

THE HARDWARE AND INDUSTRIAL SUPPLY SECTOR WEATHERS THE STORM WITH A DROP OF 5.75% IN SALES



San Sebastian, 24 March 2021. The manufacturing companies in the ESKUIN Hardware and Industrial Supply Cluster closed 2020 full of uncertainty because of the pandemic, recording a turnover of Euros 358 million, compared to the Euros 380 million recorded in 2019, representing a decrease in overall sales of 5.75%.

Sales performance has been disparate on both the domestic and international markets. While domestic sales suffered a drop of 12.25%, coming in at Euros 173 million, exports were up by 1.26%, amounting to Euros 185 million.

“The strong export tradition of the ESKUIN companies, coupled with the quality and renown of our products internationally, have been key factors for reducing the impact of the coronavirus pandemic on the global results of our firms”, affirms Miguel González, president of ESKUIN.

In the analysis by sector on the domestic market, the industrial sector, which accounts for 48% of total sales, has seen a drop of 13.30% with respect to the prior year. Construction, which accounts for 43% of sales, is the sector with the most significant slump, falling 14.08% below the previous year. In contrast, the third ranking sector, agriculture, which represents 9% of sales, has increased by 8% compared to last year.

In terms of the distribution of international sales, the European Union continues to be the main destination of exports (77.22%), followed by the American continent (9.27%), and the Middle East (5.70%). Lastly, Africa (2.98%), Russia and Eastern Europe (2.77%), and Asia and Oceania (2.06%).

The main destinations of sector exports per country in 2020 have been France, Germany, USA and Portugal, which are very demanding and value the high standards of quality, durability and functionality that characterise the sector's production.

Sector employment figures also remained stable, at nearly 1,900 workers, as in 2019.

CURRENT SITUATION AND OUTLOOK

2020 started out with signs of slowdown which were accentuated after the outbreak of the pandemic, forcing companies to revise all forecasts. During the first five months of 2020, accumulated sales by ESKUIN companies fell by 24%. However, in the second half of the year, the first signs of recovery began to emerge, with the third quarter of 2020 recording one of the best overall sales figures in the last five years.

Miguel González comments: *“Our diversification in terms of target markets and sectors has been key to withstanding a year of extreme difficulties. It has proven evident that the industry needs our quality tools to operate. We are an essential sector for keeping the manufacturing activity of factories and workshops, construction and the ever crucial farming industry alive”.*

For 2021, the hope is that, as the situation stabilises, sales will recover to levels similar to those of 2019.

“In so far as challenges, the digitalisation of our plants and manufacturing processes, the implementation of efficient and lean manufacturing strategies and the reinforcement of our positioning on the different sales channels, particularly online, will be key. ESKUIN will continue working to support our companies to advance in these areas and in other matters of interest for them.”

For more information, please contact the Director of the Communication Department, María Ruiz-Lopetedi (maria.rlopetedi@afm.es), phone numbers 943 309 009 / 679 979 083.

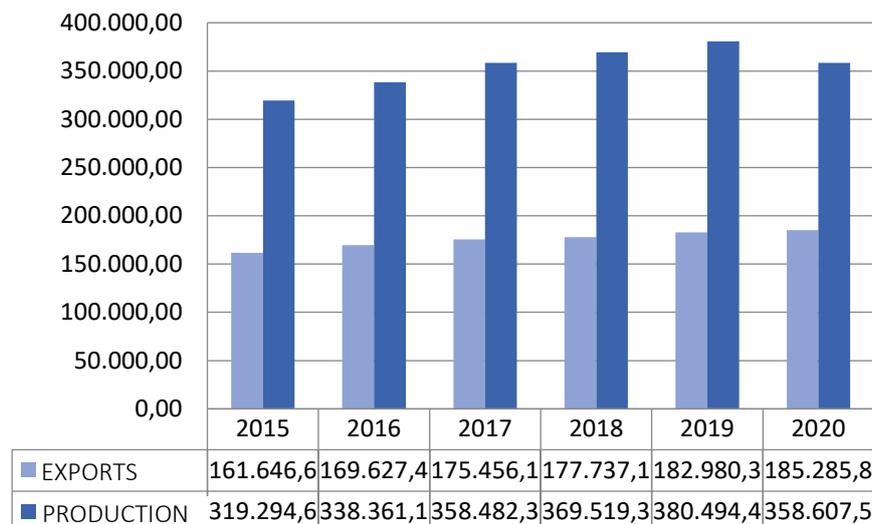
2020 FIGURES

. thousands of €

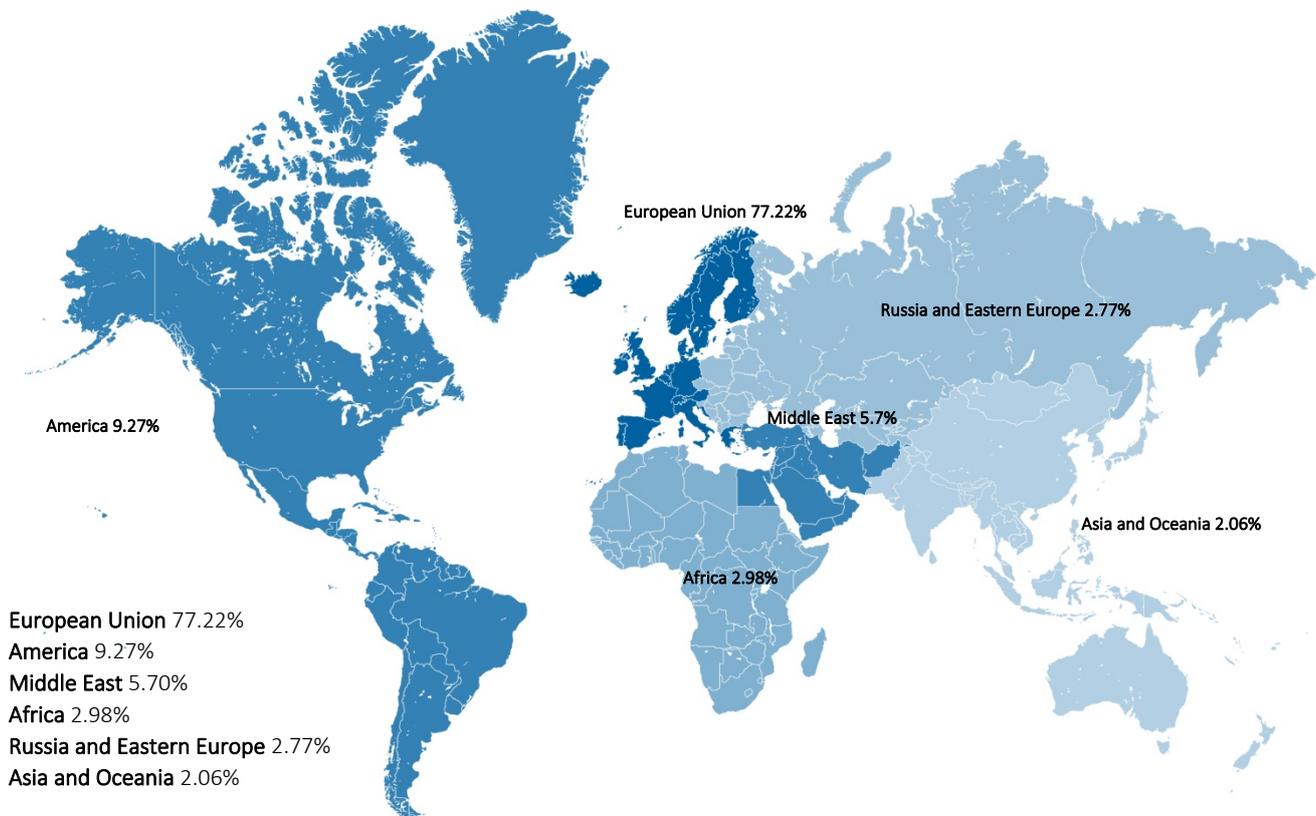
SECTOR TOTAL	2020	2019	% 20/19
TOTAL PRODUCTION	358,607.52	380,494.46	-5.75%
DOMESTIC TOTAL	173,321.63	197,514.12	-12.25%
Industry	84,239.01	97,161.49	-13.30%
Construction	75,105.34	87,413.11	-14.08%
Agriculture	13,977.27	12,939.52	8.02%
EXPORTS	185,285.89	182,980.34	1.26%
Exports/Production	52%	48%	

PRODUCTION/EXPORTS 2015-2020

. thousands of €



EXPORTS PER REGION



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ABOUT AFM CLUSTER

AFM CLUSTER is the organisation that represents the interests of Advanced and Digital Manufacturing. Made up of five industry associations, it groups more than 500 companies, which employ 16,500 people and have a joint turnover of over 3 billion euros. From its headquarters in San Sebastian, and its set-up in Tianjin (China), AFM CLUSTER works to promote the internationalisation, industrial development, strategic positioning and training of people in its associated companies. The five related and synergistic sectors that AFM CLUSTER provides services to are the following:

- Machine-tool and advanced manufacturing technologies. AFM-Advanced Manufacturing Technologies is the founding association, which gives its name to the cluster. With 75 years of history, it has 127 members that provide the industry with machine tools and other equipment for the manufacture of components, accessories and cutting tools.
- Additive Manufacturing and 3D Printing. ADDIMAT brings together 93 companies operating in this new sector, destined to be a relevant part in many industrial sectors, such as, for example, the aerospace, biomedical and automotive sectors.
- Hand Tools, Hardware and Industrial Supply. ESKUIN represents 20 companies that manufacture hand tools and hardware products, to the highest standards of quality and safety.
- Machining and Metal-Mechanical Transformation. AFMEC joins the machining and meta-mechanical transformation workshop collective. With 175 member companies, it brings visibility and services to one of the most important industrial groups in Spain.
- Technology-based companies and startups. UPTEK represents 101 technological companies and startups dedicated to advanced and digital manufacturing.

AFM CLUSTER also has 80 services companies for the industry as partners. AFM CLUSTER forms part of different international associations, such as CECIMO, ECTA or CEO, it is the co-organiser, along with BEC -Bilbao Exhibition Centre-, of the international fairs BIEMH, ADDIT3D, WORKINN and BEDIGITAL and it actively collaborates in the fairs INDUSTRY TOOLS and SUBCONTRATACIÓN. It is a co-organiser of CMH - Congress on Advanced and Digital Manufacturing and Machine Tools.