



Advanced
Manufacturing
Technologies

ECONOMIC REPORT

Machine Tools and Advanced
Manufacturing Technologies



2019

REPORT PREPARED BY

AFM, Machine Tool, Accesories, Component Parts and Tools Manufacturers' Association of Spain.

DATE

September 30, 2020

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César Garbalena
Chairman of AFM Cluster

Welcome to AFM CLUSTER, the organisation that represents the interests of Advanced and Digital Manufacturing in Spain.

Our five industrial associations, AFM, ADDIMAT, ESKUIN, AFMEC and UPTTEK comprise more than 500 companies that employ 16,500 people and have a turnover in excess of €3 billion per year.

From our central offices in San Sebastián, our education centre (IMH) in Elgoibar and our subsidiary in Tianjin (China) we are continuously working to expand our international presence, increase industrial and technological development and hone the skills of the staff in our associated companies.

Thank you for your trust.

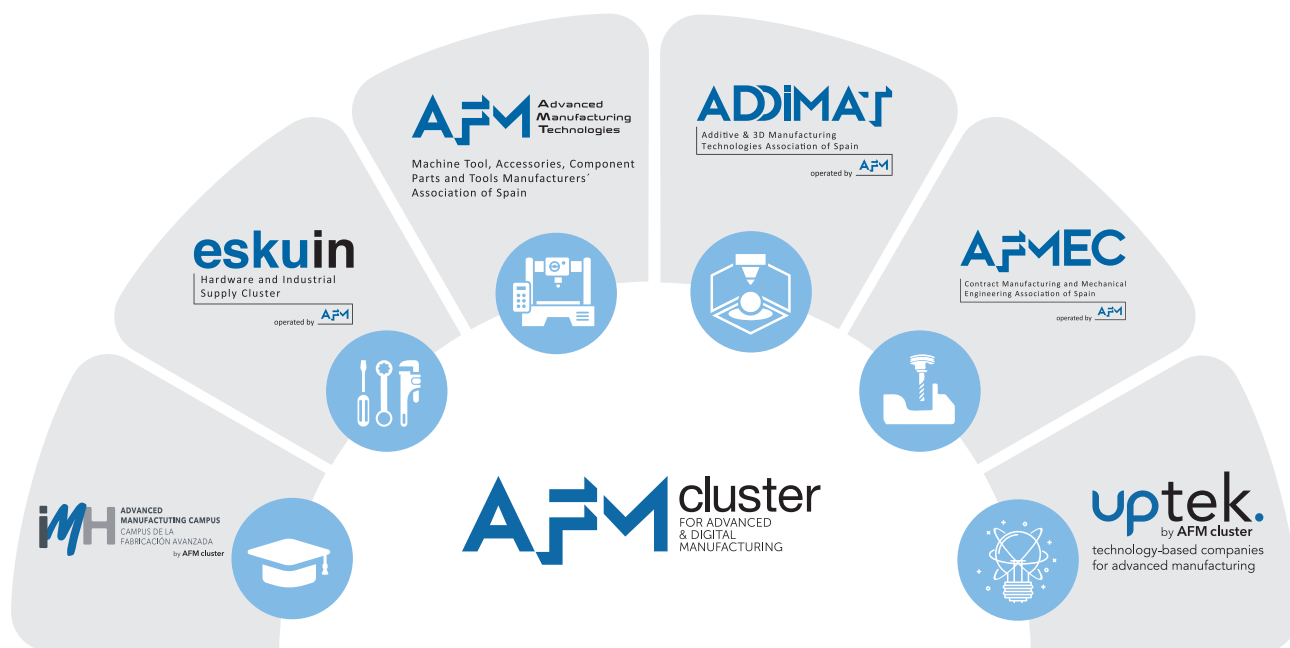


Xabier Ortueta
General Manager of AFM Cluster

AFM is the founding association of AFM CLUSTER and represents Machine Tool manufacturers and Advanced Manufacturing Technologies.

With 74 years of experience, we are proud to represent an industry that ranks third in the European Union and ninth in the world. This industry stands out for its decisive innovative character, its international presence worldwide and an extraordinary team, capable of competing with the best anywhere in the world.

Please take the time to become familiar with our Economic Report for 2019.



ASSOCIATES
+500

PARTNERS
+70

TURNOVER
+3.000M€

DIRECT JOBS
+16.500

01 | Production and Exports



Production

	2019	2018	% 19/18
Machine Tools	1,049.82	1,192.27	-11.95%
Metal Cutting	676.31	741.36	-8.77%
Metal Forming	373.51	450.91	-17.17%
Components	194.68	209.99	-7.29%
Tools	127.59	135.05	-5.52%
Accessories	65.88	71.12	-7.37%
Other machines	130.47	123.54	5.61%
Machining and other services	73.25	80.96	-9.52%
Total Production*	1,626.12	1,796.10	-9.46%

* Deducted the part of components and accessories that are incorporated into national machine tools.

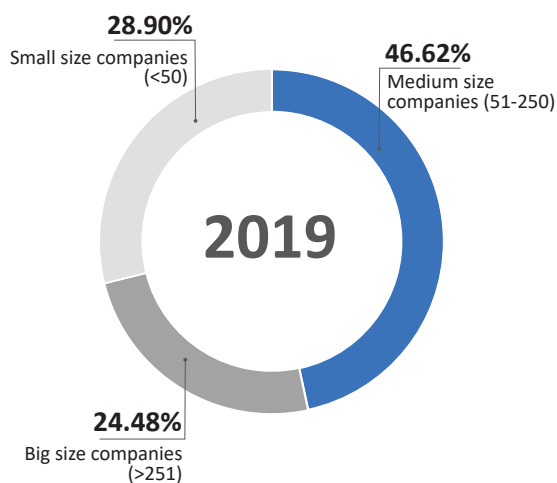
Million €

Exports

	2019	2018	% 19/18
Machine Tools	922.51	1,004.35	-8.15%
Metal Cutting	662.55	672.58	-1.49%
Metal Forming	259.96	331.77	-21.64%
Components	125.46	121.93	2.90%
Tools	69.70	72.80	-4.26%
Accessories	47.74	48.71	-1.99%
Other machines	79.50	64.97	22.36%
Machining and other services	49.02	50.43	-2.80%
Total Exports	1,293.93	1,363.19	-5.08%

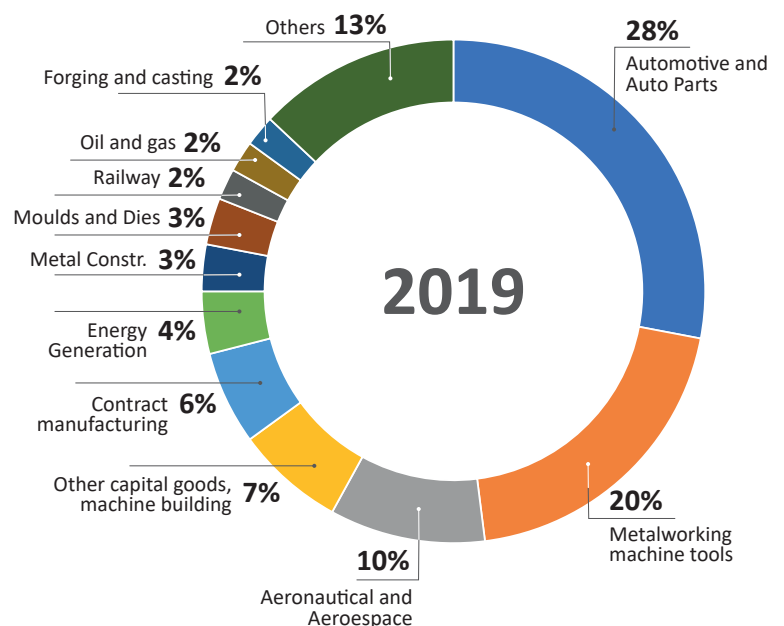
Million €

02 | Employment



7,643 DIRECT JOBS

03 | Sectors



04 | Production, Trade and Consumption



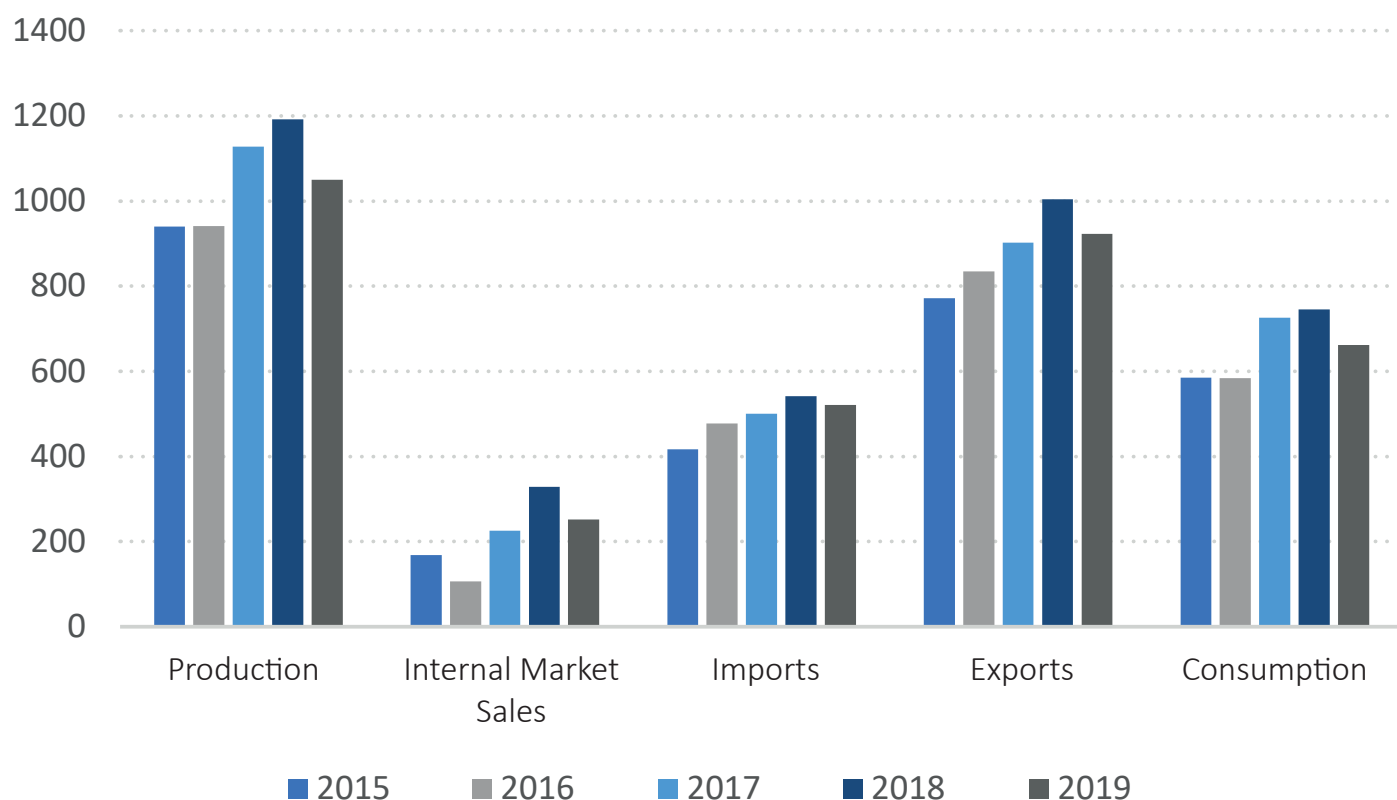
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Metal Cutting Machines	662.55	672.58	-1.49%
Metal Forming Machines	259.96	331.77	-21.64%
Internal Market Sales	251.85	328.23	-23.27%
Exports / Production	87.87%	84.24%	
Imports	520.88	542.24	-3.94%
Apparent consumption	662.03	745.23	-11.16%
Export / import coverage	177.11%	185.22%	
Internal Sales / Consumption	38.04%	44.04%	

Million €

3rd PRODUCER AND EXPORTER OF THE EU

9^o PRODUCER AND EXPORTER OF THE WORLD

Spain



05 | Activity by country



Exports 2019



		2016	2017	2018	2019
1	Germany	108.05	130.08	137.17	118.95
2	USA	65.48	75.45	86.66	93.46
3	Italy	68.57	57.43	67.61	74.56
4	France	51.27	56.96	69.64	69.95
5	Portugal	72.31	56.85	71.08	69.73

Million €

		2016	2017	2018	2019
6	China	96.63	89.17	92.72	68.69
7	Mexico	77.82	88.43	97.84	57.56
8	India	15.25	26.50	11.88	30.26
9	Poland	33.88	30.86	35.15	25.89
10	Turkey	10.78	20.63	16.76	18.76

Million €

Imports 2019



		2016	2017	2018	2019
1	Germany	99.32	122.10	137.92	146.90
2	Italy	73.15	90.18	100.35	100.06
3	Japan	61.54	53.34	47.45	45.75
4	China	23.29	29.58	31.47	36.08
5	Taiwan	35.10	29.40	24.12	24.75

Million €

		2016	2017	2018	2019
6	France	18.32	15.15	23.50	24.30
7	Switzerland	24.64	29.06	35.65	17.49
8	Turkey	12.82	16.80	19.28	16.43
9	United Kingdom	17.03	16.35	14.14	16.40
10	Belgium	43.23	21.76	13.33	13.44

Million €

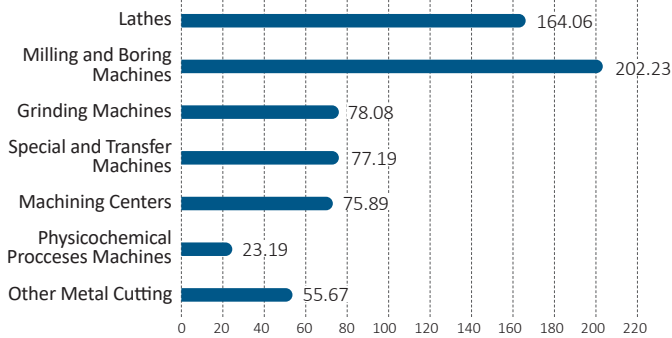
06 | Activity by type of machine



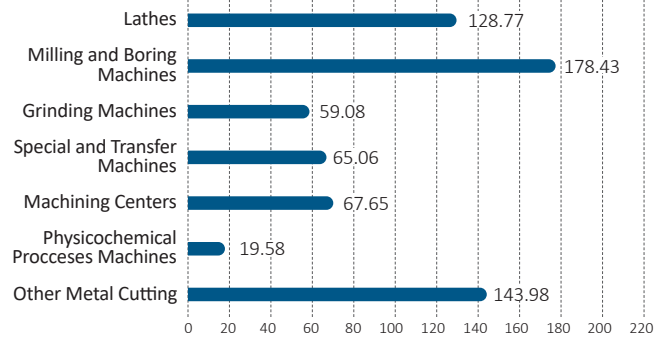
2019

METAL CUTTING MACHINES

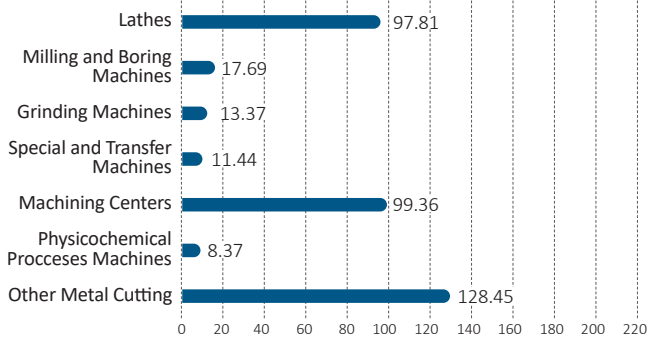
Production Total: 676.31 mil. €



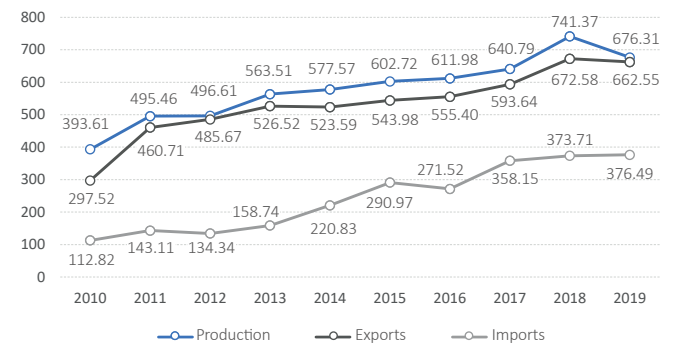
Exports Total: 662.55 mil. €



Imports Total: 376.49 mil. €



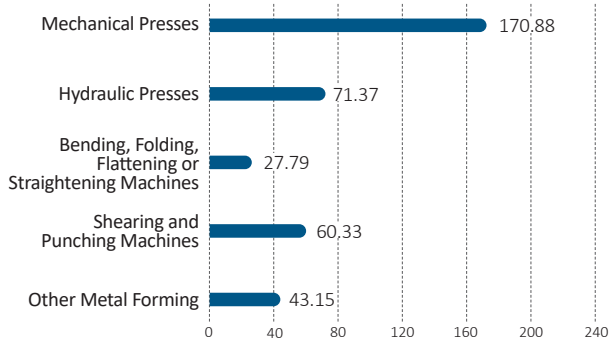
Evolution



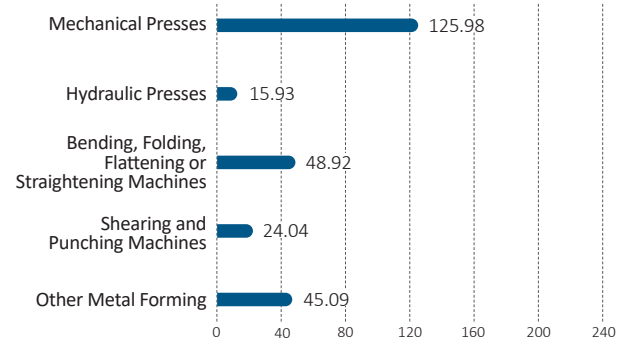
2019

METAL FORMING MACHINES

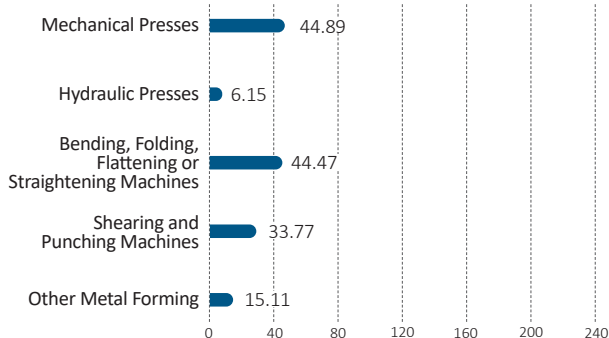
Production Total: 373.52 mil. €



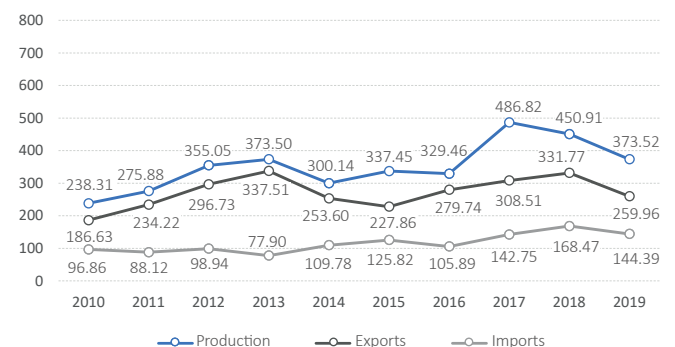
Exports Total: 259.96 mil. €



Imports Total: 144.39 mil. €



Evolution





powered by



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