

HAND TOOL SECTOR AND INDUSTRIAL SUPPLY CLOSES A POSITIVE 2018 WITH 3.1% GROWTH



San Sebastian, 28 February 2019.- The manufacturing companies in the Hardware and Industrial Supply Cluster, ESKUIN, closed a positive year 2018 with sales reaching 369 million euros, compared to the 358 recorded in 2017, which is an increase of 3.1% in overall sales.

In a year that started strong and tapered off, the domestic market showed somewhat more dynamism than international markets, with sales increasing by 4.78%, reaching 191.8 million euros.

Exports edged up slightly, amounting to 177.7 million euros, an increase of 1.3% in comparison to the corresponding prior year figure (175 million euros).

According to ESKUIN Chairman, César Sainz: *"The figures this year are largely positive and, although the year has kicked off relatively well, the outlook appears to be getting complicated. We maintain the prospects for 2019 are good, based on the forecasts of our associated companies, however, like the majority of the industrial sectors, we are seeing some slowdown. In any event, being manufacturers is our strength and we will continue to work to bring improvements and innovations to our products, distinguishing ourselves by their excellent finish, their durability, and the high standards of safety and functionality that set us apart."*

In the analysis by client sector on the domestic market, the industrial sector continues to top the group, accounting for almost 50% of total sales, 3.27% up compared to the prior year. Construction, which accounts for 43.6% of sales, is the sector with the most growth, having climbed 7.21% compared to the previous year. The third sector of destination, agriculture, grew very slightly, by 0.95%, in line with the trend set the previous year.

There are no major variations in the split of export sales: the European Union, which accounts for the majority of exports, represents 71.24%; then the American continent, with 11.80%, followed by the Middle East, with 7.41%, and lastly Africa with 3.69%, Russia and Eastern Europe with 3.04% and Asia and Oceania with 2.82%.

Employment stability in the sector is once again noteworthy this year, with approximately 1,900 jobs held, in line with 2017 and 2016.

2019 FORECAST

At the start of the year, prospects are looking good and, based on the good level of business confidence shown by our associates, sales are expected to remain steady or even improve with respect to the previous quarter. Therefore, although some signs of slowdown are being seen, we are still very optimistic for 2019 and hope to be able to continue to generate increases in both production and exports in line with the steady upward trend of the last five years.

60TH ANNIVERSARY OF THE CEO, THE EUROPEAN TOOL COMMITTEE

CEO (Comité Européen de l’Outillage), the European association for tool manufacturers, the presidency of which is currently held by the Chairman of ESKUIN, is celebrating the 60th anniversary of its founding. This will be commemorated at the committee’s annual congress, which is to be held in Italy in October. ESKUIN has been a member of the CEO since 1963. CEO represents the interests of 180 European companies with an estimated annual sales volume of 4 billion euros and its goal is to enhance and maintain the best conditions for competitiveness for European tool manufacturers.

César Sainz spotlights the milestone anniversary of CEO: *“It marks 60 years of cooperation between the main European manufacturers, sharing a determination to achieve excellence in production, which has become our hallmark and differential value on the global market on which we operate”.*

INDUSTRY TOOLS AT + INDUSTRY, OUR TRADE FAIR

Industry Tools by Ferroforma is being held once again this year, the biggest fair in the sector on the domestic market, organised within the framework of **+ INDUSTRY** alongside Subcontratación, Addit3D and Bedigital. The event expects to attract upwards of the 19,200 visitors of the 2017 edition and has raised the industrial profile of its exhibitors to cater for professionals from the manufacturing and industrial distribution sectors.

The event will take place in Bilbao from 4 to 6 June and twelve ESKUIN associated companies have already confirmed their attendance.

COLLABORATION IN THE FIELD OF ADVANCED AND DIGITAL MANUFACTURING

Our membership of AFM Cluster, the corporate conglomerate that ESKUIN joined in 2016, has strengthened our commitment to people, innovation and internationalisation. The Chairman of ESKUIN affirms: “being part of this collective of over 500 industrial companies strengthens our positioning as “high end” manufacturers and integrates us into a collaborative setting that opens up huge possibilities for our companies”.

2019 KEY EVENTS

22nd AECOC HARDWARE AND DIY CONGRESS: 13 March, Madrid.

FASTENER FAIR STUTTGART 2019: 19 to 21 March, Stuttgart, Germany.

ESKUIN GENERAL ASSEMBLY: 17 May 2019, Fundación ORONA, Hernani.

+INDUSTRY: 4 to 6 June, BEC (Bilbao).

NATIONAL HARDWARE EXPO: 5 to 7 September, Guadalajara, Mexico.

CEO CONGRESS: 3 to 5 October, Lago di Como, Italia.

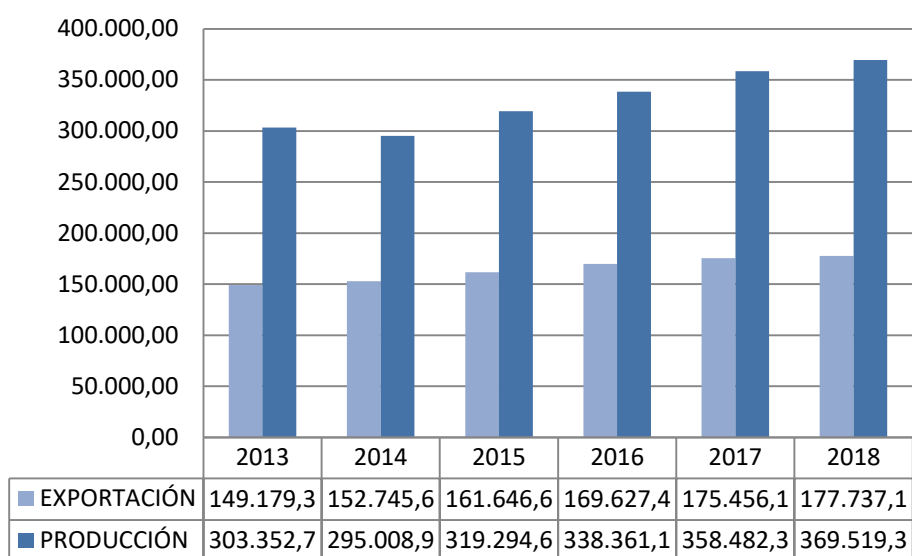
2018 FIGURES

Thousands
of Euros

PRODUCTION	2018	2017	% 18/17
TOTAL PRODUCTION	369,519.31	358,482.31	3.08%
DOMESTIC	191,782.26	183,026.19	4.78%
Industry	95,135.11	92,122.70	3.27%
Construction	83,576.93	77,956.28	7.21%
Agriculture	13,070.22	12,947.22	0.95%
EXPORTS	177,737.10	175,456.12	1.30%
Exports / Production	48.10%	48.94%	

2013-2018 PRODUCTION/EXPORTS

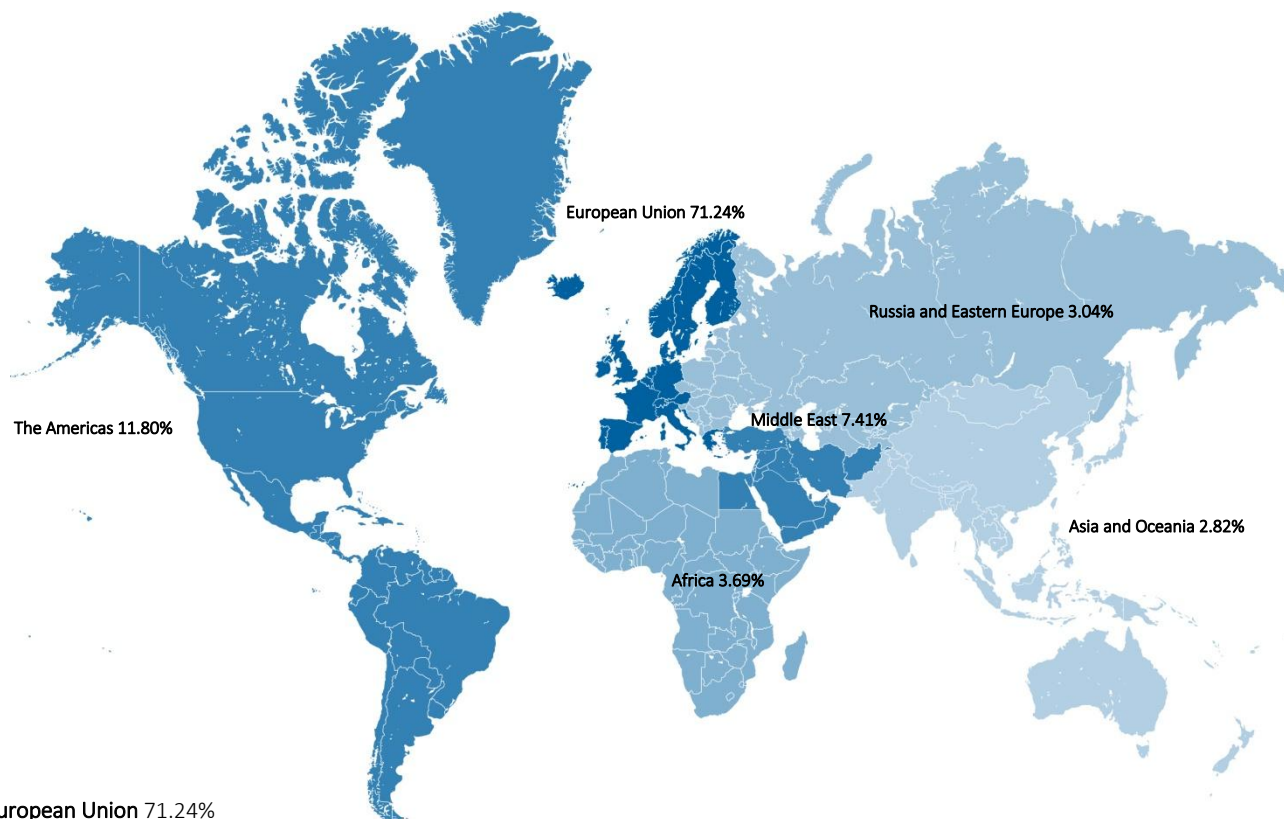
Thousands of euros



EXPORTACIÓN: EXPORTS

PRODUCCIÓN: PRODUCTION

EXPORTS BY REGION



European Union 71.24%
The Americas 11.80%
Middle East 7.41%
Africa 3.69%
Russia and Eastern Europe 3.04%
Asia and Oceania 2.82%

NOTA 1/2019

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ABOUT AFM CLUSTER

AFM Cluster is the organisation that represents the interests of Advanced Manufacturing in Spain. Comprised of four industrial associations, it groups together almost 500 companies, which employ over 16,500 people and turn over upwards of 3.0 billion euros. From its headquarters in San Sebastián, and its establishment in Tianjin (China), AFM Cluster works to promote internationalisation, industrial development, strategic positioning and employee training in its associated companies. AFM CLUSTER provides service to the following four associated and synergistic sectors:

- Machine tool and advanced manufacturing technologies. AFM-Advanced Manufacturing Technologies is the original association that the CLUSTER is named after. Founded more than 70 years ago, it has 128 members that supply machine tools and other equipment to industry, to manufacture components, accessories and cutting tools.
- Additive Manufacturing and 3D Printing. ADDIMAT groups together 71 companies that operate in this new sector. Destined to be a key element in many industrial sectors such as, for instance, aerospace, biomedics and the automotive industry.
- Hand Tools, Hardware and Industrial Supply. ESKUIN represents 22 companies that manufacture manual tools and hardware products in Spain, to the highest quality and safety standards.
- Machining and Metal-Mechanical Transformation. AFMEC includes the group of machining and metal mechanical transformation workshops. With more than 200 member companies, its aim is to give visibility and services to one of the most important industrial groups in Spain.

AFM CLUSTER also has 57 industrial service company partners. Together, all of these companies make up Spain's big advanced and digital manufacturing family. AFM CLUSTER is a member of several international associations, such as CECIMO, ECTA or CEO, and organises trade fairs and international events such as BIEMH, ADDIT3D, INDUSTRY TOOLS, SUBCONTRATACIÓN, WORKINN, BEDIGITAL, or the CMH -Advanced Manufacturing and Machine Tool Congress.