

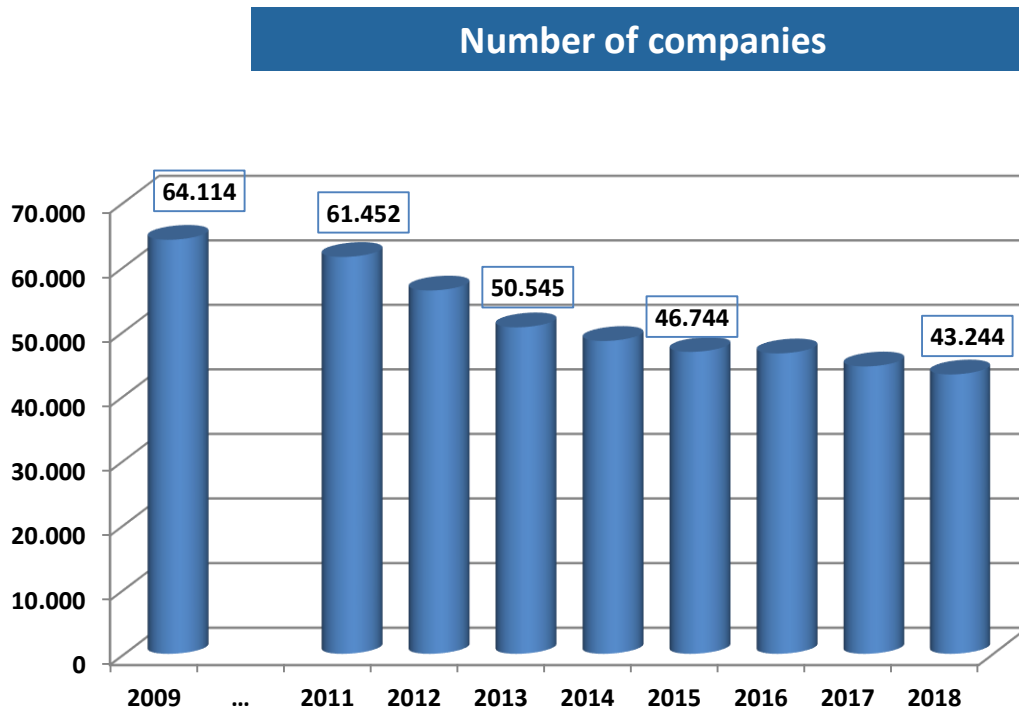


**Portuguese  
Construction  
Recent Evolution,  
Internationalization:  
Key Figures and Main  
Markets**



### 2002-2018 Sector Construction Evolution

From 2009 to 2018 there was a decrease of more than 20 thousand construction companies



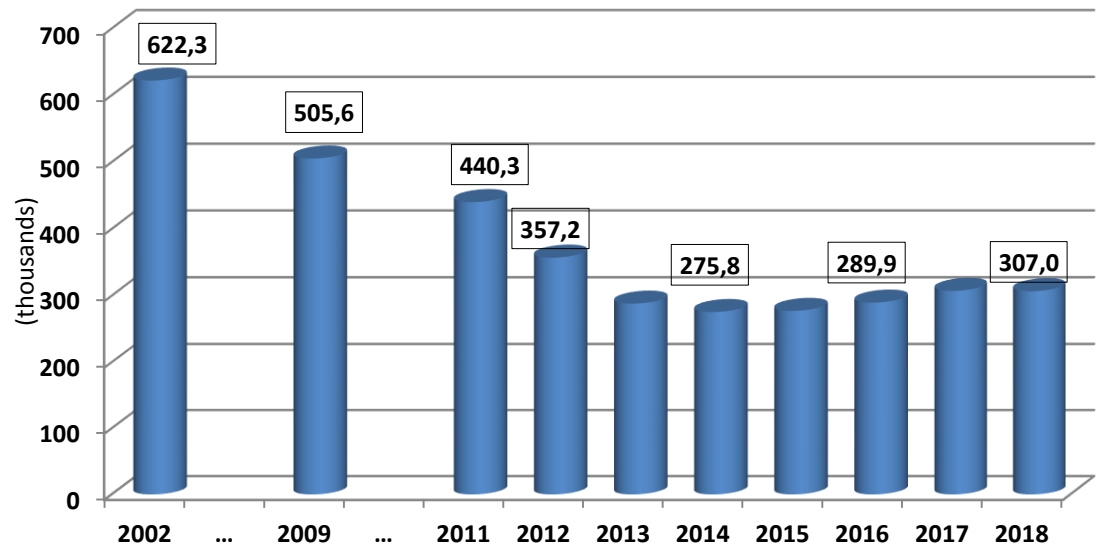
Sources: IMPIC, AECOPS



### 2002-2018 Sector Construction Evolution

From 2002 to 2018 there was a decrease of more than 50% of construction workers

#### Construction Employment



Sources: INE, AECOPS

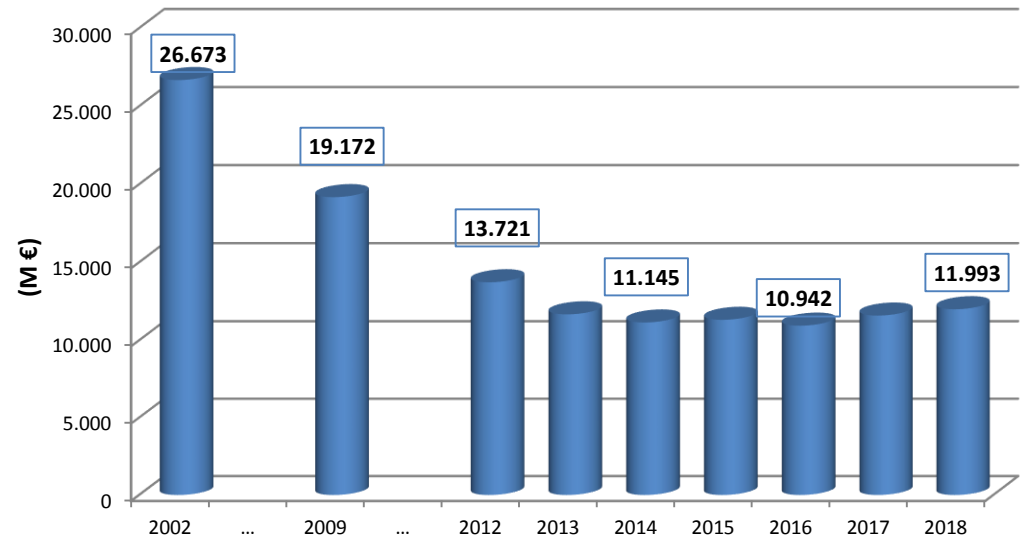


### 2002-2018 Sector Construction Evolution

From 2002 to 2018 and in real terms, production value dropped more than 50%.

### Construction Production Value

(at 2011 constant prices)



Source: FEPI COP



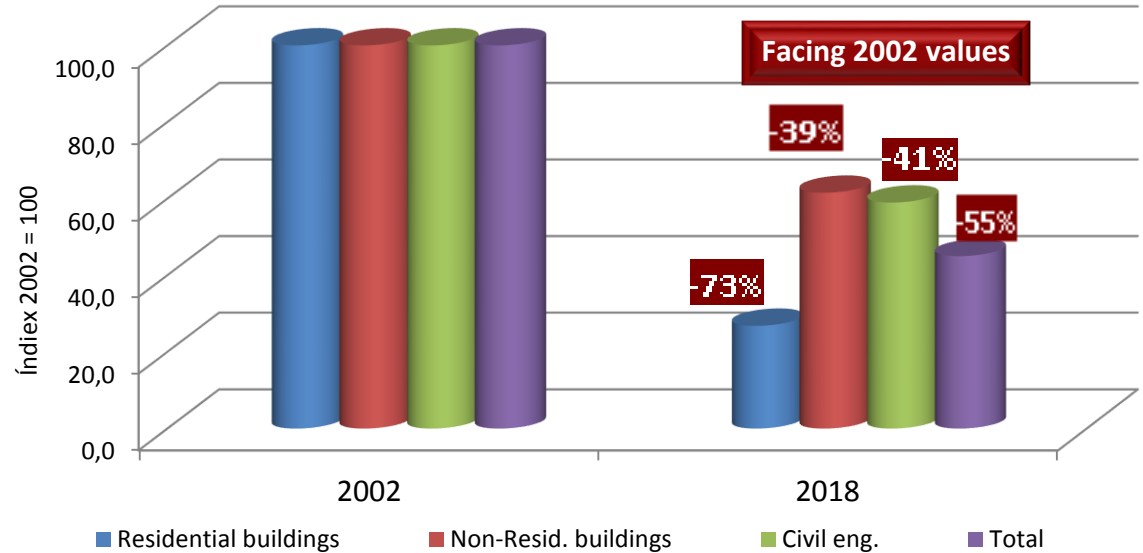
### 2002-2018 Sector Construction Evolution

**In real terms:**

- residential buildings dropped 73%
- non residential buildings decreased around 40%

### Construction Production by branch of activity

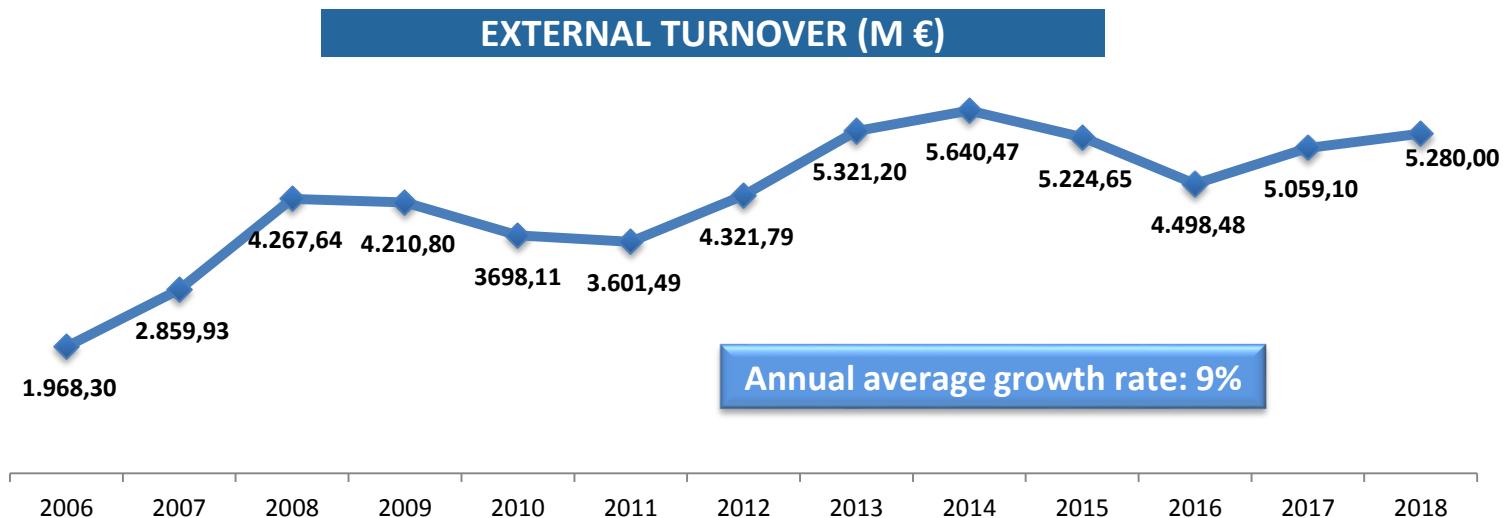
(index: 2002 = 100)



Source: FEPI COP



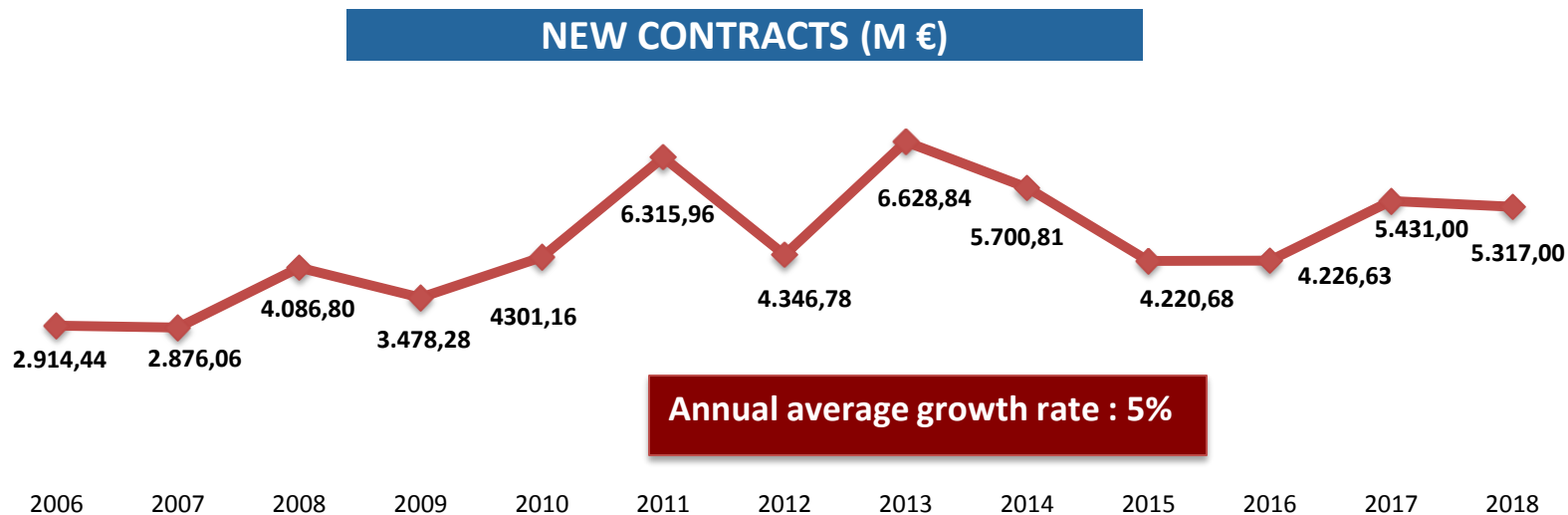
### 2006-2018 Construction External Evolution



The turnover from external markets grew at an annual average growth rate of 9%







### 2006-2018 Construction External Evolution



• The New Contracts value grew at an annual average growth rate of 5%



### ◆ Figures 2018

	Value (M euros)	Evolution 2018/2017
 <b>Turnover</b>	5.280 M€	 4%
 <b>New Contracts</b>	5.317 M€	 -2%

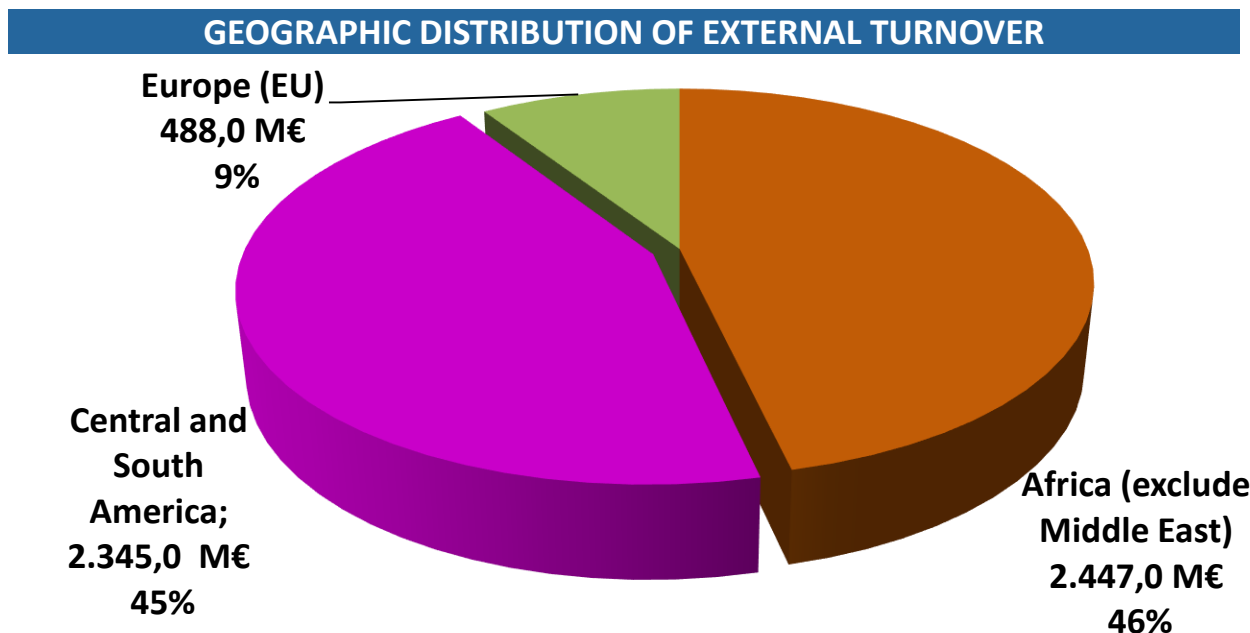
◆ The international activity of Portuguese construction companies increased 4% in 2018 compared to 2017, maintaining 2017 growth trend

◆ New Contracts decreased 2% compared to 2017





### Figures 2018 – Geography



The international activity of Portuguese construction companies focuses on 3 geographical areas: Africa, Central and South America and Europe



### ◆ **Figures 2018 – Geography**

- ◆ **The turnover obtained in Africa reached 2.447 M€ in 2018, the same of 2017**
- ◆ **However, in relative terms, Africa lost importance in both turnover and new contracts**

◆ **Main markets: Angola 1.029,8 M€**

**Moçambique 295,3 M€**

**Argélia 217,3 M€**

**Malawi 202,4 M€**

**South Africa 131,7 M€**

**Tanzânia 93,8 M€**

**Rwanda 90,2 M€**

**Costa Marfim 79,4 M€**

**Guiné Conakry 75,3 M€**



### ◆ **Figures 2018 – Geography**

◆ **Central and South America increased its share by 4 pp in turnover and by 3 pp on new contracts, facing 2017 values**

◆ **The Turnover in Central and South America reached 2.345 M €, increasing 12% compared to 2017**

◆ **Main markets in 2018: México 1.196,2 M€**

**Brasil 521,2 M€**

**Peru 304,4 M€**

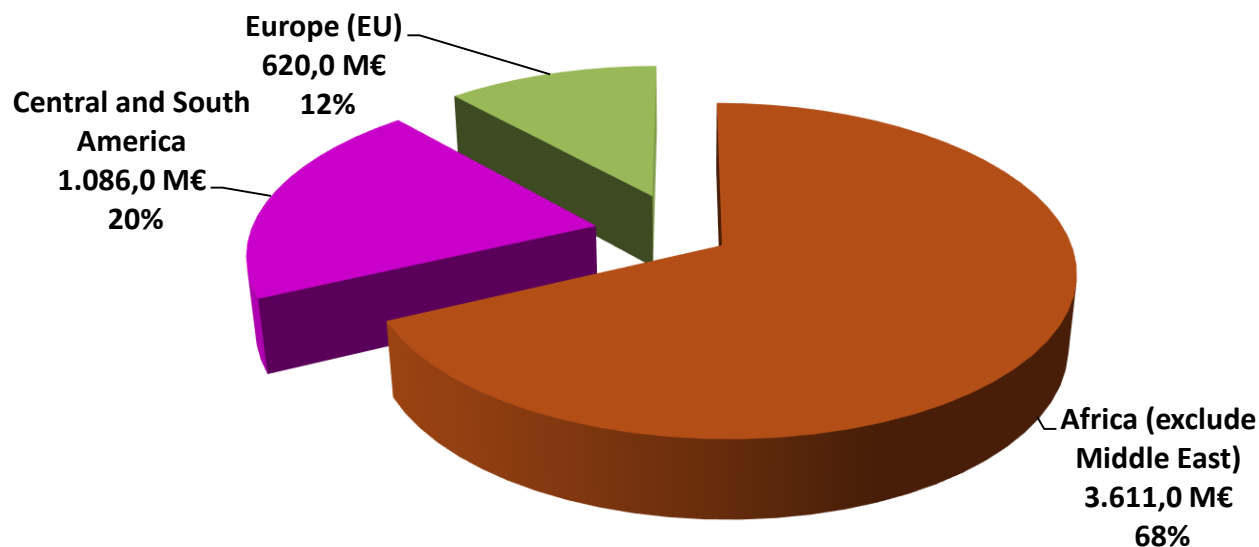
**Colombia 196,9 M€**

◆ **The Turnover in Europe (620 M€) represents 9% of the total (the main market is Poland 291,3M€)**



### Figures 2018 – Geography

#### GEOGRAPHIC DISTRIBUTION OF NEW CONTRACTS



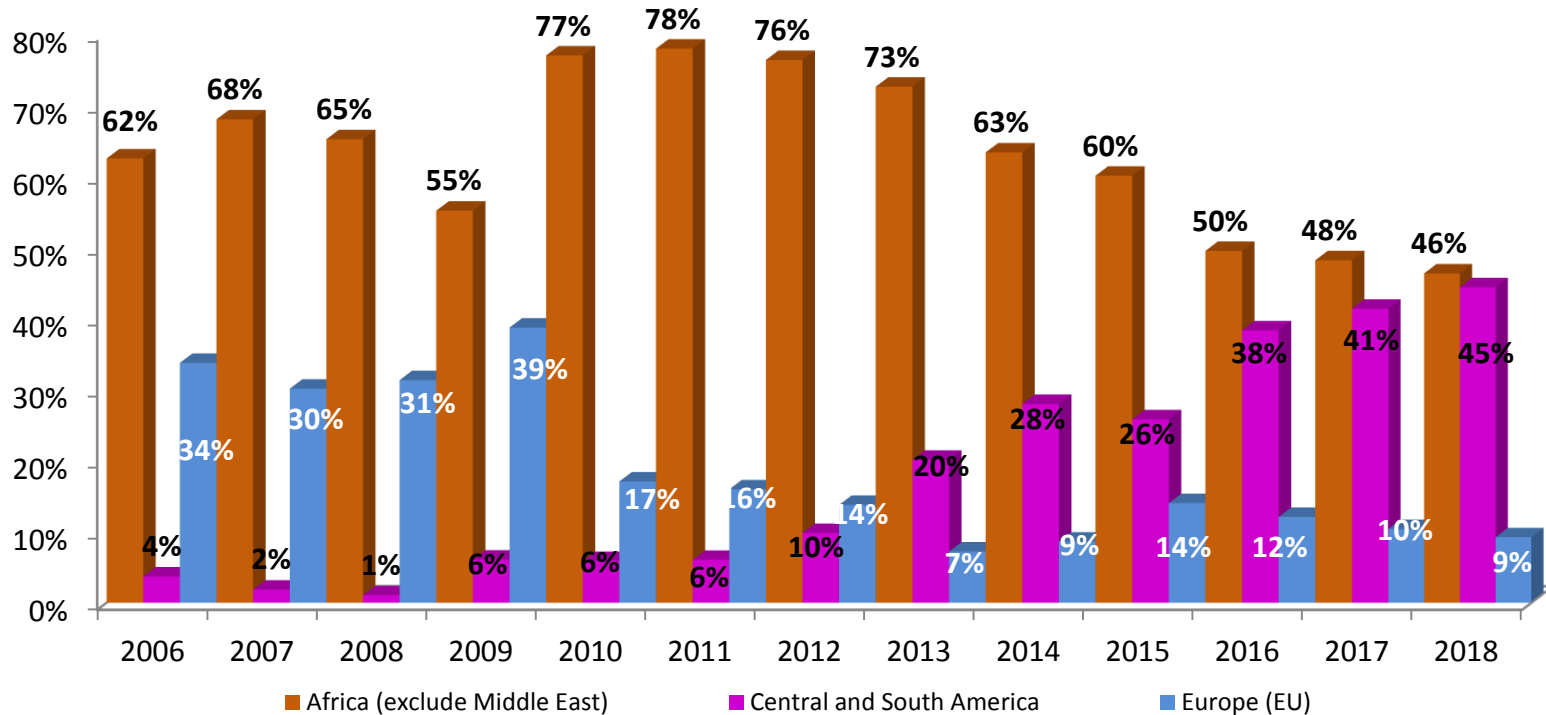
#### In 2018:

- the main share of new contracts was obtained in Africa (68%), corresponding to 3.611 M€
- new contracts in Central and South America amounted to 1.086 M€ (20 % of the total)

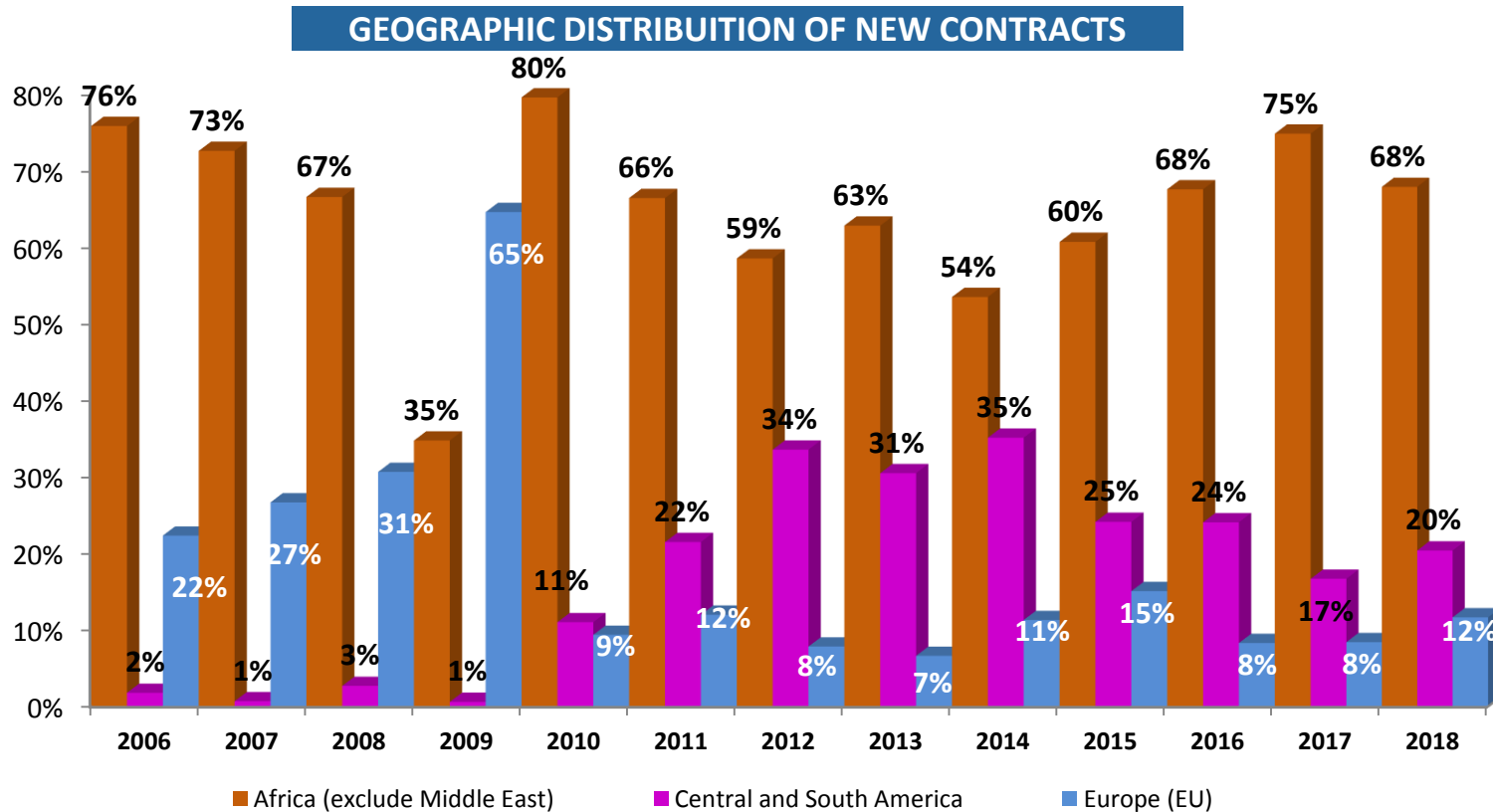


### 2006-2018 Evolution – Geography

**GEOGRAPHIC DISTRIBUTION OF EXTERNAL TURNOVER**



### 2006-2018 Evolution – Geography (Cont.)



### ◆ Some Remarks...

- ◆ Portuguese construction companies have done a remarkable journey regarding internationalization
- ◆ Portuguese Construction Companies were in 35 countries in 2018
- ◆ Construction sector plays a determinant role in the dynamism of country internationalization process with positive impact on other sectors of activity



◆ **Some Remarks...**

**Strengths:**

**Flexibility**

**Resilience**

**Efficiency**

**Specialization**

**Partnerships**

**Cooperation**





◆ **Some Remarks...**

**In Portugal and around the world Portuguese Engineering has a solid reputation :**

**Business flexibility and dynamism**

**Aknowledged international experience**

**Quality and efficiency**

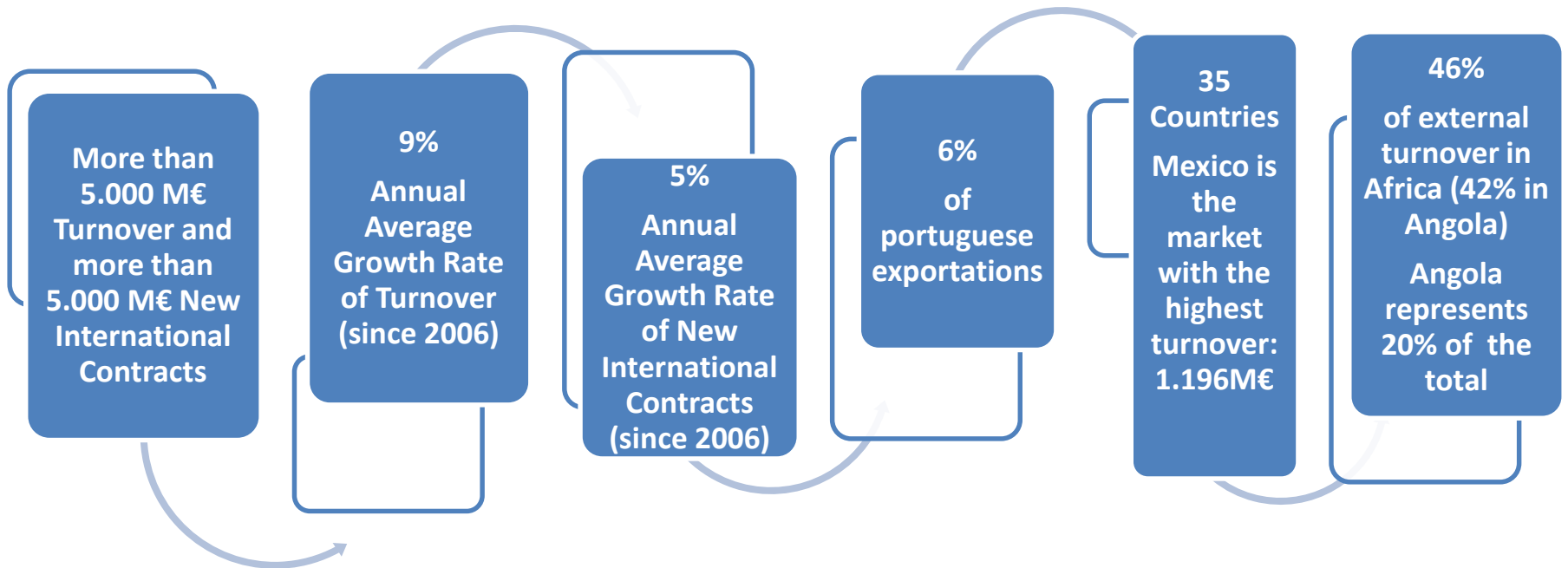
**Innovation**

**Creativity and prestige**

**Environmental responsibility**



### Key Figures - 2018



## Planning and Quality Management The portuguese construction capacity



**Thank You!**  
**Ricardo Pedrosa Gomes**

