



Press release

## **531 thousand hires expected by companies in September** **Demand is growing for personal services and logistics, while uncertainty is** **increasing for trade and tourism.** **Recruiting difficulty stands at 48%**

Rome, 4 September 2023 – There are 531 thousand workers sought by companies (with a fixed-term contract of more than one month or permanent) for the month of September, 7 thousand more (+1.3%) than planned a year ago. For the entire September-November 2023 quarter, expected hires slightly exceed 1.4 million, up 1.9% compared to the same period in 2022.

The difficulty in recruiting reported by companies continues to grow, affecting 48% of planned hires, up by 5 percentage points compared to twelve months ago, with rates ranging from 60% to 70% for many technical and engineering positions as well as skilled laborers. This scenario is outlined by the *Excelsior Information System Bulletin*, created by **Unioncamere** in collaboration with **Anpal**<sup>1</sup>.

It is large enterprises (with over 250 employees) and small companies (10-49 employees) that fully cover the overall increase in planned hires compared to 2022 (respectively, with +4.4 thousand and +4.3 thousand in the month and + 11 thousand and +12 thousand in the quarter); while smaller companies (1-9 employees) expect a decline in recruiting for September (-3 thousand).

The manufacturing sector as a whole plans 99 thousand entries in September 2023 (similar figure compared to 12 months ago) and 275 thousand hires in the quarter (-0.2%). Among the main manufacturing sectors, mechatronics stands out with a forecast of 25 thousand contracts in September and 69.5 thousand in the quarter, followed by metallurgy (20 thousand and 55 thousand, respectively). The food industry (13 thousand and almost 40 thousand) and the fashion industry (11 thousand and 33 thousand) are further behind.

Construction companies plan 60.5 thousand hires in September and 196 thousand in the September-November period (+3.5 thousand in the month and +15 thousand in the quarter).

For services companies, 371 thousand job contracts are expected in September (+1.0% compared to 12 months ago) and almost 989 thousand in the quarter (+1.3% compared to the same period in 2022). The outlook is especially positive for personal services (111 thousand contracts in the month and 238 thousand in the quarter), thanks in particular to hiring in the education and private training services sector, as well as transport and logistics (44 thousand and 126 thousand), while the hiring forecasts of commercial companies (59 thousand in the month equal to -2.2% compared to the previous year and 185 thousand in the quarter equal to -0.8%) and of those in tourism (69 thousand, i.e. -7.3% compared to 2022 and 193 thousand equal to -2.2%) were lower than in the same period of 2022.

Fixed-term contracts are confirmed as the most proposed contractual form with 284 thousand units, equal to 53.4% of the total, followed by permanent contracts (108 thousand), agency workers (57 thousand), other non-employee contracts (32 thousand), apprenticeship contracts

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<sup>1</sup> The September forecasts are based on interviews conducted on a sample of around 90 thousand companies. The interviews were conducted between 17 July 2023 and 1 August 2023.

(26 thousand), other employee contracts (14 thousand) and collaboration contracts (11 thousand).

Companies declare difficulties in finding workers for over 252 thousand hires in September (48% of the total), confirming the "lack of candidates" as the main cause with a share of 31.7%, while "inadequate preparation" stands at 12%. The professional groups with the highest mismatch are specialized labourers (64.2% share of hard-to-find entries), stationary and mobile machinery operators (53.2%) and technical professions (49.5%). In particular, the most difficult figures to find are toolmakers, workers and artisans of wood treatment (74.1% and a peak of 87.7% in the North West), building finisher specialised labourers (73.6%, with a maximum in the North East of 80.9%), artisan mechanics, fitters, repairers and maintenance technicians for stationary and mobile machines (73.1%, 76.7% in the North West) and blacksmiths tool makers (72%, but up to 81.5% in the Centre). Also difficult to find are goods and services production processes management technicians (67.5%, which reaches 74.5% in the central regions), engineering technicians (64.2%, with a maximum of 66, 5% in the North East), health technicians (58.9%, 65.6% in the Centre) and commercial distribution technicians (58.8%, with a peak of 68.3% in the North East).

The use of foreign workers is growing, going from 95 thousand entries last year, equal to 18.2% of total, to the current 108 thousand hires, equal to 20.4% of total (+13 thousand contracts; +13.6%). Sectors that make most use of foreign labour are operational support services for businesses and individuals (35.2% of planned contracts is reserved for immigrant personnel), transport, logistics and warehousing services (32.7%), metallurgical and metal products industries (25.8%), accommodation, catering and tourism services (25.7%) and food industries (25.1%).

At a territorial level, companies in the North Eastern regions show greater difficulties in recruiting, where 53.4% of the staff wanted is difficult to find, a significantly higher share than that recorded in the South and Islands regions (43.5%) and in the Center (45.9%), while the value in the North West (47.4%) remains close to the average. In particular, for the main regions in terms of hiring flow the following quotas of recruitment difficulties emerge: in Lombardia 122 thousand contracts and recruitment difficulties equal to 46.5%, in Lazio 56 thousand and 38.0%, for Veneto 52 thousand and 54.4%, in Emilia-Romagna 49 thousand and 51.9% and, finally, in Campania 42 thousand and 41.0%.

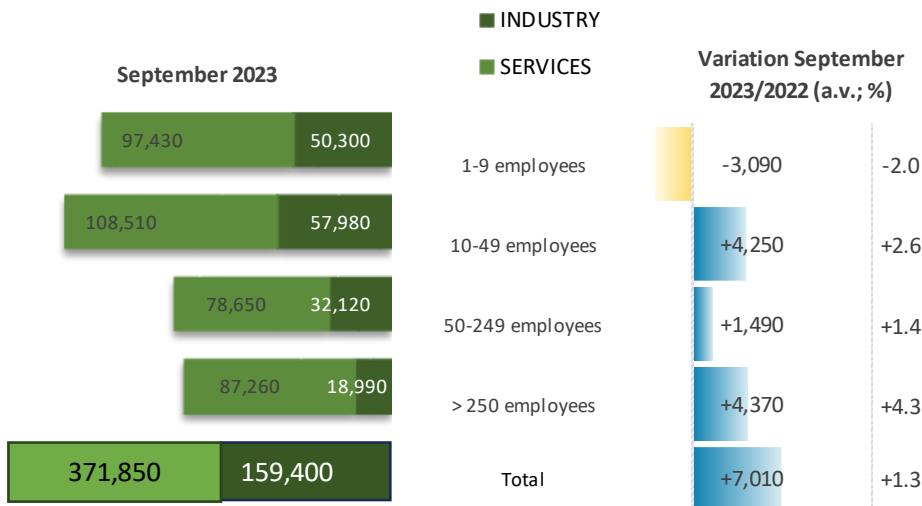
**INFLOW OF WORKERS EXPECTED BY COMPANIES BASED ON BUSINESS SECTOR**

	Total inflow		Variation september2023 - september 2022		Variation sep-nov23/sep-nov22	
	Planned September 2023	Planned sep-nov23	v.a.	%	v.a.	%
<b>TOTAL</b>	<b>531,250</b>	<b>1,432,260</b>	<b>7,010</b>	<b>1.3</b>	<b>26,960</b>	<b>1.9</b>
<b>INDUSTRY</b>	<b>159,400</b>	<b>443,450</b>	<b>3,500</b>	<b>2.2</b>	<b>14,290</b>	<b>3.3</b>
<b><i>Manufacturing and PU</i></b>	<b>98,810</b>	<b>274,310</b>	<b>30</b>	<b>0.0</b>	<b>-510</b>	<b>-0.2</b>
Food, beverage and tobacco industries	13,800	39,870	-850	-5.8	-1,820	-4.4
Textile, clothing and footwear industries	11,910	33,210	730	6.6	2,410	7.8
Wood and furniture industries	5,530	15,310	-170	-2.9	-70	-0.5
Paper, paper transformation and printing industries	3,160	8,540	50	1.7	330	4.1
Chemical-pharmaceutical, plastic and rubber industries	9,150	25,200	-110	-1.1	-1,020	-3.9
Non-metallic mineral processing and mining industries	3,460	9,460	50	1.5	480	5.3
Metallurgical and metal products industries	20,210	55,420	250	1.3	-740	-1.3
Mechanical and electronics industries	25,300	69,510	30	0.1	20	0.0
Other industries	6,310	17,780	20	0.4	-100	-0.5
<b><i>Construction</i></b>	<b>60,590</b>	<b>169,140</b>	<b>3,470</b>	<b>6.1</b>	<b>14,800</b>	<b>9.6</b>
<b>SERVICES</b>	<b>371,850</b>	<b>988,810</b>	<b>3,520</b>	<b>1.0</b>	<b>12,680</b>	<b>1.3</b>
Commerce	59,640	185,030	-1,350	-2.2	-1,520	-0.8
Accommodation and catering services; tourist services	68,880	193,490	-5,450	-7.3	-4,430	-2.2
Transport, logistics and warehousing services	43,800	125,630	3,580	8.9	11,580	10.2
Media and communication services	9,260	24,480	3,050	49.2	7,800	46.8
IT and telecommunications services	13,420	38,220	-2,660	-16.5	-6,260	-14.1
Advanced business support services	21,430	60,580	-2,940	-12.1	-5,300	-8.1
Financial and insurance services	3,840	10,940	-860	-18.3	-1,590	-12.7
Operational support services for businesses and individuals	40,380	112,080	-1,010	-2.4	-1,990	-1.7
Personal services	111,210	238,370	11,150	11.1	14,390	6.4

Absolute values rounded to the nearest ten. The totals may not coincide with the sum of the single values.

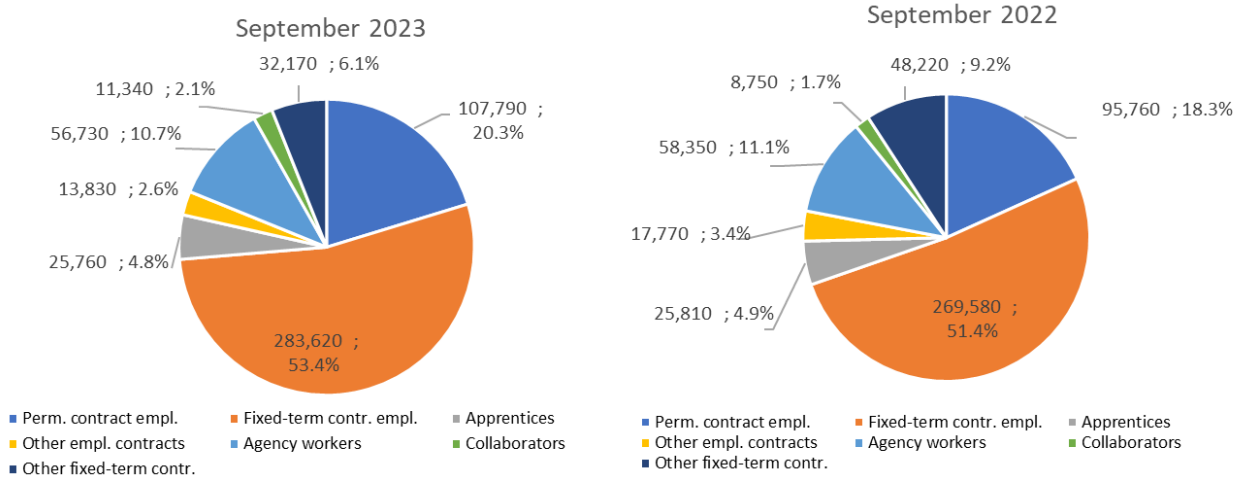
Source: Unioncamere - ANPAL, Excelsior Information System, 2023

**INFLOW OF WORKERS FORECAST BY COMPANIES BY COMPANY SIZE (a.v.; %)**



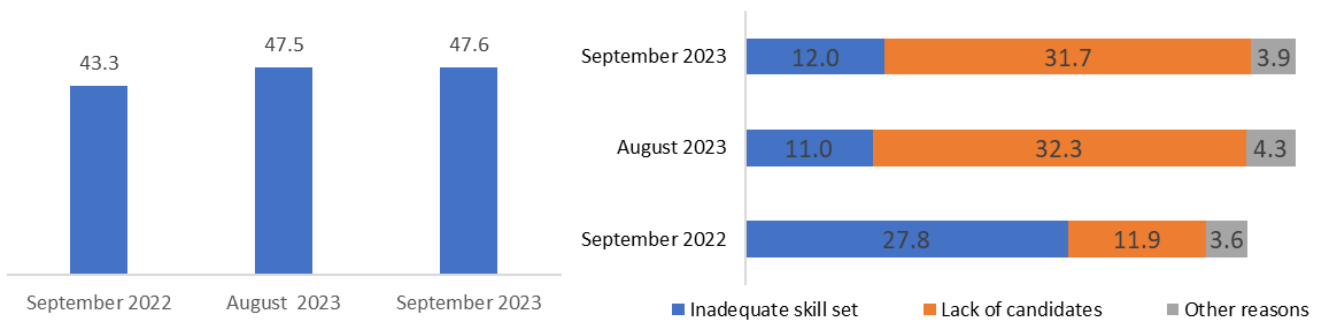
Source: Unioncamere - ANPAL, Excelsior Information System, 2023

**INFLOW OF WORKERS FORECAST BY COMPANIES BY CONTRACT TYPE (a.v.; %)**



Source: Unioncamere - ANPAL, Excelsior Information System, 2023

**DIFFICULTY IN RECRUITING AND REASONS (%)**



Source: Unioncamere - ANPAL, Excelsior Information System, 2023

## THE PROFESSIONS MOST IN DEMAND IN THE MONTH OF SEPTEMBER 2023 \*

*according to the classification of professions - ISTAT 2021 (3 digit)*

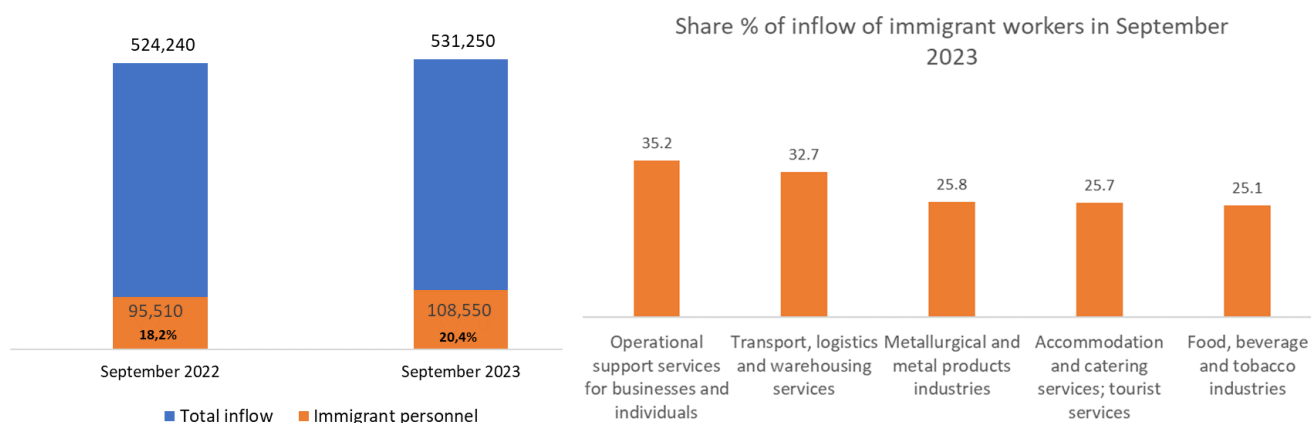
	INFLOW FORECAST SEPTEMBER 2023	Distributi on x 1000	Difficulty in recruitin g (%)	INFLOW FORECAST September- November
<b>INFLOW</b>	<b>531,250</b>	<b>1,000</b>	<b>47.6</b>	<b>1,432,260</b>
<b>MANAGERS</b>	<b>770</b>	<b>1.4</b>	<b>49.5</b>	<b>1,890</b>
<b>INTELLECTUAL, SCIENTIFIC AND HIGHLY SPECIALISED PROFESSIONS</b>	<b>56,100</b>	<b>105.6</b>	<b>35.0</b>	<b>117,330</b>
Engineers	5,010	9.4	56.4	13,550
Specialists in management, commercial and banking sciences	5,470	10.3	30.1	14,560
Specialists in artistic-expressive disciplines	2,870	5.4	16.0	7,630
Secondary and post-secondary school teachers	10,310	19.4	13.1	15,560
Primary and pre-primary school teachers	14,000	26.4	33.9	21,670
Other education and training specialists	6,580	12.4	38.3	11,680
Analysts and experts in designing applications	2,690	5.1	53.9	8,100
<b>TECHNICAL PROFESSIONS</b>	<b>79,050</b>	<b>148.8</b>	<b>49.5</b>	<b>200,550</b>
IT, telematics and telecommunications technicians	8,610	16.2	46.8	24,040
Engineering technicians	6,690	12.6	64.2	17,760
Goods and services production processes management technicians	5,140	9.7	67.5	14,460
Health technicians	19,180	36.1	58.9	42,340
Technicians of the organisation and administration of production activities	5,290	10.0	47.6	14,690
Market relations technicians	11,960	22.5	48.9	33,660
Commercial distribution technicians	2,920	5.5	58.8	8,060
Teachers in vocational training, instructors, coaches, athletes	7,540	14.2	31.4	16,650
Social services technicians	2,810	5.3	27.6	5,660
<b>OFFICE WORKERS</b>	<b>43,110</b>	<b>81.1</b>	<b>31.9</b>	<b>116,370</b>
Secretarial and general affairs office staff	19,460	36.6	38.9	50,680
Customer reception and information office staff	10,560	19.9	23.1	27,990
Logistics administrative management office staff	5,320	10.0	30.1	15,410
Economic, accounting and financial management office staff	3,850	7.2	27.2	10,970
<b>SKILLED PROFESSIONS IN COMMERCIAL ACTIVITIES AND IN SERVICES</b>	<b>119,810</b>	<b>225.5</b>	<b>47.5</b>	<b>352,870</b>
Sales people	35,980	67.7	33.2	115,040
Catering business operators	55,980	105.4	58.4	165,730
Qualified professions in health and social services	10,180	19.2	46.5	25,520
Beauty treatment professionals	6,020	11.3	58.4	15,170
Skilled professions in personal services	8,880	16.7	34.8	20,580
<b>ARTISANS, SPECIALISED LABOURERS AND AGRICULTURALISTS</b>	<b>94,050</b>	<b>177.0</b>	<b>64.2</b>	<b>261,850</b>
Specialised labourers in construction and building maintenance	28,350	53.4	58.6	73,920
Building finisher artisans and specialised labourers	15,620	29.4	73.6	45,020
Smelters, welders, tinsmiths, boilermakers, metal structure fitters and similar professions	8,090	15.2	70.0	24,110
Blacksmith ironworkers, tool makers and similar professions	6,440	12.1	72.0	17,400
Artisan mechanics, fitters, repairers and maintenance technicians for stationary and mobile machines	11,100	20.9	73.1	32,320
Electrical and electronic equipment installation and maintenance artisans and specialised labourers	6,370	12.0	63.1	19,950
Artisans and specialised workers in food processing	3,620	6.8	59.9	10,620
Toolmakers, Artisans and specialised workers in wood treatment	2,620	4.9	74.1	6,730
Artisans and specialised workers in textile and clothing	3,410	6.4	58.1	8,890
<b>PLANT OPERATORS AND STATIONARY AND MOBILE MACHINERY OPERATORS</b>	<b>69,120</b>	<b>130.1</b>	<b>53.2</b>	<b>190,460</b>
Automatic and semi-automatic machinery workers for metal processing and for mineral products	5,720	10.8	64.6	13,320
Operators of machinery for the manufacture of rubber items and plastic materials	2,550	4.8	55.9	7,100
Workers assigned to machinery in the industry of textiles, garments and similar	3,260	6.1	55.0	9,810
Workers assigned to assembly of industrial products	5,330	10.0	50.5	14,370
Workers assigned to industrial product packaging machines	5,190	9.8	29.5	13,620
Workers assigned to stationary machinery for the food industry	3,050	5.7	48.3	7,890
Motor vehicle drivers	28,730	54.1	58.6	77,550
Operators of earthmoving, lifting and material handling machinery	8,490	16.0	52.8	25,790
<b>UNSKILLED PROFESSIONS</b>	<b>69,240</b>	<b>130.3</b>	<b>37.1</b>	<b>190,950</b>
Unskilled staff assigned to moving and delivery of goods	24,130	45.4	32.0	67,550
Unskilled cleaning service staff	35,190	66.2	38.3	93,860
Unskilled staff assigned to manufacturing	2,730	5.1	46.4	6,880

\* The professions requested for the main professional groups are presented here. The sum of the inflow of workers for each "group shown", therefore, does not correspond to the total.

Source: Unioncamere - ANPAL, Excelsior Information System, 2023



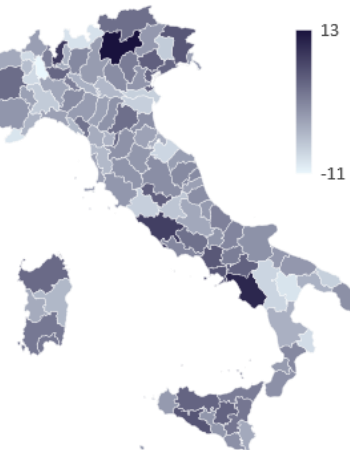
## INFLOW OF IMMIGRANT PERSONNEL AND MAIN SECTORS HIRING IMMIGRANT WORKERS (a.v.; %)



Source: Unioncamere - ANPAL, Excelsior Information System, 2023

## THE INFLOW IN THE TERRITORIES IN THE MONTH OF SEPTEMBER 2023 AND IN THE PERIOD SEPTEMBER - NOVEMBER 2023

	September 2023		September - November 2023		Variations (a.v.)		Variation % forecast inflow September 2023/2022
	Forecast inflow	% difficult to recruit	Forecast inflow	september 2023/2022	sep - nov 23/ sep - nov 22		
PIEMONTE	37,050	49.2	98,690	-290	-2,230		
VALLE D'AOSTA	1,160	48.1	4,170	-40	+110		
LOMBARDIA	121,640	46.5	314,640	+1,590	+3,860		
LIGURIA	10,710	51.3	31,600	-390	+70		
TRENTINO ALTO ADIGE	13,780	52.4	34,270	+1,040	+750		
VENETO	51,940	54.4	137,980	+610	+1,080		
FRIULI VENEZIA GIULIA	10,770	56.6	29,250	-30	+140		
EMILIA ROMAGNA	49,230	51.9	129,830	-320	-1,240		
TOSCANA	31,440	54.5	87,200	-370	+1,310		
UMBRIA	6,090	55.8	16,600	+40	+690		
MARCHE	12,780	54.9	35,220	-370	+140		
LAZIO	56,260	38.0	151,680	+3,410	+10,020		
ABRUZZO	10,100	52.0	27,030	-80	+550		
MOLISE	1,550	46.9	4,510	--	-20		
CAMPANIA	41,710	41.0	114,300	+2,460	+6,830		
PUGLIA	25,220	44.2	71,760	-460	+880		
BASILICATA	3,030	46.2	8,780	-270	-290		
CALABRIA	8,300	43.0	24,700	-210	+320		
SICILIA	28,360	39.8	80,940	+530	+3,080		
SARDEGNA	10,130	52.9	29,120	+160	+930		
<b>NORTH WEST</b>	<b>170,570</b>	<b>47.4</b>	<b>449,090</b>	<b>+860</b>	<b>+1,810</b>		
<b>NORTH EAST</b>	<b>125,720</b>	<b>53.4</b>	<b>331,340</b>	<b>+1,290</b>	<b>+720</b>		
<b>CENTRAL</b>	<b>106,570</b>	<b>45.9</b>	<b>290,700</b>	<b>+2,720</b>	<b>+12,150</b>		
<b>SOUTH AND ISLANDS</b>	<b>128,390</b>	<b>43.5</b>	<b>361,130</b>	<b>+2,140</b>	<b>+12,280</b>		
<b>ITALY</b>	<b>531,250</b>	<b>47.6</b>	<b>1,432,260</b>	<b>+7,010</b>	<b>+26,960</b>		



Source: Unioncamere - ANPAL, Excelsior Information System, 2023