

ECONOMIC REPORT

Machine Tools and Manufacturing Technologies





César Garbalena
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Welcome to AFM CLUSTER, the organisation that represents the interests of Advanced and Digital Manufacturing in Spain. Our four industrial associations, AFM, ADDIMAT, ESKUIN and AFMEC comprise more than 400 companies that employ 12,500 people and have a turnover in excess of €2.5 billion per year.

From our central offices in San Sebastián 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.

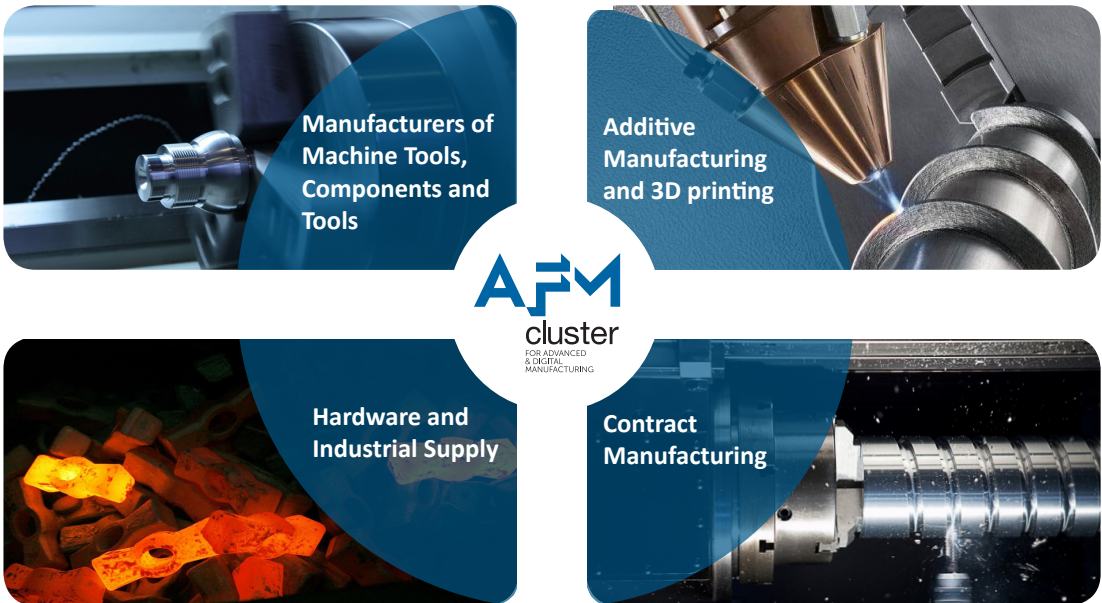
AFM is the founding association of AFM CLUSTER and represents Machine Tool manufacturers and Advanced Manufacturing Technologies.

With 72 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.

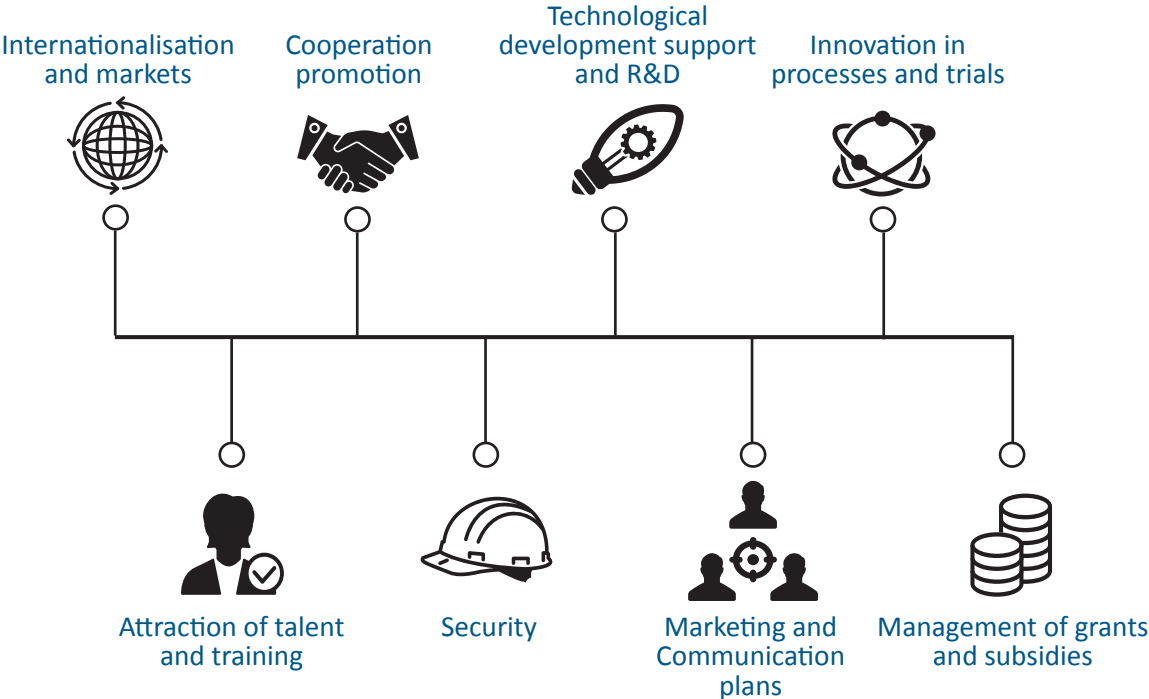
Please take the time to become familiar with our Economic Report for 2017.



AFM CLUSTER: WHO DO WE REPRESENT



SERVICES



01 | Production and Exports

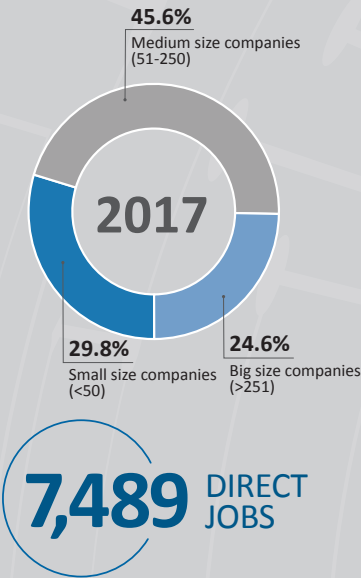
Production	2017	2016	% 17/16
Machine Tools	1,127.61	941.44	19.78%
Metal Cutting	640.79	611.98	4.71%
Metal Forming	486.82	329.46	47.76%
Components	196.38	187.85	4.54%
Tools	116.28	109.15	6.53%
Accessories	70.60	61.35	15.08%
Other machines	130.44	147.00	-11.27%
Machining and other services	65.19	59.51	9.54%
Total Production*	1,690.69	1,496.67	12.96%

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

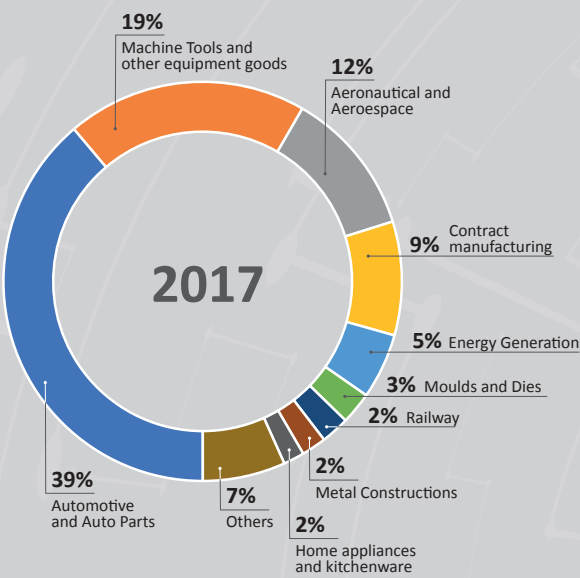
Exports	2017	2016	% 17/16
Machine Tools	902.15	835.12	8.03%
Metal cutting	593.64	555.38	6.89%
Metal forming	308.51	279.74	10.28%
Components	121.44	124.54	-2.49%
Tools	63.50	61.37	3.47%
Accessories	42.90	41.47	3.45%
Other machines	63.95	89.73	-28.73%
Machining and other services	39.43	32.52	21.25%
Total Exports	1,233.37	1,184.75	4.10%

Million €

02 | Employment



03 | Sectors



04 | Production, Trade and Consumption



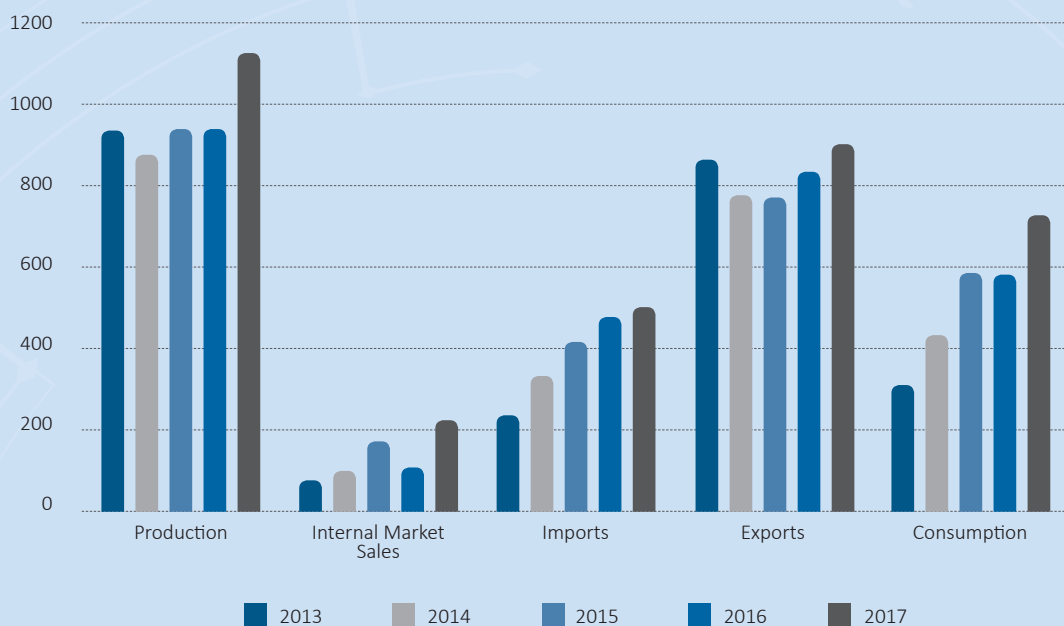
	2017	2016	% 17/16
Total Production	1,127.61	941.44	19.78%
Metal Cutting Machines	640.79	611.98	4.71%
Metal Forming Machines	486.82	329.46	47.76%
Total Exports	902.15	835.12	8.03%
Metal Cutting Machines	593.64	555.38	6.89%
Metal Forming Machines	308.51	279.74	10.28%
Internal Market Sales	225.46	106.32	112.06%
Exports / Production	80.01%	88.71%	
Imports	500.90	477.41	4.92%
Apparent consumption	726.36	583.73	24.43%
Export / import coverage	180.11%	174.93%	
Internal Sales / Consumption	31.04%	18.21%	

Million €

3rd PRODUCER AND
EXPORTER OF THE EU

9th PRODUCER AND
EXPORTER OF THE WORLD

Spain



MACHINE TOOLS

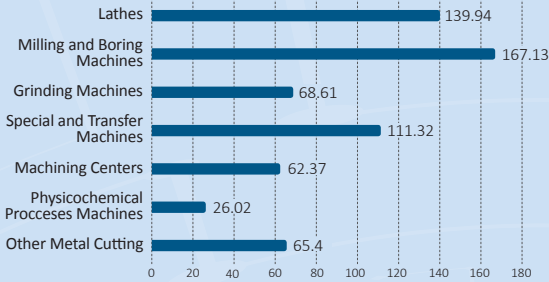
05 | Activity by type of machine



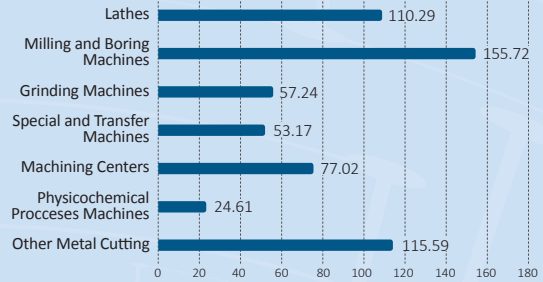
2017

METAL CUTTING MACHINES

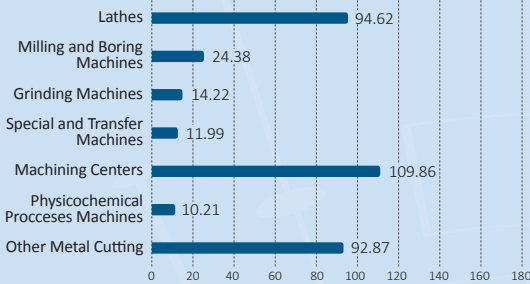
Production Total: 640.79 mil. €



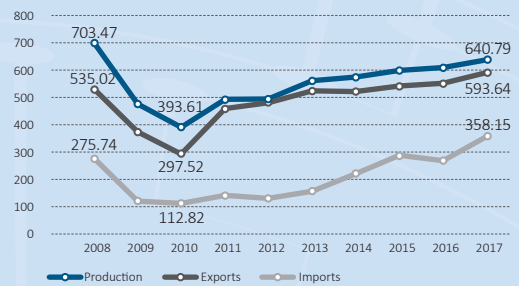
Exports Total: 593.64 mil. €



Imports Total: 358.15 mil. €



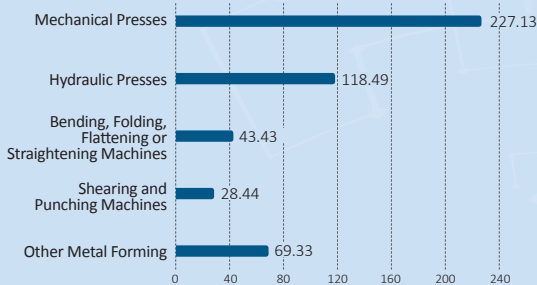
Evolution



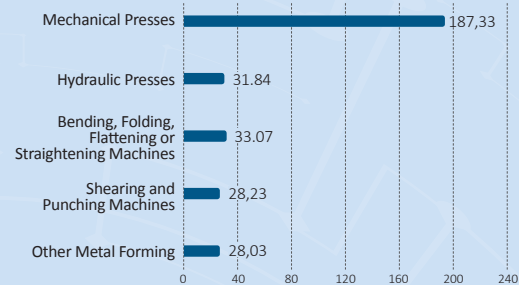
2017

METAL FORMING MACHINES

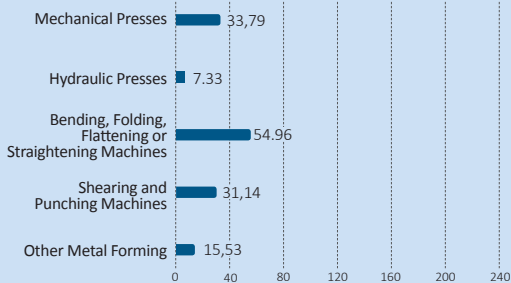
Production Total: 486.82 mil. €



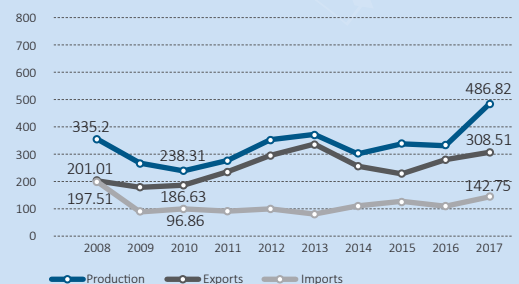
Exports Total: 308.51 mil. €



Imports Total: 142.75 mil. €



Evolution



06 | Activity by country



Exports 2017



		2014	2015	2016	2017
1	Germany	87.13	80.07	108.05	130.08
2	China	154.49	51.34	96.63	89.17
3	Mexico	40.11	46.65	77.82	88.43
4	USA	54.46	97.05	65.48	75.45
5	Italy	30.99	51.07	68.57	57.43

Million €

		2014	2015	2016	2017
6	France	42.47	45.06	51.27	56.96
7	Portugal	41.21	51.31	72.31	56.85
8	United Kingdom	40.72	48.75	24.31	36.46
9	Poland	13.31	35.27	34.30	30.86
10	India	28.83	20.39	15.25	26.50

Million €

Imports 2017



		2014	2015	2016	2017
1	Germany	90.78	98.07	99.32	122.11
2	Italy	56.99	61.52	73.15	90.18
3	Japan	27.70	43.03	61.54	53.34
4	China	17.64	20.76	23.29	29.58
5	Taiwan	23.38	33.44	35.10	29.40

Million €

		2014	2015	2016	2017
6	Switzerland	17.74	17.67	24.64	29.06
7	Belgium	20.51	38.59	43.24	21.76
8	South Korea	7.59	15.87	19.90	17.49
9	Turkey	5.48	9.45	12.82	16.80
10	United Kingdom	13.31	18.73	17.03	16.35

Million €



Machine Tool, Accessories, Component
Parts and Tools Manufacturers'
Association of Spain

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