

## 93 年營造業經濟概況調查摘要報告

93 年營造業經營概況調查對象為從事綜合營造業經主管機關核准登記有案者，且於 93 年底仍繼續營業之綜合營造業及土木包工業，調查結果摘要如下：

- (一) 93 年底營造業共計 13,012 家。
- 以等級別分析，丙等綜合營造業占 44.7% 最多，土木包工業占 33.8% 次之，甲等綜合營造業占 12.1% 再次之，乙等綜合營造業占 9.3% 最少。
- 以地區別分析，臺灣省中部區域占 34.4% 最多，臺灣省北部區域占 24.4% 次之，臺灣省南部區域占 22.4% 再次之。
- 以組織型態別分析，營造業以公司組織居多占 67.0%，獨資或合夥占 33.0%。
- 以員工人數別分析，以 9 人以下的小型或微型營造業占 59.9% 最多，10~19 人的營造業占 21.9% 次之，20~49 人的營造業占 13.6% 再次之，三者合計已超過九成五，而 50 人以上之中大型營造業僅 4.6%。
- 以收入總額別分析，以收入總額未滿 600 萬元的營造業占 43.5% 最多，其次是 1,000 萬元~未滿 2,000 萬元的營造業占 16.8% 次之。另收入總額在 3 億元以上之各規模組別所占比例較低，均不足 1%。
- 以生產總額別分析，生產總額未滿 600 萬元的營造業占 42.1% 最多，其次是 1,000 萬元~未滿 2,000 萬元的營造業占 17.0%，而以 3 億元以上之各規模組別之家數所占比例較低，均不足 1%。
- 以實際運用資產別分析：實際運用資產未滿 600 萬元的營造業家數占 39.7% 最多，其次是 600 萬元~未滿 1,000 萬元及 1,000 萬元~未滿 2,000 萬元的營造業家數，各占 15.9% 及 15.5%。
- (二) 93 年底營造業之從業員工人數約 19 萬 4 仟人，其中工員人數 13 萬 2,758 人，為職員人數的 2.3 倍。
- (三) 93 年營造業全年勞動報酬支出為 1,046 億 1,635 萬 7 仟元，甲等綜合營造業平均每企業全年勞動報酬達 3,475 萬 6 仟元居冠，而營造業平均每企業全年勞動報酬為 804 萬元，較 92 年 609 萬 5 仟元明顯上升。

(四)	93 年營造業全年收入總額為 4,689 億 1,158 萬 6 千元，較 92 年增加，其中營業收入 4,567 億 4,779 萬 7 千元，占收入總額之 97.4%；各等級中，以甲等綜合營造業占的 61.6%最高。
(五)	93 年營造業全年各項支出總額為 4,964 億 8,899 萬 5 千元，較 92 年增加，其中營業支出為 4,813 億 4,312 萬 7 千元，占全年支出總額之 96.9%；各等級中，以甲等綜合營造業全年各項支出總額占全體營造業的 61.5%為最多。
(六)	93 年底營造業實際運用資產淨額 1 兆 1,045 億 747 萬 4 千元，較 92 年增加，且大部分為流動資產，而甲等綜合營造業就達 8,903 億 9,718 萬 2 千元居冠。
(七)	93 年營造業生產總額為 5,292 億 2,710 萬元，較 92 年之 4,811 億 7,718 萬 7 千元高出近一成。
(八)	93 年底營造業使用土地總面積為 75 萬 2,804 平方公尺，而平均每企業所使用土地面積為 57.9 方公尺，平均每員工使用土地面積為 3.9 平方公尺。
(九)	93 年底營造業使用建築物樓地板總面積為 119 萬 3,574 平方公尺，平均每企業所使用建築物樓地板面積為 91.7 平方公尺，平均每員工使用建築物樓地板面積為 6.2 平方公尺。
(十)	93 年全年各項工程施工價值為 5,259 億 2,464 萬 7 千元，較 92 年增加約一成，甲等綜合營造業約占六成一居冠。
(十一)	各項營建工程投入成本約 4,359 億 7,374 萬 2 千元，亦較 92 年增加約一成，以公共工程比例最高，而住宅工程較 92 年成長最多。
(十二)	93 年臺閩地區營造業全年實際耗用材料價值為 3,198 億 5,095 萬 8 千元，較 92 年增加一成四；其中由廠方自行採購的部分有占 88.9%，由顧客及營造同業提供的部分占 11.1%。平均每企業全年實際耗用材料價值為 2,458 萬 1 千元。
(十三)	93 年底營造業整體負債及淨值總額 1 兆 679 億 9,506 萬 4 千元。其中負債占 77.9%，淨值占 22.1%。平均每企業負債及淨值總額為 8,207 萬 8 千元。
(十四)	93 年臺閩地區營造業整體流動比率為 116.8%，負債比率為 77.9%，固定資

	產適合率為 34.6%，自有資本率為 24.3%。
(十五)	93 年臺閩地區營造業純益率由 92 年的 1.8% 上升為 2.8%，持續上升中，而以土木包工業的純益率最高達 9.0%。
(十六)	93 年臺閩地區營造業總資產週轉率為 40.8%，較 92 年上升，且有隨資產規模之增加而總資產週轉率下降的狀況。
(十七)	93 年臺閩地區營造業勞動裝備率為 569 萬 6 仟元，較 92 年高；其中甲等綜合營造業之勞動裝備率為 1,340 萬 3 仟元，遠遠大於其他等級之營造業。
(十八)	93 年臺閩地區營造業之勞動生產力為 272 萬 9 仟元，較 92 年明顯上揚；其中以甲等綜合營造業之勞動生產力 486 萬 2 仟元居冠。
(十九)	93 年臺閩地區營造業平均每元勞動報酬生產總額為 5.1 元，較 92 年的 4.8 元略微增加。
(二十)	93 年臺閩地區營造業資本生產力為 47.7%，較 92 年的 44.0% 增加，且其隨營造業等級成反比。
(廿一)	93 年臺閩地區營造業實際運用資產獲利率為 1.2%，較 92 年的 0.7% 上升，其中以土木包工業之實際運用資產獲利率 13.2% 為最高。

## Economic Survey of Construction Industry in Taiwan, 2004 Executive Summary

The population of the 2004 Economic Survey of Construction Industry in Taiwan included all R.O.C. construction companies and Civil Engineering Contractors which registered with the supervisory organization and continued to do business at the end of 2004. The survey period covered from January 1, 2004 through December 31, 2004. The survey results are summarized as follows:

1. There were 13,012 construction companies at the end of 2004

Analyzing based on grades level, we found that the “Grade C Construction Companies” had more number of companies (44.7%) than any other grades, followed by “Civil Engineering Contractors” (33.8%), “Grade A Comprehensive Construction Companies” (12.1%), and “Grade B Construction Companies” (9.3%).

Observing based on region, we found that more companies were located in the Central Region (34.4%), followed by North Region (33.8%) and South Region (22.4%).

By type of organization, majority of them were company (67.0%) ; only 33% were individual proprietorship or partnership.

By number of employees, majority (59.9%) of them were small firms with only 9 or under employees, followed by 10-19 employees (21.9%), and 20-49 employees (13.6%) ; and only 4.6% had 50 or over employees.

Analyzing based on the total revenue, there were 43.5% with annual revenue under NT\$6,000,000, followed by NT\$10,000,000~20,000,000 (16.8%). Less than 1% had annual revenue over and above NT\$300,000,000.

By total value of production, 42.1% had annual value of production lower than NT\$6,000,000, followed by 17.0% in NT\$10,000,000~20,000,000. And less than 1% had annual value of production over and above NT\$300,000,000.

Analyzing based on the value of assets in operation, 39.7% had the total value of assets in operation less than NT\$6,000,000, followed by NT\$6,000,000~10,000,000 (15.9%) and NT\$10,000,000~20,000,000 (15.5%).

2. The number of employees in the construction industry was around 194,000 with 132,578 laborers at the end of 2004. The number of the laborers was 2.3 times of the number of the staff.
3. The 2004 annual expenditures on labor costs amounted to NT\$104,616,357,000 in the construction industry. The average 2004 annual expenditures on labor costs per Grade A comprehensive construction company was the highest, NT\$34,756,000. And the average 2004 annual expenditures on labor costs per company in the construction industry was NT\$8,040,000, which increased significantly from NT\$6,090,000 of year 2003.
4. The 2004 total revenue of the construction industry was NT\$468,911,586,000, which was more than that of the year 2003. Among the total revenue, NT\$456,747,797,000 was the business revenue, accounted for 97.4% of the total revenue. By different grades of construction companies, we found that Grade A Comprehensive Construction Companies accounted for 61.6% of the total revenue in the construction industry.
5. The 2004 annual total expenditures of the construction industry were NT \$496,488,995,000, more than that of the year 2003. The business expenditures were NT \$481,343,127,000, accounted for 96.9% of the total expenditures. Grade A Comprehensive Construction Companies had the largest total expenditures among the different grades of construction companies, accounted for 61.5% of the total expenditures of the whole construction industry.
6. The net value of actual assets in operation in the construction industry at the end of 2004 was NT\$110,457,474,000, which was more than that of the year 2003. And the majority of the actual assets were liquid assets. Grade A Comprehensive

Construction Companies had the total liquid assets of NT \$890,397,182,000, more than any other grade construction companies.

7. The 2004 annual total value of production was NT\$529,227,100,000, increased about 10 percent from the year 2003 (NT\$481,177,187,000).
8. The total area of the land used by the construction industry at the end of 2004 was 752,804 square meters. The average area of the land used by each company was 57.9 square meters and average area of land used by each employee was 3.9 square meters.
9. The total floor area of the buildings used by the construction industry was 1,193,574 square meters at the end of 2004. The average floor area of buildings used by each company was 91.7 square meters and used by each employee was 6.2 square meters.
10. The 2004 annual total value of construction work was NT\$525,924,647,000, increased 10% from year 2003. The Grade A Comprehensive Construction Companies accounted for 61% of it.
11. The total cost of construction was NT\$435,973,742,000 which increased 10% from the year 2003. The cost of public work construction accounted for the highest proportion of it, and the cost of residential housing construction increased the most over the year 2003.
12. The 2004 annual actual value of materials used by the construction industry in Taiwan Fujian area was NT\$319,850,958,000, an increase of 14% from that of the year 2003. 88.9% was procured by the construction companies themselves, 11.1% provided by customers or other construction companies. Average actual value of materials used by every company was NT\$24,581,000.
13. The 2004 annual total amount of liabilities and net worth was NT\$167,995,064,000. 77.9% was liabilities, 22.1% net worth. The average amount of liabilities and net-worth per company was NT\$82,078,000.

14. The 2004 annual liquidity ratio for the construction industry in Taiwan-Fujian area was 116.8% ; the liability ratio was 77.9% ; the fixed assets adequacy ratio was 34.6% ; and the self-capital ratio was 24.3%.
15. The 2004 annual net profit margin of the construction industry in Taiwan-Fujian area was 2.8%, increased from 1.8% of the year 2003. And the net profit margin of Civil Engineering Contractors was the highest (9.0%).
16. The 2004 annual total asset turnover rate for the construction industry in Taiwan-Fujian area was 40.8% which was higher than that of the year 2003. And the total asset turnover rate decreased when the asset amount increased.
17. The 2004 annual labor facility rate for the construction industry in Taiwan-Fujian area was NT\$ 5,696,000 which was more than that of the year 2003. The labor facility rate of Grade A Comprehensive Construction Companies was NT\$13,403,000 which was much more than other grades of construction companies.
18. The 2004 annual labor productivity for the construction industry in Taiwan-Fujian area was NT\$2,729,000 which increased significantly over that of the year 2003. The Grade A Comprehensive Construction Companies having NT\$4,862,000 in labor productivity was the top in the whole construction industry.
19. The 2004 annual total value of production on every dollar spent in labor cost for the construction industry in Taiwan- Fujian area was NT\$5.1, increased slightly from NT\$4.8 of the year 2003.
20. The 2004 annual capital productivity for the construction industry in Taiwan-Fujian area was 47.7%, increased from 44.0% of the year 2003. The higher the construction company' s grades (Grade A is the highest grade), the lower the capital productivity.
21. The 2004 annual profit rate of actual assets in operation for the construction industry in Taiwan- Fujian area was 1.2%, increased from 0.7% of the year 2003.

The Civil Engineering Contractors with 13.2% profit rate of actual assets in operation was the highest among all graders of construction companies.