The economy of Treviso
between the vocation for manufacturing and tertiary expansion

On the basis of the most recent Population and Industry Census performed by the ISTAT of Rome (National Statistics Institute) in 2001 there are 795,264 **inhabitants** in the Province of Treviso (+6.9% over 1991) and 72,565 **local units**[1] (+17.2% with respect to 1991), which employ 308,097 **workers**. In practice there is a local unit for every 11 inhabitants.
Additionally, there are 3,728 public and private **non-profit institutions** (ISTAT data, 1999) and 43,697 **agricultural businesses** (ISTAT data, 2000), almost all of which are family-operated, 88% of which own less than 5 hectares of cultivated agricultural land.
In any case, the most important vocation of the Treviso economy is **the manufacturing industry:** 47.4% of the workers in the Province (almost 146,000) are employed in one of the industrial divisions tied to Treviso's reputation in the world: agriculture and foodstuffs, clothing, sports footwear, home appliances, industrial machinery, furniture, porcelain, metal carpentry and the plastics industry.
The industrial complex of these divisions generated a volume of **exports** of over 8,300 million Euros in 2003: Treviso is the fourth province in Italy in terms of exports and the third in terms of the export/import balance of payments (first in Veneto) with a favourable balance of trade approaching 4.000 million Euros.
The **five most important sales markets** are Germany, France, the United Kingdom, Spain and the United States. Additionally, Romania, Croatia and Hungary make a good showing in Treviso's export (and import) statistics, above all because of the processes of productive internationalisation that began in the Nineties and the consequent outgoing flow of raw materials and incoming flow of semi-processed or finished goods.
In aggregate terms, the most important manufacturing divisions, based on the number of workers employed are *metal mechanics* (almost 55,000 workers, some 37% of the total), *the wood and furniture industry* (almost 32,000 workers, 22% of the total), *the fashion system,* including textiles, clothing and footwear (almost 30,000 workers, 20% of the total), *the food and beverage industry* (almost 8,200 workers), and *the plastics industry* (7,200 workers).
Two fundamental statistics that emerged in the 2001 Census are sufficient to synthesize the most important transformations that the Treviso economy is going through in a few words: *professional services to enterprise* have grown by over 10,000 workers in the space of ten years (+83%), the *fashion system* has lost almost 10,000 workers and 1,200 local units[2].
Such are the symbolic data of advancing **tertiary expansion** and the process of productive internationalisation: the macro-axes within which the Treviso economy is being transformed.
By division of growth between 1991 and 2001 in the **tertiary** sector, we again find *real estate* at the top of the list (with an increase of almost 4,000 workers), *wholesale and*

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[1] The Local Unit is the minimum statistical unit of reference for the Industry and Services Census: it includes company offices and factories, warehouses and branch offices, whether they reside inside or outside the Province (i.e. branch offices of banks whose home office is in Milan).
[2] The textiles division lost over 5,600 workers; footwear lost almost 2,500 and clothing almost 1,800.

intermediary commerce (+2,466), *information technology and connected activities* (+2,367), the division that includes *transportation auxiliaries and travel agencies* (+2,221); even the most “leisure-time-oriented” business in the tertiary sector, *hotels and restaurants,* grew by 1,219 employees (+12%). Finally the growth of *private health and other social services* (+904 workers, +30%) is worth mentioning as another emerging component of Treviso’s tertiary sector.

Among the most rapidly expanding **manufacturing** divisions between 1991 and 2001, again in terms of growth in the number of workers, are the divisions of *industrial machinery and home appliances* (+7,700 workers, up 55%), *metal carpentry* (+4,200 workers, an increase of 27%), *the furniture industry* (+3,900 workers, +22%) and *the rubber and plastics industry* (+2,500 workers, up 52%).

The **construction** industry is a case apart, with a growth of over 5,000 workers, most of whom are “independent” (namely, owners of a business).

Clearly, even from this synthetic information, Treviso is undergoing a process of tertiary expansion, which is nevertheless taking place within its solid manufacturing vocation. The challenge in upcoming years is not so much to follow improbable models of intangible economy, as much as it is the manner in which the tertiary and manufacturing sectors come together to co-generate managerial innovations of products and processes.

Although Treviso’s position of excellence in Italy has not been affected in recent years by the weak international financial situation, it has brought to light several tensions that must not be underestimated, such as the limits of the dimensions of family enterprise and an acceleration in processes of productive internationalisation, which make it all the more important to attain new formal knowledge, to fecundate, at all levels, the “distinctive knowledge” that is the basis of the success of the Treviso economy, in an inescapable strategy of competitive repositioning of the various chains of production in the global scenario, which the Treviso Chamber of Commerce, moreover, began pursuing at the end of the Nineties.

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