

SPECIAL EDITION

Empresa

XXI

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BASQUE COUNTRY

MACHINE TOOLS



OPINION | CUTTING-EDGE TECHNOLOGY

THE WORLD IS CHANGING AT GREAT SPEED

**JOSÉ
PÉREZ BERDUD**

CECIMO President



The world's major powers are now competing for geopolitical, military, economic and industrial leadership. In this new environment, two factors have become essential: critical mass and speed. Without them, it is very difficult to remain relevant.

Europe therefore faces a decisive moment for its future and, in particular, for its industrial future.

We are witnessing a transformation of the international order. We see the controversial reactions of the United States to the threat of losing part of its global leadership. We see the rise of China as a new industrial power, increasingly flooding world markets with medium- and high-technology products at prices never seen before. This situation has the

potential to profoundly disrupt, or even jeopardise, entire sectors of activity.

At the same time, we are facing an unprecedented technological transformation driven by artificial intelligence. AI will bring about a genuine revolution for industry. Machines and robots, together with the availability of data, will allow us to see AI applied in physical environments, transforming our factories.

In this context, Europe must act together to protect itself against emerging risks and to make the most of every opportunity. We need common policies in industry, finance, defence, energy and employment. We need policies that give Europe the critical mass and speed of development its industry requires. Only in this way will Europe remain a place where advanced industrial technologies are developed, manufactured and scaled up.

The central objective of my presidency at CECIMO is clear: to ensure that manufacturing technologies are recognised as a strategic priority for Europe. CECIMO must strengthen the visibility of our sector. We must defend its role in European policies. And we must ensure that manufacturing technologies are properly reflected in EU funding programmes, strategic frameworks and competitiveness agendas.

Manufacturing technologies are the backbone of Europe's manufacturing ecosystem. They drive productivity and

make innovation possible across value chains. They are essential to digitalisation, sustainability and industrial resilience.

Our sector does not lack capability. The real challenge is to create better conditions so that companies can scale, invest, innovate and compete globally at greater speed.

Europe has a strong industrial base. It has world-class companies. It has deep technological knowledge, innovation capacity and talent. But these strengths must be supported by the right framework conditions.

First, we need to improve the European single market. Europe needs less bureaucracy, more simplification, clear and predictable rules, and uniform application of those rules across all Member States. In short, we need a single market

that acts as a genuine engine for investment, innovation and industrial growth.

Second, we need to develop a strong trade policy. This is essential for an export-driven sector such as ours. Free trade agreements must help European companies access global markets and strengthen Europe's position in international value chains. The agreements with Mercosur and India are good examples.

Third, we must reinforce market surveillance. Only safe machinery that complies with regulations should enter the European market. We must also monitor any attempt at unfair competition.

Fourth, we must ensure that regulation on artificial intelligence, cybersecurity, digitalisation and machinery is applied in a way that does not hold back innovation and helps strengthen competitiveness.

Fifth, we must approach initiatives linked to "Made in EU" with caution. The priority should not be to close markets. Europe must be an attractive and competitive place to invest, produce and innovate.

Sixth, we must prepare industry for the application of the new Machinery Regulation in January 2027. This will be a critical moment. It will require clear guidance, harmonised standards and strong preparation by companies.

Seventh, in the face of a shortage of skilled workers, Europe must invest in digital, technical and engineering skills adapted to modern manufacturing.

And finally, CECIMO must continue to play an active role in shaping global standards. Standards determine how markets function and how technologies evolve. Europe must continue to play a leading role in this field.

Europe has industry. Europe has talent. Europe has technological capability. But now Europe must turn these strengths into action. And to do so, we need speed, consistency, ambition and unity among companies, institutions and policymakers.

Let us keep working together.

**WE NEED
COMMON
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AND SCALED UP**

TRADE FAIR | THE EPICENTRE OF THE START UP

AMB'26 SETS ITS SIGHTS ON GERMANY

GERMANY'S KEY MACHINE TOOL SHOWCASE WILL BE HELD FROM 15 TO 19 SEPTEMBER AT MESSE STUTTGART

Machine tool companies have an unmissable appointment at AMB Stuttgart 2026, which will take place from 15 to 19 September. The biennial fair, specialised in metal-cutting systems since its creation in 1982, is one of the leading platforms for the international metal-working industry. The event will focus on the sector's products, technologies, innovations, services and concepts.

With around 125,000 square metres of exhibition space, AMB will bring together more than 1,000 exhibitors from over 30 countries, who will present their latest machines, tools, production systems and services. The German event is expected to attract more than 50,000 visitors, including representatives from the automotive, aerospace, energy and mechanical engineering industries.

One of its main attractions lies in its

local character, as it is the trade fair that draws German companies and businesses from neighbouring countries.

Strong Trade Links

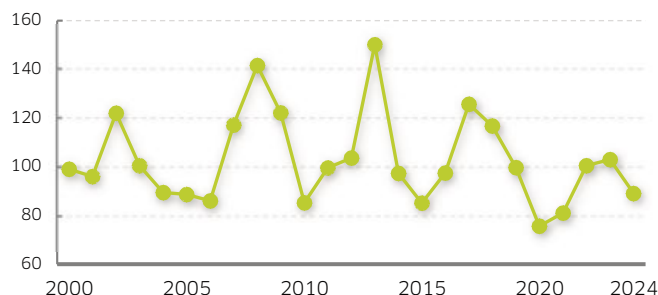
The sector's trade links with Germany have always been very close. This is reflected in the fact that practically all Basque manufacturers have service centres in Germany and also manufacturing subsidiaries, as in the case of Danobatgroup with Overbeck. Likewise, many German manufacturers have agents for Spain in the Basque Country, as is the case with Delteco.

Trade exchanges between the Basque Country and Germany so far this century have totalled 3.791 billion in direct purchases and sales of machinery, excluding components and systems, including 2.572 billion in Basque sales and 1.219 billion in purchases.

IT WILL WELCOME MORE THAN 50,000 VISITORS

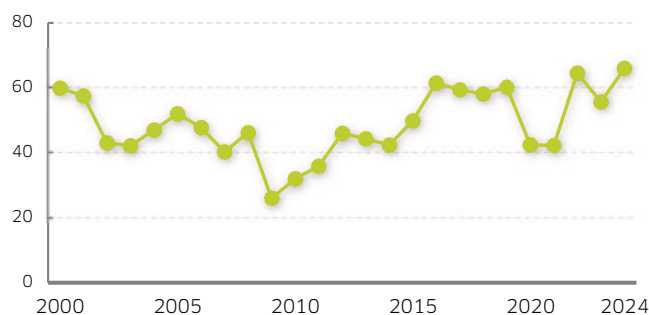
BASQUE EXPORTS TO GERMANY FALL BY 14%

After two consecutive years in which Basque machine tool exports to Germany exceeded €100 million, they fell to €89 million in 2024, down 14%.



GERMAN MACHINERY THRIVES IN BASQUE COUNTRY

Purchases of this type of capital equipment from Germany rose by 18% in 2024, reaching €66 million and returning to the highest levels recorded this century.



Figures in million euros. 2024 data are preliminary. Source: Eustat.

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INTERNATIONAL | EUROPE

EUROPEAN MT FEEL THE STRAIN

GLOBAL MACHINE TOOL PRODUCTION FELL BY 3% IN 2025,
ALTHOUGH FORECASTS POINT TO A 5% RISE IN CONSUMPTION IN 2026

EUROPE SUFFERS INSTABILITY

The machine tool sector in Europe recorded a broad-based contraction in activity in 2025, while global consumption and production withstood the blow.

	2025	%25/24	2024	2023	2022
MT EVOLUTION IN EUROPE					
Consumption	19,266	-4.6%	20,164	24,347	22,876
Exports	19,412	-10.3%	21,633	22,656	20,141
Production	24,731	-6.88%	26,539	28,876	26,876
MT EVOLUTION WORLDWIDE					
Consumption	76,056	-2.3%	77,830	81,942	82,714
Exports	40,792	-4.1%	42,517	45,103	42,043
Production	76,056	-2.9%	78,308	82,766	82,069

Estimated data as of May 2026, figures in millioneuros. Source: VDW.

In December 2025, Cecimo, the European Association for Manufacturing Technologies, warned that the European machine tool industry has been facing “a severe recession in recent years”. The sector is “under constant pressure due to global instability, trade barriers, weak demand and supply chain disruptions”, it stressed. It also argued that “without decisive political action, Europe risks losing its leadership in advanced manufacturing and technological innovation”.

Economic uncertainty and weaker demand have had a significant impact on production and investment. According to the Cecimo8 forecast, which includes Austria, the Czech Republic, France, Germany, Italy,

Spain, Switzerland and the United Kingdom, machine tool production fell by 9.2% in 2024 and a further decline of close to 8.5% is expected in 2025. Current estimates put Europe’s market share at 31%, compared with 37% in 2019. Consumption also fell by 17% in 2024 and is expected to decline by 5.2% in 2025. According to Cecimo, since 2023 the market share of European machine tool manufacturers in global consumption has fallen from 25.2% to 20.8% in 2025.

Machine Tool Production Fell by 6.8%

Although the provisional production and consumption figures from Germany’s machine tool manufacturers’ association, VDW, differ from Cecimo’s Global Machine Tool Report because they use partly different estimation methods and cover more countries, the closing forecasts for 2025 point in the same negative direction for production, which fell by 6.8% in Europe compared with the previous year.

As regards the sector’s performance in 2025 at global level, VDW also records a negative trend, with falls of 4.5% in consumption and 3% in production. Meanwhile, based on Oxford Economics data, VDW anticipates a 5.1% rise in global machine tool consumption to 79.9 billion in 2026.

EUROPE’S MARKET SHARE IN CONSUMPTION IS FALLING

INTERNATIONAL | GERMANY

DOMESTIC DEMAND HOLDS THE KEY

PRODUCTION IS EXPECTED TO IMPROVE IN 2026 THANKS TO THE GOVERNMENT’S “SPECIAL FUNDS”

After two years of decline, the German machine tool industry expects production in 2026 to improve on the previous year’s ratios. “The fundamental basis for this is the expected recovery in domestic demand,” according to Germany’s machine tool manufacturers’ association, VDW.

In 2025, investment was held back by high costs, insufficient planning security and the absence of economic reforms to revitalise Germany as a manufacturing location, it explains. However, this year positive effects are expected from the German federal government’s so-called “special funds”, created for investment in infrastructure, defence, climate protection, digitalisation and mo-

bility, which could provide at least a small boost.

Competition from China in the international market is affecting German machine tool exports, which will require adaptation to what is already a structural change. VDW warns that, for the industry to regain momentum, it will have to tackle capacity adjustments, production abroad and market diversification, as well as expand technological leadership and intensify research and development activities.

By demand sectors, defence, aircraft construction, electronics, energy and medical engineering stand out.

Broad-Based Decline

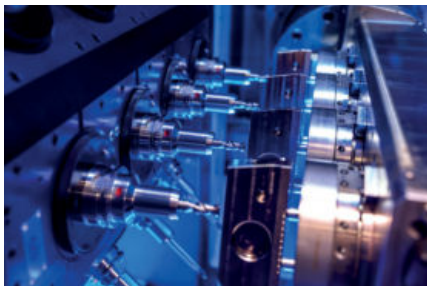
During the past year, ma-

GERMANY HITS THE BRAKES IN 2025

Germany’s machine tool sector suffered from the negative economic climate after cutting production by 7% in 2025.

	2025	%25/24	2024	2023	2022
Total Production	13,759	-7%	14,795	15,384	14,116
Exports	8,592	-9%	9,412	9,757	8,770
Domestic sales	3,654	-5%	3,833	4,079	3,960
Orders	11,045	-3%	11,380	14,130	15,800
Domestic consumption	6,646	-5%	6,993	7,821	7,621

Figures in millioneuros, 2025 data are estimates. Source: VDW.



An equipment on display at the 2024 AMB Stuttgart.

SPAIN | SITUATION

A TOUGH YEAR AHEAD

METAL-CUTTING MACHINES WILL KEEP REVENUE AND ORDERS AFLOAT IN 2026, DESPITE AUTOMOTIVE WEAKNESS AND CHINESE COMPETITION

The year 2026 “will continue to be difficult, but also full of opportunities” for the advanced manufacturing and machine tool sector, following a 2025 in which turnover reached 2.248 billion, down 3% on the previous year, according to provisional figures from AFM Cluster. The results were marked by a sharp fall in the forming subsector, which, dragged down by automotive, fell 12%, and by the strong performance of metal cutting, which grew 25% on the back of aerospace, rail and energy.

For this year, the association forecasts a period “without major changes in the short term, in which the main challenge will be to keep activity stable, especially in forming, and, through our strong position in several sectors that drive industry, generate sufficient order intake,” explains AFM Cluster president José Pérez Berdud.

As regards orders, AFM expects them to continue increasing in the metal-cutting subsector, which “already has a good order book for the coming months”, offsetting the contraction in forming, which “is feeding its activity by consuming its order backlog”.

Choppy Markets

The sector’s performance will be shaped by a climate in which “geographical markets are certainly unsettled, with Europe still fairly weak, although recovering slightly; the United States showing robust demand, but facing difficulties due to tariffs and exchange rates; and China sharply limiting purchases of foreign equipment,” he says.

“Sectors are also behaving unevenly. While automotive is cutting investment and very se-

verely affecting forming, aerospace, defence, rail and some areas of the energy sector are brimming with activity,” he adds.

AFM also highlights the significant impact China will have. “Its entry into international markets with very low-priced products, sometimes even be-

IN 2025, TURNOVER IN THE MACHINE TOOL SECTOR FELL BY 3%

low the cost of European products, and the low penetration of European components in its value chains, confronts us with a very tough rival. To compete, a range of ingredients will be needed, involving both public and private effort. Our companies must therefore continue working to increase their competitiveness, investing and taking risks in order to transform ourselves.”

For their part, “European, national and regional authorities must help absorb the shock by protecting their industries against an unprecedented wave.” In addition, AFM stresses the need for very substantial resources to drive transformation, R&D and innovation, and investment in the renewal of production equipment.

“We are at a moment in which opportunities are as great as the risks, and we must seize the former while protecting ourselves as much as necessary,” the cluster concludes.

During 2025, orders increased by 2% compared with 2024. Metal cutting posted a historic record, driven by aerospace, defence, rail and some



AMETS

The decline in forming machines was partially offset by metal-cutting machines

12%

DECREASE IN TURNOVER FOR FORMING MACHINES

areas of the energy sector, which are brimming with activity. Forming declined as a result of investment cuts in automotive and sustained its activity by consuming its order backlog.

In the domestic market, orders rose by 41%, while export orders fell by 2%. Even so, orders grew by 18% in Europe and by 4% in the US, which led order intake with 22% of the total, while they fell by 1% in China.

Production

Meanwhile, according to provisional data, turnover from machine sales totalled just over 1.4 billion last year, down 3%,

accounting for 63% of all sector revenue, including components and other subsectors such as cutting tools.

Revenue from forming equipment, which totalled 481 million, recorded the worst performance, with a 12% fall caused mainly by the freeze in investment in the automotive sector.

By contrast, revenue from sales in the metal-cutting machine subsector performed better. With turnover of 943 million, it increased by 2% compared with 2024. The momentum came mainly from numerous projects and investments in sectors such as aerospace, rail, defence and energy.

MACHINE PRODUCTION FELL 3% LAST YEAR

Machine production declined by 3% in 2025, with a sharp drop in forming machines, down 12%, and a 2% rise in metal-cutting machines, which prevented a sector-wide slump.

MACHINE TYPE	2025	2024	2023	2022	2021
METAL CUTTING	943	929	918	808	682
Lathes			160	155	146
Milling and boring machines			133	265	207
Grinding machines			95	86	72
Special and transfer machines			70	64	69
Machining centres			93	74	57
Physico-chemical process machines			77	60	22
Other metal-cutting machines			90	104	109
FORMING	481	546	502	325	296
Mechanical presses			147	136	83
Hydraulic presses			82	40	
Shearing and punching machines			35	36	40
Bending, folding, flattening or straightening mach.			157	110	77
Other forming machines			80	5	65
TOTAL	1,424	1,475	1,420	1,133	978

Figures in million euros, 2025 data are preliminary. Source: AFM.

SPAIN | FOREIGN TRADE

GERMANY BOUNCES BACK

MARKET SHIFTS RESTORE GERMANY'S APPEAL AS THE LEADING EXPORT DESTINATION



Aerial view of Sector 3 of the Port of Bilbao.

Without final figures yet available for 2025, data published by ICEX up to November confirm a new reshuffle in the ranking of the main export markets for metalworking machine tool companies. While in 2024 foreign sales to Germany and Italy were hit by the turbulent situation in those economies, benefiting markets with stronger demand such as the United States and China, 2025 has put each market back in its place. Germany has regained its status as the main export destination for Spanish machine tools, after rising 54% to 158 million.

Between January and November 2025, Spanish machine tool exports increased by 3% compared with the same period of the previous year, reaching a total of 1.046 billion, with Germany as the leading export market. It was followed by the United States, which, despite cutting demand by 14%, maintained an export volume of 140 million up to November, although it

lost the leadership it had held during 2024.

Italy, for its part, which in 2023 was the main market for Spanish machine tools, fell to fifth place in 2024 before recovering third position in 2025, after increasing demand by 20 percent compared with the first eleven months of 2024 and making purchases worth 78.8 million. France, with a volume of 72.1 million, also improved its outlook for Spanish machine tools, increasing demand by 11%.

FOREIGN SALES ROSE BY 3% UP TO NOVEMBER

Exports to China Fall

Although the weak momentum of European markets in 2024 propelled China into second place as an export market, the final push recorded by Italy in 2025, driven by tax incentives, and Germany's efforts to overcome its economic slowdown have relegated the Asian country to fifth place in the ranking, after foreign sales to China fell by 41 percent to 65 million.

EXPORTS TO GERMANY TAKE OFF

Germany, Italy and France regained their status among the top five export markets for machine tools after increasing demand by 54%, 20% and 11%, respectively.

	%25/24 ^(*)	2024	2023	2022	2021
U.S.A.	-14%	192	135	88	121
China	-41%	118	107	92	97
Germany	54%	116	131	134	108
Mexico	-44%	89	49	36	49
Italy	20%	76	151	137	98
France	11%	75	82	71	67
Portugal	-15%	60	62	58	45
Türkiye	-43%	44	39	25	52
United Kingdom	-1%	36	30	31	33
Poland	25%	31	28	25	29
Canada	41%	30	17	10	25
India	133%	23	36	16	49
Brazil	119%	14	15	8	26
Czech Republic	13%	14	12	14	16
Belgium	52%	10	11	9	11
TOTAL (JAN-DEC)		1,127	1,158	976	1,099

Figures in million euros. Note^(*): January-November Data. Source: Icesx.

A BITTERSWEET YEAR

The year 2025 closed in negative territory for all indicators, except exports, which remained stable.

	2025	%25/24	2024	2023	2022
Production	1,400	-5%	1,475	1,420	1,133
Domestic sales	285	-22%	364	304	278
Imports	510	-3%	528	559	493
Exports	1,150	+0%	1,148	1,152	890
Consumption ^(*)	801	-10%	894	889	771

Figures in million euros, 2025 Data, preliminary.
Note^(*): Sum of domestic and export sales. Source AFM.

BASQUE COUNTRY | EXPORTS

RECORD RUN MOVES OUT OF REACH

BASQUE EXPORTS FALL BACK AFTER SEVERAL HISTORIC YEARS

Instability across the international arena, marked by trade wars and a range of geopolitical conflicts, had an adverse impact in 2025 on Basque exports of metalworking machine tools and other machine tools. According to the latest data published by Eustat, the value of Basque production sold in international markets in the first eleven months of the year reached a provisional 823 million, representing a 9% fall compared with the same period of 2024.

Moreover, with only one month of data still missing to complete the full 2025 balance, it looks extremely difficult for Basque manufacturers even to match the value of exports recorded in 2024, a year in which they reached an all-time high of 983 million, according to provisional figures. As a result, a four-year growth cycle that began after the pandemic is very likely to come to an end.

Throughout 2024, the United States confirmed its position as the main international destination for Basque metalworking machi-

ne tools and other machine tools, absorbing almost one fifth, 19.6%, of the total value of sales. The situation did not change in the first eleven months of last year, as the US remained the leading market for the Basque sector, although its share faded slightly to 15.2% of the total.

Germany Climbs the Ranking

By contrast, in the first eleven months of last year, Germany recorded a strong increase in its share of Basque machinery exports, rising to second place with 13.5% of the total value of sales. By comparison, in the whole of 2024 it ranked fourth, with just 9% of the value.

Mexico, China and France also remained in the top five international customers, although both Mexico and the Asian giant lost ground as Germany advanced. Mexico moved from second place in the whole of 2024 to third up to November 2025, while China slipped from third to fourth over the same period.

US CEMENTS ITS POSITION AS LEADING DESTINATION

In 2024, the United States consolidated as the leading market for Basque MT, and in 2025 it continued to top the rankings.

	%25/24	2024	2023	2022	2021
U.S.A.	-27%	193	136	64	88
Mexico	-41%	181	63	45	25
China	-40%	97	86	59	54
Germany	+39%	89	103	101	81
France	-4%	64	58	58	40
Italy	-5%	56	113	102	70
United Kingdom	-36%	38	24	38	21
Türkiye	-16%	32	37	30	38
Canada	+6%	23	15	8	16
Portugal	-10%	15	11	15	12
Switzerland	-37%	15	15	12	5
India	+91%	15	27	12	35
Poland	+111%	13	24	15	20
Czech Republic	+37%	11	8	10	8
Brazil	+138%	10	12	5	14
Sweden	+194%	9	28	16	8
Belgium	-33%	8	9	5	5
Australia	-41%	8	4	10	1
Azerbaijan	-100%	8	0	0	0
Netherlands	+31%	8	5	9	12
TOTAL	-9%	983	881	716	657

Figures in million euros. Exports of metalworking machine tools and other machine tools. Final data up to 2023. The 2025/2024 variation refers only to the sum of the first eleven months of each year. Source: Eustat.

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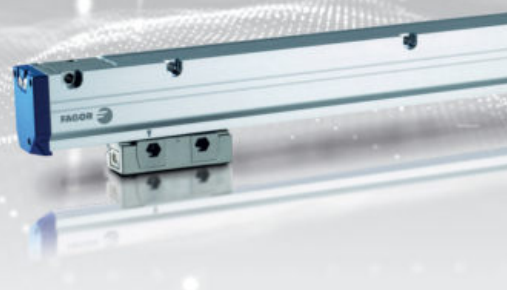
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BASQUE COUNTRY | PROVINCES

GIPUZKOA HOLDS FIRM

COMPANIES IN THE REGION REACH THE €1 BILLION SALES MARK

Gipuzkoa continues to consolidate its position as the main machine tool hub in both the Basque Country and Spain. And it is still growing. In 2024, the latest full-year data available, manufacturers in the province increased their sales by 9% and their aggregate profits by 11%, taking them to 1 billion and 43 million, respectively, according to Eustat figures.

As a result, Gipuzkoa's companies maintained profitability at 4.3%, the same rate as in the previous year, although slightly below the profit-to-turnover ratio recorded in both 2019, at 4.6%, and 2008, at 4.5%, the two years preceding the last two major economic crises, Covid-19 and the financial crisis, respectively.

In terms of sales, the 1 billion in aggregate revenue achieved in 2024 represented practically 80 percent of the total turnover of the Basque machine tool sector and was the highest figure since Eustat records began.

As for net profit, the 43 million figure also ranks among the strongest aggregate results posted by Gipuzkoa's companies in recent decades, in line with 2016, at 46 million, and slightly below 2017, at 52 million, and 2018, at 48 million.

The strong figures for net profit and turnover encouraged companies to sow the seeds of future results through investment, which rose 19% year-on-year in 2024 to 55 million. This was the sector's second-lar-

gest aggregate outlay in Gipuzkoa in the past 16 years, behind only 2008, when investment reached 104 million.

Employment generated by these companies in 2024 stood at 3,202 jobs, broadly stable compared with the previous year and even with 2019 levels, although still 18% below 2008.

Leaders in Exports

In other developments, Gipuzkoa's manufacturers exported goods worth 736 million in 2024, the latest year with complete data, accounting for 75 percent of foreign revenue across the Basque sector. This figure also represented a 10 percent increase.

However, in the first eleven months of last year, their revenue from international markets fell by 2 percent compared with the same period in 2024, to 661 million.

INVESTMENT SURGES OVER FIVE YEARS

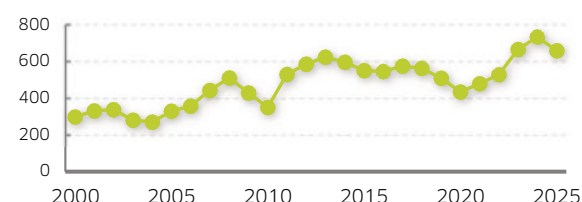
Gipuzkoa's machine tool companies increased their investment by 131% over the past five years, although compared with 2008 it was still down 47%.

	2024	%24/23	%24/19	%24/08	2023
Employees	3,202	+0%	0%	-18%	3,188
Worked hours (K)	5,346	+3%	0%	-19%	5,205
Investment made	55	+19%	+131%	-47%	46
Turnover	1,000	+9%	+34%	+12%	917
Operating profit	58	+18%	+68%	+44%	50
Net profit	43	+11%	+26%	+8%	39

Figures in million euros. MT Sector in Gipuzkoa. Source: Eustat.

ABOVE €700 MILLION ABROAD

Gipuzkoa continued its upward export cycle in 2024, exceeding the €700 million mark, although in 2025, up to November, it corrected.



Figures in million euros. Definitive until 2023. The 2025 data refer only to the period up to November, the sum of the first eleven months. Metalworking machine tools and other machine tools. Source: Eustat.

55
MILLION
WERE INVESTED
BY COMPANIES
IN 2024

SURVEY | MACHINE TOOL

DRIVEN TO STAND APART

THE MACHINE TOOL SECTOR IS OPTIMISTIC FOR 2026 AND REMAINS COMMITTED TO ADVANCED TECHNOLOGY

The Basque machine tool sector is facing the year with favourable prospects and a strong dose of caution in view of market volatility and the impact of possible international developments and geostrategic decisions. In this context, the industry is maintaining its commitment to the modernisation and automation of its production processes, a pillar on which the heads of Fagor Automation, José Pérez Berdud; CMZ, Aitor Zumárraga; Danobatgroup, Nerea Aranguren; TDG, Fernando Santamaría; and Ibarmia, Koldo Arandia, are building their strategies for positioning in the United States and India, and for technological differentiation against China.

► HOW DID 2025 END IN TERMS OF DEMAND? DO YOU EXPECT A CHANGE IN THE INVESTMENT CYCLE IN 2026?

José Pérez Berdud / Fagor Automation
2025 was a tough year for everyone. In general, we have seen better performance in the machining segment, whose order book is more diversified and focused on niche markets. Forming has been more heavily affected by the situation in the automotive sector and by Chinese competition.

JOSÉ PÉREZ BERDUD

Fagor Automation
CEO



“THE PLAYING FIELD MUST BE LEVEL FOR EVERYONE”

For us, it has been a good year in which we have met the targets we had set. We have performed well across all markets. Fluctuations in the exchange rates of some of our main markets have been one of the factors to keep an eye on.

Aitor Zumárraga / CMZ

In CMZ's case, 2025 closed with a 22% increase in sales compared with 2024. However, it is important to point out that this growth does not stem from an overall improvement in the market, which remains weak, but rather from the direct result of our commercial expansion into new markets.

Over the last two years, we have worked very intensively in regions where we previously had no significant presence, particularly Eastern Europe and Turkey on the one hand, and the United States on the other. We are now beginning to reap the rewards of those efforts, and virtually all of the growth recorded in 2025 has come from these markets. Had this not been the case, sales would have been very similar to those of the previous financial year.

Looking ahead to 2026, we are reasonably optimistic. Firstly, because these new markets continue to gain traction and we expect to continue growing in

them. Secondly, because we are confident that the Italian market will recover, having been going through an especially weak cycle for around three years.

In this respect, there is talk in Italy of the possible introduction in 2026 of major investment incentives, with one particularly important element: support would be conditional on the purchase of machinery manufactured within the European Union. If this measure is confirmed, it would provide a very significant boost to our sales in that country and makes us look to the next financial year with optimism.

Allow me to add a broader reflection. This type of policy should also be extended to Spain and to Europe as a whole. If public institutions grant subsidies for the purchase of machinery, vehicles or other goods, it would make perfect sense for those incentives to prioritise products manufactured in Europe.

It is difficult to understand why, in a context of clear industrial weakness, we continue to finance imports from third countries with public money when we have a strong European industry that is going through difficult times and is in need of precisely that support.

(continued on page 10)

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SURVEY | MACHINE TOOL

(from page 9)

Nerea Aranguren / Danobatgroup

Danobatgroup's companies as a whole closed 2025 very positively. We came from a historic 2024, with record turnover and a solid order book, and we managed to maintain a very high level of activity, even exceeding the targets set in our management plan.

Looking ahead to this year, the outlook is positive and we are starting the year with a balanced order book across all businesses and with high-value projects. That said, we are living in a highly turbulent global environment, with geopolitical tensions, regulatory changes and a slowdown in some traditional markets for our sector. We are therefore approaching 2026 with enthusiasm, but also with caution, self-discipline and close attention to all the developments taking place.

Fernando Santamaría / TDG

The year has started very well for us because we have secured a couple of high-value projects which, together with the order book we ended 2025 with, provide us with workload for the whole year, which is unusual in our case.

On the other hand, however, we are noticing a decline in enquiries. We are not yet able to identify the underlying trend, but there is a possibility that the trend could turn for the worse.

Koldo Arandia / Ibarmia

The start of the year has been moderate, as is usually the case at this time of year. A number of contracts have already been signed, and our sales team is actively pursuing a considerable number of projects that we hope will also turn into orders over the coming months.

Looking ahead to 2026, we are reasonably optimistic because, although some markets are not going through a good period, we see opportunities in certain sectors and regions, and we have new developments that could open up further applications.

► WHICH MARKETS ARE SHOWING THE STRONGEST INVESTMENT POSITION?**José Pérez Berdud**

In our case, perhaps somewhat atypically, Asia remains a strong customer. The United States has shown a more neutral situation, and Europe is the weakest geographical environment. In any case, from the point of view of investment, it is the United States that is holding up for the interests of the sector.

Aitor Zumárraga

From our point of view, the markets that currently show a relatively stronger investment position are Spain and France. It should be noted, however, that speaking of strength does not mean that these markets are experiencing particularly buoyant conditions. In both cases, they are stable but subdued markets in which we are well positioned and where we have managed to maintain sales levels similar to those of the previous year, which, in the current context, is already a positive sign.

A different case is the United Kingdom, where we have recorded significant growth. This increase is due less to an overall improvement in the market than to a strategic change in our commercial approach. We have considerably strengthened our local structure, deploying a large and well-distributed sales team throughout the country, and that effort is already yielding results in 2025, with expectations of further improvement in 2026.

As for the United States, we see a solid investment environment and demand on an upward trend. However, it is still a market in which we are in the process of establishing ourselves. We are a relatively new player, which means that the process of commercial penetration is necessarily gradual. We are convinced of its potential, although we know it will take several years to consolidate a significant position.

Overall, the international environment remains challenging and demanding.

Nerea Aranguren

Despite the general slowdown in the European market, in our case we continue to see relevant opportunities both at national level and in classic countries for our sector such as Germany and Italy, although on a smaller scale than in the past.

I would also highlight the opportunities opening up along the USMCA axis—the United States, Mexico and Canada—where the US reindustrialisation policy and Mexico's growing weight in major projects may generate interesting opportunities. The recently signed trade agreement between Europe and India opens up a new scenario of opportunity that we must explore in detail.

Fernando Santamaría

We are securing a considerable number of orders in Asia. Certainly far more than usual, as it has not historically been our strongest market, but the last few months have been particularly good in China and Taiwan. By contrast, the American market, which had been our strongest, appears to be slowing down.

AITOR ZUMÁRRAGA
CMZ CEO

“THERE SHOULD BE INCENTIVES TO ENCOURAGE THE PURCHASE OF EUROPEAN MT”

NEREA ARANGUREN
Danobatgroup
Managing Director

“FOR US, THE US IS STRATEGIC”

Koldo Arandia

The United States currently stands out, where we are seeking to strengthen our presence alongside our partner Modig. Certain European countries are also performing well, although the main EU countries remain too sluggish. In general, industry continues to invest in modernising production processes and incorporating advanced technologies, in many cases through solutions involving some degree of automation. We are also seeing significant activity in sectors such as aerospace, defence, power generation and capital goods, where the precision, reliability and flexibility of the solutions are particularly important.

► TO WHAT EXTENT ARE US TARIFFS AFFECTING THE SECTOR'S COMPETITIVENESS IN THE UNITED STATES?**José Pérez Berdud**

We are watching developments closely. The 15% tariff seems, at first glance, to have been absorbed by the market in some way. The fall in the dollar exchange rate has operated in the same direction as the tariffs, making our products roughly an additional 15% more expensive, or, where applicable, narrowing margins.

The use of Section 232, linked to national security, as an additional tariff surcharge is also a concern, as specific tariff headings could be penalised with an additional rate affecting their steel and aluminium content and origin.

Even so, the US is one of our main markets and a driver of demand in the sector.

Aitor Zumárraga

The tariffs imposed by the United States on European products, at around 15%, have not had any significant negative impact on our competitiveness in the US market. The reason is simple: this is not a discriminatory measure against Europe, but rather a fairly broad-based tariff policy.

In fact, other major exporting countries are in a similar or even worse position. Manufacturers in Japan and South Korea are subject to equivalent tariffs, while Taiwan faces even higher duties. In that context, our competitive position today is very similar to, and even somewhat better than, what it was before these measures came into effect.

In addition, there is an indirect effect that should be taken into account. Some US manufacturers that traditionally imported castings, forgings or steel components from China are seeing those supplies become significantly more expensive as a result of the new tariffs. This has led to a substantial increase in their production costs, which

in practice reduces the competitive advantage enjoyed by part of the domestic industry compared with European suppliers.

In short, tariffs have changed the playing field, but not to our detriment. In relative terms, the European machine tool sector maintains a reasonably balanced position within the US market.

Nerea Aranguren

Although US tariffs have affected the competitiveness of the machine tool sector by generating negative effects such as higher production costs and disruptions to supply chains, it is important not to analyse them in isolation but rather within a broader context that includes the reindustrialisation strategy and the strengthening of the domestic manufacturing base. In this regard, according to the latest publication from the AMT association, 2025 was a positive year for the machine tool sector in the United States. Excluding December activity, cumulative orders up to November (figures released in January 2026) were almost 5% higher than those recorded for the whole of 2024.

For us, the United States is a strategic market in which we have maintained a commercial presence for many years. For example, in 2024 Danobat acquired the US company Delta Wheel Truing Solutions in order to expand its presence in the rail market. We are closely monitoring the evolution of the measures adopted by the US Administration, but the fact is that so far they have not acted as a brake on our activity. We have maintained our plans, and

our forecasts for 2026 continue to point to growth in that market.

Fernando Santamaría

They have not yet had a real impact, but they are creating an atmosphere of uncertainty that is delaying some investments. Our order intake remains stable, but our machinery manufacturing customers are beginning to feel the effects, and that is something that is likely to reach us in the short to medium term.

Koldo Arandia

Tariffs add complexity and put pressure on prices, but fortunately they are not the only factor customers take into account. In the United States, where local production is almost non-existent, the quality, technology and service that accompany the machine remain key factors. By offering differentiated solutions and strong technical support, we can continue to be competitive, although there is no doubt that the commercial environment has become more complex and it is difficult to predict how it will evolve. Hopefully the situation will stabilise and no further tensions will arise.

> DO YOU CONSIDER THE CHALLENGE OF ENVIRONMENTAL SUSTAINABILITY AS AN ADVANTAGE OR A RISK FOR INDUSTRIAL COMPETITIVENESS?

José Pérez Berdud

Sustainability is a global challenge, and strategies will only work when all geographical areas agree on common measures and implement them jointly. In the meantime, we are committed to

making our own contribution to the changes that are needed.

Like any change, it can be seen either as a challenge or as an opportunity. For it to become an opportunity, a strategy must be developed and acted upon. We are working on this. In addition, the playing field must be level for everyone, since we compete in globalised international markets.

Aitor Zumárraga

Environmental sustainability can represent a competitive advantage. In our case, by focusing on European manufacturing and maintaining full control over the process, we minimise our carbon footprint. Producing more than 80% of our lathe components in-house means that our environmental impact is up to five times lower than that of other manufacturers. Since our manufacturing process is based in Europe, we avoid maritime transport. Shipping a lathe from Asia generates approximately 3.2 tonnes of CO₂.

CO₂ emissions per kWh are lower in Europe than in Asia. As a result, manufacturing in Europe generates between five and eight times less carbon footprint.

By using top-quality components and leading brands, we manufacture lathes with an average service life of 28 years, almost twice that of other machines.

Nerea Aranguren

For us, sustainability in general, not only environmental sustainability, is clearly an opportunity, and it is also

FERNANDO SANTAMARÍA

TDG Head of Marketing and Sales



"WE HAVE A GUARANTEED WORKLOAD FOR THE WHOLE YEAR"

(continued on page 12)



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SURVEY | MACHINE TOOL

(from page 11)

very much aligned with our cooperative nature: leaving a better legacy to the next generations is part of our reason for being.

Progress in this area is essential, but it must be done in an orderly manner, with gradual changes and realistic requirements.

In our case, this commitment goes back a long way and we have strengthened it year after year. To cite a few examples, Soralue has held ISO 14006 eco-design certification since 2010. In addition, in our latest investment cycle at Danobatgroup we have installed more than 8,000 square metres of photovoltaic solar panels on the roofs of our facilities in the Basque Country. We have also invested in a solar farm, a key step towards the goal of having one third of our energy consumption come from our own renewable generation. All this forms part of our sustainability roadmap.

Fernando Santamaría

For us, at the moment, it is neither one thing nor the other. At TDG, it is not proving to be a particularly relevant factor beyond a couple of new procedures that need to be monitored and followed up.

Koldo Arandia

Sustainability is here to stay; it is an opportunity. More and more customers are looking for machines that are more efficient, consume less energy and offer a longer service life. This not only reduces environmental impact, but also helps to lower costs and improve productivity. If approached properly, we believe sustainability strengthens industrial competitiveness rather than limiting it.

➤ **IS THE BASQUE MACHINE TOOL INDUSTRY PREPARED TO FACE CHINESE COMPETITION?**

José Pérez Berdud

This is perhaps one of the greatest challenges for global industry. China has developed extraordinary capabilities to manufacture any type of product. It also dominates the field of all types of materials, including critical ones. From a technological perspective, they have spent years understanding, mastering, and implementing the latest advances, and are now a technology generator.

KOLDO ARANDIA

Ibarmia CEO



“SERVICE IS A KEY FACTOR AGAINST CHINA”

The Ibarmia stand in the June 2024 edition of BIEMH, held at BEC (Bilbao Exhibition Centre).



The combination of all the above with very low prices, even for sophisticated products, is the real challenge to overcome. It's worth asking whether this is due to the inherent competitiveness of Chinese companies, or if there is some external factor that facilitates it. In that case, we should have adequate protection that gives us sufficient time to react. In any case, I think that in our case we must continue to invest in technology, in being very good at what we do, in proximity to and value-added customer service that complements our products. Additionally, we must transform ourselves to be even more competitive internationally.

Aitor Zumárraga

The issue of Chinese competition is not so much a problem of industrial preparedness, but fundamentally a problem of the political and regulatory framework.

European industry, and Basque machine tool manufacturing in particular, does not compete on a level playing field with Chinese manufacturers. We are seeing products from China arriving in Europe at significantly lower prices, in some cases up to 40 or 50% lower than European-made goods. This is not due to technological superiority, more efficient production processes, or higher product quality.

The main distortion lies in the fact that China operates with mechanisms that artificially alter prices, such as an intervened currency and a cost structure that does not reflect standards comparable to European ones in labor, environmental, or financial matters. In this context, no European company can “prepare” to manufacture at half the cost, because it is simply not viable

within an open and regulated economic system.

Therefore, we are not facing a business challenge, but a political one. European industry is competitive in technology, quality, reliability, and service, but it needs a level playing field. If Europe allows free access to products from markets that don't operate under the same rules, the problem cannot be solved by companies alone; it must be addressed by institutions. In this regard, it is up to Europe to act, establishing protective or corrective mechanisms (tariffs or regulations) until fair competition exists. This is not about closing markets, but about defending a strategic industry against practices that clearly distort competition.

Nerea Aranguren

China is today both a market and an enormously relevant competitor: it accounts for one third of global machine tool consumption and production, and is immersed in a major technological renewal.

In our case, the group's manufacturing companies, Danobat and Soralue, are focusing on providing solutions with a high level of technology and added value. We believe that technological differentiation, projects that integrate more layers such as digitalisation, automation and servitisation, are key to maintaining our competitiveness in the market, including in China.

Fernando Santamaría

Absolutely yes. What we do in the Basque Country has no competition anywhere. Our machine tools offer a top-quality product on the market, fully customized to our clients' needs and at a very competitive price. That's

why both we and our local clients are able to sell worldwide, even against competitors in the destination country. We just need to believe in ourselves more and defend the brand as a bloc.

Koldo Arandia

The Basque machine tool industry will be able to stand up to it if it continues to back innovation and specialisation. Chinese competition is very strong in price and volume, and it is improving in performance, but proximity to the customer and the design of tailor-made solutions still allow for key differentiation in order to maintain competitiveness. Investors should consider the entire life cycle of the product, and there service is a key factor, where we have a major advantage over “exotic” products.

TECHNOLOGY | AUTOMATION

TECNALIA SWITCHES ON AUTONOMOUS WELDING

THE TECHNOLOGY CENTRE IS WORKING ON INNOVATIVE JOINING AND WELDING TECHNOLOGIES, FOCUSED ON ADVANCED ROBOTICS SOLUTIONS AND HYBRID JOINING TECHNIQUES



Their iWeld asset addresses the shortage of qualified personnel.

Tecnalia, the research and technological development centre, is making progress in the development of innovative solutions for autonomous welding and additive manufac-

turing with the aim of improving industrial productivity and reducing dependence on highly specialised personnel, one of the main concerns currently facing the manufacturing sector.

Industry, both in Spain and across Europe, is facing a context marked by a shortage of skilled professionals, especially in technical trades such as welding. To address this gap, the centre is developing the iWeld technology asset, designed to automate and increase productivity in welding processes. The solution adapts to different types of joints and part geometries, making it possible to efficiently tackle electric arc welding processes such as GMAW, plasma or TIG, as well as laser welding. In addition, it also includes novel welding technologies that can significantly increase deposition rates and, therefore, have a positive impact on the productivity of

welding cells.

iWeld integrates advanced hardware and software. It incorporates robotic solutions and advanced process-monitoring systems, as well as specific software that facilitates the autonomous and intuitive execution of welding processes. In this way, it responds to the shortage of qualified operators while meeting the needs of an industry increasingly geared towards short series and highly customised products, where flexibility takes precedence over volume.

Hybrid Manufacturing

In the field of additive manufacturing, Tecnalia goes beyond the manufacture of complete parts and coatings, taking new steps in what it describes as hybrid manufacturing. As the centre explains, this is based on adding details or sections to large parts produced by forging or casting, using additive processes based on traditional welding technologies. In this line of work, it is collaborating with Samylabs, integrating the Samystudio slicing software into the additive manufacturing process, thereby expanding the capabilities of the iWeld asset towards advanced deposition technologies, while always maintaining the premise of autonomy.

Tecnalia is currently validating the technology through different case studies with companies in sectors such as oil and gas, rail, lifting, shipbuilding and aerospace, while also moving towards welding and manufacturing processes using laser technology. This latest commitment will allow it to broaden its scope and open up new opportunities for industrial application in the coming years.

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TECHNOLOGY | DIGITAL TWIN

IDEKO PAVES THE WAY FOR DEFECT-FREE MACHINING

THE TECHNOLOGY CENTRE LEADS THE TWIN5 PROJECT TO IMPROVE THE RELIABILITY AND PRODUCTIVITY OF MULTI-AXIS MILLING PROCESSES

The technology centre Ideko is coordinating the Twin5 project, a collaborative R&D initiative aimed at improving the reliability and productivity of multi-axis milling processes through the use of advanced digital twins. Its goal is to move towards more productive, robust and defect-free 5-axis machining, especially in high-value-added applications such as aerospace, energy and space, reducing rejects, set-up times and conservative trial-and-error strategies.

To achieve these objectives, the project addresses several key lines of research. These include the development of advanced digital twins for 5-axis milling, integrating the machi-

ne, the process, tool wear, thin-wall behaviour and surface topography generation, as well as their acceleration and improvement through parallelisation techniques, the use of GPUs and hybrid models based on machine learning and physics-informed neural networks, or PINNs.

Twin5 also includes the creation of specific software for scanning raw blanks and final parts, the development of real-time visual twins and process analysis and optimisation applications combining real data with simulation results.

Advanced Models

In addition to acting as coordinator, Ideko leads the deve-

lopment of advanced digital twin models, especially in relation to milling process simulation, machine dynamics, defect prediction and the generation of hybrid real-simulated signals. The centre is also driving the integration of these models with digitalisation and artificial intelligence techniques to ensure their application in real industrial environments.

The project consortium is made up of Ibarria, which contributes its expertise in 5-axis machining centres and validates the solutions on large-scale machines; Goimek and ITP Aero, which contribute real industrial cases of complex machining; Trimek, with its experience in advanced measure-



Ideko will improve the productivity of multi-axis milling.

ment systems; while Tecnalia and the University of the Basque Country, EHU, participate in the development of advanced models, simulation, machine learning and scientific validation.

The project, which began in September 2025 and will run until the same month in 2028, will make it possible to provide advanced tools for the design, control and optimisation of multi-axis milling processes, while also driving the real digitalisation of machining processes.

TECHNOLOGY | METROLOGY

TEKNIKER SHARPENS MEASUREMENT

THE CENTRE IS DEVELOPING DIGITAL TWINS OF METROLOGY TOOLS TO ENSURE 'ZERO-DEFECT' QUALITY IN COMPLEX PRODUCTION PROCESSES

The paradigm shift in component design and in increasingly fast and precise measurement systems requires intelligent solutions capable of predicting process behaviour. To respond to this demand, Tekniker is part of the consortium of the European ADAM project (Application of Digital-Metrological Twins for Emerging Measurement Technology in Advanced Ma-

nufacturing) an initiative funded by the EMPIR-EURAMET programme that seeks to develop the next generation of digital twins applied specifically to the field of metrology, known as Digital Metrology Twins, or D-MT.

Unlike conventional digital twins, used to model processes or production equipment, the ADAM project addresses an unprece-

IT WILL DEMONSTRATE HOW INTEGRATES WITH ROBOTIC SYSTEMS



A Tekniker researcher working on the ADAM project.

dent challenge: the creation of mathematical models that faithfully represent measurement operations, both in coordinate measuring machines, or CMMs, and in machine tools. The ultimate goal is to provide methods that make it possible to add traceability to measurements and ensure the quality of parts, optimising the efficiency and profitability of advanced manufacturing.

The project brings together national metrology institutes and universities from across Europe, with Tekniker's work focusing on the mathematical modelling of measurement equipment and the characterisation of optical sensors, as

well as the parameterisation of digital twins. As the technology centre explains, one of its key contributions is the development of tools to estimate measurement uncertainties. This involves complex mathematical calculations that analyse how uncertainties propagate through the different stages of the process, making it possible to automate data processing and ensure its quality.

TECHNOLOGY | MANUFACTURING

CEIT PAVES THE WAY FOR A NEW-GEN OF FACTORIES

IN THE FABRICARE PROJECT, THE CENTRE LEADS THE INTEGRATION OF ADVANCED ROBOTICS, IMMERSIVE INTERFACES AND DIGITAL TWINS TO OPTIMISE PROCESSES AND IMPROVE INDUSTRIAL SAFETY

Ceit is driving a new generation of collaborative, safe and efficient factories through the Fabricare project, developed in collaboration with the technology centres Tecnalia, Ikerlan, CTC and Aidimme. The strategic project has been promoted over the past two years to respond to the growing demand for solutions aimed at reducing production times, increasing safety and lowering costs through smarter and more efficient processes.

The initiative, which concluded last November after intense research activity, aimed to improve current manufacturing processes through the deployment of collaborative and mobile robotics, reliable perception systems and their direct integration with a simulation and modelling platform based on digital twins. As Ceit explains, this platform makes it possible to predict and analyse the behaviour of the production process before it is executed, as well as facilitating real-time monitoring and control.

In addition to coordinating the project, Ceit has contributed its expertise in the development of digital twins for simulation,



Ceit's facilities in San Sebastián.

new haptic interfaces, advanced controllers for collaborative manipulators, as well as sensor-based solutions for environmental perception and the localisation of mobile robots through the fusion of optical and radiofrequency techniques. According to Diego Borro, Ceit researcher and Fabricare coordinator, the project reinforces the centre's leadership in the development of techno-

logical solutions for the digital transformation of industry and consolidates a track record of more than two decades of research in this field.

Key Results

The project was closed at Ceit's facilities with the final consortium meeting, a session at which the main achievements were reviewed. Among the most notable results were the optimisation of machine designs, the improvement of maintenance and plant control, as well as significant progress in operator training and in assistance and incident-resolution systems.

The Fabricare project received 3.4 million in funding from the Centre for the Development of Technology and Innovation, CDTI, through the 2023 Cervera Call for Technology Centres of Excellence. The consortium's joint work made it possible to address some of the main challenges facing today's manufacturing industry in a comprehensive way, validating key technologies that facilitate the adoption of smarter and more efficient production processes.

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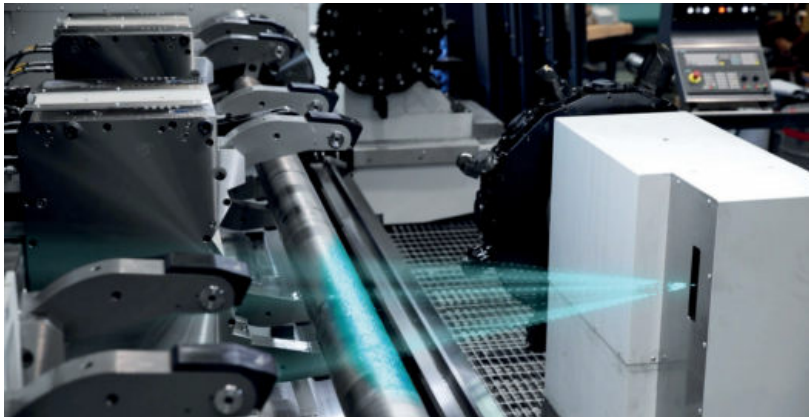
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TECHNOLOGY | COMPUTER VISION

VICOMTECH OPENS MACHINING'S EYES

THE CENTRE IS DEVELOPING, TOGETHER WITH GURUTZPE AND SARIKI, AN ARTIFICIAL VISION SYSTEM FOR THE AUTOMATIC ALIGNMENT OF PARTS ON LARGE LATHES



Vicomtech has collaborated with Gurutzpe and Sariki.

In the metalworking transformation sector, especially in critical industries such as rail, aerospace and renewable energy, the machining of large rotational parts presents a major challenge: the raw material is never perfect. Forged parts arrive with irregular geometries and, until now, aligning these large rotational parts on the lathe depended entirely on the operator. This alignment is critical, as the way the bar is positioned determines how much material is machined and wasted, which is particularly important when working with titanium or other high-value materials.

Faced with the slowness of this manual process, which is prone to inefficiencies, the machine tool manufacturer Gurutzpe, the metrology specialist Sariki and the technology centre Vicomtech have jointly developed an artificial vision system for the automatic alignment of parts on large lathes. In this way, it responds to market demand, which "requires this process to be integrated into the machines, so that both measurement and analysis are automatic", according to the project's technical managers.

Digital Twins

The collaborative solution, validated using digital twins, reduces preparation time from one hour to 15 minutes: five minutes for measurement, another five for automatic correction and the remainder for final verification, ensu-

ring maximum precision and material savings in high-value machining.

The solution gives the lathe its own vision. To achieve this, a 3D laser triangulation system has been installed on the machine's tool carriage itself. Unlike traditional methods, this system scans the complete raw part, generating a massive point cloud of up to 35 million points, which reconstructs the real geometry of the object in three dimensions with a resolution of 0.1 mm.

Using advanced artificial vision algorithms developed by Vicomtech, the system automatically calculates the "maximum inscribed cylinder", in other words, the optimal use of the part. However, one of the most significant milestones provided by this technology centre is the use of the digital twin. The researchers developed a complete simulator using state-of-the-art graphics engines, which made it possible to work in parallel with the Gurutzpe team, which was physically building the machine. As a result, instead of waiting for the physical construction to be completed, Vicomtech was able to simultaneously integrate the vision and reconstruction module, accelerating development concurrently.

This virtual environment faithfully recreated the mechanics of the lathe, the laser sensor and the behaviour of the PLC. "This has allowed us to carry out the entire software development with a simulator, achieving a very agile start-up," Vicomtech says.



The solution is capable of working without a prior CAD model.

TECHNOLOGY | AUTOMATION

LORTEK DEMOCRATIZES WELDING

THE CENTRE IS DEVELOPING A ROBOTISED WELDING SOLUTION CAPABLE OF WORKING ON THE REAL GEOMETRY OF THE PART

The automation of welding remains one of the major challenges for the metalworking industry, where the real geometry of parts differs from the theoretical model. To respond to this challenge, Lortek has developed a robotised welding solution capable of working directly on the real geometry of the part, eliminating the need for a prior CAD model.

With this project, the technology centre takes a step forward in the democratisation of flexible automation, bringing advanced robotised welding technologies closer to a larger number of industrial companies.

Unlike conventional seam-tracking systems, which start from a nominal trajectory and make local corrections in real time based on the average profile, Lortek's proposal introduces a paradigm shift. Instead of adjusting an exist-

ing trajectory, the system scans the real scene, automatically interprets the geometry, identifies seams or cavities and autonomously generates the welding trajectories.

Greater Reach

This new approach makes it possible to address unique or highly variable parts, even when the CAD model is incomplete or simply non-existent, significantly broadening the scope of robotised automation.

IT INTRODUCES A PARADIGM SHIFT

The workflow is structured in three phases: an initial scan using a profilometer or 3D scanner to capture the real geometry; a

processing stage in which the software identifies the areas to be welded or filled and generates optimised trajectories; and execution of the process, in which parameters such as travel speed adapt to the local geometry.

SURVEY | MACHINING

SIGNS OF STRENGTH

EXECUTIVES FROM FIVE COMPANIES IN THE SECTOR CONFIRM STRONG ACTIVITY LEVELS

The machining sector has strengthened its position in international markets over the past year, according to executives from Zerbimek, Alain Vivas; Mekalerun, José Ramón López; Goimek, Aitor Txurruka; Utilmaik, César Calleja; and Bronymec, Ander Cristobal. Innovation, the ability to adapt to the current climate of uncertainty and a working model focused on added value are among the keys to maintaining competitiveness, with diversification into areas such as defence representing an opportunity.

► HOW WOULD YOU DESCRIBE YOUR COMPANY'S ACTIVITY OVER THE PAST YEAR AND WHAT FACTORS HAVE INFLUENCED ITS PERFORMANCE?

Alain Vivas / Zerbimek

Over the past year, we have reinforced our position as "bespoke tailors" in machining, adapting our solutions to each customer's needs. We have the capacity to manufacture parts in 3, 4 and 5 axes, including parts of up to 10 tonnes, which allows us to tackle highly complex projects. Factors such as the European crisis, especially in markets such as France, have posed a challenge, but diversification and growth at national level have enabled us to remain solid.

The key has been adapting to uncertainty and seizing opportunities. The main challenges include absenteeism and the associated costs, as well as the shortage of qualified personnel, which makes it difficult to meet demand and attract talent to a sector that has undergone a cultural change. Maintaining competitiveness in a global market requires flexibility, innovation and constant adaptation.

José Ramón López / Mekalerun

The year has been especially intense and interesting. Activity levels have been strong, with a double-digit increase in turnover compared with the previous year and in line with the year's targets. Among the main milestones of the year, I would highlight the consolidation of the implementation of an MES on the shop floor for real-time management of the entire production process and its integration with the ERP; progress in the digitalisation of machining stations; the significant growth in export figures to Europe; the

continuous improvement of our processes, also supported by top-tier collaborators; and major investments in auxiliary and verification equipment. We remain attentive to all the latest developments and technologies in our sector, and we take part in forums and industrial innovation and research projects.

Aitor Txurruka / Goimek

It has been an especially interesting year for Goimek, marked by the start of a new strategic cycle that has meant adopting a different way of working, more focused on added value, diversification and people's involvement in decision-making. This change has coincided with the culmination of a period of heavy investment: in total, 11.6 million allocated to modernising our facilities and strengthening our capabilities in both precision machining and large-scale machining, including a specific area fitted out for aerospace projects with thermal control and latest-generation machinery such as Soraluce's PR-W 17000 milling machine. All of this has allowed us to make a significant leap in production capacity and competitiveness in demanding sectors.

César Calleja / Utilmaik

Utilmaik designs and manufactures special tooling for the machining sector, focused on parts from foundries, forges and aluminium injection. The company was created by taking advantage of the Covid shutdown, and since then we have grown every year in turnover and, above all, in gradually carving out a place for ourselves in the market.

Ander Cristobal / Bronymec

The past year has been clearly positive for the company, above all because of the evolution of the workload and the volume of projects brought in, which are at especially high levels. Beyond the pace of execution in the short term, I would say it has been a year in which we have strengthened our position through our entry into projects of greater technical complexity and longer time horizons, which we believe gives us a solid base for the coming years.

In that context, several factors have had an influence. On the one hand, greater selectivity in the type of pro-

ALAIN VIVAS

Zerbimek
Production Manager



"EUROPEAN DEFENCE IS AN OPPORTUNITY"

JOSÉ RAMÓN LÓPEZ

Mekalerun
Managing Director



"WE ALREADY WORK WITH REAL-TIME DATA"

jects we take on, prioritising those where we can provide real value through our knowledge of materials, processes and design. On the other, the effort made in recent years in production capabilities, process control and internal reorganisation, which has enabled us to respond more robustly to increasingly demanding requirements.

► IN A CONTEXT IN WHICH THE MACHINING SECTOR REMAINS STABLE, BUT WITH UNEVEN PERFORMANCE BY MARKET, WHICH SECTORS ARE CURRENTLY DRIVING ACTIVITY AND WHICH ARE SHOWING GREATER WEAKNESS?

Alain Vivas

Demand is currently being driven by the rail, aerospace and capital goods sectors, where the machining of one-off and highly complex parts provides added value.

The ability to offer tailor-made technical solutions and act as a partner to customers, advising them and solving production problems, has been key.

By contrast, automotive and machine tools are showing lower activity due to pressure on prices and concentration on series production. Diversification in these sectors has allowed us to maintain balance and stabilise workload in the face of volatility in some markets.

José Ramón López

Our main market is machine tool manufacturers. A bed, a headstock, a column or a ram goes into a machine that may machine parts for the defence sector or for the automotive sector. What we see, therefore, is the variation in the volume of incoming orders depending on the sector to which our machine-manufacturer customers direct their machines. Orders are increasing from customers whose machines are aimed at sectors such as defence, shipbuilding, aerospace, rail and others. And we see that those especially linked to automotive have a somewhat lower workload.

(continued on page 18)

SURVEY | MACHINING

(from page 17)

Aitor Txurruka

In our case, the sectors that are driving activity most strongly are machine tools, where we work to a large extent for Danobatgroup companies, Danobat and Soralue, and the aerospace sector, which remains one of our main vectors of specialisation. Other areas such as energy, especially wind power, capital goods and shipbuilding are also among our most relevant sectors, although we would have liked to have had a higher volume of business in this area.

César Calleja

As everyone knows, the automotive industry in Europe is completely "stuck". The sectors that have currently been sustaining us are electric trucks and agricultural machinery, along with civil works machinery.

Ander Cristobal

In our case, and probably also in other companies in the sector, this uneven performance by market is quite visible. The sectors in which we have historically had the greatest presence and knowledge have remained very solid, especially rail, energy and electronics. Within the energy field, we have seen weaker performance in the wind sector, where in our specific case there has been some deterioration in activity.

At the same time, we believe it is important to highlight the strength of the defence sector, where we have experienced a clearly favourable dynamic and greater demand for solutions with a high technical component, which fits well with our capabilities.

By contrast, we are seeing more weakness or greater pressure in more mature sectors or those highly exposed to price, where competition focuses on deadlines and costs and it is harder to differentiate through technical value. In our case, these are areas from which we had already been progressively moving away, so their performance has not had a negative impact on our activity.

> THE INCREASE IN EUROPEAN DEFENCE SPENDING OPENS UP NEW OPPORTUNITIES FOR THE METAL-WORKING INDUSTRY. DO YOU IDENTIFY REAL POSSIBILITIES IN THIS FIELD? WHAT TECHNICAL REQUIREMENTS DOES THIS NEW MARKET INVOLVE?

Alain Vivas

The field of European defence presents a scenario of interesting opportunities, driven by the progressive increase in defence spending in several countries

AITOR TXURRUKA

Goimek Manager



"WE ARE STRONGLY COMMITTED TO GROWING IN CAPABILITIES"

CÉSAR CALLEJA

Utilmaik CEO



"COMPANY SIZE IS MEASURED BY ITS PEOPLE"

on the continent. This growth generates rising demand for advanced technological solutions, specialised equipment and highly qualified services, opening new doors for companies able to offer differentiated and highly reliable products.

However, it is an extremely demanding sector: quality standards are very high, certification processes are complex and competition is intense, both locally and internationally. This means that any entry into this market requires careful planning, investment in technical capabilities and deep regulatory knowledge. Despite these challenges, European defence represents a strategic opportunity to diversify activity, strengthen international presence and establish solid relationships with institutional and corporate customers that value excellence and reliability.

José Ramón López

We work with Spanish and European manufacturers that are building machine tools or capital goods aimed at defence projects. The technical requirements are not very different from those of any other sector; what are much more demanding are the certifications that a company must have in order to gain direct access to these projects and markets.

Aitor Txurruka

Our strategic positioning is much more focused on the aerospace field linked to scientific missions and research projects, where we already have very solid and differentiating experience in machining parts for rockets or satellites.

César Calleja

Yes, we identify real possibilities, although entering this sector is very complicated and slow. In the services offered by Utilmaik, this sector does not have greater requirements than others, such as automotive, for example. More than adapting to its way of working, it is a matter of bureaucracy rather than requirements. I also think that the new projects and their investment will continue to go to the four big players at national level. It is up to SMEs to "fish" for whatever we can, if possible.

Ander Cristobal

In line with what we mentioned in the previous question, the defence sector is already playing a relevant role in our activity and has shown clearly positive performance.

From a technical point of view, based on what we have been able to experience internally, these markets emphasise material consistency, process

stability and, in our case, metrological aspects. These are environments where repeatability and reliability carry as much weight as the machining capability itself and require stable, well-controlled processes.

In addition, batches tend to be larger than in our standard work, which introduces additional pressure in terms of efficiency and the ability to absorb demand without losing control. In our case, the fact that we have already spent three or four years advancing in the automation of different machining processes is helping us maintain cost efficiency and adapt more swiftly to these types of needs in terms of lead times.

> WHAT ROLE DOES DIGITALISATION PLAY IN YOUR BUSINESS STRATEGY TO MEET THE REQUIREMENTS OF SECTORS AS DEMANDING AS AEROSPACE OR ENERGY?

Alain Vivas

Digitalisation plays a central role in our business strategy, as a determining factor in maintaining and strengthening our competitiveness, especially in highly demanding sectors such as aerospace or energy. Its relevance is not limited solely to the automation of processes, but also covers production optimisation, quality improvement, cost reduction and the ability to respond to changes in the market.

Although it is not the only strategic line of action, digitalisation has become a common thread running through all our investments and future plans. The integration of advanced technologies, from data analysis to Industry 4.0 solutions, allows us to anticipate customer needs, innovate in products and services, and ensure that our company remains agile, resilient and prepared to face the challenges of an increasingly competitive and globalised business environment.

José Ramón López

Although today we are not working for either of those two sectors, already in the 2021-2023 Strategic Plan we addressed the need to digitalise all our processes. This endless path of digitalisation and continuous improvement that we began five years ago has led us to have, today, a company with a high degree of digitalisation across all our processes.

We work with real-time data, and this is allowing us to significantly increase our productivity. At the same time, it is allowing us to improve the comprehensive management of our projects and customer satisfaction.

Aitor Txurruka

Digitalisation plays a very important role for us. In sectors where precision and traceability are critical, having advanced three-dimensional measurement systems, digitalised quality-control processes and connected machinery is essential. The conditioning of work areas with thermal control, process sensorisation and the ability to record and analyse data in real time help us optimise our processes and reduce risks in high-value parts. In terms of added value for the customer, it is also a competitive advantage that we add to our offer. In other words, the customer can have all the information about the project process online, at the same time as execution is taking place.

César Calleja

For us, at least for the moment, digitalisation does not really have a major impact because every project we carry out is special and different. The data we can collect from previous projects are of little use to us in terms of quantitative data. What is most important for us are the experiences and adaptations we have to keep making to stay up to date in our know-how, with the new production systems and machines that are emerging, so that we can bring that to the next project and continue providing value to our customers.

Ander Cristobal

From the outset, we have tried to discipline ourselves around the idea that digitalisation should not be an end in itself, but a tool to support process reliability and the ability to meet increasingly demanding requirements. In sectors such as aerospace, energy or defence itself, what we see is that it is not enough to manufacture a part well; it is necessary to be able to demonstrate how it has been manufactured.

In this regard, we have been incorporating digital tools aimed at in-process control and traceability, both in production and in the prior stages of quotation and planning. This helps us reduce uncertainty, be more consistent in execution and respond more quickly when the customer requires adjustments or additional information.

> COMPANY SIZE HAS BEEN IDENTIFIED AS A STRATEGIC CHALLENGE. DO YOU CONSIDER IT NECESSARY TO GROW IN CAPABILITIES, ALLIANCES OR STRUCTURE TO FACE CURRENT CHALLENGES?

Alain Vivas

Business growth is not limited solely to internal development; inorganic growth strategies, strategic alliances and partnerships with other players in the sector are key elements in tackling

large-scale projects. This approach allows us to expand our technical capabilities, increase our infrastructure and consolidate our presence in increasingly competitive and demanding markets.

Collaboration with strategic partners facilitates access to new knowledge, technologies and resources, accelerating our response capacity and boosting innovation in products and services. By combining internal growth and external collaborations, we strengthen our business structure, ensuring that we are prepared to face complex challenges, optimise operations and generate sustainable long-term value.

In this way, alliances not only multiply our capabilities, but also reinforce our position as a reliable partner in highly demanding projects with international projection.

José Ramón López

Growing into the capabilities of people and teams is absolutely necessary in a world where technology is advancing so quickly. You cannot fall behind because you will gradually be pushed out of the market. As for alliances or cooperation between companies, I have always thought they are important, although sometimes they are not so easy. And this probably happens because of the barriers people put up, out of mistrust that the other party will copy what you believe you are doing better or what differentiates you. It is good to open up and see what other companies are doing because you will always learn something new and interesting. Mekalerun is made up of 24 people, a structure suited to our resources and objectives at this moment. Growing in structure is interesting, provided it is done in a planned way and with a clear understanding that it has many advantages and also some drawbacks.

Aitor Txurruka

Without a doubt, in our case we are strongly committed to growing in capabilities. This is an essential aspect in order to respond to the needs of constantly evolving sectors. A large part of the investments made in recent years, and those planned for the coming years, are aimed precisely at improving and renewing our equipment.

As for alliances, I also believe they are crucial. In our case, for example, we have an agreement with Sakana for the integration of the supply of castings that our customer may need. This collaboration strengthens our value proposition and allows us to guarantee our customers an integrated and reliable supply.

On the other hand, structure is important in order to provide the customer with the peace of mind and secu-

rity they need. In our case, as we are a cooperative that is part of Danobat-group and Mondragon, we have business solidity and a unique organisational ecosystem that offers security and peace of mind to our customers.

César Calleja

The industrial sector that is dedicated to "making things" in Europe is going through a very turbulent period right now. There are many purchase and sale movements involving Spanish companies, including some of our customers.

We are a small company and we love what we do. We fight to create "things" that help our customers compete in this highly globalised world. There is no better reward for us than finishing a project and seeing our customers happy with the final result. Logically, with a level of profitability that allows us to keep doing it. What really drives us is that feeling, not growing more or joining forces with other companies to cover more ground. We do not rule it out in the future, but it does not keep us awake at night. And if we have to start going out to sell abroad, today's artificial intelligence in the area of language already gives us a lot of help. It will not be a problem in a short time.

We measure the potential and size of a company not by its dimension, but by what those of us who make it up can contribute and how much we can pull together.

Ander Cristobal

I think size is almost always talked about as a handicap, but our experience is somewhat more nuanced. As you work with companies much larger than yours, you also realise that being a small organisation has clear advantages. The main one, probably, is the proximity between where things happen and where decisions are made. That gives us an agility that from the outside may look like a matter of reflexes, when in reality it has more to do with the fact that those who decide are very close to the problems and experience them almost first-hand.

That said, it is also clear that, especially when you go abroad and compare yourself with competitors from other countries that are ten times our size, you become aware of what a larger organisation can contribute from another angle: not so much more technical focus, but a more cross-cutting vision, with the capacity to connect knowledge from different fields and transfer it into broader or more integrated solutions.

That comparison helps you understand how far an organisation with greater size could go.

ANDER CRISTOBAL
Bronymec CEO



"WE ARE TAKING ON PROJECTS OF GREATER COMPLEXITY"

INDUSTRY ECOSYSTEM | CORPORATIONS

DANOBATGROUP BROADENS ITS HORIZONS

THE MACHINE TOOL MANUFACTURER IS OPENING THE DOOR TO DIVERSIFYING INTO AREAS THAT COMPLEMENT ITS PRODUCT RANGES UNDER ITS STRATEGIC PLAN TO 2028

Machine tool manufacturer Danobatgroup is entering a new cycle from a comfortable position after setting a turnover record for the third consecutive year in 2025 and securing a solid order book in 2026. As its CEO, Nerea Aranguren, explained last year during the presentation of the results at the company's headquarters in Elgoibar, Danobatgroup entered 2025 with solid, high-quality orders from repeat customers that allowed it to develop technologies. Looking ahead to the 2025-2028 strategic period, the group expects to increase its turnover by 5%, during years in which it is considering diversifying its activity into areas that complement its product range.

Growing geopolitical tensions, market uncertainty and the slowdown in the global economy did not prevent Danobatgroup from reaching turnover of 366 million in 2025, 6.4% more than in 2024, with an export share of more than 90%. Danobat and Soraluce are the main players in foreign trade, the group's flagships alongside Goimek.

The United States, at 18.8%, Germany, at 12.7%, and Italy, at 8.3%, were the best-performing markets.

By activity, aerospace stands out after the notable progress it recorded, reaching 31.1%, along with capital goods and general engineering, at 22.8%. Another sector in which the group was present in 2025 was the energy, where it practically doubled its activity, accounting for 13.4 percent of orders.

Danobatgroup is beginning a new stage with the rollout of its 2025-2028 strategic plan, a period during which it will structure its activity around four pillars: technological innovation, servitisation, diversification and internationalisation, with artificial intelligence, sustainability and talent as cross-cutting lines.

As in previous years, technological innovation will remain the path on which the group continues to work as a key factor for its businesses. In 2025, it allocated more than 9% of revenue to R&D&I investment.

Nerea
Aranguren,
Danobatgroup
Managing
Director.



DANOBATGROUP

2025-2028 Roadmap

Given the dizzying pace at which the world is advancing, Danobatgroup will seek diversification paths in areas that complement its product ranges and add value to its current technologies. To this end, it is set to incorporate a new-business development profile, as it told this newspaper. Along these lines, the launch by Danobat

of a new range of precision robots has been the first milestone in this strategy, joined by the group's investment in Swiss startup Saeki to move forward in robotics.

In terms of infrastructure, the inauguration of Goimek's new plant in Itziar has brought to a close the strong investment cycle maintained by the cooperative group over the past four years.

DANOBAT REINVENTS INDUSTRIAL MANUFACTURING

Machine tool manufacturer Danobat is set to mark a before and after in industrial manufacturing after breaking with classic standards through the design and development of a disruptive precision robot, a technological commitment with which it is making the leap into the robotics sector.

As its CEO, Xabier Alzaga, told Empresa XXI, the company is entering this new field with the aim of filling the existing gap in the machining of lightweight-material parts through the design and manufacture of a pioneering solution

that "combines the agility and flexibility of a six-axis robot with the stability and precision of a machine tool".

The launch of this innovative robot model will open the door to new forms of advanced manufacturing for sectors such as aerospace, energy and automotive.

dBOT Range

Focused on machining parts made of materials such as composites, aluminium and even steel, the dBOT range delivers three times the performance of traditional robots in terms of

repeatability and accuracy in critical operations such as drilling and riveting. It is also capable of following trajectories with three times greater precision in operations such as trimming. These features position the equipment as an alternative to traditional systems for complex machining and high-precision additive manufacturing.

The new robotic family increases productivity while guaranteeing superior quality in critical applications. It reduces vibrations up to ten times more than today's robots.

INDUSTRY ECOSYSTEM | MILLING MACHINES

SORALUCE SETS THE COURSE

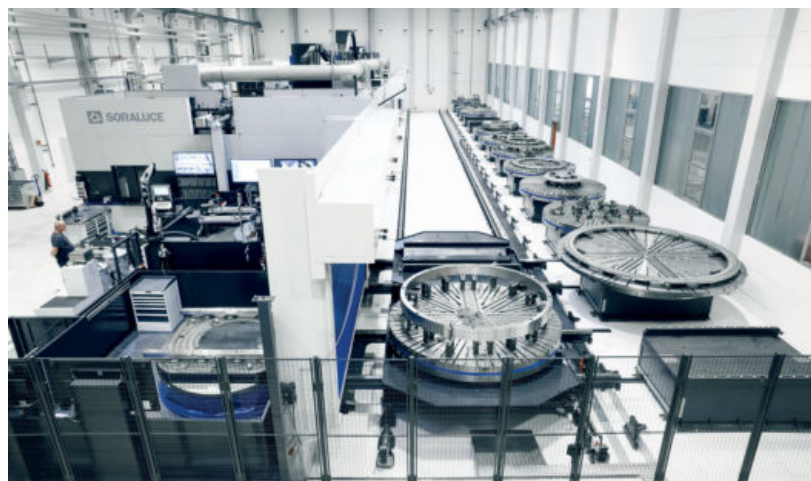
THE COMPANY BRINGS INTELLIGENT AUTOMATION TO MACHINING IN A FLAGSHIP PROJECT FOR GERMANY'S KRONES AG

Soraluce is strengthening its position in advanced industrial automation solutions with a flagship project for Krones AG, one of the world leaders in process, filling and packaging technology. It consists of a fully automated machining line.

The installation, located at the Nittenau plant in Germany, is one of the most representative projects in the Basque company's intelligent automation strategy.

The project forms part of a broad investment programme by Krones aimed at improving the productivity, flexibility and competitiveness of its machining operations.

The solution is based on a fully integrated Flexible Manufacturing System, or FMS, designed for machining medium-sized components in aluminium and stainless steel. The line consists of three Soraluce PM multifunction gantry ma-



Soraluce's fully automated machining line.

SORALUCE

chines, operating three shifts a day, six days a week, with minimal operator intervention. The system has been designed to run unsupervised during weekends, a milestone that allows production capacity to be maximised and operating costs to be reduced.

Thanks to this comprehensive automation, the installation achieves availability of more than 95% and productivity above 80%, results achieved

through close collaboration between the technical teams of Soraluce and Krones throughout every phase of the project.

Process Integration

From a technical standpoint, the automated line covers an area 52 metres long by 19 metres wide and integrates advanced solutions for machining, pallet handling and tool management.

A photograph showing a large red ship being hoisted by a crane at a port. The ship's hull is red and white, with the name 'EDNA' visible. A forklift operator is visible in the foreground, and the Bilbao Port logo is in the top right corner. The scene is set against a clear sky.

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Aerial view of the land where CMZ UK's new technology centre will be built, which will also house the headquarters of the British subsidiary, in Coventry.

INDUSTRY ECOSYSTEM | LATHES

CMZ STRENGTHENS ITS INTERNATIONAL FOOTPRINT

THE COMPANY REINFORCES ITS BRITISH SUBSIDIARY AND NOW HAS ITS NEW US OPERATION UP AND RUNNING, TWO MARKETS THAT WILL MAKE A SIGNIFICANT CONTRIBUTION TO INCREASING SALES THIS YEAR

CMZ has acquired more than 16,000 square metres of buildable land in Coventry, United Kingdom, where it will build a technology centre that will also house the headquarters of its British subsidiary, CMZ UK.

In this way, the company will consolidate its presence in this market and take a further step in its international expansion plan with a project that follows the creation last year of its US subsidiary, CMZ USA Corp., as well as the announcement of the forthcoming launch of another Tech Centre in Haute-Savoie to strengthen its CMZ France subsidiary.

With the launch of CMZ USA, operational in Boston since the middle of last year, the group now has six subsidiaries in Germany, France, Italy, the United Kingdom, Denmark and the United States. Thanks to this diversification and a dense distribution network, it exports around 80 percent of the CNC lathes it manufactures

at its seven Spanish plants, mainly in the Basque Country.

By September 2025, CMZ's turnover was already 22 percent higher than in the 2024 financial year, an increase that its director, Aitor Zumarraga, attributes mainly to the United Kingdom, the United States and the regions where the company is consolidating its presence. In this regard, he explains that "although markets are generally lower than usual, especially Italy, we have offset this situation with higher sales in new countries where

we are establishing ourselves, such as the United States, Turkey and also Eastern Europe".

The project to build CMZ UK's technology centre and headquarters in Coventry will begin in a few months, and the company's current timetable points to around two years to complete construction. The future Tech Centre will include sales offices, a showroom with CMZ lathes and an applications

engineering area dedicated to serving customers in the United Kingdom. In addition, its after-sales team will expand its structure and move to the new facilities.

The choice of location was by no means made at random, as it will place the subsidiary's new headquarters in the heart of the West Midlands, specifically in the WMIZ (West Midlands Investment Zone), which offers economic and innovation advantages.

It also has excellent road links, facilitating access for customers and partners. "Jaguar Land Rover's engineering facilities and the UK Battery Industrialisation Centre, UKBIC, are also located nearby, making this an ideal location for our commercial development," Zumarraga says.

Currently, CMZ's sales in the United Kingdom do not reach 10% of its turnover, although the group's managing director stresses that "forecasts suggest that we will soon achieve this". To this end, a year ago CMZ UK hired five new British salespeople, "who are doing extraordinary work, ensuring that we are increasingly present in mo-

re commercial operations". "This, combined with the strength of a technical assistance team made up of more than twelve professionals, provides us with a very solid personnel infrastructure that will support this growth."

Consolidation in France

For its part, CMZ acquired an industrial building a few months ago in the French region of Haute-Savoie, where it will launch a new technology centre with a team of after-sales technicians and sales engineers who will provide direct advice to customers in the area. It will also have a permanent showroom, featuring the full range of CMZ lathes, which will host technical demonstration days.

As regards the project to build what will be CMZ's eighth manufacturing plant on a 22,000-square-metre plot in Berriz, Bizkaia, where assembly of its new lathe model will be concentrated, the group's managing director acknowledges that progress "is slower than expected" and explains that "this is due to bureaucratic processes".

22%
INCREASED
ITS SALES
IN 2025
UP TO SEPTEMBER

INDUSTRY ECOSYSTEM | CONTROL

FAGOR AUTOMATION DRIVES CNC RETROFIT AS A LEVER FOR GROWTH

THE COMPANY SUPPORTS MANUFACTURERS IN THEIR PRODUCTION MODERNISATION PROCESSES

Fagor Automation has made a strong start to its 2025-2028 strategic plan, a new cycle that will be marked by technological diversification, sector expansion and a drive for innovation with the aim of responding to the real needs of industry. This approach is taking shape, among other areas, in the upgrading of its CNC solutions, conceived as a lever to support manufacturers in their production modernisation processes.

For the cooperative, a benchmark in automation and control systems, CNC upgrading responds to a very specific and demanding reality in today's market: numerous machines remain mechanically productive, but need their control systems updated in order to meet new requirements. In this scenario, the retrofitter plays an essential role as a technology provider for the end user. Its function is not limited to replacing a control system, but includes feasibility analysis, electrical engineering, drive selection, the integration of feedback systems and the

The open architecture of its CNCs, together with the ability to adapt to different machine configurations, makes it possible to address both partial and full upgrades, while maintaining the flexibility needed to adjust

to each application. In this way, Fagor Automation addresses current market needs by adapting to different production environments.

As the cooperative points out, this is a way of

understanding CNC upgrading that, in addition to improving competitiveness, allows the useful life of machines to be extended and, consequently, enables more efficient use of industrial resources.

"UPGRADING THE CNC CAN MAKE A DIFFERENCE TO MACHINE PERFORMANCE"

► Based on Fagor Automation's experience, when does an industrial user begin to notice that their CNC is limiting the machine's productivity, even though the machine remains mechanically valid?

In our experience, users begin to notice it when the machine continues to operate correctly, but is no longer competitive. Cycle times become longer than desirable, difficulties arise in automating or integrating new functions, and a lack of flexibility limits the response to current production needs. That is when the CNC becomes the real bottleneck and the user understands that upgrading the control can make a difference to the machine's performance.

► How do Fagor Automation's CNC upgrade solutions help without replacing the entire machine?

Our solutions make it possible to achieve an immediate leap in performance and productivity without changing the machine, by acting on the control and software. The user starts working with an up-to-date CNC, more powerful and ready for automation, with optimised cycles and easier programming. This translates into less downtime, greater repeatability and better day-to-day use of the machine.

► Has the way users assess a CNC upgrade changed in recent years?

Yes, clearly. A few years ago, the decision was very focused on the direct

impact on production, whereas today users take a broader view. They value the CNC's capacity to evolve, continuity of support, ease of use for the operator and the ability to continue making the most of the machine for longer.

► When a user considers extending the useful life of their CNC, what differentiating aspects does Fagor Automation provide?

What users value most when they start working with a Fagor Automation CNC is the combination of reliability, ease of use and proximity. They find a powerful yet intuitive control that makes programming and the operator's daily work easier. This is complemented by close, specialised technical support.

► What other solutions were available at Fagor Automation's stand at the BIEMH trade fair in Bilbao, held in March?

Visitors found a set of solutions aimed at improving the precision, efficiency and digitalisation of their pro-

duction processes. In the CNC area, the stand featured CNCelite 2.0 as the basis of our new generation of controls. Alongside it, we presented the new CNC 8065elite 2.0 G, developed specifically for grinding applications, where the requirements for precision, stability and process control were especially high.

In feedback systems, we presented a wide range of Series 3 linear and angular encoders. Among the new products were new models that could reach measuring lengths of up to 100 metres, as well as new enclosed incremental encoders designed for demanding industrial environments. These solutions incorporated improvements aimed at greater energy efficiency. In addition, in

the field of digital services, we presented FDS Fog On-Premises, a solution that allowed users to advance in the digitalisation of their production and management systems while keeping data local and under their control.

IÑAKI SÁNCHEZ

Fagor Automation
South-West Europe
Director



"WE INTRODUCED THE 3 SERIES ENCODERS"

FOCUSES ITS VALUE PROPOSITION ON MAKING INTEGRATION EASIER

optimisation of the machine's overall performance.

Aware of this technical responsibility, Fagor Automation focuses its value proposition on making the integrator's work easier at every stage of the project.

INDUSTRY ECOSYSTEM | DISTRIBUTION

DELTECO RAISES THE TECHNOLOGY BAR

THE GIPUZKOA-BASED COMPANY STRENGTHENS ITS CATALOGUE AT THE 2025 OPEN HOUSE WITH THE EXCLUSIVE PRESENTATION OF THE DN SOLUTIONS DVF5000 AND DNX 2100S

Delteco, the leading machine tool distributor in the Spanish market, has reaffirmed its commitment to innovation and to the technological expansion of its catalogue during its traditional annual Open House, held from 22 to 24 October 2025 at its headquarters in Zumaia, Gipuzkoa.

The event brought together more than 230 companies from the metalworking sector, which were able to see first-hand the performance of more than 50 machines on display, as well as the latest automated, robotised and industrial digitalisation solutions incorporated into the company's offering.

This year's event featured a larger number of machines on display than in previous editions, including two international premieres from DN Solutions: the second generation of the DVF 5000 5-axis machining centre and the DNX 2100S multi-tasking centre.

Attendees had the opportunity to see both models operating in situ. The machines, presented at the recent EMO trade fair in Hannover, "have generated enormous interest among industry professionals," explained Ainara Rodríguez, Business Development Director at Delteco Robotics. "They are cutting-edge technological machines that mark the future of precision machining."

One of the DVF5000 units on display was sold during the event, where the company also received numerous requests for quotations.

Other machines that set the tone for the sector included the NHP4000, NHP5500 and NHM6000 horizontal machining centres, the second-generation HERMLE C42U, different wire and

die-sinking EDM machines from the Japanese company Sodick, and high-precision grinding machines.

Delteco president Xabier Aranbarri assessed the latest open-house edition very positively. "It has been a success in terms of attendance, interest and quality contacts. We have closed deals and opened up new opportunities that

companies in Spain, if not the only one, able to offer complete machine and robot solutions from a single supplier.

In response to growing demand for automation solutions, this area expanded its exhibition at its latest Open House with the presentation of three Halter cells and four Doosan cobots.



DELTECO

will materialise in the coming months."

The automation and robotics division was another of the event's major highlights, reflecting the strong growth it has experienced in recent years.

Robotics Division on the Rise

Created in 2017 to respond to the needs of its customers, its differential value lies in a business model based on tailor-made projects, developed entirely by its own engineering team, which designs, programmes and implements each solution. This full integration capability makes Delteco one of the few

Professionals were able to see the premieres first-hand.



View of the ONA AV100 Z1000 machine installed at Novaindef.

INDUSTRY ECOSYSTEM | ELECTRICAL DISCHARGE MACHINING

ONA MAKES A TECHNOLOGICAL LEAP

THE COMPANY POSITIONS ITSELF IN DEFENCE AFTER DEVELOPING, ON A TURNKEY BASIS, "THE WORLD'S FIRST MACHINE" CAPABLE OF MACHINING LARGE PARTS WITH WIRE EDM

ONA Electroerosión has installed at Novaindef's new specialised centre in Linares, Jaén, "the world's first machine" capable of carrying out wire EDM with a full metre of useful height. As ONA's Technology Director, Jose María Ramos, explained to Empresa XXI, this feature "represents a historic technological leap in the EDM, or Electrical Discharge Machining, sector," positioning Novaindef as the "only centre in Europe with this machining capability".

The ONA AV100 Z1000 machine was developed specifically by ONA's R&D department at the request of Novaindef, a subsidiary of Sicnova, in order to respond to a growing challenge in industry: the need to manufacture and post-process increasingly large parts produ-

ced using additive manufacturing technologies, especially in defence and aerospace. With this development, which has required a year of work, ONA has become a benchmark in EDM technology for defence and aerospace in Europe.

The order forms part of Sicnova and Novaindef's commitment to advanced manufacturing. Through the new centre, they will offer high-tech industrial solutions to military platforms and public entities. Wire EDM plays a central role in the manufacture and maintenance of military systems because of its ability to work with extremely demanding materials, such as titanium, Inconel, nickel superalloys and ballistic steels; maintain micrometric tolerances; and ensure maximum dimensional stability.

According to Jose María Ramos, EDM overcomes these limitations thanks to a machining process based on electrical discharge that generates neither stresses nor mechanical forces, preserving the integrity of the part.

The AV100 Z1000 "solves a critical bottleneck in the transition towards large components", enabling deep, stable and high-precision cuts in parts that until now required fragmented processes or were impossible to tackle. ONA EDM has already received expressions of interest in the performance of this new machine

from additive-technology manufacturers, "to cut large parts from their base".

The Centre for the Development of Special Applications and Process Certification for the Military and Defence Sectors, Cedeac, forms part of an

agreement signed between Sicnova and the Ministry of Defence, to be managed by its subsidiary Novaindef, to develop a digitalisation strategy that simplifies the manufacture of

parts and spare parts through an approach based on design and additive manufacturing, which has become a high-impact technology in defence.

ONA HAS RECEIVED EXPRESSIONS OF INTEREST FROM THE ADDITIVE MANUFACTURING SECTOR

INDUSTRY ECOSYSTEM | MACHINING CENTERS

IBARMIA TAKES OFF IN AEROSPACE

THE COMPANY IS CONSIDERING STRENGTHENING ITS PRODUCTION INFRASTRUCTURE WITH A NEW 2,500-SQUARE-METRE ASSEMBLY AREA TO KEEP PACE WITH BUSINESS GROWTH ALONGSIDE SWEDEN'S MODIG GROUP

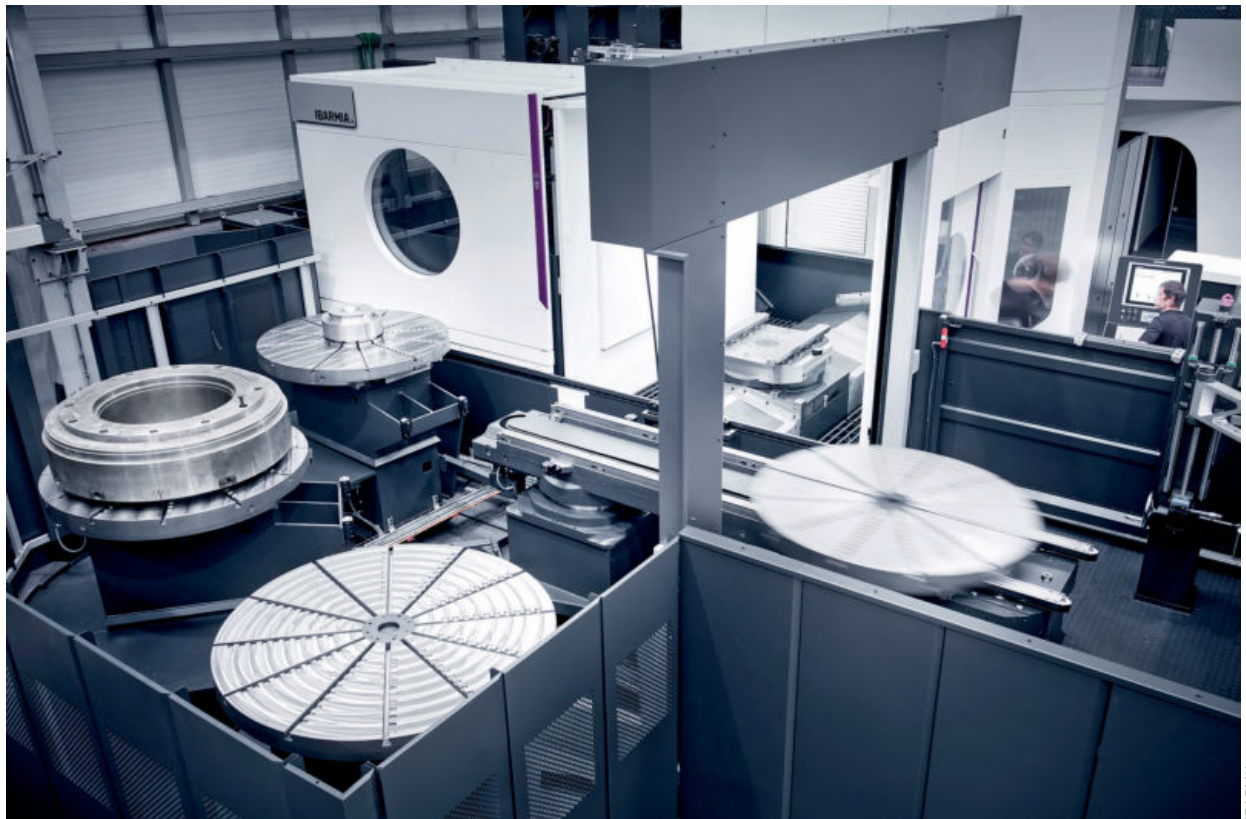
Ibarmia is entering a new stage of growth as it gains altitude in the aerospace sector, where it expects to raise its share from the current 10% to a range of between 20% and 25% over the coming years. This take-off is being driven by the strategic alliance it sealed in 2024 with Sweden's Modig Machine Tool, a collaboration that is significantly expanding the engineering, manufacturing and international market access capabilities of the Gipuzkoa-based machine tool manufacturer.

The synergies generated are already having a direct impact both on the company's commercial positioning and on the production activity of its Azkoitia plant, which is consolidating itself as the group's centre of excellence for machine design and construction.

The alliance with the Swedish group has enabled Ibarmia to make a qualitative leap in its offering for the aerospace industry. Together, they have developed two new ranges of machines designed specifically to meet the sector's requirements, with manufacturing carried out entirely at the Azkoitia plant.

The first family, called MTX, is a line of high-performance milling centres for machining medium-to-large aluminium aerospace components, designed to maximise productivity, dynamics and precision through heads of up to 30,000 rpm, feeds of up to 60 m/min and accelerations of 7 m/sec².

The second range, the HHV NG,



Ibarmia's
THC 22P
Multiprocess
machining
centre.

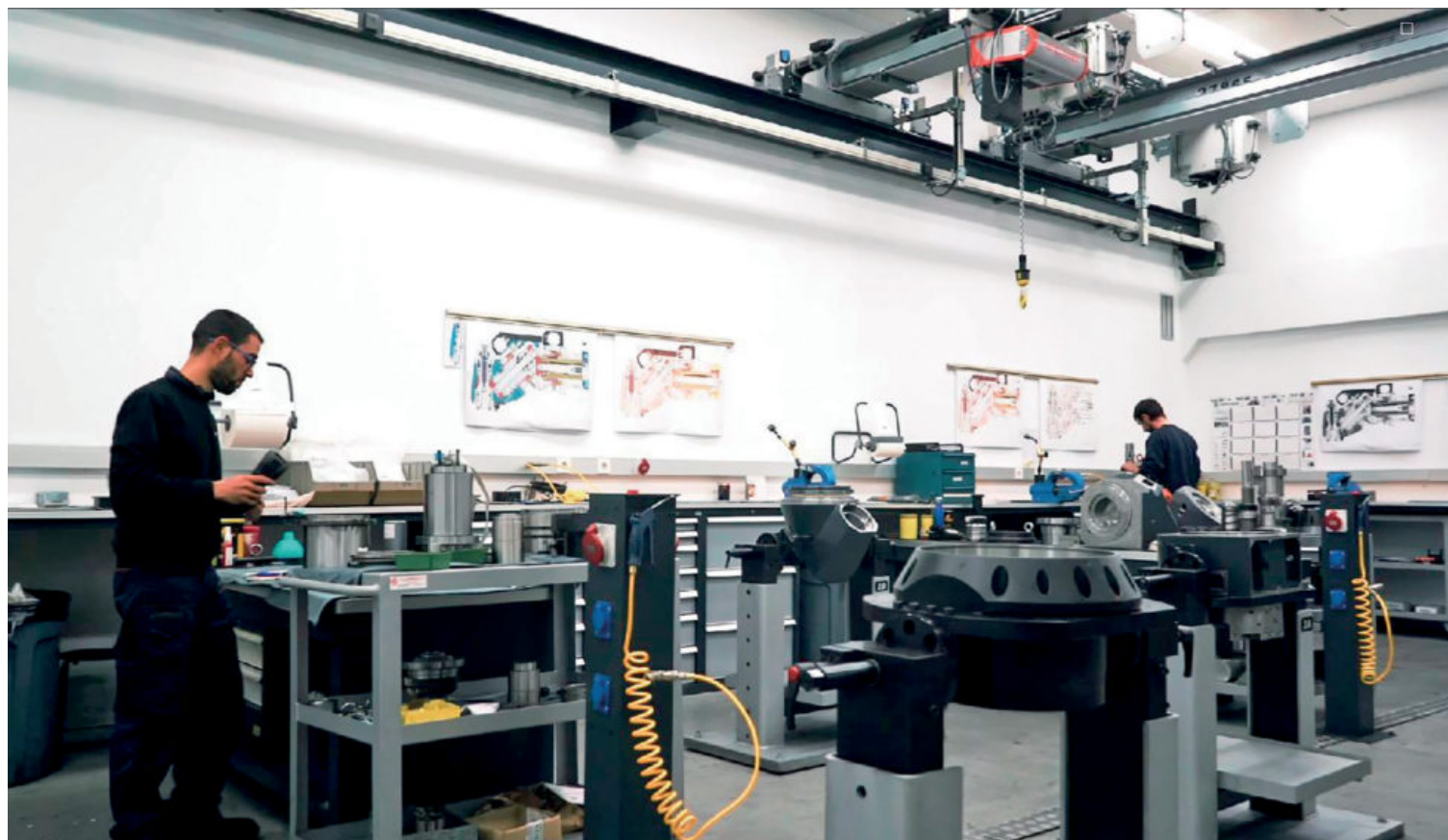
is a new machine concept in which each partner contributes 50% of the configuration. It is focused on the continuous machining of extrusion profiles, mainly aluminium, widely used in the aerospace sector but also in rail and electric vehicles. These solutions combine Modig's experience in this segment with Ibarmia's engineering and manufacturing capabilities, allowing the group to serve highly demanding international customers, especially in North America, where the Swedish group markets close to 80 per cent of its production.

New MHM family

These two new developments are joined by a third strategic project, currently in the launch phase for construction, the result of a concu-

rent engineering project between Ibarmia and the Basque Centre for Research and Technological Development Tecnalia.

It is a new family of machines called MHM, whose first unit should see the light of day in the final part of 2026 due to the relevance and complexity of the project. According to Arandia, this new type of machine, aimed at horizontal milling with one or two heads for aerostructures, is attracting considerable market interest and already has several potential customers, mainly in the United States.



INDUSTRY ECOSYSTEM | MILLING MACHINES

MTE GEARS UP FOR RISING DEMAND

THE COMPANY IS LAUNCHING AN INVESTMENT PLAN TO EXPAND THE HEAD MANUFACTURING AREA AT ITS ITZIAR PLANT AND INCREASE PRODUCTION CAPACITY BY 30%

MTE Machine Tool Engineering expects a favourable outlook for the current year, in which it maintains a significant workload, especially in large-machine projects. MTE Deputy Director Eneko Etxeberria told Empresa XXI that although “the market remains in a hesitant phase, a slight recovery is emerging, with a gradual trend towards improvement”. Despite the current situation in Germany, where the milling machine manufacturer has a 4,000-square-metre plant for sales, distribution, service and after-sales support, the company

THE EXPANSION OF THE DEPARTMENT WILL ENABLE MORE CUTTING HEADS TO BE OPERATED

has achieved strong order intake. However, “it is essential to continue working across all areas, as conditions remain challenging”. In 2025, MTE reached turnover of 30 million, a figure it expects to match in 2026.

Along these lines, in order to adapt to current market needs and project itself into the future, MTE has rolled out an investment plan whose main feature is the expansion of the head manufacturing department at the Itziar plant. The initiative aims to significantly increase head production and repair capacity, resulting in a

MTE's head laboratory at the Itziar plant in Gipuzkoa.

30-40% increase over current capacity. The head department, which has a climate-controlled and clean environment, will also incorporate an additional new test bench. As Etxeberria notes, this new facility “will make it possible to run in more heads, aligning with the increase in production and ensuring that products meet the highest quality standards”. The investment amounts to 1 million and, according to forecasts, the new “head laboratory” will be fully operational in the second quarter of the year.

R&D investment

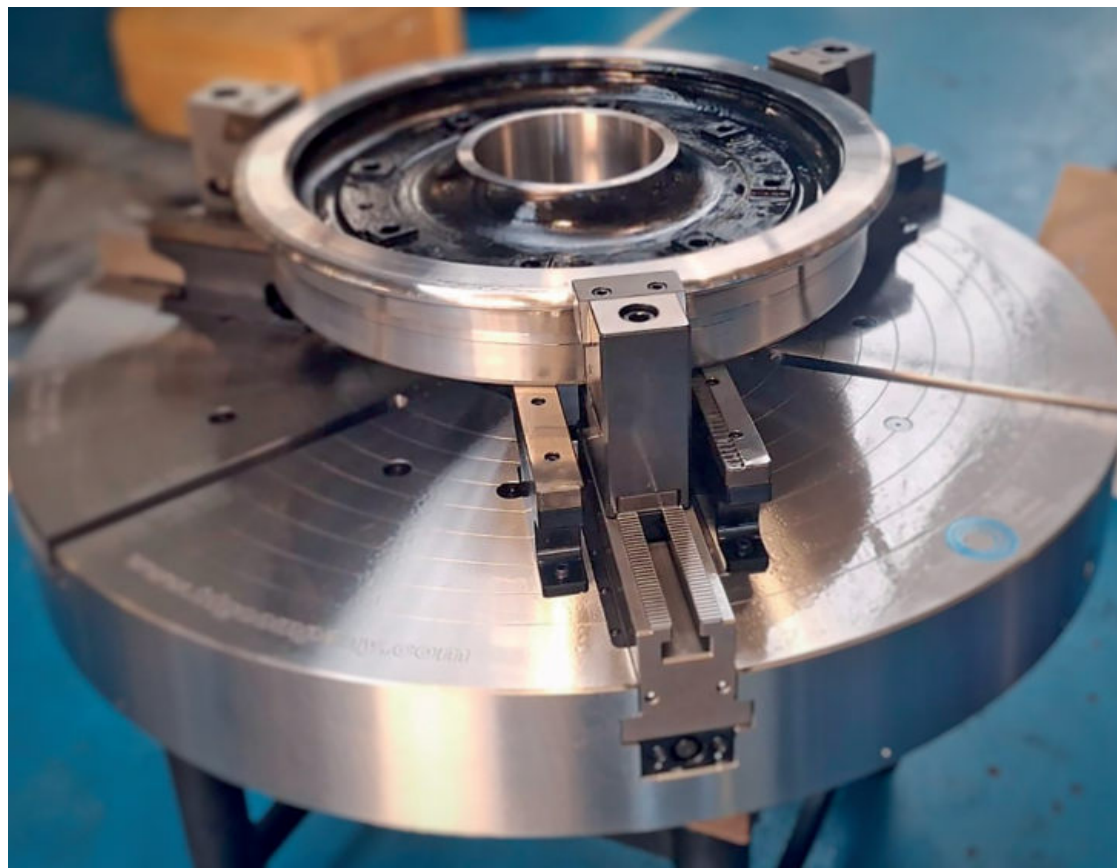
In the field of R&D, the company has also committed an additional investment of 300,000 to redesign its moving-column models, supporting the planned improvements and new launches. In this area, the first units with improvements will be delivered in the second and third quarters of the year, reflecting the company's commitment to continuous innovation. The effort focuses on redesigning several structural components, specifically the rams of a series of machines, optimising the design of the FBF family of moving-column milling machines in its three sizes. All of this will result in higher performance and improved workshop-space optimisation. The first machines to incorporate the improvements described will be delivered to Osterkamp Maschinenbau and Siemens Energy, both in Germany.

As regards the order book secured in 2025, projects in the domestic market, Europe and the United States stand out.

INDUSTRY ECOSYSTEM | CHUCKS

TDG HITS ITS MILESTONES

THE COMPANY EXCEEDS ITS 2025 TARGET OF €6.2 MILLION AND ADVANCES ITS 2025-2027 STRATEGY WITH A MAJOR RAIL ORDER IN CHINA



Automatic chuck for turning railway wheels.

TDG Clamping Solutions continues to move forward with its expansion and growth strategy through the rollout of its new three-year strategic plan. Fernando Santamaría, Business Development Director of the Bizkaia-based company, told Empresa XXI that their new plan has digitalisation and process improvement as its main pillar. With this, the company will grow by more than 11 percent, reaching close to seven million in turnover in 2026, a level it will consolidate in 2027.

Specialised in the manufacture of clamping systems, TDG plans to strengthen its customised-solution

design area, advance in data capture on the shop floor and improve planning, as well as review the factory layout to improve productivity, optimise manufacturing processes and increase production capacity.

Strengthening Its Entry into China

In line with these objectives, TDG has secured its order book for the first half of 2026 after confirming the capture of a major project, worth close to 1 million, with delivery expected in the first part of the year.

As Santamaría notes, the project focuses on the Chinese rail sector through a leading Asian manufacturer of vertical lathes, a regular TDG partner.

The order consists of the design and manufacture of 12 high-capacity automatic chucks, 1,600 mm in diameter, specially developed for turning railway wheels, with a jaw stroke of 110 mm, and designed for the final customer's full range of wheel sizes. The chucks also incorporate advanced technical solutions that improve precision, safety and efficiency in machining processes for large rail components.

This is not the first time TDG has secured orders in China in this same sector, but "it is the largest by volume, as well as confirmation of our positioning as a quality benchmark in rail. Our products are gaining very good traction in China, also in the wind sector," TDG says.

Along these lines, the plan includes intensifying its presence in the aerospace and energy sectors, where it is achieving its growth targets, as well as in the geographical markets of Eastern Europe, the Balkans and the Baltic countries.

The close of 2025 confirmed the target set for order intake at 6.2 million, and the company is starting 2026 with "a very significant order book for the first half, exceeding 3.5 million".

3,5

MILLION EUROS
IS THE ORDER
INTAKE UP TO JUNE
2026



Lantek's team at a trade fair.

INDUSTRY ECOSYSTEM | SOFTWARE

LANTEK DIGITALISES METALWORKING

THE COMPANY CELEBRATES ITS 40TH ANNIVERSARY THIS YEAR, CONSOLIDATED AS ONE OF THE BENCHMARK TECHNOLOGY FIRMS IN SHEET METAL AND METAL CUTTING AND PROCESSING

Four decades after its foundation, the company remains a pioneer in the digital transformation of metalworking workshops, with a proposition based on advanced software, automation and process integration. As its Sales and Marketing Director, Juan José Colás, explains, "Lantek's key has always been to anticipate manufacturers' real needs and turn technology into high-value solutions."

The company's 40th anniversary coincides with a moment of particular technological dynamism. The recent pre-

sentation of Lantek v45, the new version of its corporate software, reinforces its commitment to connectivity, automation and smart manufacturing. It is a version that "paves the way in the evolution of workshops towards more connected and automated environ-

THE V45 REINFORCES ITS COMMITMENT TO CONNECTIVITY, AUTOMATION AND SMART MANUFACTURING

ments, focusing on making the daily work of metal professionals easier," Colás says. Among the main new features is the incorporation of KAI, Lantek's new generation of artificial intelligence-based services, conceived as a cross-cutting assistant that supports technicians in their daily tasks.

Version v45 also strengthens integration between cutting, bending, palletising and production management, ensuring a continuous flow of data from design through to manufacturing. This comprehensive vision makes it possible to reduce errors, improve traceability and optimise the use of production resources.

Sustained Growth

In an industrial context marked by uncertainty, Lantek continues to record sustained growth. In the 2023/2024 financial year, the company reached sales of 36.1 million, with double-digit growth in its main markets, and 2024/2025 once again closed with a new record, despite the volatility of the environment. "We expect to continue along this path of expansion, with a new acceleration in growth and in the size of the company in the current financial year," he adds.

Looking ahead to the coming years, the company will continue to drive its geographical expansion and strengthen its professional teams, after announcing in recent months the opening of its own office in Canada, based in Toronto, where more than 300 companies work with Lantek solutions, and the creation of a new subsidiary in Japan following the integration of FA Service, reinforcing its presence in North America and Asia.

With these additions, Lantek's international network now reaches 23 offices in 17 countries, consolidating a growth model based on direct presence in key markets and proximity to customers.

Innovation will remain one of its strategic pillars. "We have spent many years prioritising R&D&I, and that has allowed us to lead the sector's transformation through software," Colás says. Over the past decade, average investment in R&D has exceeded 20% of turnover.

INDUSTRY ECOSYSTEM | ADDITIVE MANUFACTURING

MAUSA OPENS UP NEW BUSINESS LINES

THE COMPANY EXPANDS ITS MATERIALS PORTFOLIO WITH THE ADDITION OF TPU, ENABLING IT TO SERVE NICHE IN SECTORS SUCH AS HEALTHCARE AND SPORT

Mausa, a company that combines conventional die-making with new additive manufacturing techniques in plastic and metal, has taken an important step towards serving new niches in its 3D manufacturing business line thanks to the addition of new materials to its technological offering. Specifically, it has added the Lubrizol Estane 3D TPU M88A polymer to its portfolio, a flexible and durable material that enables it to serve new sectors such as healthcare, including orthopaedics and prosthetics, and sport, including technical equipment, as well as deepen its presence in more traditional areas such as automotive, in tooling and interior parts, and industry, in accessories and functional components.

According to company executives speaking to Empresa XXI, “the incorporation of this material responds to the growing demand for technical TPU parts that require skin contact and high mechanical performance, demonstrating that 3D continues to make strong inroads into sectors where innovation and personalisation are vital”.

In order to work with the new material under optimal conditions and guarantee maximum quality in its use, the Gipuzkoa-based company has incorporated a new Processing Station from the HP ecosystem, supplied by Maquinser, dedicated exclusively to working with TPU. This equipment “allows safer and more efficient handling of the material by facilitating the loading of build units and ensuring greater traceability and control in production processes”.

Along these same lines of expanding capabilities, Mause has also strengthened its resources with a stereolitho-



Mause has recently implemented the 5S method.

graphy printer, the Formlabs Form 4, “which allows us to manufacture parts with a high-quality surface finish and great precision”. “Although this is not a major strategic investment, it is a useful reinforcement to broaden the range of applications and continue offering our customers more versatile solutions,” those same sources clarified this for us.

Mause, which already has more than half a century of history, decided a few years ago to complement its die-making services with additive manufacturing aimed at producing short series of fully functional parts. Today, this business area has become the company’s largest source of revenue, largely thanks to the investments made in recent years.

Continuous Improvement

In addition to technological improvements, another area in which this family business has made a “qualitative” leap, according to its executives, is the improvement of quality procedures.

In this regard, as well as reviewing and updating its ISO 9001 protocols, it has implemented the 5S method, a Japanese methodology aimed at continuous improvement in organisation, order, cleanliness and discipline in the workplace, thereby improving efficiency, safety and staff motivation.

On another front, Mause’s Chief Financial Officer, Amalia García, joined the new Addimat Board last year as a member.

MAUSA



The new waterjet cutting-machine installed at Grupo IAM's workshop.

INDUSTRY ECOSYSTEM | CUTTING TOOLS

GRUPO IAM EXPANDS ITS CUTTING RANGE

AS PART OF ITS TECHNOLOGY INVESTMENT PLAN, THE COMPANY ADDS A WATERJET CUTTING MACHINE CAPABLE OF ANGLE CUTTING

Grupo IAM, a company specialised in high-precision cutting services, is expanding its capabilities with the addition of an ultra-high-pressure waterjet cutting machine, designed to produce complex parts in a wide variety of materials.

Among its key features is the ability to carry out angle cuts in a precise and controlled way, broadening cutting possibilities compared with traditional 2D waterjet systems. Specifically, the machine is a Flow M500-4020 / HyperJet 50 with Dynamic Waterjet XD.

The machine makes it possible to produce parts of greater complexity and precision, requiring three-dimensional cuts of up to 57°C, without deformation and with very tight tolerances.

It also improves finish quality thanks to its automatic jet-angle compensation system, which elimi-

nates the need for subsequent machining operations, shortening delivery times and reducing costs.

The new machine also reduces working times thanks to intelligent control software, which increases process efficiency.

Grupo IAM is strengthening its technological capacity in waterjet cutting to respond to the market's evolution towards more complex and higher-precision parts in high-strength or special materials. "Customers from demanding sectors such as automotive, aerospace and

renewables increasingly require more versatile, faster and more technologically advanced cutting services," explains Mikel Ariztimuño, Manager of Grupo IAM.

IT WILL BE ABLE TO PRODUCE MORE COMPLEX PARTS

THE NEW RESOURCES EXPAND AND IMPROVE THE OFFER

Technology Rollout

The technology deployment carried out by the company over the past four years,

which has included the implementation of a machining centre and a new laser-cutting activity, supports its goal of offering the highest quality with the best delivery times.

The new equipment allows the company to access new value-added services and projects while increasing productivity and profitability by "improving operational efficiency, reducing reprocessing costs and making better use of human resources," he says.

The incorporation of new capabilities has also resulted in greater autonomy and control over the production process, offering greater response capacity and shorter lead times.

The company is also growing in digitalisation through the advanced sensor technology, connectivity and advanced control software incorporated into the new equipment.

Two Business Lines

Grupo IAM offers high-quality cutting for parts of all types of materials and different sizes and geometries through two distinct business lines: wire EDM, die-sinking EDM and drilling processes, and waterjet cutting and micro waterjet cutting.

IAM, Industria Auxiliar de Matricería, was created in 1981 with the aim of offering wire and die-sinking EDM services for parts made of different materials and sizes for various industrial sectors.

It began its activity cutting all types of parts, mainly for the subcontracting market in sectors such as aerospace, machine tools, special machinery for food, rail and tooling for automotive. "Mainly for the cutting and machining of all those moving parts of dies and moulds, and so on," the manager explains.

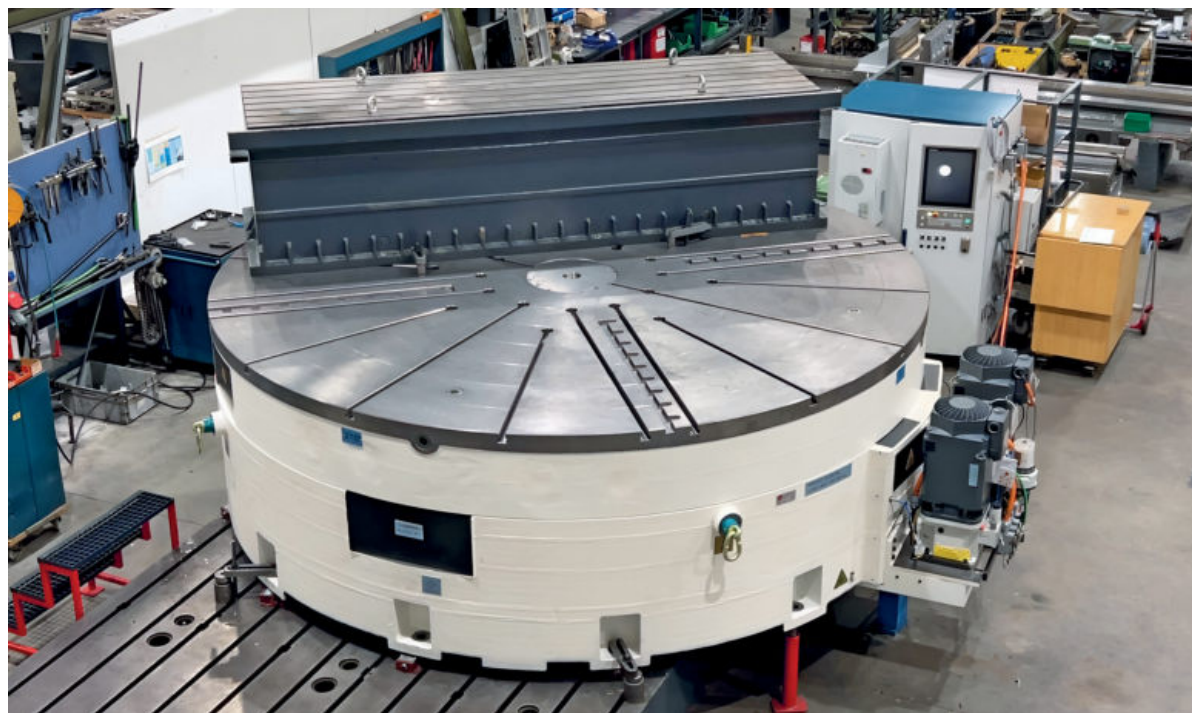
In 1998, IAMCUT was created to offer customers the cutting of all types of material, metallic or otherwise, through waterjet cutting services. Through its experience and latest-generation production resources, provides a high-quality cutting and does so with the best delivery time.

In 2015, the company incorporated micro waterjet cutting into its processes in order to respond to customers' growing need for high-precision, highly complex and smaller-dimensional parts, in low thicknesses and in all types of materials. It works for sectors including aerospace, nuclear equipment, rail, medicine, automotive, construction, machine tools, packaging machinery and renewables.

INDUSTRY ECOSYSTEM | INDEXING TABLES

ZEATZ ENTERS THE PRECISION ELITE

THE COMPANY MANUFACTURES SIX-METRE-DIAMETER ROTARY TABLES AND INDEXING TABLES FOR MACHINING PARTS FOR THE US AEROSPACE SECTOR



Four-metre-diameter indexer.

Zeatz, a manufacturer of indexing tables and rotary tables, is consolidating its position as a supplier to the US aerospace sector with the production of several four- and six-metre-diameter rotary indexers, which will be integrated into machines used to machine parts for this industry.

The Icíar-based company is one of the few firms supplying milling or turning indexers for this highly demanding market. The latest units manufactured offered load capacities of 150 tonnes.

Despite current trade uncertainties, the company will continue to invest strongly in the North American market because, as it says, “it brings us closer to projects of great technological interest and growth as a company”.

In line with its trajectory in recent years, Zeatz is strengthening its position in a strategic sector where new technologies allow it to achieve the highest levels of precision and performance, both for mi-

lling applications and for milling-turning applications.

Among the units delivered by the company over the past year, one particularly noteworthy example is a three-axis tilting indexer, with linear movement and rotation, and a palletising system with 3000x1500 pallets, offering tilting and rotary capacity of 15 tonnes. This high-precision indexer model, which will allow the end customer to double production, is one of the most complex projects carried out by the company to date.

High precision

It should be noted that few indexer manufacturers have completed projects of such high complexity to date.

For their part, both the four-metre-diameter indexer and the six-metre unit, which the company has delivered in recent months to the US industry, feature the Twin Drive rotation system, which ensures high precision in rotation and posi-

tioning for perfect machining. These are major projects in which the precision and quality of machining processes are preserved in every detail.

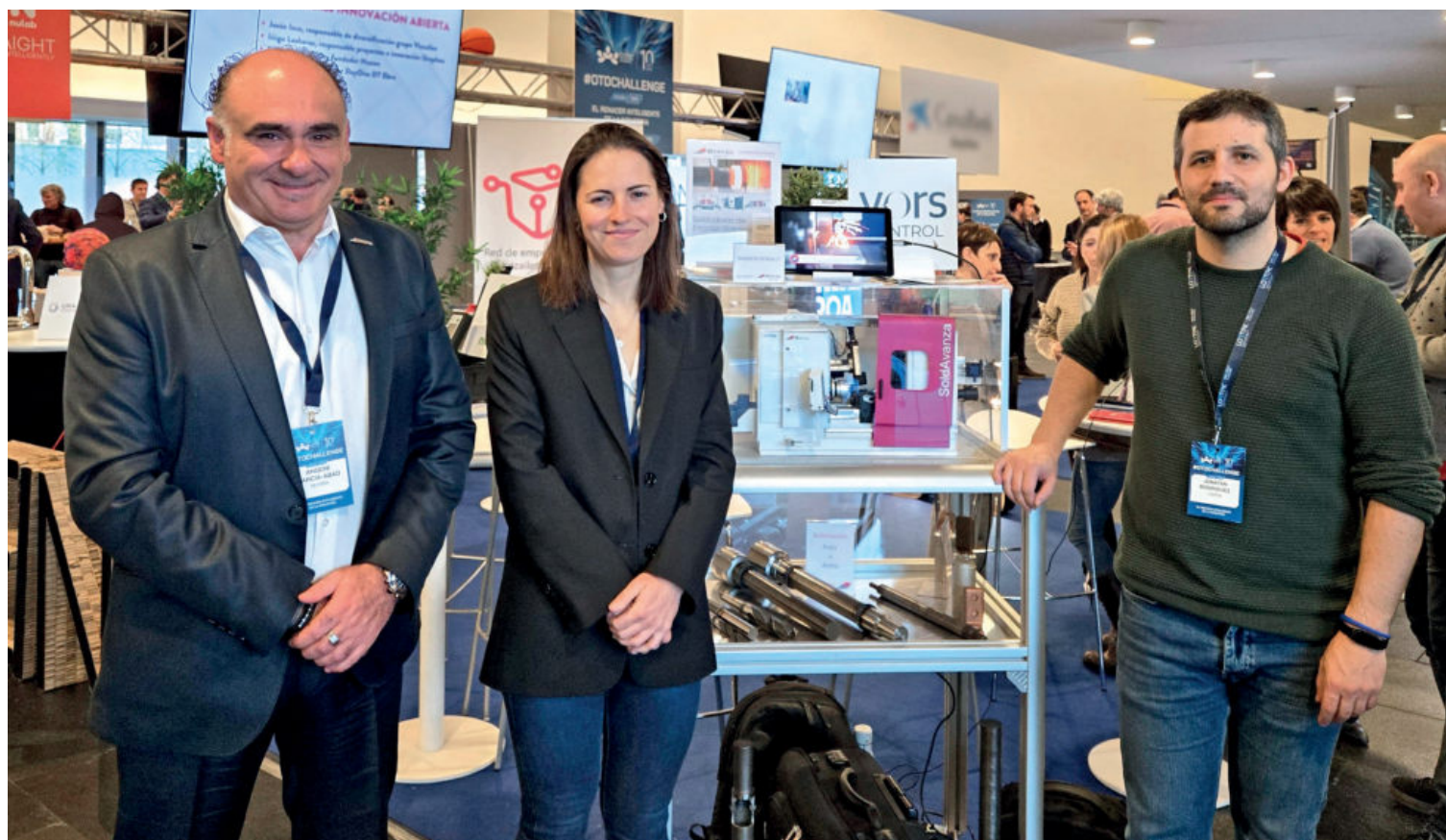
Zeatz's main customers include the leading Spanish machine tool manufacturers, with whom it has forged “a relationship of mutual trust in which the strategy shared by both parties is win-win”, the company explains.

To carry out all these projects, Zeatz has its own engineering department, allowing it to collaborate with customers on cutting-edge Research, development and innovation projects. From its origins in Eibar, manufacturing universal indexers and all types of accessories for milling machines, Zeatz has always relied on quality local suppliers, “which en-

ables joint growth and strengthens an industrial sector that is so necessary and important for sustainable development”.

This year, the company has become the official distributor of SAV clamping systems. This German manufacturer of electromechanical clamping systems and complete clamping systems rounds out Zeatz's product range. “With this new collaboration, we are giving fresh momentum to our slogan ‘Fitting your projects’, offering tailor-made projects and providing comprehensive solutions,” the company says.

THEY ARE ONE OF THE FEW COMPANIES SUPPLYING MILLING OR TURNING INDEXERS



Presentation of the SoldAvanza machine.

INDUSTRY ECOSYSTEM | MT

BERKOA MODELS WELDING

THE COMPANY HAS DEVELOPED A DIGITAL TWIN THAT SIMULATES THE SYSTEM'S BEHAVIOUR

Berkoa Machine Tools has developed, in collaboration with the Basque technology centre Lortek and the university spin-off Vors Control, a digital twin that positions the SoldAvanza test bench as a benchmark in the development of rotary friction welding machines in Spain.

SoldAvanza stands out for its ability to adapt to a wide range of industrial applications, reaching up to 20 tonnes of thrust at 3,000 rpm and up to 60 tonnes at 1,500 rpm. This versatility covers a broad spectrum of applications, although it also entails te-

chnical challenges that have been addressed through advanced modelling of the welding process.

As it is a machine designed for the production of prototypes and short series, it faces a wide variety of shapes and materials in the parts it has to weld, which poses a challenge when manufacturing parts close to the machine's capacity limits. According to its promoters, achieving good results at these limits requires an adjustment in thrust-force control. And this is where model-based control comes into play. A modelling project was proposed to

serve as a tool to better understand the dynamics of the process and optimise process control in order to ensure the level of quality required in sectors such as automotive, machine tools and power generation.

The central axis on which the project has been developed is the BLSC 4.0 controller, designed together with Lortek. This modular control system makes it possible to record and analyse multiple process parameters in real time, facilitating the implementation of the digital twin: a virtual, physics-based model that accurately simulates the real behaviour of the machine.

The spin-off Vors Control has contributed its experience in implementing control models in real environments such as power generation and industry.



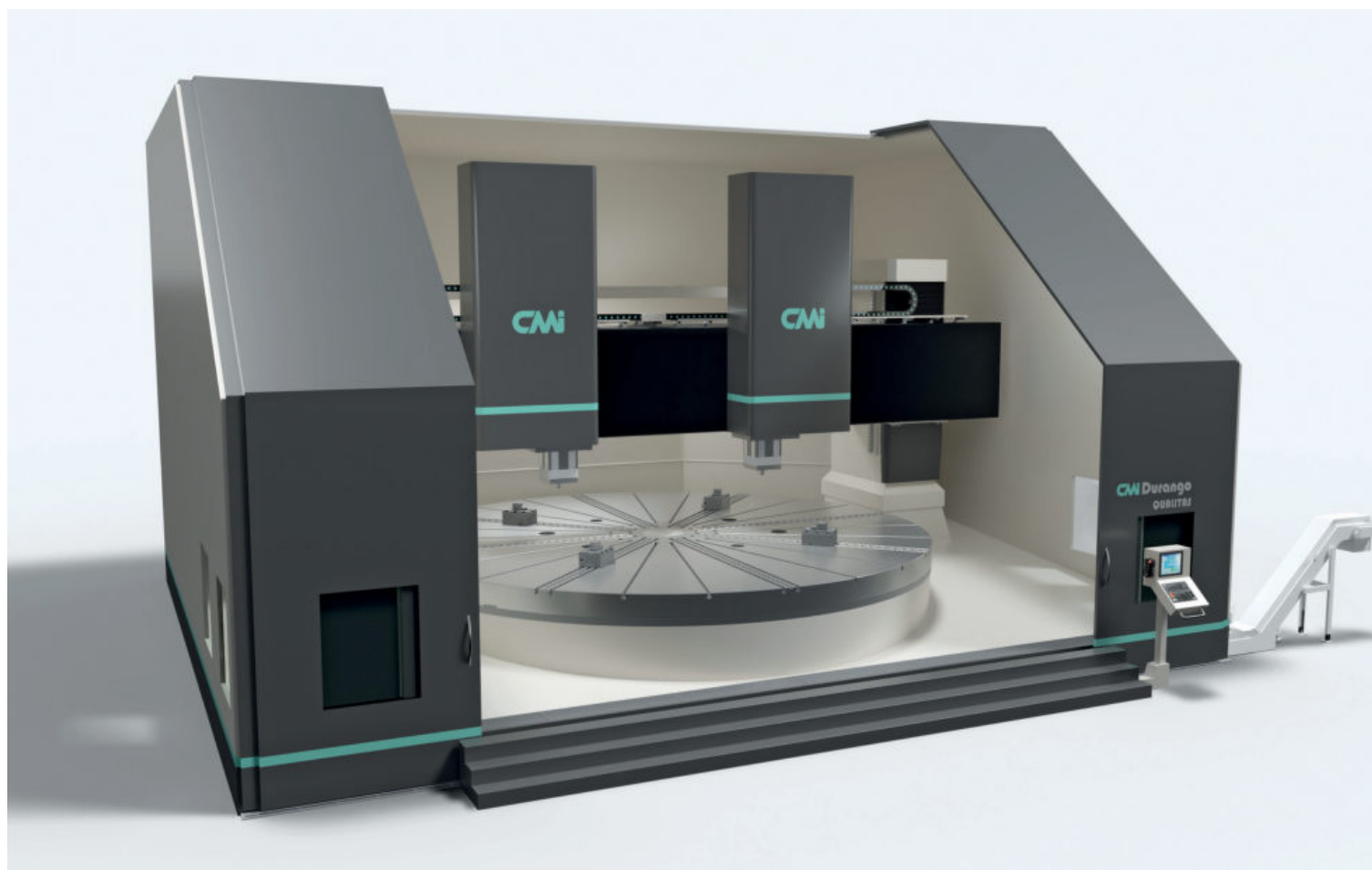


Image of one of the multifunction vertical lathes manufactured by CMI.

INDUSTRY ECOSYSTEM | LATHES

CMI DURANGO MACHINES THE FUTURE

THE MANUFACTURER OF VERTICAL LATHES FOR LARGE PARTS
INCORPORATES THE LATEST TECHNOLOGIES TO ADAPT TO THE SCALE
OF ITS PROJECTS

CMI Durango, a machine tool manufacturer with more than 80 years of history, is moving forward by incorporating into its machines the latest technologies on the market, such as automation, Industry 4.0 and Artificial Intelligence applied to manufacturing.

With its new lathes, the company aims to position itself at the forefront of machinery manufacturing for machining medium and large-sized parts, such as structural components for cars, trains, wind turbines and ships. In this

highly demanding environment, CMI's lathes seek to offer customers the best solution through a design tailored to their needs. The machine is customised through the design and manufacture of some of its components and the incorporation of commercial elements from other manufacturers needed to achieve exceptional performance.

CMI Durango's vertical and multi-function lathes make it possible not only to turn, but also to carry out other types of machining such as milling,

grinding and drilling. They specialise in machining complex parts manufactured in short series.

Precision and Productivity

Through advances such as bridge mobility, which increases precision by bringing the tool closer to the machining area in smaller components; the probe, which reports the exact position of the part for machine alignment; and computer-aided design and manufacturing systems, the machines offer extraordinary precision and versatility in the manufacture of critical parts. To this they add leading figures in speed, at around 30 metres of feed per minute, and machining power of up to 260 kW, which translate into high productivity.

In the automotive sector, CMI counts OEM and Tier 1 manufacturers among its customers. It also works for the rail and energy sectors, supplying the latter with machines for manufacturing the large components of wind turbines.

In addition to manufacturing lathes, CMI Durango carries out retrofitting, or upgrading, of any type of machine, such as vertical lathes and bridge milling machines, and offers a machining service for customers with two bridge milling machines.

INDUSTRY ECOSYSTEM | CUTTING TOOLS

IZAR SETS COURSE FOR ANOTHER YEAR OF EXPANSION

THE COMPANY WILL STRENGTHEN ITS CARBIDE TOOLS BUSINESS, IN LINE WITH ITS TARGET OF REACHING €50 MILLION IN TURNOVER BY THE END OF ITS STRATEGIC PLAN IN 2026, WITH ANNUAL INVESTMENT OF €2 MILLION

Izar Cutting Tools is moving steadily forward in the development of its 2023-2026 strategic plan, at the end of which it has set the target of reaching 50 million in turnover, improving the expectations established at the start of the plan. As the new managing director of the Bizkaia-based company, Aitor Navarro, told Empresa XXI, “our aim is to achieve a diversified distribution of our sales by country and customer, gaining greater penetration in industry with our carbide tool range, which is the business line that has seen the strongest growth in recent years”.

The cutting tool manufacturer closed 2024 with record turnover, comfortably breaking through the 40 million barrier and marking an 8% increase in overall sales compared with the previous year. Along these lines, the 2025 financial year will be confirmed as the fifth consecutive year of growth, “for which we have pressed the accelerator to meet our targets by the end of that year”.

The current strategic plan defines its core lines as growth, both in Spain and internationally, among carbide-tool customers; the expansion of the customer base globally in general and, more specifically, in certain countries with greater growth potential. In addition, the company has set out to increase levels of service and customer care, as well as improve internal productivity through greater automation and process improvement.

With this objective, Izar maintains its commitment to continuing

to reinvest in the production and logistics facilities of its Boroa factory, in order to achieve greater productivity and improve response capacity and speed. Along these lines, the investment plan maintains an annual injection of around 2 million for the incorporation of

new machinery and equipment across the different business lines.

Izar has a high degree of internationalisation, with a presence in 90 countries, and maintains a roadmap aimed at finding “new niches for improvement”. Izar’s strategic markets are North America, Central

Europe and Great Britain, as well as some countries in South America, where it aims to intensify its presence. To this end, it plans to reach agreements with strategic distributor partners, in some cases establishing consignment stock, to provide a rapid response to new markets.

R&D Activity

Izar’s innovation activity seeks to improve performance, precision, versatility and specialisation targets for each job and material. In the field of materials, for example, the company is currently testing different alloys and also new coatings in order to continue improving tool efficiency.



Aitor Navarro joined Izar as Managing Director in March 2025.

IZAR CUTTING TOOLS

REPORT | SECTORAL RANKING IN SPAIN

THE SECTOR GAINS TRACTION

EMPRESA XXI'S SECTOR REPORT SHOWS A 4% YEAR-ON-YEAR INCREASE IN SALES IN 2024, DRIVEN BY THE DYNAMISM OF LARGE COMPANIES SUCH AS FAGOR ARRASATE AND ETXE TAR

The machine tool sector gained traction again in 2024. The sector report prepared by Empresa XXI from a sample of more than 700 companies, covering manufacturers of machines as well as components, software, tools and companies associated with AFM, confirms a double advance: the sector once again raised the turnover bar compared with previous years, with a generalised increase in sales across all company segments.

As a whole, companies increased their turnover from 3.289 billion in 2023 to 3.410 billion in 2024, representing a year-on-year rise of 4% and cumulative growth of 14% compared with 2019.

Large companies, with turnover of more than 50 million, reinforced their role as the sector's main engine, reaching global sales of 1.4969 billion in 2024, 5 percent more than the previous year.

The Drive from Mid-Sized Companies

Mid-sized companies, with turnover of between 10 million and 49.9 million, also acted as a lever. Their sales increased by 5 percent in the 2023-2024 period, reaching total turnover of 1.0377 billion, while small companies, with turnover of between 2 million and 9.99 million, also improved their results, albeit at a more moderate pace. In this case, sales rose from 870.7 million to 875.6 million, an increase of 0.6 percent.

The Basque Country remains the main hub of activity, with aggregate turnover of 1.7778 billion, equivalent to 52% of the national total, with clear leadership from Gipuzkoa-based companies. They account for 39% of national sales, followed by companies from Bizkaia, with

GIPUZKOA LEADS SECTOR SALES WITH A 39% SHARE

THE SECTOR RETURNS TO PRE-COVID SALES LEVELS

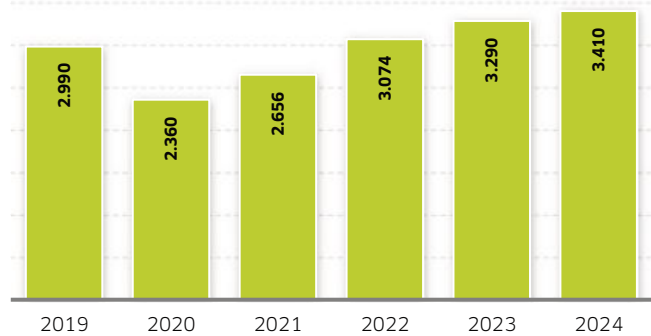
Empresa XXI's report shows a broad-based rise in revenue in 2024, although large companies were the most dynamic, growing at an annual rate of 5%.

	2024			%24/23			%24/19			2019		
	Nº	SALES	SHARE	Nº	SALES	%SALES	Nº	SALES	%SALES	Nº	SALES	SHARE
Big	15	1,496.88	44%	-1	+67.39	+5%	+1	+324.13	+28%	14	1,172.75	39%
SMES (< 50 mill.)	615	1,913.32	56%	-13	+53.20	+3%	-83	+96.07	+5%	698	1,817.26	61%
50- 10 mill.	45	1,037.72	30%	-1	+48.08	+5%	-4	+54.47	+6%	49	983.24	33%
< 10 mill.	570	875.61	26%	-12	+5.12	+1%	-79	+41.60	+5%	649	834.01	28%
Without activity	96	-	-	+14	-	-	+82	-	-	14	-	-
TOTAL	630	3,410.21	100%	-14	+120.59	+4%	-82	+420.20	+14%	712	2,990.00	100%

Figures in million euros. Source: Registros Mercantiles. Development: Empresa XXI.

FIVE YEARS OF CONTINUOUS GROWTH

Sector sales have not stopped growing over the past five years, reaching €3.410 billion in 2024.



Figures in billion euros. Source: Registros Mercantiles. Development: Empresa XXI.

8%, and Álava, with 4%. In the second tier is Catalonia, with an 18% share, while the sector map is completed by Castilla and Leon, with 8%, Navarre, with 6%, the Valencian Community, with 5%, and La Rioja, with 3%.

The ranking of companies by sales volume confirms Gipuzkoa's leadership, with nine companies among the top twenty. The cooperatives Fagor Arrasate, Danobat

and Soralue, all part of Mondragon Corporation, lead the ranking, while the top ten is completed by the cooperative Etxe Tar, which climbs to seventh position after growing its sales by 17% between 2023 and 2024, and Biele, which rises to eighth place with turnover of 94.8 million, up 17%.

The leading companies in Bizkaia and Álava advanced at a slower pace. CMZ, with turnover of 78.9 million, reduced its sales by 13 percent in 2024 compared with the previous year, while Zayer posted a 10% decline.

A SECTOR WITH A BASQUE ACCENT

Gipuzkoa-based companies maintain their weight in Spain, accounting for 39% of turnover.

COMMUNITY	2024	SHARE	WORKFORCE
Basque Country	1,778	52%	6,208
Gipuzkoa	1,345	39%	4,218
Bizkaia	287	8%	1,230
Araba	146	4%	760
Catalonia	610	18%	2,740
Castilla and Leon	267	8%	780
Navarre	220	6%	938
Valencian Community	163	5%	1,141
La Rioja	106	3%	337
Asturias	66	2%	255
Castilla - La Mancha	46	1%	161
Aragón	43	1%	285
Andalucía	30	1%	248
Galicia	30	1%	223
Madrid	23	1%	180
Murcia	19	1%	106
Extremadura	5	0%	37
Cantabria	3	0%	17
Balearic Islands	1	0%	10
Canary Islands	1	0%	11
TOTAL	3,410		13,677

Figures in million euros. Source: Registros Mercantiles. Development: Empresa XXI.

MANUFACTURERS OF METALWORKING MACHINE TOOLS, TOOLS AND COMPONENTS IN SPAIN 2024

The ranking of companies related to metalworking machine tools includes a selection of companies carried out by Empresa XXI under CNAE codes 2841, 2849, 2891 and 2899, mainly machinery manufacturers, process automation companies, tool and component manufacturers, and also includes companies associated with AFM.

RK	COMPANY	PROVINCE	YEAR FOUNDED	SALES							Result.	Workf.	Web
				2024	%24/23	%24/19	2023	2022	2021	2020			
1	FAGOR ARRASATE SC	Gipuzkoa	1957	n.a.	-	-	209.97	204.76	134.16	138.68	8.13	561	www.fagorarrasate.com
2	DANOBAT SC	Gipuzkoa	1966	149.16	+22%	+37%	122.23	104.32	92.19	94.75	15.62	422	www.danobat.com
3	M TORRES DISEÑOS INDUSTRIALES SAU	Navarra	1975	126.19	+70%	+20%	74.16	69.87	57.82	76.10	7.60	418	www.mtorres.es
4	NICOLAS CORREA SA	Burgos	1948	115.17	+12%	+110%	103.17	73.50	60.92	53.82	11.84	239	www.nicolascorrea.com
5	SORALUCE SC	Gipuzkoa	1962	n.a.	-	-	n.a.	105.34	81.62	59.11	6.04	271	www.soraluce.com
6	RUBI TOOLS GROUP SA	Barcelona	1969	98.07	-1%	+32%	98.99	107.37	112.91	81.61	10.61	305	www.rubitoolsgroup.cat
7	ETXE TAR SA	Gipuzkoa	1966	95.94	+67%	+82%	57.28	44.05	57.25	57.20	12.97	148	www.etxetar.com
8	BIELE SA	Gipuzkoa	1982	94.88	+17%	+88%	81.43	71.89	52.10	35.47	1.87	263	www.biele.com
9	HYPERION MAT. & TECH. SPAIN SLU	Barcelona	2017	94.52	+2%	+13%	93.02	88.70	85.75	74.32	1.73	384	www.hyperionmt.com
10	NIDEC ARISA SL	La Rioja	2015	n.a.	-	-	81.02	59.61	51.23	42.62	2.94	232	www.arisa.com
11	CMZ MACHINE TOOL MANUFACTURER SL	Bizkaia	2014	78.91	-13%	+23%	90.91	80.57	71.42	39.91	7.10	64	www.cmz.com
12	SARRALLE STEEL MELTING PLANT SL	Gipuzkoa	2002	69.09	-14%	-	80.35	90.87	114.20	60.56	5.87	58	www.sarralle.com
13	SAMOA INDUSTRIAL SA	Asturias	1962	65.06	+2%	+39%	64.07	58.35	50.24	38.43	7.56	246	www.samoaindustrial.com
14	SERRA SOLDADURA SAU	Barcelona	1972	n.a.	-	-	60.95	63.89	41.10	43.07	2.74	139	www.serrasold.com
15	LOIRE SA FRANCO ESPAÑOLA	Gipuzkoa	1962	n.a.	-	-	52.60	54.02	33.95	46.92	-10.46	147	www.loiregestamp.com
16	ZAYER SA	Araba	1957	48.64	-10%	+25%	54.00	46.74	42.04	20.05	3.86	132	www.zayer.com
17	TECOI CORTE SL	León	2003	n.a.	-	-	46.84	40.35	24.77	26.63	1.43	98	www.tecoi.com
18	IBARMIA INNOVATEK SL	Gipuzkoa	2006	42.74	+5%	+3%	40.75	40.66	33.49	27.54	1.75	111	www.ibarmia.com
19	MONDRAGON ASSEMBLY SC	Gipuzkoa	1988	n.a.	-	-	40.39	37.83	26.73	23.12	4.63	183	www.mondragon-assembly.com
20	IZAR CUTTING TOOLS SAL	Bizkaia	1997	40.19	+7%	+35%	37.40	35.03	33.86	28.61	2.98	202	www.izartool.com
21	TECNOLOGIA DE CORTE E INGENIERIA SL	Valencia	2001	38.69	+2%	+15%	38.02	38.95	33.54	22.61	1.27	221	www.tci-cutting.com
22	SIDASA ENGINEERING SL	Barcelona	2013	38.68	+4%	+67%	37.05	25.05	21.87	18.07	0.79	41	www.sidasacom
23	AIRTFICIAL INTELLIGENT ROBOTS SAU	Barcelona	1998	n.a.	-	-	36.76	39.57	30.87	31.75	-0.96	95	www.airtficial.com
24	GIA SL	Albacete	1990	36.65	+20%	+157%	30.63	33.51	24.03	15.32	3.40	93	www.giaet.com
25	INGEMAT SL	Bizkaia	2010	35.27	+60%	+48%	22.10	24.89	24.77	25.78	1.81	101	www.ingemat.com
26	ATHADER SL	Gipuzkoa	1992	35.11	-3%	+131%	36.18	25.96	17.42	17.71	2.59	48	www.athader.com
27	INDUSTRIAL MATRICERA PALENTINA SLU	Palencia	1989	33.58	+11%	-7%	30.39	29.38	25.61	20.91	0.88	163	www.inmapa.com
28	GEMINIS LATHES SA	Gipuzkoa	1994	31.58	+8%	+74%	29.23	25.43	18.50	21.72	1.88	79	www.geminislathes.com
29	GH ELECTROTHERMIA SA	Valencia	1999	n.a.	-	-	27.51	25.35	23.17	18.52	37.03	131	www.ghinduction.com
30	JUARISTI BORING & MILLING MACH. SLU	Gipuzkoa	1994	n.a.	-	-	27.41	27.08	24.36	23.76	1.17	99	www.juaristi.com
31	GURUTZPE TURNING SOLUTIONS SL	Gipuzkoa	2012	25.77	+20%	+133%	21.40	21.45	13.63	13.03	2.32	71	www.gurutzpe.com
32	MTE-MACHINE TOOL ENGINEERING SA	Gipuzkoa	1994	n.a.	-	-	24.80	22.79	16.68	17.26	0.73	45	www.mtemachine.com
33	BOST MACHINE TOOLS COMPANY SLU	Gipuzkoa	2012	24.60	+10%	-7%	22.39	22.54	22.35	20.96	0.44	66	www.bost.es
34	FLUITECNIA SA	Navarra	1990	24.43	+19%	+41%	20.49	17.05	14.41	16.33	1.44	120	www.fluitecnia.com
35	MARRODAN Y REZOLA SAU	La Rioja	1929	n.a.	-	-	22.44	20.11	14.51	9.29	1.83	79	www.marzola.es
36	MECANICA VILARO SL	Barcelona	1991	n.a.	-	-	21.18	18.84	12.34	10.16	2.54	98	www.mecvil.com
37	CONSTR. MECANICAS JOSE LAZPIUR SLU	Gipuzkoa	1983	20.87	-5%	+14%	22.05	15.72	18.11	13.84	0.58	103	www.lazpiur.com
38	HYPATIA GNC ACCESORIOS SA	Burgos	1997	20.20	-11%	+7%	22.72	24.05	18.37	14.26	1.62	46	www.gnchypatia.com
39	GAINDU SL	Gipuzkoa	2009	20.09	+0%	+2%	20.02	10.55	10.41	11.57	4.23	45	www.gaindu.com
40	SHUTON SLU	Araba	1975	n.a.	-	-	19.67	15.26	11.91	7.80	1.98	104	www.shuton.com
41	ONA ELECTROEROSION SA	Bizkaia	1980	18.93	-34%	-29%	28.87	27.32	26.72	18.72	-2.18	111	www.onaedm.com
42	LANTEK SHEET METAL SOLUTIONS SLU	Araba	2006	n.a.	-	-	16.46	14.58	n.a.	10.97	2.01	146	www.lantek.com
43	METROLEC SLU	Valladolid	2006	16.12	+3%	+25%	15.71	12.68	11.23	10.50	1.80	59	www.metrolec.es
44	PUNTEADOS DE PRECISION GOI ALDE SL	Gipuzkoa	1982	14.87	-7%	+9%	15.92	14.55	12.06	10.19	0.11	108	www.goialde.com
45	TROKEL SA	Navarra	1982	14.12	+6%	+3%	13.36	13.03	10.34	12.14	1.30	43	www.trokelsa.com
46	MAQUINARIA GEKA SL	Gipuzkoa	2019	13.61	-1%	+29%	13.78	12.70	11.24	8.39	0.67	74	www.geka-group.com
47	TUOMAS SL	Teruel	2010	13.54	-12%	+32%	15.36	11.22	10.43	8.35	0.53	94	www.tuomas.com
48	DISEÑO MECANICA Y CONSTRUCCION SA	Gipuzkoa	1987	13.28	+14%	-0%	11.64	10.60	9.74	6.41	1.24	52	www.dimeco.com
49	LAGUN MACHINE TOOLS SL	Gipuzkoa	2016	13.00	+8%	+26%	12.08	11.39	10.58	8.81	0.23	37	www.lagunmt.com
50	INDUSTRIAS PUIGJANER SA	Barcelona	1972	12.17	-0%	+18%	12.22	9.46	10.60	8.89	0.52	59	www.denn.es
51	AITEKAUTOMATION SL	Gipuzkoa	1997	n.a.	-	-	n.a.	11.84	10.94	9.85	0.41	98	www.aitek.es
52	VIRUTEX SA	Barcelona	1975	11.66	-6%	+14%	12.36	12.19	11.98	9.32	-0.71	94	www.virutex.es
53	COUTH INDUS. MARKING SYSTEMS SL	Gipuzkoa	1963	n.a.	-	-	11.12	10.23	10.40	8.33	2.39	37	www.couth.com
54	DISTEVI SL	Pontevedra	2004	n.a.	-	-	11.00	7.74	7.23	7.25	1.64	71	www.distevi.com
55	COMERCIAL MAQUINARIA ALCIRA SL	Valencia	1991	10.52	-31%	-2%	15.23	15.24	10.28	8.60	0.52	42	www.cmamachines.com

MANUFACTURERS OF METALWORKING MACHINE TOOLS. TOOLS AND COMPONENTS IN SPAIN 2024

RK	COMPANY	PROVINCE	YEAR FOUND.	SALES							Result.	Workf.	Web
				2024	%24/23	%24/19	2023	2022	2021	2020			
56	INGENIERIA DE APLICACIONES SA	Barcelona	1986	n.a.	-	-	10.48	6.45	5.75	5.68	0.11	25	www.idasa.com
57	DIPER MAQUINARIA SL	Navarra	1994	10.37	+72%	+106%	6.04	7.57	4.78	4.79	1.42	41	www.diper.net
58	NUEVA HERRAMIENTA DE CORTE SA	Bizkaia	1994	10.26	-8%	+6%	11.16	9.95	9.71	7.80	-2.52	87	www.neco.es
59	PRODEC EQUIPOS DE ENVASADO SA	Barcelona	1981	n.a.	-	-	10.14	10.33	10.98	13.88	-0.05	35	www.xolertic.es
60	SISTEMAS EN MARCHA SL	Castellón	1993	n.a.	-	-	10.13	13.78	22.96	12.72	1.50	54	www.semsl.es
61	HIDROEUROPA SL	Murcia	1993	9.96	-19%	-13%	12.26	13.32	9.06	10.21	1.52	33	www.hidroeuropa.com
62	LEMAR-LEBEN GROUP SL	Valencia	1975	9.90	+36%	+32%	7.29	7.40	7.35	5.81	1.17	66	www.tallereslemar.com
63	INDUSTRIAS HIDRAULICAS SA	Zaragoza	2011	9.71	-6%	+57%	10.38	8.33	8.23	7.18	0.94	46	www.moros.com
64	KORTA SAU	Gipuzkoa	1985	9.57	-1%	+1%	9.66	9.67	8.15	8.29	0.51	62	www.korta.com
65	FABRICACION METALES DUROS SAL	Bizkaia	1993	9.55	+3%	+22%	9.30	10.70	8.10	6.15	1.05	66	www.fmd-hm.com
66	GER MAQUINAS-HERRAMIENTA SLU	Gipuzkoa	1995	9.48	+1%	-7%	9.35	9.80	6.20	5.57	0.61	42	www.germh.com
67	ALBERDI ING. DE AUTOMATISMOS SA	Bizkaia	2010	n.a.	-	-	8.90	7.73	8.76	5.43	0.58	23	www.sidepalsa.com
68	MAQ. ELECTR. ESMERILADO Y PULIDO SA	Barcelona	1984	n.a.	-	-	8.86	7.38	7.24	6.16	0.30	44	www.mepsa.es
69	MASTED ASSEMBLY SLL	Gipuzkoa	2007	8.74	+129%	+108%	3.81	9.45	3.82	3.33	0.52	33	www.masted.net
70	IGORLE SL	Gipuzkoa	1975	8.19	+1%	+36%	8.08	7.16	5.91	3.52	0.10	32	www.smarktec.com
71	IBERMACH SPECIAL MACHINERY SL	Gipuzkoa	2009	8.11	+150%	+265%	3.25	3.53	2.49	1.68	0.61	14	www.erlogroup.com
72	METALURGICA TORRENT SA	Huesca	1962	n.a.	-	-	n.a.	8.10	n.a.	5.30	0.33	50	www.metosagroup.com
73	PRADA NARGESA SL	Girona	2004	7.89	+4%	+83%	7.59	7.94	8.07	5.85	1.44	38	www.nargesa.com
74	MASTER NAVARRA AUTOMATISMOS SL	Navarra	1986	7.69	-4%	-33%	7.99	11.95	11.99	7.93	0.66	46	www.masterautomatism.com
75	ZORROTZ LEGAZPI SLL	Gipuzkoa	2011	7.65	-5%	+12%	8.05	6.84	5.85	5.36	0.60	48	www.zorrotz.com
76	HINE SA	Gipuzkoa	1978	7.65	+18%	-83%	6.50	5.31	0.71	37.07	7.22	2	www.hinegroup.com
77	GOMETEGUI INDUSTRIAL SL	Araba	2018	7.58	-14%	+6%	8.83	14.64	9.68	3.69	-0.90	73	www.gometegui.com
78	DOIMAK SA	Gipuzkoa	1980	7.55	+71%	+103%	4.40	4.57	3.67	2.95	1.21	28	www.doimak.es
79	ELEMENTOS DE VERIF. Y CONTROL SA	Bizkaia	1969	n.a.	-	-	7.48	6.50	5.47	4.53	1.35	44	www.evec.es
80	INTZA SA	Gipuzkoa	1988	7.45	+11%	+83%	6.72	5.92	4.14	3.41	0.58	43	www.intza.com
81	LAU NIK MAQUINAS ESPECIALES SL	Bizkaia	2004	n.a.	-	-	7.44	7.96	5.58	7.41	0.11	45	www.launik.com
82	DESARR. DE SISTEMAS AVANZADOS SL	Cádiz	1994	7.40	-28%	-33%	10.31	10.30	8.24	8.63	0.09	41	www.dsagrup.com
83	TALLERES ALJU SL	Bizkaia	1959	7.34	+3%	+40%	7.14	4.74	5.45	5.90	0.13	46	www.alju.es
84	HEPYC MANUFACTURING SA	Gipuzkoa	1963	7.07	+3%	+20%	6.87	6.26	6.20	5.46	0.19	29	www.hepyc.com
85	HEROSLAM SAL	Bizkaia	1993	6.97	-	+26%	n.a.	n.a.	n.a.	4.96	0.40	53	www.heroslam.com
86	ENGRANAJES JUARISTI SL	Gipuzkoa	1978	6.95	-2%	+12%	7.11	6.95	5.70	4.79	0.86	36	www.engranajesjuaristi.com
87	TALLERES MYL SA	Gipuzkoa	1969	n.a.	-	-	6.91	7.11	5.77	5.46	0.74	33	www.myl.es
88	CONSTR. ESPAÑOLAS HERRAM. IND. SA	Barcelona	1977	n.a.	-	-	6.88	8.33	8.35	5.51	0.04	47	www.cehisa.es
89	LARGOIKO SLL	Navarra	1998	6.87	-26%	+62%	9.30	5.95	5.91	6.00	0.83	37	www.largoiko.es
90	RYME WORLDWIDE SA	Burgos	1994	6.87	+4%	+101%	6.62	5.73	4.34	3.01	0.18	31	www.ryme.com
91	ABRASIVOS MANHATTAN SA	Araba	1963	6.85	-2%	+9%	6.98	7.46	6.49	4.24	1.81	31	www.manhattanabrasives.com
92	AXIAL MAQUINARIA SL	Barcelona	1997	6.84	+21%	+17%	5.63	6.82	6.23	n.a.	0.07	41	www.aximaq.com
93	TALLERES SASPI SA	Gipuzkoa	1969	6.73	-5%	+31%	7.08	2.47	4.21	2.07	2.57	21	www.saspi.es
94	GMTK MULTI-PROCESS MACHINING SA	Gipuzkoa	2007	n.a.	-	-	n.a.	6.69	10.11	8.98	0.03	43	www.gmtk.es
95	LOXIN 2002 SL	Navarra	2000	n.a.	-	-	n.a.	6.62	5.71	5.73	-0.32	42	www.loxin2002.com
96	TDG CLAMPING SOLUTIONS SL	Bizkaia	1916	n.a.	-	-	6.55	5.56	4.59	4.96	0.19	48	www.tdgcompany.com
97	LAGUN MACHINERY SL	Araba	2004	6.44	-1%	-8%	6.54	7.17	5.32	4.65	-0.37	20	www.lagunmachinery.com
98	ALTEYCO SYSTEM SL	Gipuzkoa	2010	n.a.	-	-	6.27	5.34	6.21	3.47	0.12	40	www.alteyco.com
99	VRAIA CORP SL	Alicante	2009	6.02	+9%	+29%	5.53	4.06	4.00	3.86	0.50	47	www.vraia.com
100	VIBRANT SA	Barcelona	1971	n.a.	-	-	5.97	5.50	4.87	4.97	0.47	34	www.vibrant-rna.com
101	CARPEL MIN SL	Barcelona	1997	5.89	+16%	+18%	5.09	4.07	3.70	3.08	0.12	48	www.carpelmin.com
102	DIVIPREC SA	Bizkaia	1996	n.a.	-	-	5.87	n.a.	n.a.	3.35	0.96	27	www.diviprec.com
103	INTOREX SA	Barcelona	1982	n.a.	-	-	5.83	5.64	5.05	4.05	0.47	26	www.intorex.com
104	TALLERES RIBES CASTILLO SL	Valencia	1997	5.74	+6%	+44%	5.43	5.79	5.82	5.19	0.10	36	www.ribescastillosl.com
105	RAMIRO VILA SL	Lugo	1989	5.69	+0%	+32%	5.68	5.35	4.85	3.66	0.08	39	www.ramirovila.com
106	MAQ. PARA EL PULIDO AUTOMATICO SA	Barcelona	1980	5.68	+2%	+4%	5.57	3.21	4.47	2.25	0.12	38	www.autopulit.com
107	AGUIRREGOMEZCORTA Y MENDICUTE SA	Gipuzkoa	1948	n.a.	-	-	n.a.	5.61	4.62	5.66	0.15	47	www.agme.net
108	SOLMECTA SL	Valencia	2014	5.50	+28%	+640%	4.31	2.90	1.91	1.88	0.21	42	-
109	AMES CMA SA	Barcelona	2010	5.45	-21%	-46%	6.87	3.60	5.89	6.85	0.08	34	www.ames-sintering.com
110	CONSTRUCCIONES MEC. TINTORE SA	Barcelona	1977	5.33	+7%	-44%	4.96	4.53	4.85	6.40	0.07	46	www.cmtintore.com
111	AUTOMATIZACIONES LAMUCE SL	Navarra	1987	5.23	-3%	-6%	5.41	3.30	5.46	4.77	0.52	38	www.lamuce.com
112	NIPROMA AUTOMATISMOS SL	Madrid	2006	n.a.	-	-	5.22	4.72	4.42	3.25	0.23	36	www.niproma.com
113	INGEMOV SOLUCIONES INDUS. SLL	Palencia	2017	5.22	+15%	+148%	4.56	2.01	1.98	2.35	0.29	21	www.ingemov.es
114	SOCIEDAD INDUS. MAQ. ANDALUZA SA	Granada	1981	n.a.	-	-	5.21	5.63	6.75	4.10	0.27	36	www.simasa.es
115	TECNOSPIRO MACHINE TOOL SL	Barcelona	2008	n.a.	-	-	5.19	4.80	4.54	3.33	0.25	30	www.tecnospiromt.com

MANUFACTURERS OF METALWORKING MACHINE TOOLS, TOOLS AND COMPONENTS IN SPAIN 2024

RK	COMPANY	PROVINCE	YEAR FOUND.	SALES							Result.	Workf.	Web
				2024	%24/23	%24/19	2023	2022	2021	2020			
116	TALENS SYSTEMS SLU	Gipuzkoa	2015	5.16	+29%	-5%	4.01	6.22	6.36	7.71	0.73	20	www.talenssys.com
117	UTILLAJES Y MAQUINAS ESPECIALES SA	Araba	1984	n.a.	-	-	4.92	4.77	4.27	4.08	1.40	28	www.utimesa.com
118	COMETEL SA	Gipuzkoa	1987	n.a.	-	-	4.89	3.56	3.75	3.24	0.17	28	www.cometel.net
119	CMI AERONAUTICA SL	Bizkaia	1993	4.89	-13%	-11%	5.65	3.33	4.15	3.50	0.11	31	www.cmdurango.com
120	JRG DISEÑO Y CONSTR. SIST. AUTOM. SL	Gipuzkoa	2001	4.84	+9%	+28%	4.46	3.58	2.98	2.92	0.37	29	www.jrgdiseno.com
121	DEMAQ GALICIA SL	Lugo	2005	4.66	+20%	+40%	3.89	3.42	2.47	3.08	0.15	37	www.demaq.com
122	GRANI-ROC SA	León	1993	n.a.	-	-	4.64	5.05	3.00	3.31	0.45	12	www.grupohedisa.com
123	LLAMBRICH PRECISION SL	Barcelona	1957	n.a.	-	-	4.57	4.45	4.21	4.11	0.22	41	www.llambrich.com
124	NIASA NEFF Y ASOCIADOS SA	Gipuzkoa	1984	n.a.	-	-	4.50	3.92	4.20	4.53	0.03	35	www.niasa.es
125	BILDU LAN MAQ. ESPECIAL Y AUTOM. SLL	Navarra	1973	4.48	-3%	-20%	4.61	6.37	5.39	4.25	0.23	39	www.bildulan.com
126	TALLERES J BOCANEGRA E HIJOS SL	Burgos	1992	4.41	-7%	-5%	4.74	3.84	6.10	4.23	0.47	24	www.tbocanegra.es
127	TECNICAS IDE SL	Barcelona	2011	n.a.	-	-	n.a.	4.36	2.03	2.86	0.19	17	www.tecnicaside.com
128	JOVI AUTOMATISMOS SL	Gipuzkoa	2002	n.a.	-	-	4.32	3.35	2.52	1.84	0.23	24	www.joviatomatismos.com
129	IRUMA DISEÑO Y PROYECTOS IND. SL	Gipuzkoa	2013	4.27	-10%	+35%	4.74	4.40	3.64	2.99	0.09	26	www.iruma.es
130	B Y M INGENIEROS SL	Valencia	1992	4.21	-6%	+48%	4.46	n.a.	2.62	2.96	0.19	30	www.bym-ingenieros.com
131	ERLO TALADROS Y ROSCADORAS SL	Gipuzkoa	2009	4.10	-7%	-9%	4.40	4.86	3.84	4.31	0.01	26	www.erlogroup.com
132	INDUSTRIAS PEÑALVER SL	Murcia	1988	4.02	-26%	-26%	5.45	5.16	3.68	5.44	-0.28	23	www.penalver.com
133	CONSTR. MECANICAS F ZUMARRAGA SA	Bizkaia	1967	3.99	-10%	+10%	4.46	4.49	4.45	2.39	0.29	44	www.cmz.com
134	DAMATIC AUTOMATIZACION SL	Barcelona	2011	3.98	+9%	+20%	3.64	3.46	3.32	2.98	0.26	15	www.damatic.es
135	OXISER SL	Salamanca	1988	n.a.	-	-	3.90	2.26	2.01	2.06	0.49	13	www.oxyser.com
136	SEUNER FABRICADOS SL	Bizkaia	2014	3.81	-18%	+15%	4.64	3.59	3.02	2.19	0.29	41	www.cmz.com
137	TALLERES TAMACE SL	Castellón	1987	3.79	+9%	+32%	3.49	3.90	3.51	2.86	0.17	48	www.tamace.es
138	CASTELLANOS Y ECHEVARRIA VITORIA SA	Araba	2002	3.78	+8%	+41%	3.50	3.10	2.37	2.62	0.61	20	www.cevisa.es
139	BAUTERMIC SA	Barcelona	1979	3.77	-16%	+9%	4.48	4.56	2.84	1.89	0.56	17	www.bautermic.com
140	TPR ENGINEERING SL	Barcelona	2015	3.77	+3%	+260%	3.66	2.35	2.05	1.77	0.23	20	www.tpr-engineering.com
141	MEC. DE PRECISION JOSE MADAULA SA	Barcelona	1978	n.a.	-	-	3.76	3.40	3.10	2.67	0.29	36	www.madaula.com
142	FAT SOLUCIONES DE CORTE SL	Barcelona	2017	3.61	+14%	+20%	3.16	3.57	n.a.	2.30	0.08	10	www.fat.es
143	PEGAMO INDUSTRIAL DIVISION SL	Gipuzkoa	2009	3.51	-5%	+49%	3.69	3.12	1.59	2.64	0.40	18	www.pegamo.es
144	TALLERES MECANICOS RICMA SL	Castellón	1992	3.51	+77%	+209%	1.98	1.97	2.48	1.81	0.10	21	www.talleresricma.es
145	MECANIZADO VIRTUAL SL	Sevilla	2003	3.50	+4%	+18%	3.37	2.66	2.76	2.75	0.76	25	www.mecanizadovirtual.com
146	TALLERES DE PRECISION GAI SL	Bizkaia	1991	3.47	+4%	+16%	3.34	2.78	2.52	2.06	0.78	21	www.sikulan.com
147	GENERAL INDUSTRIAL IBERICA SL	Bizkaia	1967	3.44	-27%	-1%	4.69	2.13	2.62	3.29	0.22	9	www.geinsa.com
148	STARG BAGES SL	Barcelona	1998	3.43	-3%	+6%	3.55	2.83	2.45	2.22	0.02	29	-
149	DIMEC DISEÑO SL	Araba	2006	3.43	+8%	+99%	3.18	0.69	0.61	0.94	0.07	7	www.dmcindustrial.com
150	GLOBAL ENGINEERING INCO SL	Barcelona	1991	3.42	>999%	-2%	0.25	1.19	1.02	0.83	0.03	8	www.sa-inco.com
151	HARNNETT & LINNEMAN MAQ. IND. SL	Madrid	2015	3.38	-33%	+507%	5.06	3.65	1.24	0.37	0.27	5	www.linnerman.es
152	AUTOMATISMOS RIJAT SL	Barcelona	1994	3.34	+26%	+19%	2.66	1.74	2.43	2.81	0.16	21	www.automatismosrijat.com
153	NCCM ROLL TECHNOLOGY SL	Barcelona	2017	3.24	+1%	+171%	3.22	3.22	1.30	0.89	0.20	4	www.nccmco.com
154	TRIMEK SA	Araba	1993	3.08	+4%	+1%	2.95	2.13	2.04	2.39	0.02	14	www.trimek.com
155	MEKINDU SA	Araba	1994	n.a.	-	-	3.06	2.26	2.53	1.13	0.14	19	www.mekindu.com
156	LAIP SA	Bizkaia	1969	3.05	-14%	-3%	3.57	3.59	2.94	2.19	-0.05	30	www.laip.es
157	AUTOMATISMOS MASER SA	Gipuzkoa	1988	3.04	+52%	+27%	2.00	2.45	1.63	2.27	0.10	21	www.grupo-maser.com
158	INGENERSUN SL	Bizkaia	2008	3.02	+213%	-15%	0.97	2.24	2.12	3.57	0.05	20	www.ingersun.com
159	SAYER TECHNOLOGIES SL	Navarra	2011	2.97	-33%	-39%	4.42	3.83	1.39	3.36	0.16	7	www.sayer.es
160	WORLDMAQ-3 SL	Barcelona	2011	2.87	-10%	+105%	3.19	2.60	1.91	1.48	0.14	20	www.bermaq.com
161	INREMA SL	Valencia	1993	2.83	-50%	-27%	5.68	4.63	3.16	9.75	-2.26	37	www.inrema.es
162	INDUSTRIAS MAIL SA	Gipuzkoa	1973	2.82	-5%	-4%	2.98	2.79	2.86	2.33	-0.13	25	www.industriasmail.com
163	TECNICAS DE DIVISION SL	Bizkaia	1988	2.80	-10%	-10%	3.12	3.04	2.79	2.01	0.82	9	www.tedisa-hirth.com
164	VALLE PERFILADORAS Y LINEAS ESP. SL	Cantabria	2008	2.78	+20%	+61%	2.31	2.90	0.40	4.95	-0.05	14	www.stam.it
165	HELLER MAQUINAS-HERRAMIENTA SL	Alicante	2002	2.71	-25%	-21%	3.63	4.57	3.62	2.17	0.08	5	www.hellermaquinaria.com
166	PEDDINGHAUS ESPAÑOLA SA	Araba	1973	n.a.	-	-	2.70	2.31	2.42	1.29	0.05	20	www.peddinghaus.com
167	MECANICA COMERCIAL MECO SL	Tarragona	1984	2.68	-4%	-10%	2.79	3.43	3.45	3.01	0.07	24	www.meco-industries.com
168	MOSNIC-IRUDEX SL	Gipuzkoa	2008	2.68	+49%	-	1.80	1.96	1.69	1.62	0.04	11	www.mosnic-irudex.com
169	REIVAX MAQUINAS SL	Girona	2007	2.60	+98%	+139%	1.31	1.30	1.05	0.36	0.51	5	www.reivaxmaquinas.com
170	FERG SL	Barcelona	1965	2.55	+6%	+10%	2.41	2.74	2.53	2.06	0.73	16	www.ferg.es
171	AUTOMATIZACION DE PRENSAS SL	Barcelona	1990	n.a.	-	-	2.53	1.68	1.34	1.04	0.01	11	www.lara-spain.com
172	QUIROS INGENIERIA Y AUTOM. SL	Jaén	2011	n.a.	-	-	2.51	1.68	n.a.	0.72	0.13	18	www.quirosingenieria.es
173	TECNIFUELLE SA	Gipuzkoa	1990	2.50	+6%	+20%	2.35	2.29	2.08	1.81	0.09	25	www.tecnifuelle.com

Figures in millions of euros. The ranking includes companies that have provided data for 2024, 2023 or 2021. If they have not provided data for 2024, the figures for 2023 or 2021 are used for the ranking. If they have not provided data for any of these three financial years, the company is not included in the ranking. Source: Registros Mercantiles. Development: Empresa XXI.

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