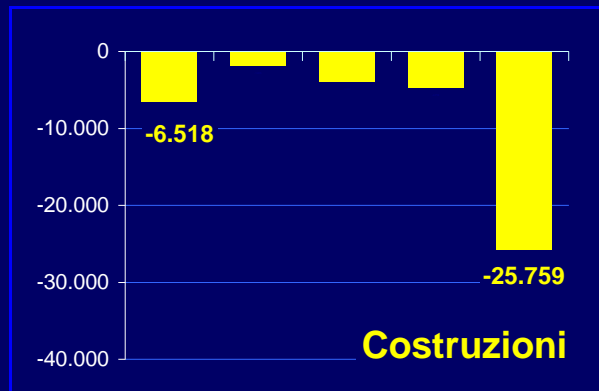
Var 2011/12: -305,7%

Var 2008/12: -1623,3%

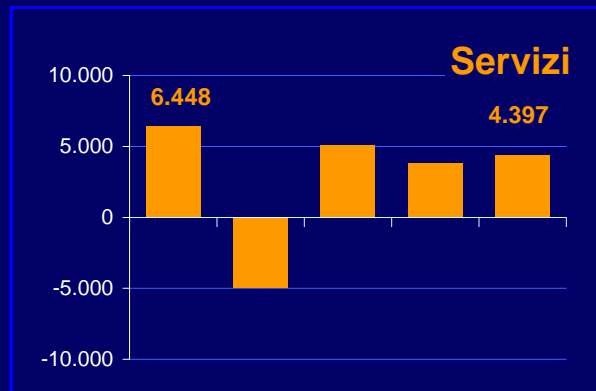
Var 2012/max: -305,7%



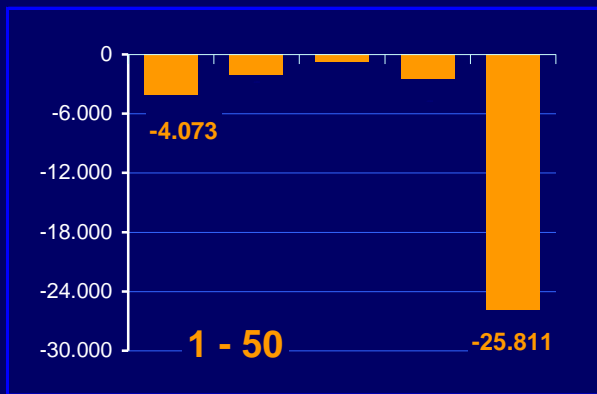
Var 2011/12: -225,7%



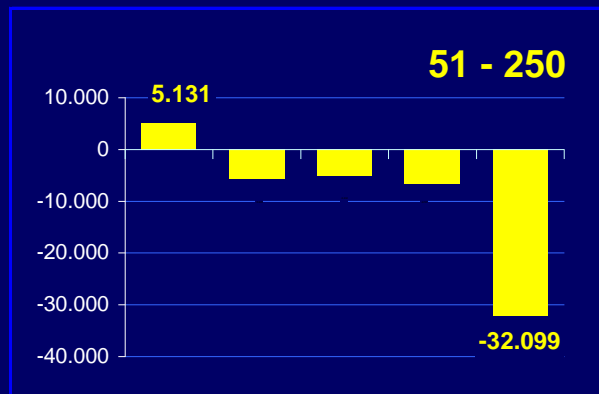
Var 2011/12: -446,0%



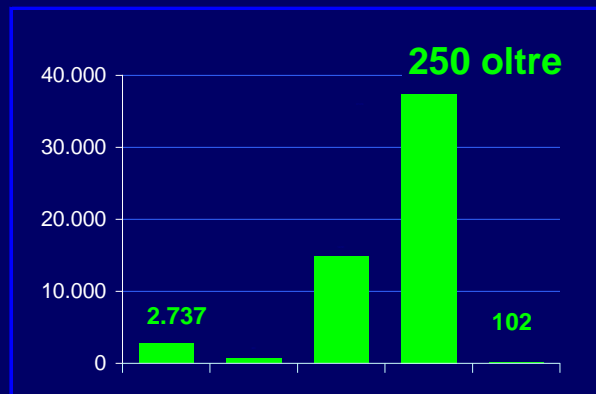
Var 2011/12: 15,3%



Var 2011/12: -919,4%



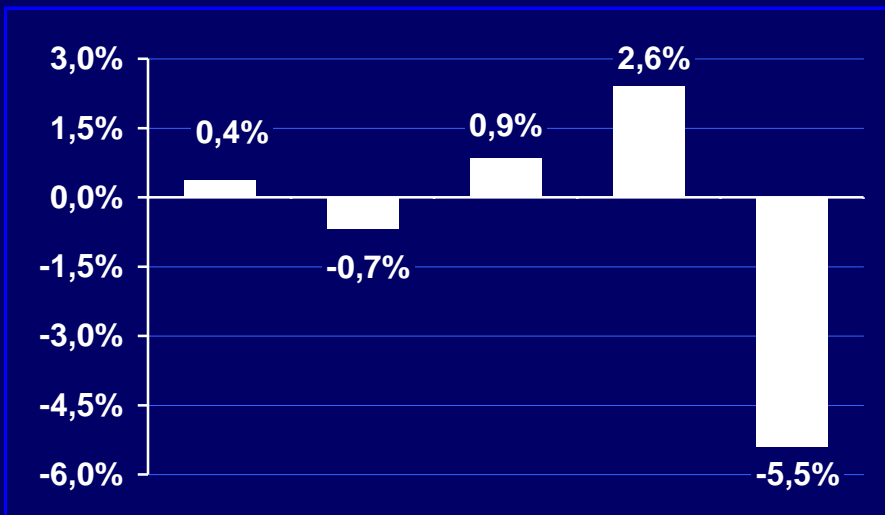
Var 2011/12: -375,8%



Var 2011/12: -99,7%

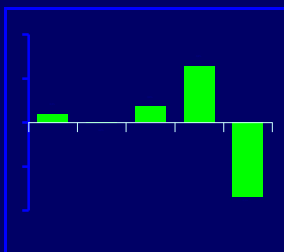
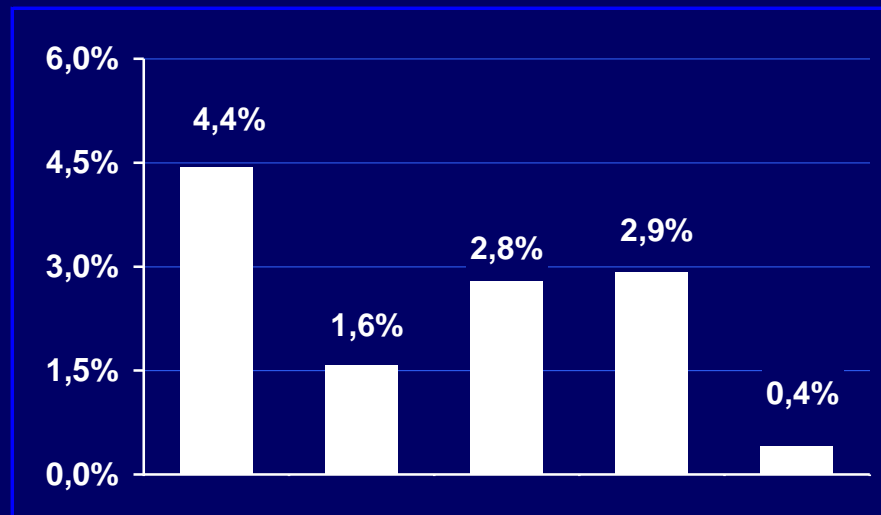
ROE

UTILE / PN: misura la redditività del capitale di proprietà

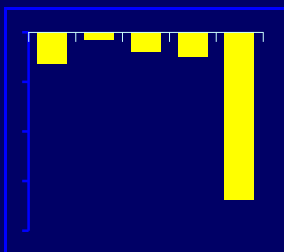


ROI

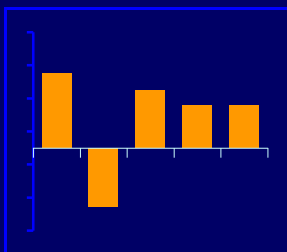
Redd. Operativo / TK: misura la redditività della gestione ordinaria



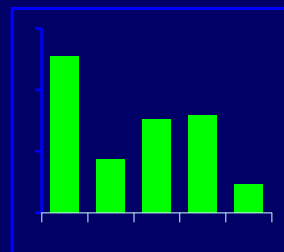
Industria: 3,2 -4



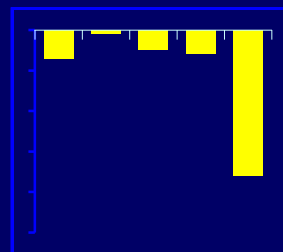
Costruzioni: -13 -84



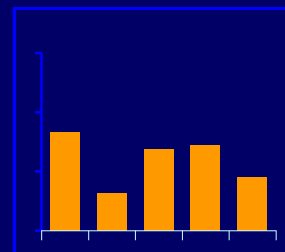
Servizi: 2,5 2,6



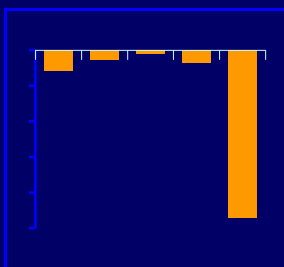
Industria: 3,2 0,9



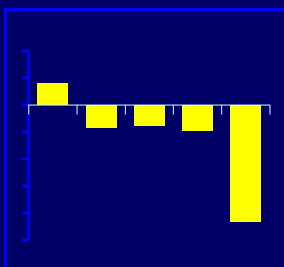
Costruzioni: -3 -22



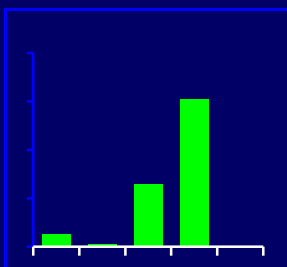
Servizi: 2,9 1,8



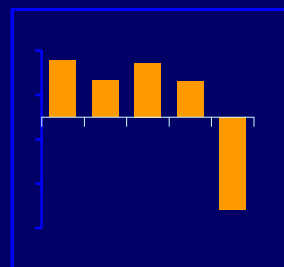
[1 - 50]: -2 -28



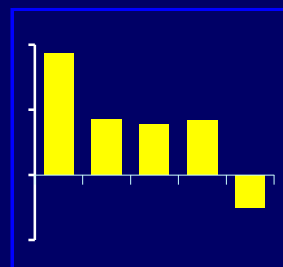
[51 - 250]: -2 -9



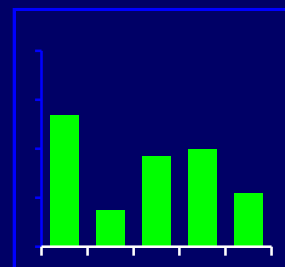
[250 oltre]: 6 0,0



[1 - 50]: 1,6 -4,1



[51 - 250]: 1,7 -1,0



[250 oltre]: 4,0 2,2

Investimenti

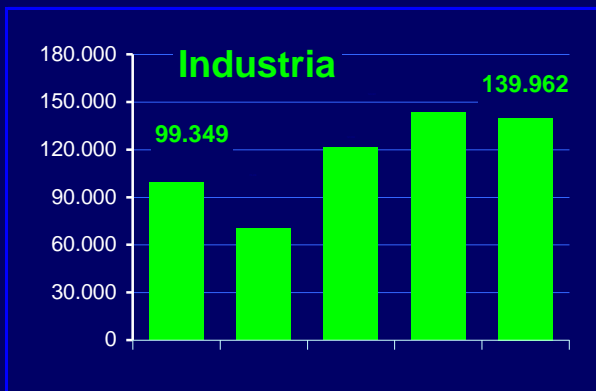
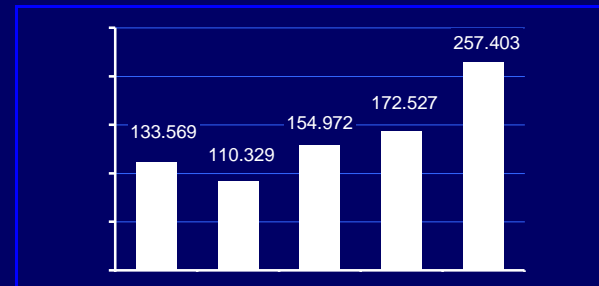
€ **257.403**

TOTALE IMPRESE: eliminando i casi estremi la spesa sarebbe costante. Investono 122 su 149; Aumentano 58; diminuiscono 70; Una impr di costruzioni aumenta di 28 mln; L'incremento delle costruzioni si concentra in 2 imp. E' comunque un anno anomalo (TrendMarche).

Var 2011/12: 49,2%

Var 2008/12: 92,7%

Var 2012/max: 0,0%



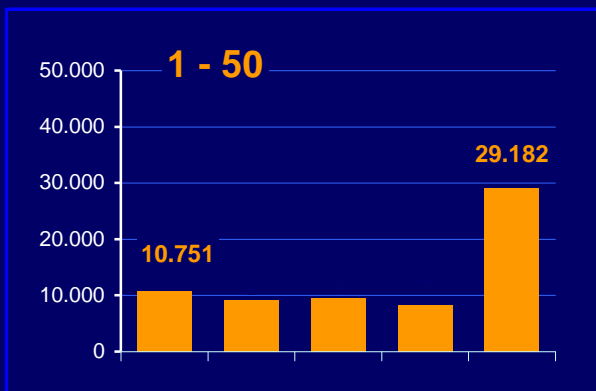
Var 2011/12: -2,5%



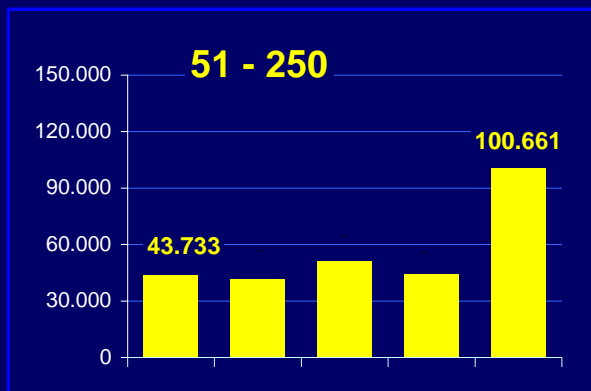
Var 2011/12: 2579,9%



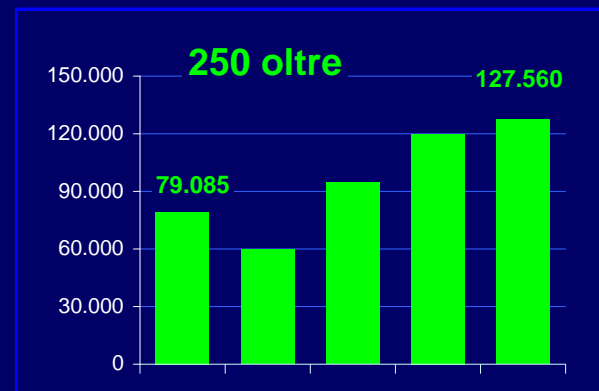
Var 2011/12: 212,7%



Var 2011/12: 250,0%



Var 2011/12: 126,7%



Var 2011/12: 6,5%

Investimenti

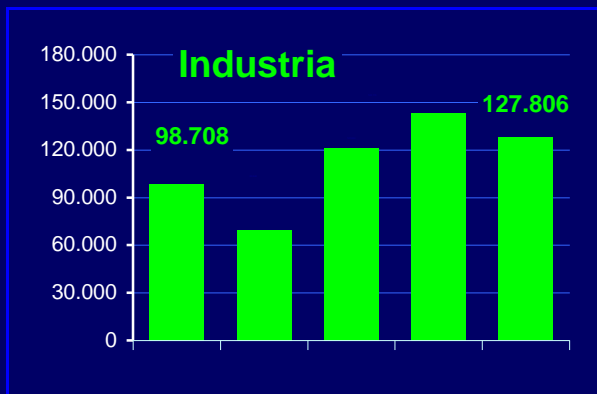
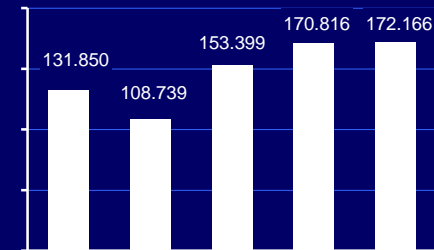
€ **172.166**

SENZA CASI ESTREMI

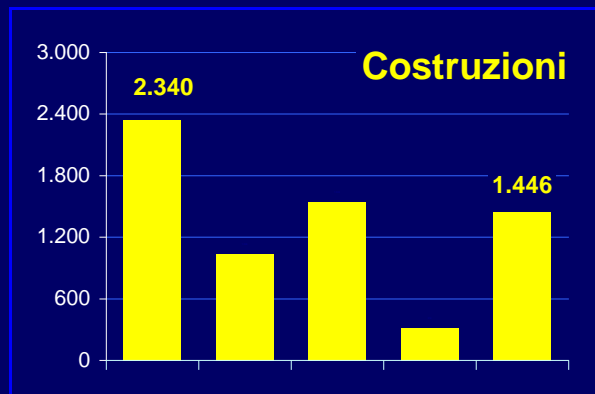
Var 2011/12: **0,8%**

Var 2008/12: **30,6%**

Var 2012/max: **0,0%**



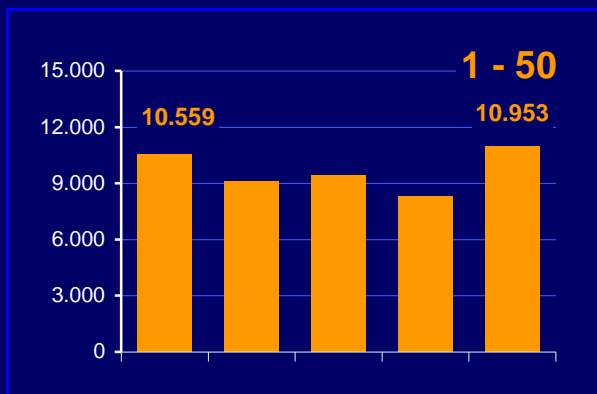
Var 2011/12: **-10,7%**



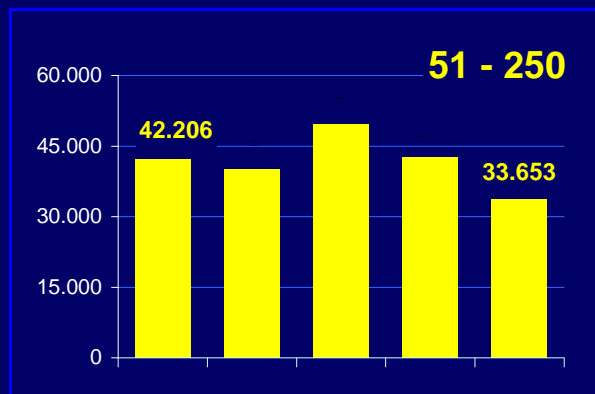
Var 2011/12: **360,5%**



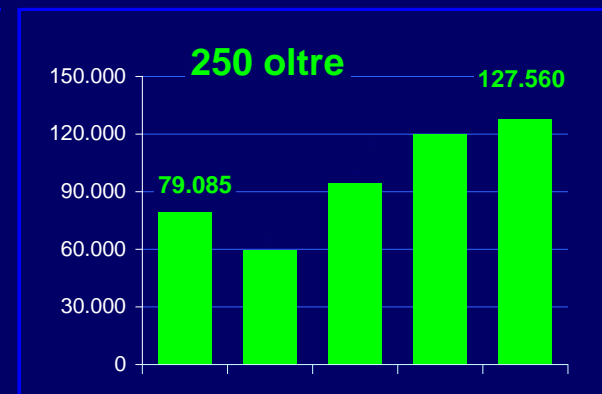
Var 2011/12: **56,7%**



Var 2011/12: **32,1%**



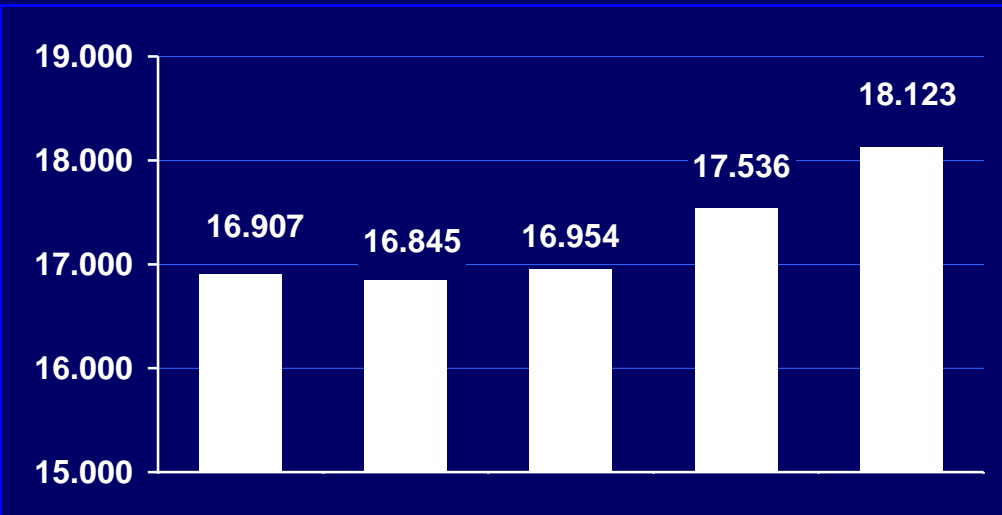
Var 2011/12: **-21,3%**



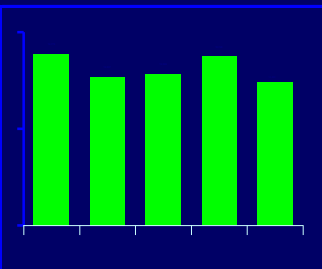
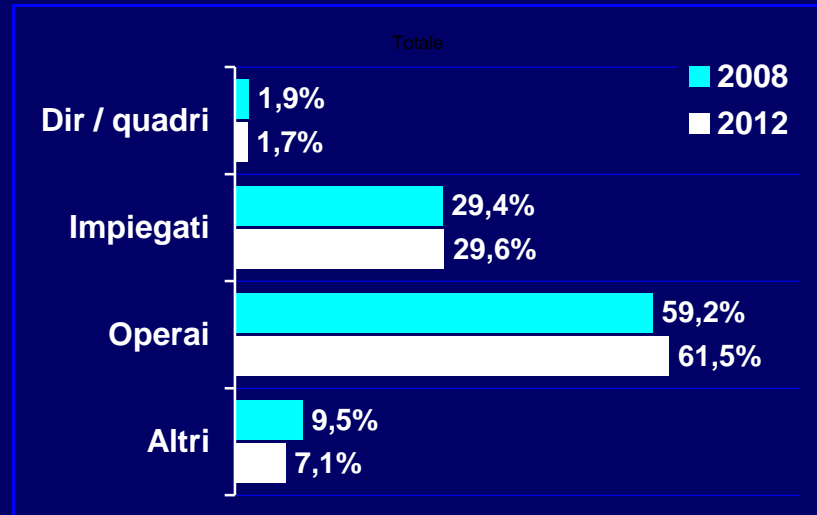
Var 2011/12: **6,5%**

Occupazione

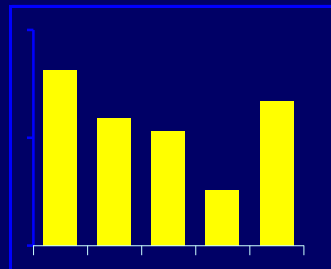
Aumenta del 3,3%; Costruzioni, servizi, grandi imprese.



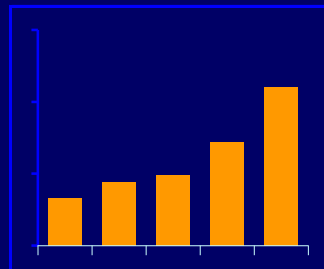
Organici



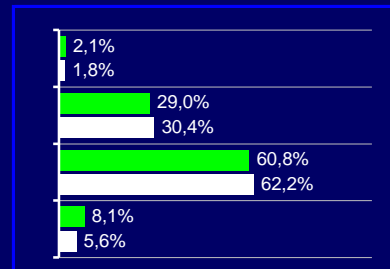
Industria: 12,7 12,5



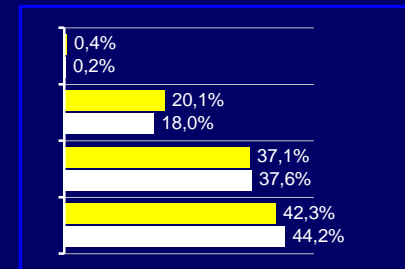
Costruzioni: 0,35 0,43



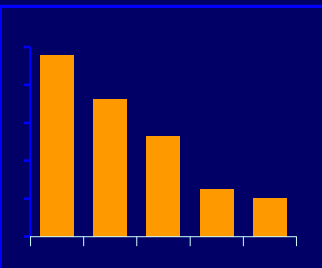
Servizi: 4,4 5,2



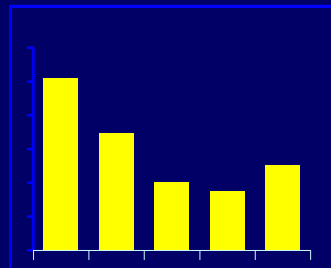
Industria



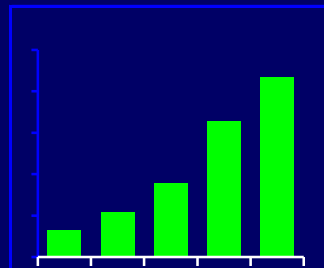
Costruzioni



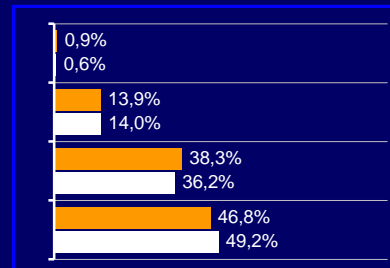
[1 - 50]: 1,7 1,7



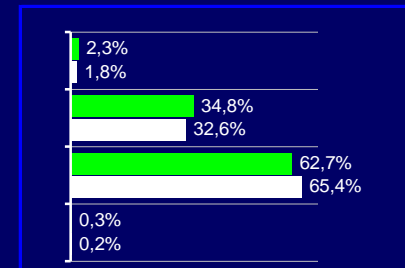
[51 - 250]: 6,2 6,3



[250 oltre]: 9,6 10,2



[1 - 50]



[250 oltre]

Cash flow

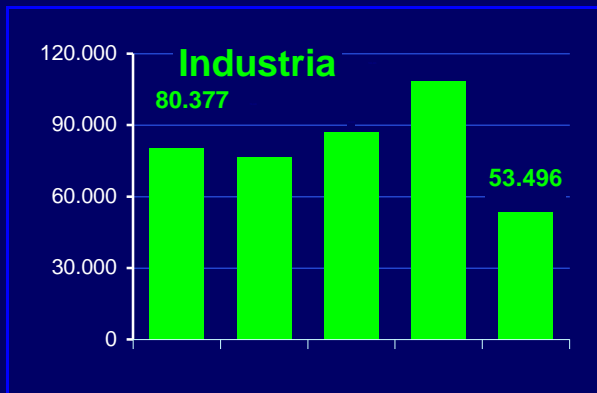
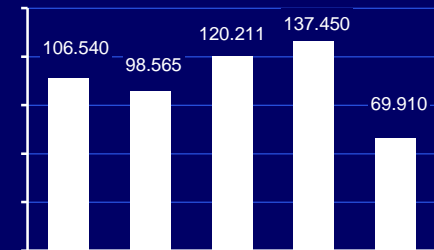
€ **69.910**

Misura la capacità di autofinanziamento. Se negativo significa che la gestione assorbe più risorse di quante ne crei con rischio di cessazione. Elevato tasso di mortalità nel 2013

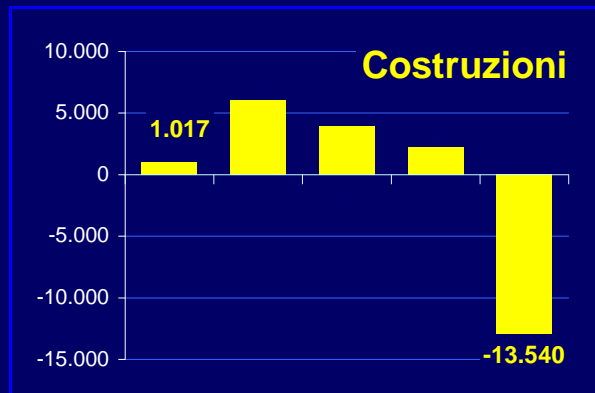
Var 2011/12: **-49,1%**

Var 2008/12: **-34,4%**

Var 2012/max: **-49,1%**



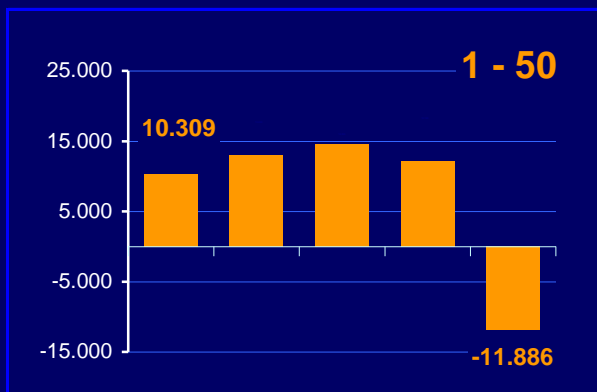
Var 2011/12: **-50,7%**



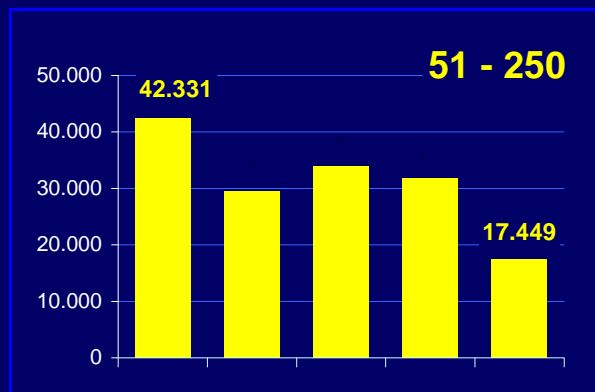
Var 2011/12: **-700,4%**



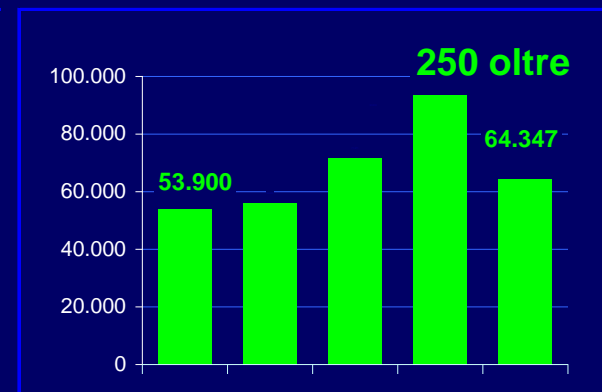
Var 2011/12: **12,1%**



Var 2011/12: **-198,1%**



Var 2011/12: **-45,1%**



Var 2011/12: **-31,2%**

Il comparto manifatturiero: un confronto con altre indagini

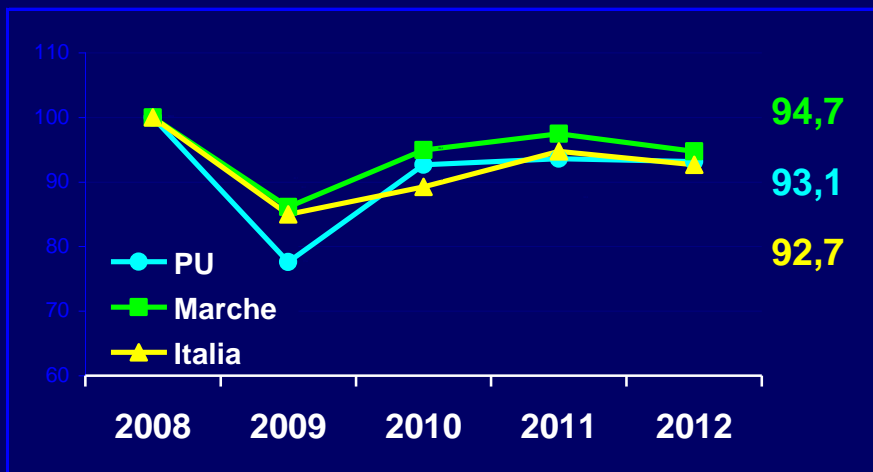
Confronto con altre indagini

- **Classifica delle Principali Imprese Marchigiane:
anno 2012 – Fondazione Aristide Merloni;**

200 imprese manifatturiere (il campione privilegia le
imprese di grandi dimensioni)

- **Ricavi / Reddito operativo** - Indagine Mediobanca;
- **Utile perdita d'esercizio** 1030 imprese manifatturiere (il campione privilegia le
imprese di grandi dimensioni)
- **ROE / ROI**
- **Occupazione / Costo del lavoro**
- **Costo del lavoro per addetto**
- **Ricavi per addetto / Costo del lavoro per addetto**

Ricavi - totale

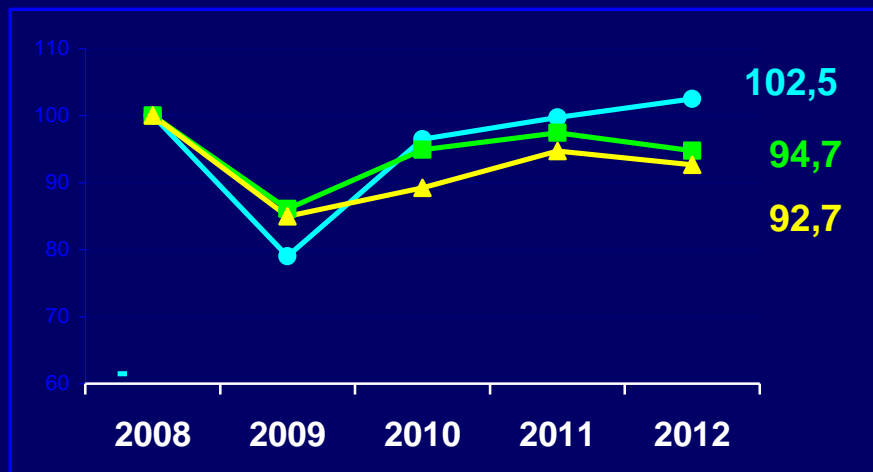


Pu: -0,5%

Marche: -2,8%

Italia: -2,2%

Ricavi - 250 oltre

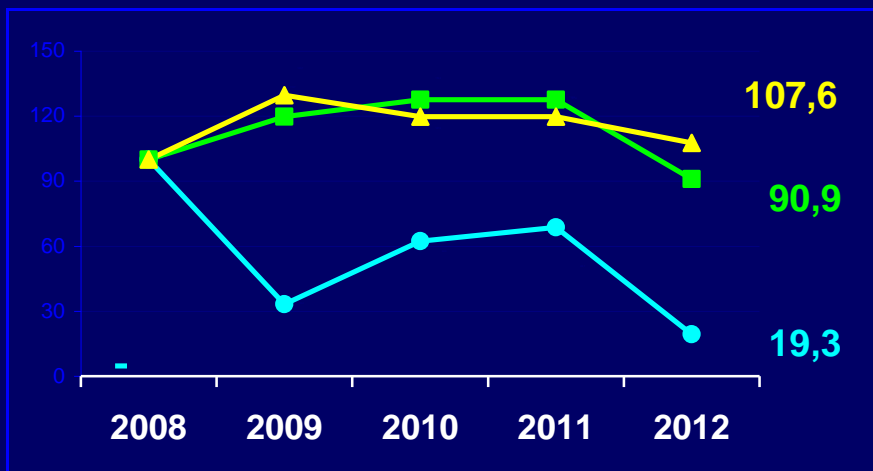


PU: 2,8%

Marche: -2,8%

Italia: -2,2%

Red. operativo - totale

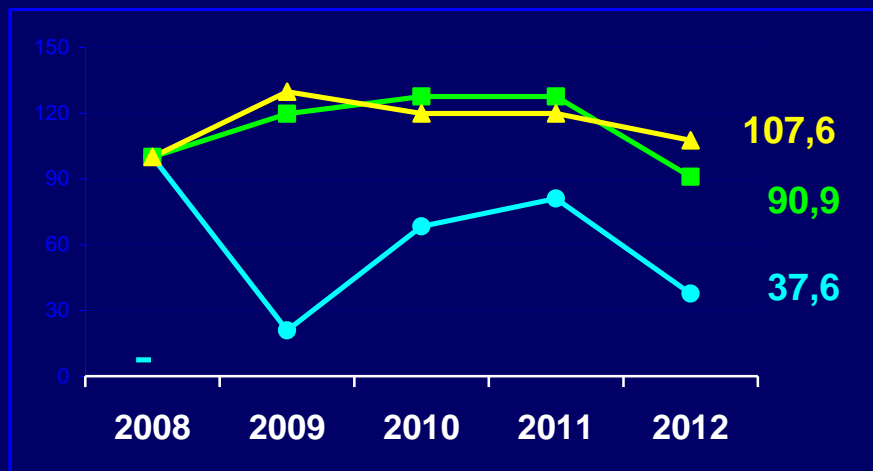


PU: -71,9%

Marche: -28,7%

Italia: -10,2%

Red. operativo - 250 oltre

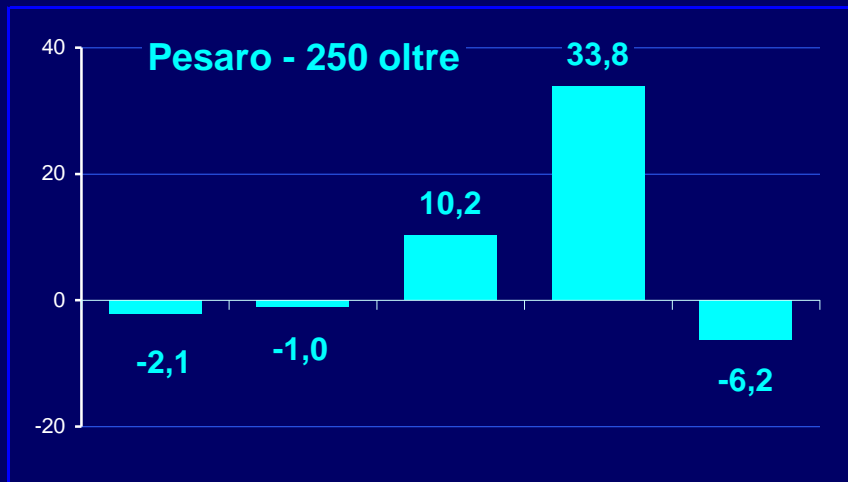
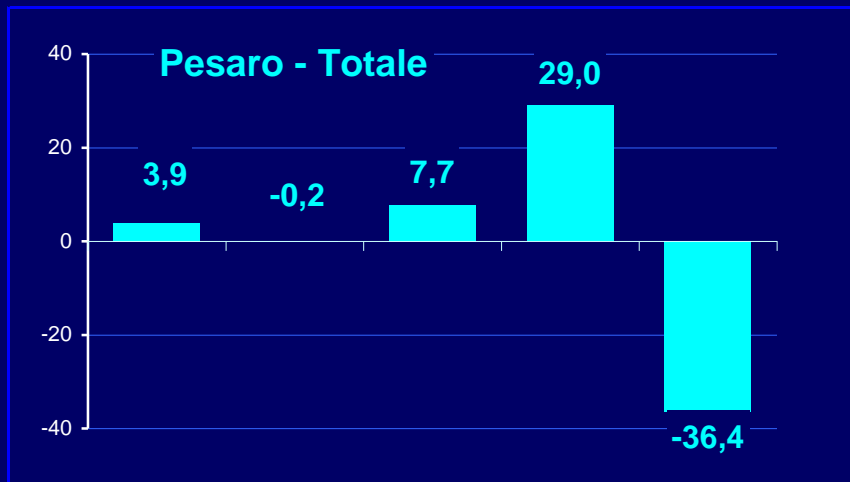


PU: -53,5%

Marche: -28,7%

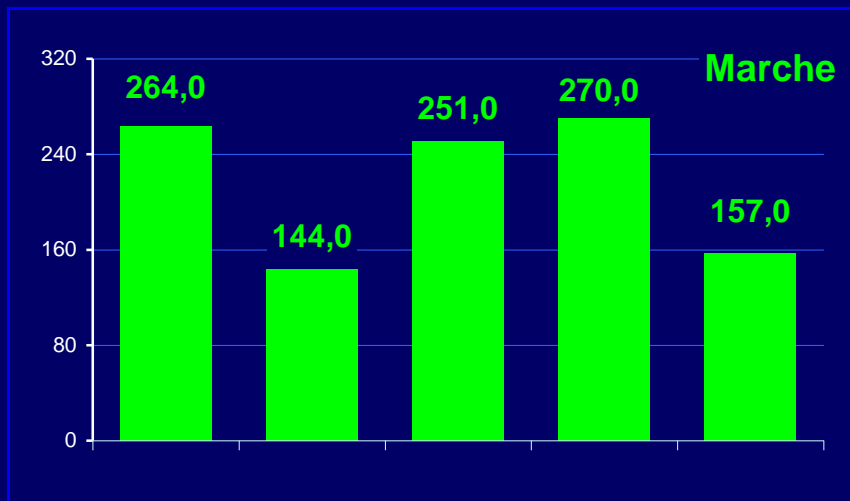
Italia: -10,2%

Utili / perdite

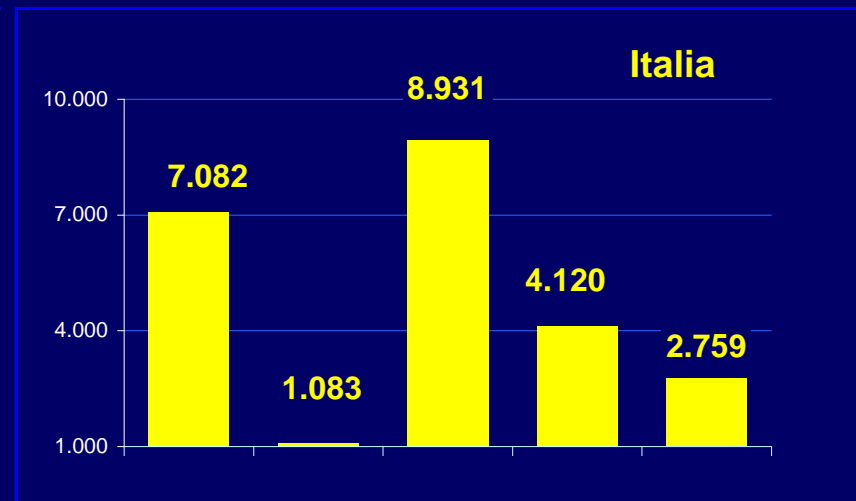


Var 2011/12: -225,7%

Var 2011/12: -118,4%



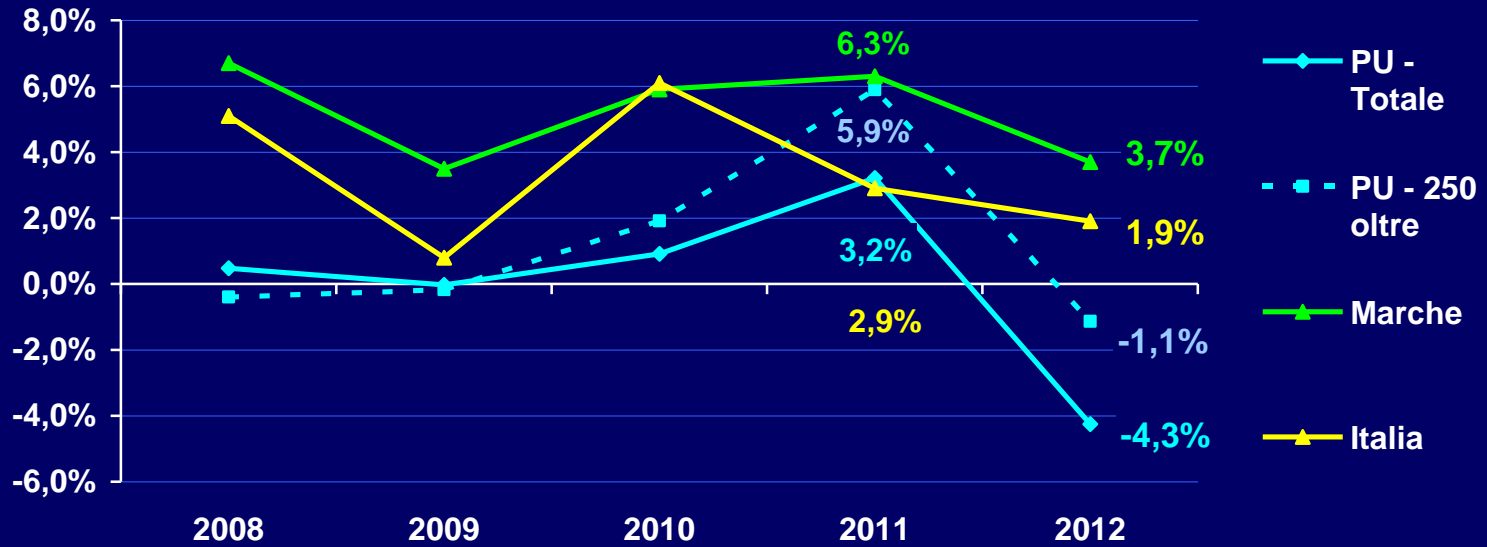
Var 2011/12: -41,9%



Var 2011/12: -33,0%

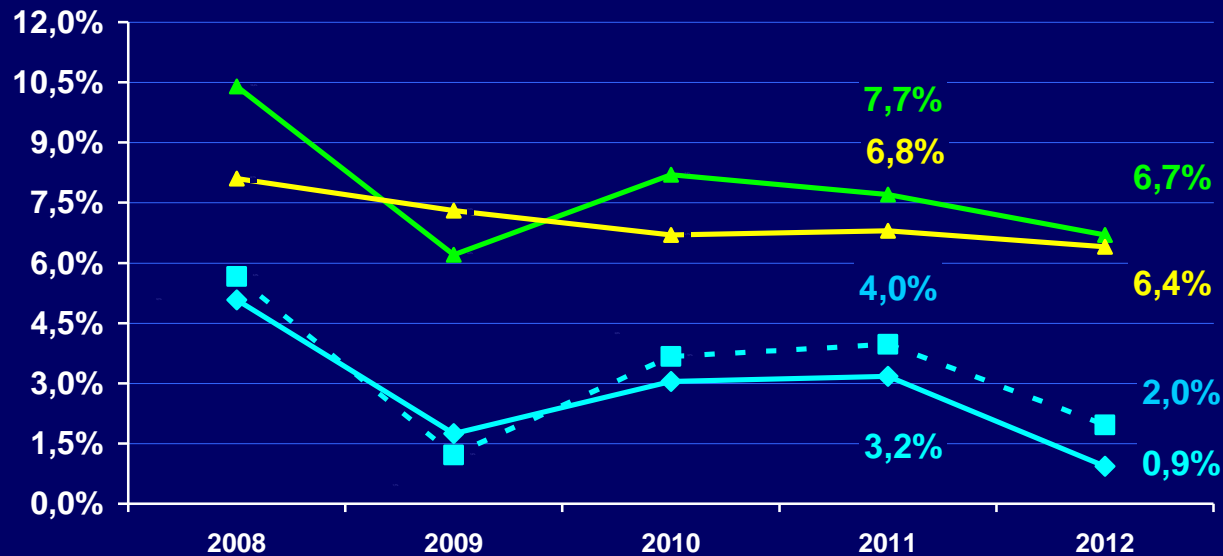
ROE

UTILE / PN:
misura la
redditività del
capitale di
proprietà

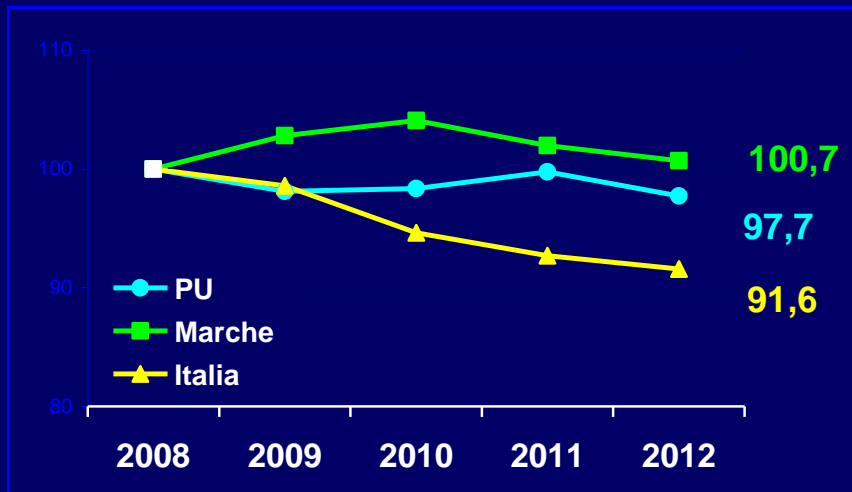


ROI

Redd.
Operativo / TK:
misura la
redditività della
gestione
ordinaria

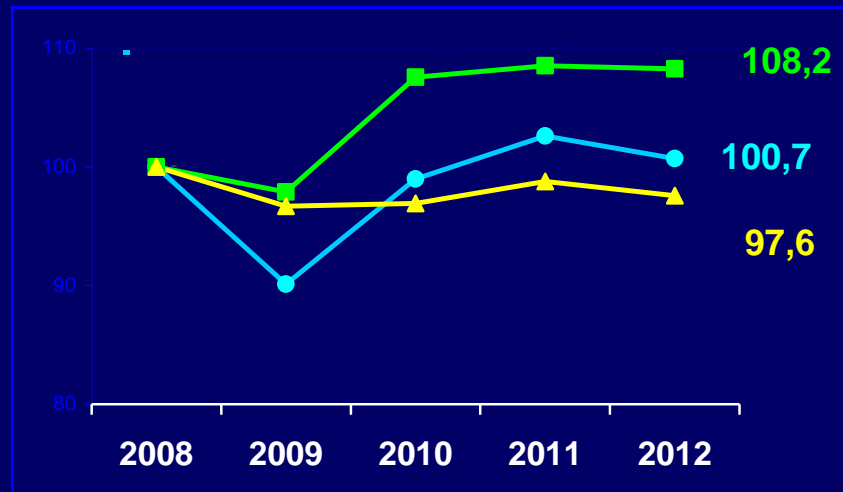


Occupazione



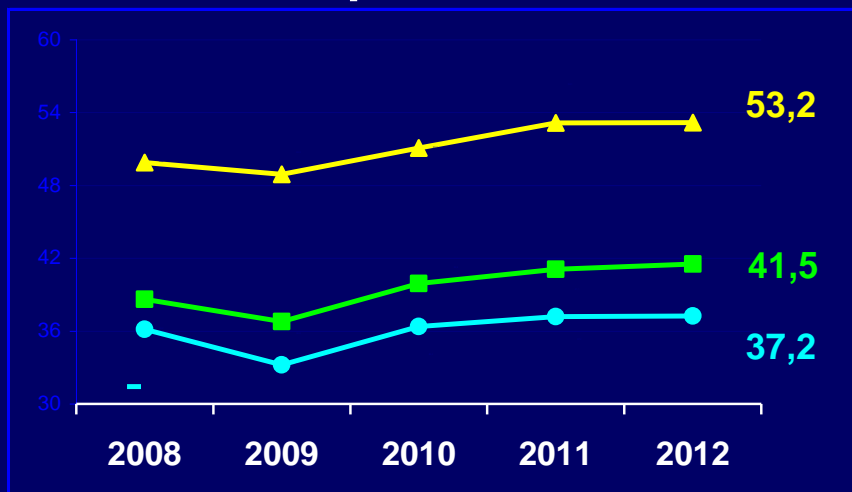
PU: -2,0% Marche: -1,3% Italia: -1,2%

Costo del lavoro



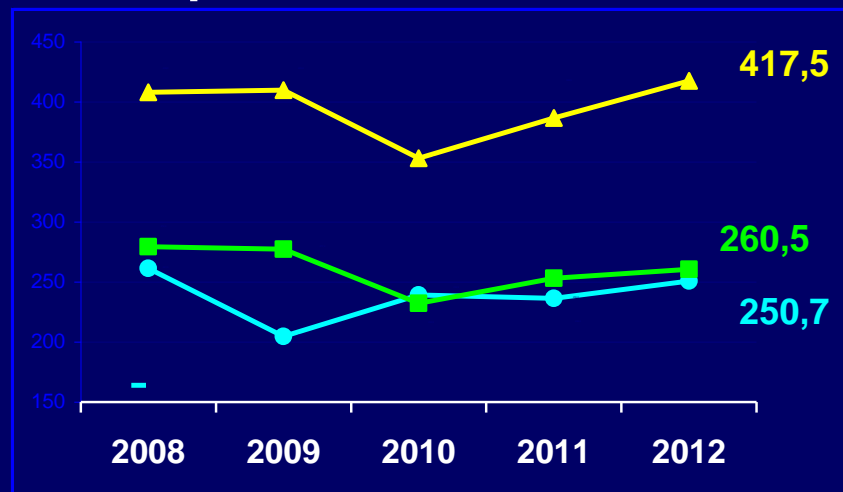
PU: -1,9% Marche: -0,2% Italia: -1,2%

Costo lavoro per addetto



PU: 0,2% Marche: 1,0% Italia: 0,0%

Ricavi per addetto



PU: 6,1% Marche: 3,0% Italia: 8,0%

Grazie per l'attenzione