

NOTA DE PRENSA

PRESS RELEASE

THE MACHINE-TOOL FACES NEW CHALLENGES, INCLUDING THE INDUSTRIAL REVOLUTION 4.0

- Slight decline of the sector in a year with a lot of uncertainty and improvement of the domestic market that continues to recover
- Good behaviour of the NAFTA area and weakening of Asia
- The contribution of financial resources from the EU, the evolution of the Euro/Dollar exchange and the oil price trend, open up new expectations
- ADDIMAT, the new association steered by AFM is growing quickly, with up to 64 companies
- The sector will hold its 20 Machine-tool Congress in San Sebastian in June
- Industry 4.0, a step forward towards an interconnected world



San Sebastian, 16 April 2015.- The definite data of 2014 confirm what the AFM Association had been anticipating, with provisional data in January: a slight decline of 3.2% in the turnover of the machine-tool and manufacturing technologies sector. Despite the uncertainty of 2014, the sector as a whole has managed to more or less maintain its production level; with the exception of metal forming, which has suffered a marked decrease of 19.6%, the other subsectors have produced a positive annual balance.

The President of AFM, Antxon Lopez Usoz comments about the year-end: *"We can say that we have weathered the storm of a year of great uncertainty and in which some of the markets where we had achieved important orders over the last few years, have been exposed to tension and to different types of changes that have caused a destabilising effect. This is the case of Russia and, to a lesser extent, Brazil. In the Asiatic continent, we have experienced a slowdown that has affected China and India. The German market, too, affected by the Russian crisis. However, other markets have livened up our sales. The US once again grow , with a 40% increase impact in our exports. In Europe, noteworthy is the recovery of the United Kingdom, Portugal, Italy and France, despite the fact that the macro data of these latter two markets are not so favourable".*

After the historical high of the sector's exports in 2013, in 2014 the figure dropped by 7.4% as a result, above all, of the decrease experienced by metal forming that fell by 24.9%. The other subsectors also offer lower figures, with the only exception of special machines, whose exports increased by 14%. In any case, the 2014 figure, with exports of almost 80% over sales, is the second highest in history, behind 2013.

Analysing the machine export data until December, it can be observed that China once again heads the foreign sales of 2014 (19.9%), followed by Germany (11.2%) and the US (7%), and by France (5.5%) and Portugal (5.3%). The following five countries are United Kingdom (5.2%), Mexico (5.2%), Brazil (4.1%), Italy (4%) and India (3.7%).

Orders in 2014 grew by 2.1% with a good final quarter of the year, marking a stable start to 2015 insofar as activity is concerned. The origin of the orders has varied a great deal: Spain heads the ranking, followed by the US, Germany and China; and after them the United Kingdom, Poland, Italy, France, Mexico and India.

Spain repeats as the first market for the second consecutive year, domestic consumption shows a hopeful growth in machines of 39% and although not at the required pace, it offers improvement perspectives. Lopez Usoz declares: *"The panorama in the national market finally starts to look hopeful. Moreover, we trust that the necessary re-equipment of the Spanish industry will take place. The support plans that the Basque Government has put into motion have been and are a good incentive for companies to consider investing in advanced manufacturing technologies to improve their production capacity. We hope that this will extend on a national level in 2015.*

We recall that the reactivation of the domestic market, apart from being essential for industry to play the leading role demanded by a more balanced economy, is fundamental for any company, especially the smallest ones, whose international radius is necessarily more limited, to find the best accomplice in national customers to install and test the more complex equipment".

The President of AFM predicts *"that, despite not knowing the consequences that the recent financial injection, the evolution of the Euro with respect to the Dollar, or the oil price trend may bring about, 2015 will be a year of stability on demand, where we will be able to grow, although only slightly, over the 2014 production figure".*

INDUSTRY 4.0

Faced with the increasing generalisation of the Industry 4.0 concept, the president of the association, Antxon Lopez Usoz, states: *"We have been observing an increasing digitalisation of our lives for some time now. Nobody is surprised any longer by the role played by portable devices or the amount of information that is currently moving around the world.*

All of this goes to show that in 2015 we will start to see the first realities of its application in industrial environments. If we add the possibilities provided by the new information and communication technologies to our know-how in the development of equipment that incorporates great advances in manufacturing processes, there is no doubt that we must be able to offer not only products, but also services, which incorporate improvements in quality, productivity and consumption of machines.

We want to seek the active collaboration of those who can provide us with their knowledge and experience in information and communication technologies and their application in the industrial world. Thus, the GAIA Cluster of ICTs seems to be an ideal companion so that, together with other industries, technology centres, etc., we can advance in the incorporation of smart technology in industry”.

FAST GROWTH OF ADDIMAT

“Following the creation of ADDIMAT, after just three months we have managed to bring 64 companies on board. Additive manufacturing joins the advanced manufacturing technologies that we offer the market to improve the competitiveness of industry. Demands to join the association have been coming hard and fast, showing the dynamism and interesting possibilities of this new way of producing. Now we will have to start analysing the real competitive advantages that the entrance of these new technologies can give our associates and clients”, states Antxon Lopez Usoz, President of AFM and of ADDIMAT.

ADDIMAT, the new association created by AFM in December 2014 has fostered, together with BEC (Bilbao Exhibition Centre), the creation of a special exhibition area given over to additive manufacturing at the Subcontracting Fair of Bilbao (26-29 May) in which fifteen of ADDIMAT’s companies will participate, which, in turn, will also take part as speakers at a conference on additive manufacturing on 27 May. Furthermore, the new association will hold its first General Meeting at BEC on Thursday, 28 May.

Additive manufacturing will also be a “nuclear” issue at the twentieth Congress of Machine-Tool that the sector will hold in San Sebastian from 10 to 12 June, with the presence of the North American guest speaker, Terry Wohlers, considered as the greatest expert in the world in additive manufacturing and 3D. The Congress will also hold some special sessions on other issues related to industry 4.0, laser, automation and robotics, “zero defects”, as well as manufacturing systems focused on aeronautical production.

2015 GENERAL MEETING

The General Meeting that AFM will hold tomorrow, and which will be attended by around 250 people, including representatives from sector companies and guests from institutional and

academic fields, in addition to dealing with normal issues related to the Association, will dedicate its ADVANCED MANUFACTURING DAY to “Additive Manufacturing and 3D printing”. To this end, it will count on Aitziber Eizagirre from Tumaker, Aitzol Lamikiz from UPV/EHU, David Sánchez from Tecnalia and Javier Laucirica from IK4, as well as Xabier Ortueta, Director General of AFM

This year, Rafael Barrenechea, former President of AFM and Director of DANOBATGROUP and SORALUCE will receive a worthy tribute to a brilliant career in the sector.

DATA 2014

. millions €

TOTAL FOR SECTOR	2014	2013	% 14/13
TOTAL PRODUCTION*	1.367,29	1.412,11	-3,17
Metal cutting	577,57	563,51	2,50
Metal forming	300,14	373,50	-19,64
Components	180,27	180,25	0,01
Tools	117,39	104,53	12,30
Accessories	86,34	84,73	1,90
Other machines and technologies	59,11	62,22	-5,00
Machining and other services	57,86	54,92	5,35
TOTAL EXPORT	1.090,95	1.178,22	-7,41
Export for Metal cutting	523,59	526,52	-0,56
Export for Metal forming	253,60	337,51	-24,86
Exports for Components	126,53	126,16	0,29
Export for tools	70,87	61,97	14,36
Export for Accessories	47,99	51,28	-6,42
Export for other machines and technologies	31,33	37,36	-16,14
Export for machining and other services	37,04	37,42	-1,02
Domestic sales	276,34	233,89	18,15
Export / Production	79,79%	83,44%	

* After deduction of the part of the accessories, components and tools sold for Spanish-produced machine tools.

MACHINE TOOLS	2014	2013	% 14/13
TOTAL PRODUCTION	877,71	937,01	-6,33
Metal cutting	577,57	563,51	2,50
Metal forming	300,14	373,50	-19,64
TOTAL EXPORT	777,19	864,03	-10,05
Metal cutting	523,59	526,52	-0,56
Metal forming	253,60	337,51	-24,86
Domestic sales	100,52	72,98	37,74
Export / Production	88,55%	92,21%	
Imports	330,61	236,64	39,71
Apparent consumption	431,13	309,62	39,24
Export / import coverage	235,08%	365,12%	
Domestic sales /Consumption	23,32%	23,57%	

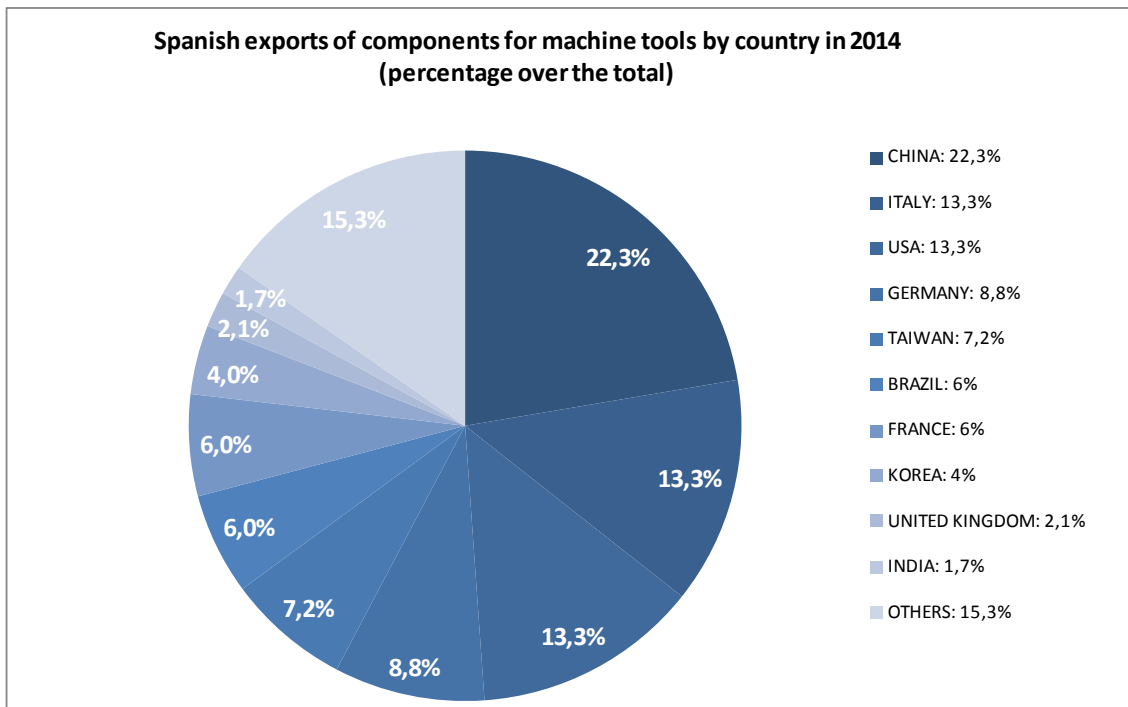
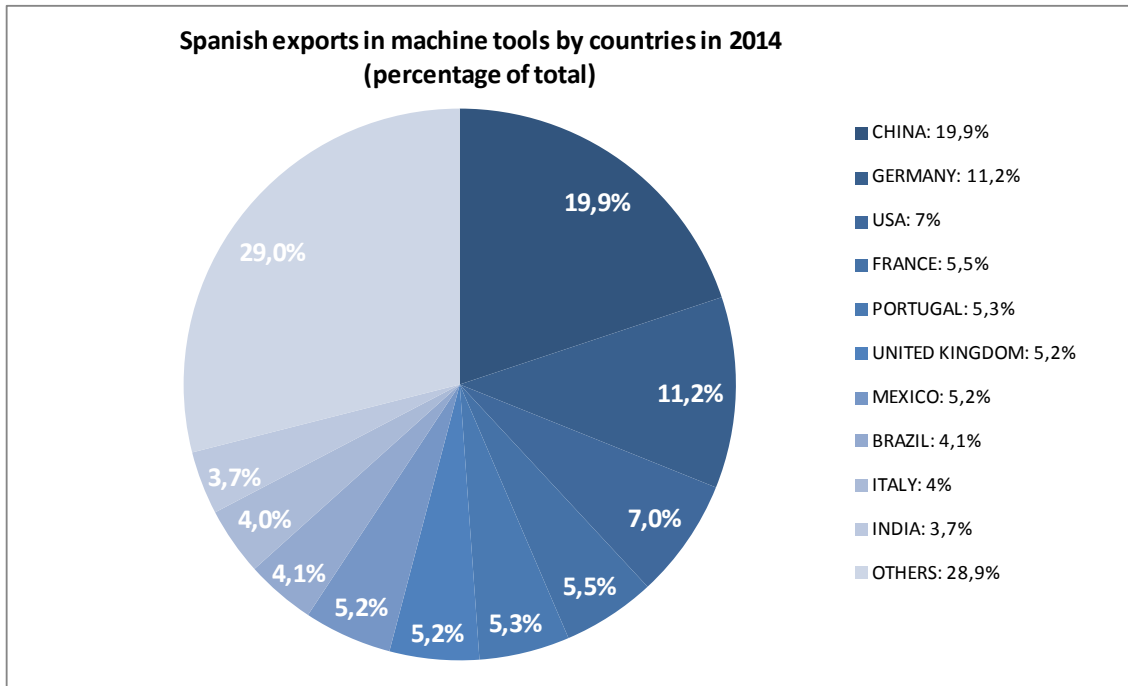
COMPONENTS	2014	2013	% 14/13
TOTAL PRODUCTION	180,27	180,25	0,01
TOTAL EXPORT	126,53	126,16	0,29
Domestic sales	53,74	54,09	-0,65
Export / Production	70,19%	69,99%	

OTHER MACHINES AND TECHNOLOGIES	2014	2013	% 14/13
TOTAL PRODUCTION	59,11	62,22	-5,00
TOTAL EXPORT	31,33	37,36	-16,14
Domestic sales	27,78	24,86	11,75
Export / Production	53,00%	60,05%	

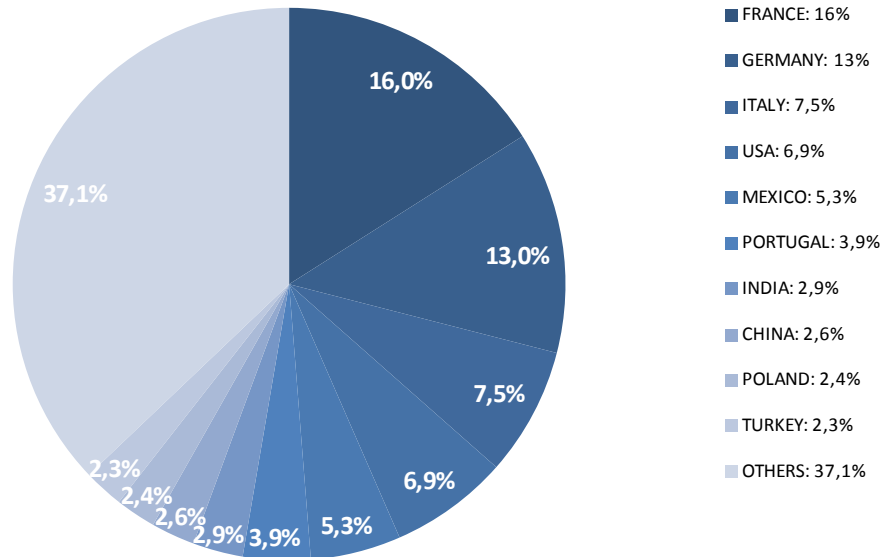
TOOLS	2014	2013	% 14/13
TOTAL PRODUCTION	86,34	84,73	1,90
TOTAL EXPORT	47,99	51,28	-6,42
Domestic sales	38,35	33,45	14,65
Export / Production	55,58%	60,52%	

MACHINING AND OTHER SERVICES	2013	2012	% 13/12
TOTAL PRODUCTION	62,22	50,25	23,82
TOTAL EXPORT	37,36	25,96	43,91
Domestic sales	24,86	24,29	2,35
Export / Production	60,05%	51,66%	

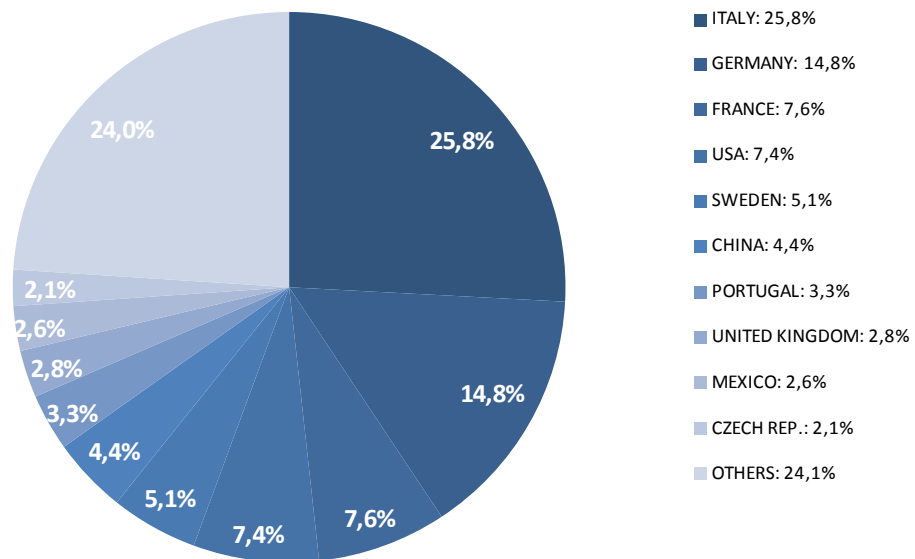
ACCESSORIES	2014	2013	% 14/13
TOTAL PRODUCTION	57,86	54,92	5,35
TOTAL EXPORT	37,04	37,42	-1,02
Domestic sales	20,82	17,50	18,97
Export / Production	64,02%	68,14%	



**Spanish exports of tools for machine tools by country in 2014
(percentage over the total)**



**Spanish exports of accessories for machine tools by country in 2014
(percentage over the total)**



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ABOUT AFM

AFM, Advanced Manufacturing Technologies, the Spanish Association of manufacturers of machine tools, accessories, component parts and tools, represents 90% of companies specialising in machine tools and advanced manufacturing technology that exist in Spain today. From its headquarters in San Sebastian and since its consolidation in China and India, it works to promote internationalisation and the technological innovation of its associate companies. AFM Advanced Manufacturing Technologies is member of CECIMO and of ECTA, European associations of manufacturers of machine-tools and cutting tools, respectively It is also the joint organiser of BIEMH, the Spanish Machine Tool Biennial, whose 29th edition will be held in Bilbao from 30 May to 4 June 2016. It also organises the Machine-Tool and Manufacturing Technologies that will hold its twentieth edition from 10 to 12 June this year, in San Sebastian.

ADDIMAT, the Spanish Association of Additive Manufacturing Technologies and 3D, run by AFM, aims to group together all the players with interests in developing and promoting additive manufacturing and 3D. With the mission of representing additive manufacturing and favouring its development, promoting between-company cooperation and providing its members with professional services, ADDIMAT provides a forum to build a coherent and differentiated image of the additive manufacturing and 3D industry, giving voice to its companies.