

## CRIF Study of the Construction Industry in Switzerland



### Introduction

According to the KOF Swiss Institute of Business Cycle Research at ETH Zurich, investment in construction represents about 10% of Switzerland's gross domestic product. A particular feature of this industry is that the upfront expenditure largely comes from inside the country, and that any fluctuations probably exert a more profound effect on the economic position of other industrial sectors. How is the situation in the construction sector in detail? CRIF has taken a look, and reports here on developments in the construction industry over the past few years.

### About the survey process

In this survey, we took account of all those construction businesses that were entered into the Commercial Register, and were active or inactive and had either been closed or were newly opened during the years between 2015 to 2019.

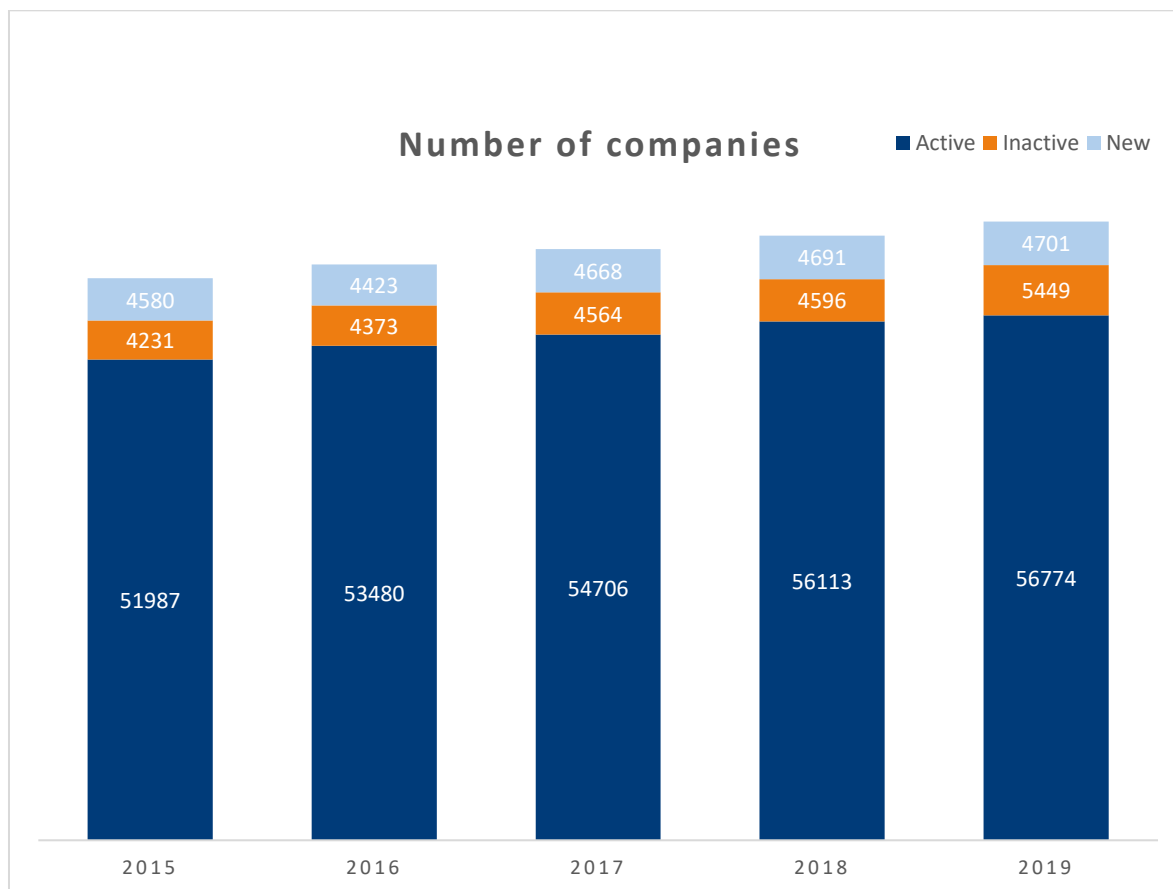
### Analysis undertaken by

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### Date

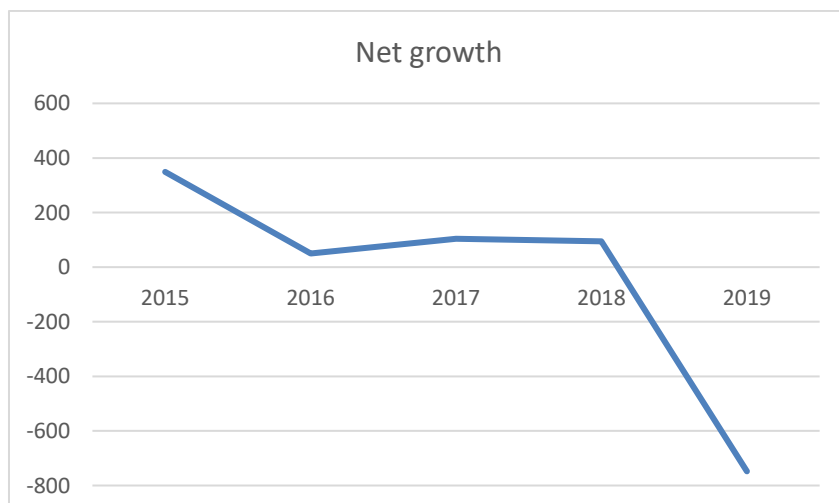
31<sup>st</sup> December 2019

## Development of the industry, 2015 - 2019



As a result of new start-ups, the number of active companies within the construction industry has increased every year. However, the number of company dissolutions or insolvencies (described as inactive here) also grew. In 2019 in particular, more companies were dissolved than were newly founded. This resulted in a reduction of 748 companies.

## Net growth



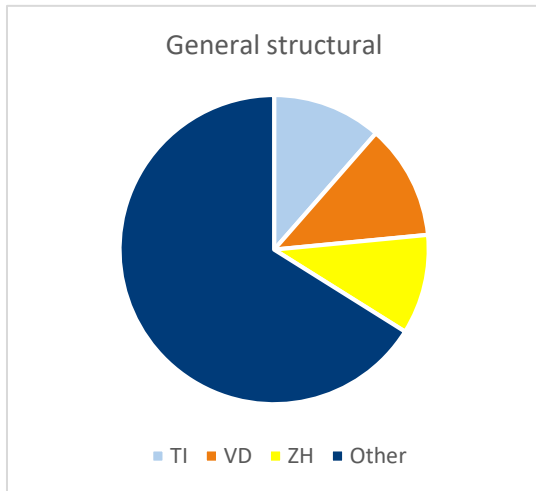
## Number of companies by Canton in 2019

Canton	Number of companies
Zurich	8402
Bern	6111
Vaud	6017
Aargau	4283
St. Gallen	4052
Geneva	3779
Ticino	3626
Valais	3528
Lucerne	2931
Freiburg	2654
Thurgau	2111
Basel-Landschaft	1971
Graubünden	1824
Schwyz	1716
Solothurn	1699
Zug	1390
Neuchâtel	1105
Basel-Stadt	1073
Jura	596
Appenzell Ausserrhoden	540
Schaffhausen	496
Nidwalden	413
Obwalden	381
Glarus	340
Uri	235
Appenzell Innerrhoden	202
<b>Total for Switzerland</b>	<b>61,475</b>

At the end of 2019, Switzerland had over 60,000 registered companies in the construction industry. Most of these were domiciled in the Canton of Zurich, followed by Bern, Vaud, Aargau, St. Gallen and Geneva.

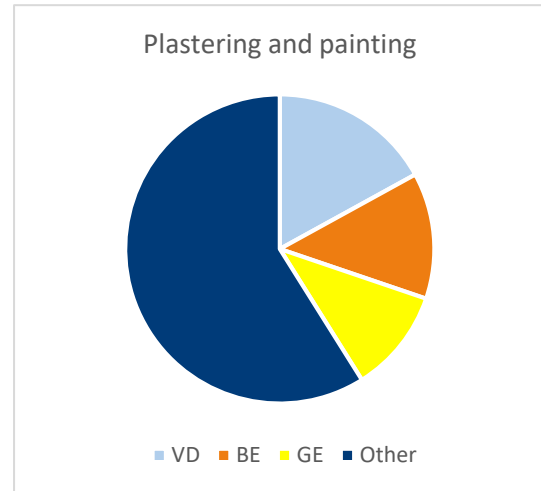
## Sector distribution in 2019

In 2019, the Canton of Zurich recorded the highest number of companies in the construction industry as a whole. In some sectors, however, more companies were based in other Cantons.

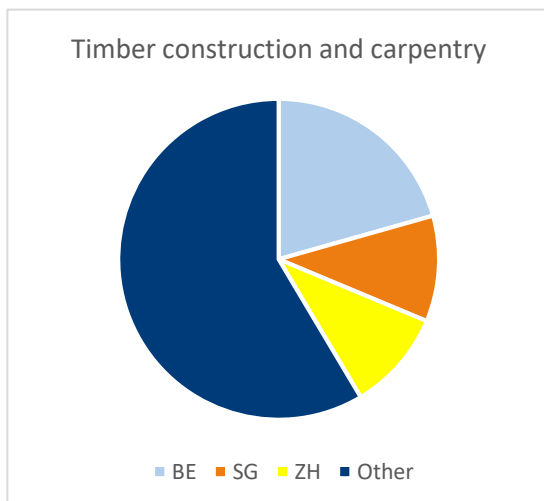


Other

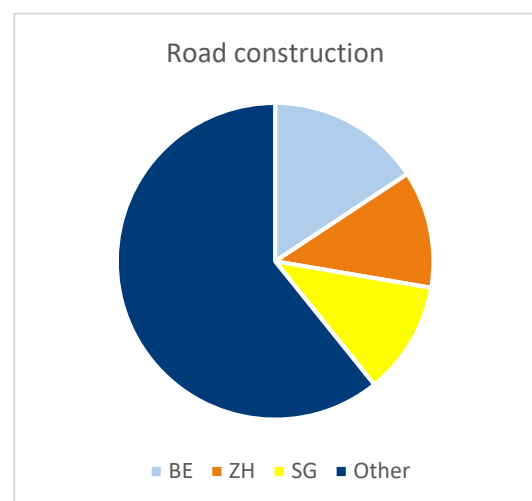
In the structural sector, most companies are registered in the Canton of Vaud (632), followed by Ticino (601) and Zurich (548).



The Canton of Vaud has the most plastering and painting companies (632), followed by Bern (491) and Geneva (404)

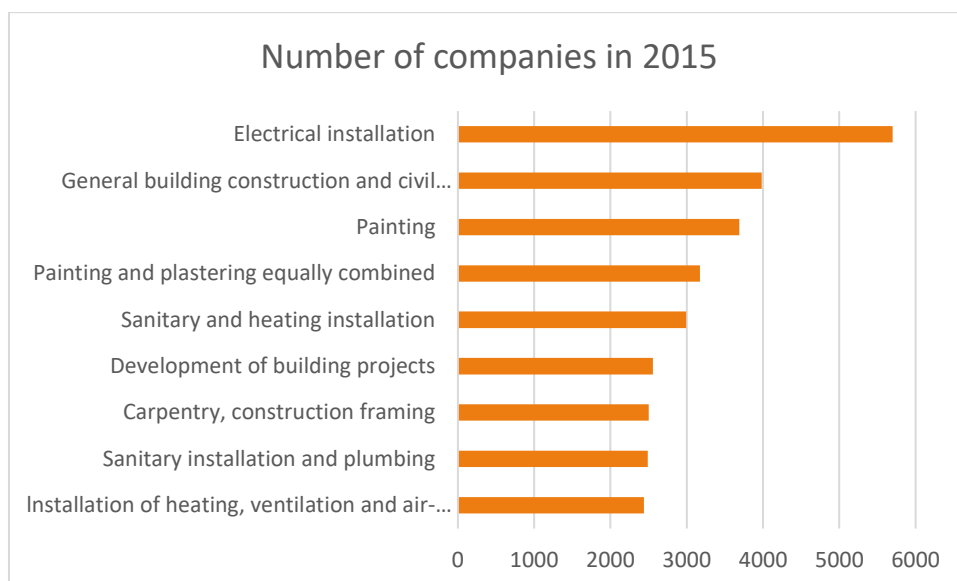


The Canton of Bern leads in timber construction (550), followed by St. Gallen (285) and Zurich (271).



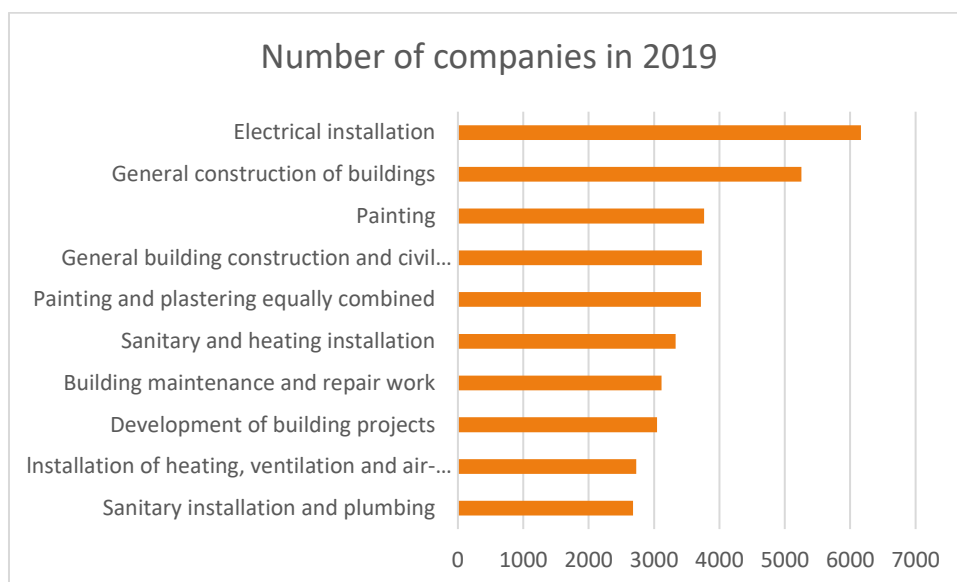
Road construction companies are most frequently based in the Canton of Bern (113), followed by Zurich (86) and St. Gallen (83).)

### The 10 sectors with the largest number of companies in 2015



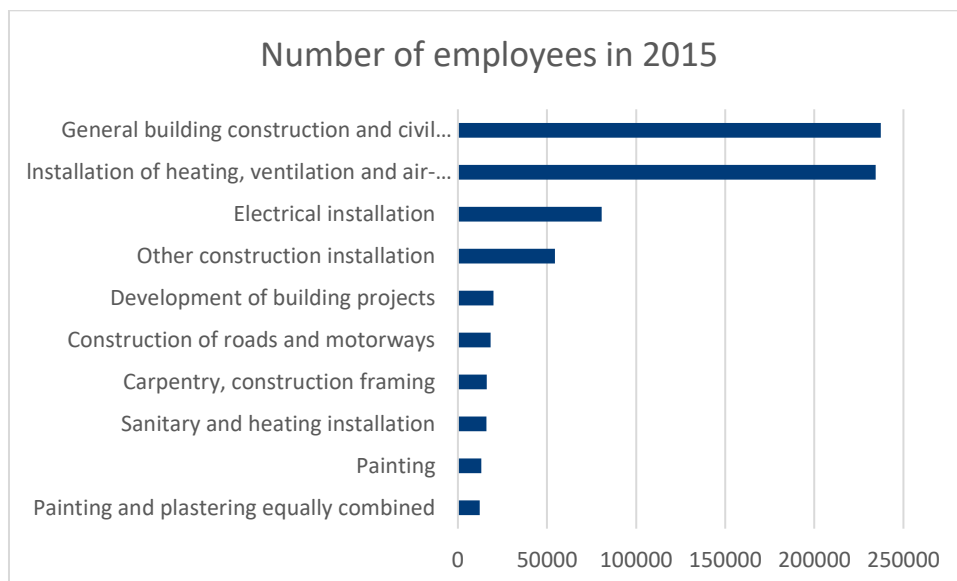
The largest number of companies were based in the following sectors: electrical installation (5,699), followed by general structural and civil engineering (3,982) and painting (3,687).

### The 10 sectors with the largest number of companies in 2019



In 2019 too, the largest number of companies are to be found in the electrical installation sector (6,166) followed by general structural engineering (5,253) and painting (3,765).

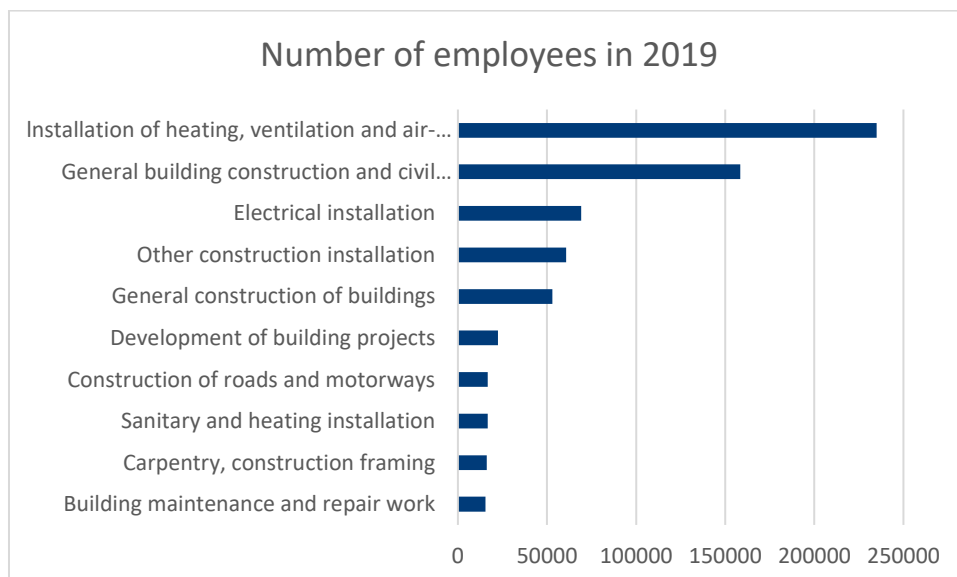
## The 10 sectors with the most employees\* in 2015



\*estimated figures

In 2015, the general structural and civil engineering sector recorded the most employees in the construction industry (237,285), followed by the installation of heating, ventilation and air conditioning systems (234,403) and electrical installation (80,691).

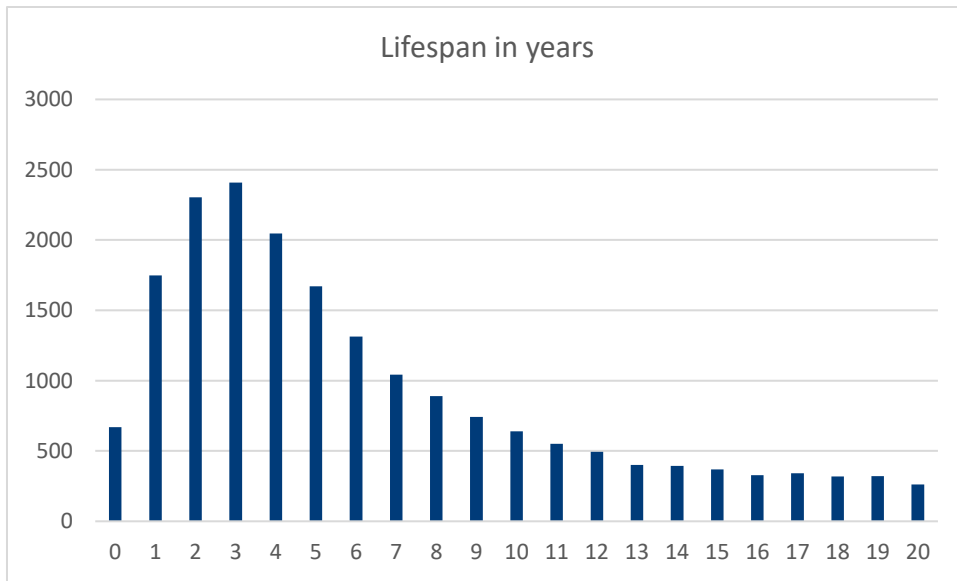
## The 10 sectors with the most employees\* in 2019



\* estimated figures

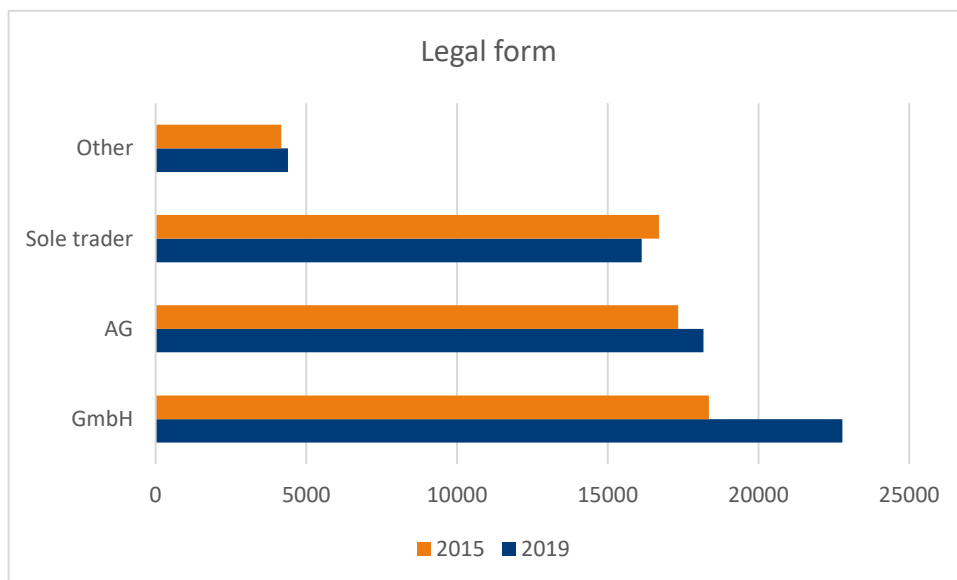
In 2019, the installation of heating, ventilation and air conditioning systems employed the most people, but had the lowest number of companies of any of the sectors investigated. These must therefore have mostly involved larger businesses.

## Lifespan of companies in the construction industry



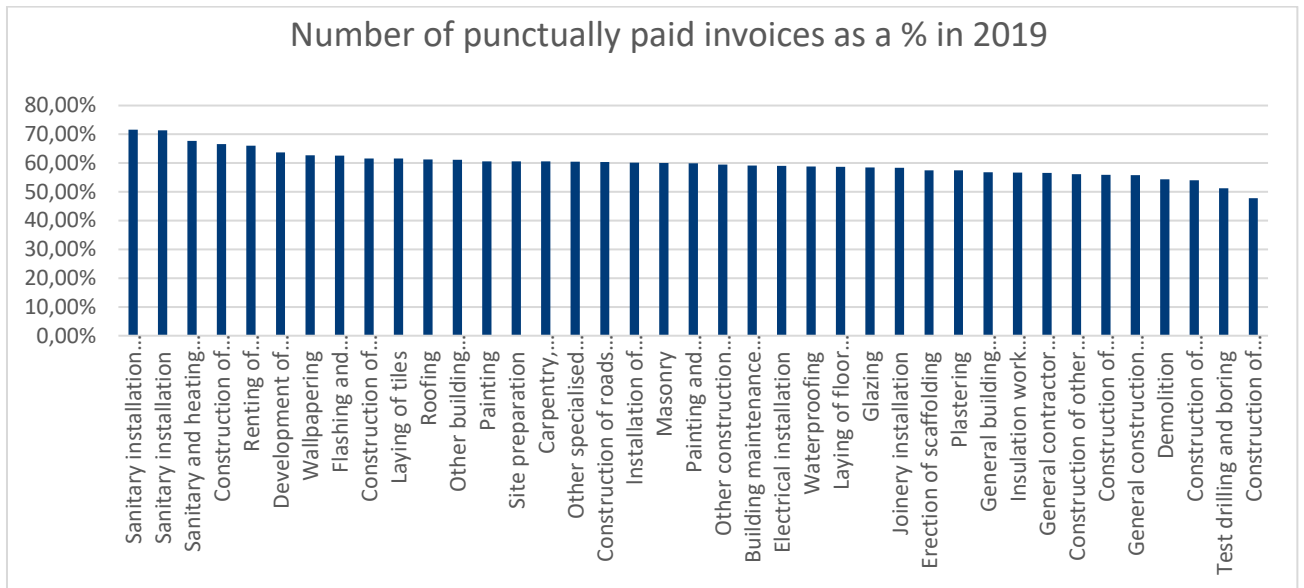
Traditionally, there are many new company set-ups in the construction industry, but most of these businesses disappear again within the first three years.

## Legal form



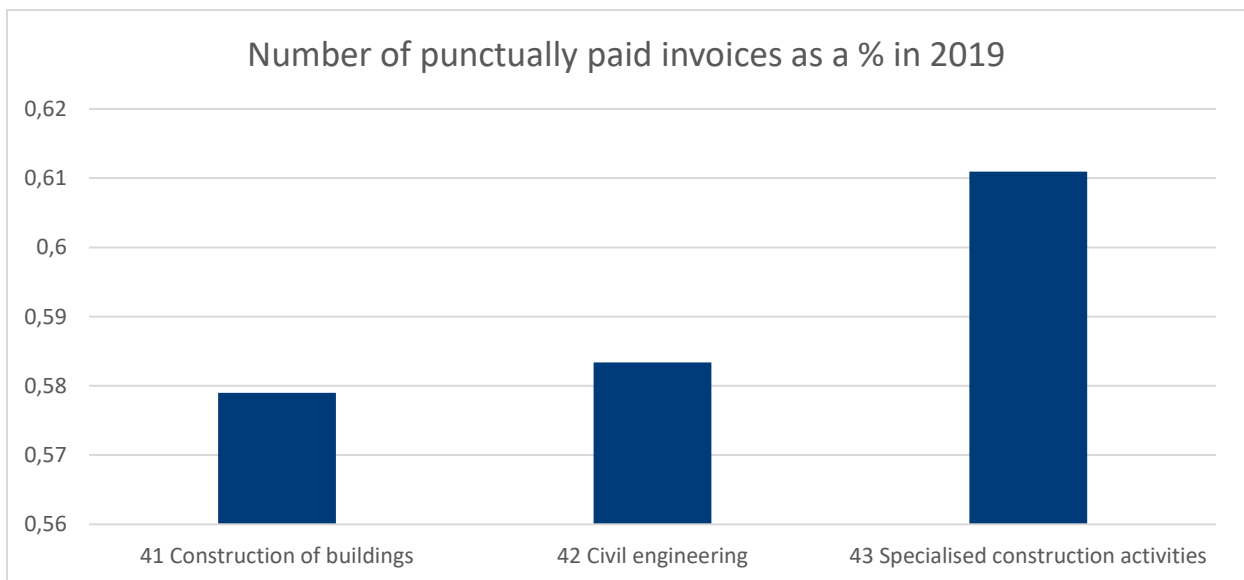
“GmbH” or Limited Liability Company is the legal form most often adopted in the construction industry, and the number of companies selecting this form has again risen appreciably since 2015 (+24%). The number choosing the form “AG” or “Aktiengesellschaft” (Public Limited Company) has increased slightly in comparison with 2015, while the number of sole traders has slightly fallen.

## Payment behaviour in 2019



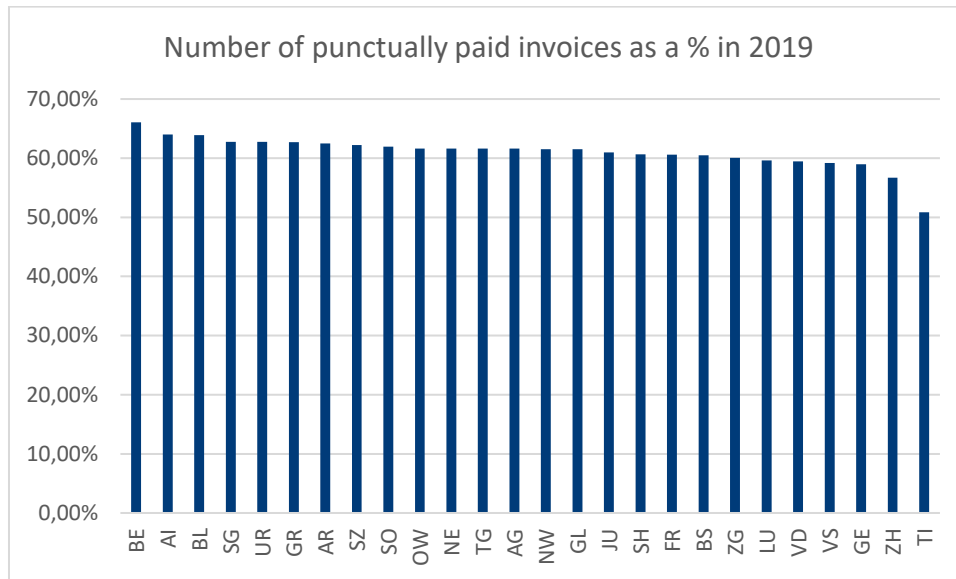
On average, 40% of the invoices in the construction industry are paid punctually.

## Payment behaviour in the various sectors, subdivided by 2-digit NOGA code



When we investigate payment behaviour in line with the categories of structural engineering, civil engineering and specialised construction activities, it becomes clear that structural engineering is the least punctual for payment by far: only 58% of these invoices are paid punctually.

## Payment behaviour by Canton 2019



A comparison of the payment behaviour of the individual Cantons shows that invoices are paid most punctually in the Canton of Bern. They are paid least punctually in the Canton of Ticino, where 50% of invoices fail to be settled punctually.