

INDUSTRIAL SURVEY OF THE BASQUE COUNTRY - REGIONS 2023

In 2023, the region with the highest labour productivity in the Basque Country was Cantábrica Alavesa, with 95,000 euros per person employed

Employment in the extraction and manufacturing industry increased in 15 of the 20 regions

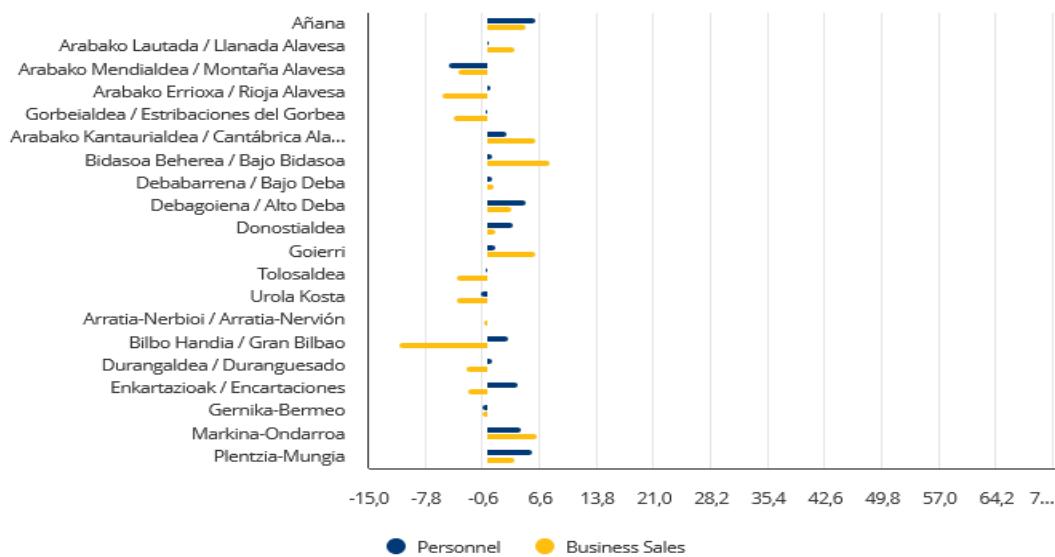
Cantábrica Alavesa, with 95,000 euros per person employed, became the region with the highest labour productivity in the Basque Country in 2023, according to Eustat data.

Apparent labour productivity is a synthetic economic indicator that measures the efficiency of a company's activity, understood as the value added generated per person employed. In 2023, the twenty regions had a wide range of labour productivity levels which, with an average of around 79,000 euros, ranged from nearly 58,000 euros in Encartaciones to 95,000 euros in Cantábrica Alavesa.

Joining Cantábrica Alavesa at the top of the ranking was another region in Álava, Rioja Alavesa, which came in second place with 88,000 euros. Third place was held by Goierri, in Gipuzkoa, with 87,000 euros. In fifth place came the first region from Bizkaia, Gran Bilbao, with productivity of 84,000 euros.

Personnel and turnover of the manufacturing and extractive industry of the Basque Country by district. 2023

Interannual variation rate



Source: Eustat. Industrial Survey

Employment in the extraction and manufacturing industry recorded positive annual growth rates in fifteen of the twenty regions of the Basque Country in 2023.

The average increase in the Basque Country was 1.8%, with the largest increases in Añana, in Álava, where it was up 6.2%, Plentzia-Mungia, in Bizkaia, where it rose by 5.7%, and Alto Deba, a region in Gipuzkoa, where employment increased by 4.9%.

At provincial level, industrial employment grew in all three provinces, albeit to varying degrees. While in Bizkaia it rose by 2.2%, in Gipuzkoa it increased by 1.9% and in Álava it was up 0.9%.

Although turnover fell by 2.5% in the Basque Country, at regional level, several regions recorded significant increases. They included Bajo Bidasoa (8.0%) in Gipuzkoa, Markina-Ondarroa (6.4%) in Bizkaia and, with the same growth rate of 6.1%, Goierri in Gipuzkoa and Cantábrica Alavesa in Álava. At the other end of the scale, it is worth noting that Gran Bilbao was the region that posted the most negative trend, with turnover falling by 11.0% between 2023 and 2022.

As regards gross value added, which is understood as the difference between the value of what is produced and that of the consumption utilised and represents the wealth generated, it rose by 5.1% in 2023, the most recent year for which there is available data, compared to the previous year.

The trend for the regions as a whole was positive, with eighteen of the twenty Basque regions registering a positive balance. As was the case with employment, Añana was the region that saw the largest increase in value added, with growth of 33.2%.

Álava

Of the three provinces in the Basque Country, Álava was where the positive effects on employment were felt the least (0.9%). Añana broke this pattern, as already mentioned, with the highest year-on-year growth in employment of 6.2%. Increases were seen in four other regions: Cantábrica Alavesa, with a rise of 2.5%; Rioja Alavesa, with growth of 0.5%; and Llanada Alavesa, the region where the provincial capital, Vitoria-Gasteiz, is located, and which accounted for 63.4% of employment in the province, with an increase of 0.4%; while in Esteribaciones del Gorbea, the employment rate remained unchanged compared to 2022. In contrast, employment in Montaña Alavesa fell by 4.7% between 2022 and 2023.

With regard to turnover, it should be pointed out that in the province of Álava it rose by 2.7% compared to the previous year, a trend marked by the region of Llanada Alavesa, where turnover was up 3.6% from the previous year. This region, where the provincial capital, Vitoria-Gasteiz, is located, accounted for 69.2% of total turnover in the province.

As for the remaining regions, only two others saw significant increases: Añana (4.9%) and, in particular, Cantábrica Alavesa (6.1%). The latter was the second largest in terms of turnover and volume of employment, accounting for 12.4% of total turnover in Álava and 13.8% of jobs. Lastly, three regions recorded a decrease in turnover, namely Rioja Alavesa, with 5.5% less turnover, Esteribaciones del Gorbea, with a drop of 4.2%, and Montaña Alavesa, where it was down 3.4%.

Gross value added for the Basque Country as a whole rose by 5.1%. The regional trend was only negative for two of the twenty regions of the Basque Country, one of which is in Álava, namely Esteribaciones del Gorbea, which saw its value added drop by 1.5%. The province of Álava as a whole recorded growth of 7% in value added, and its regions also saw a positive variation, with very significant rises in Añana (33.2%), Cantábrica Alavesa (20.3%) and Montaña Alavesa (18.1%). Increases were also seen in Llanada Alavesa and Rioja Alavesa, up 3.9% and 1.5%, respectively.

This province registered the best overall performance in terms of labour productivity, with six regions accumulating average apparent labour productivity of 84,000 euros. With 95,000 euros, not only did Cantábrica Alavesa top the ranking for the province, it also came out on top in the ranking for the Basque Country as a whole. It was followed by Rioja Alavesa (88,000 euros), Estripaciones del Gorbea (85,000 euros), Añana (83,000 euros), and Llanada Alavesa (82,000 euros), all with values above the overall average. These regions occupied five of the top eight positions in the ranking by region of the Basque Country. The only exception in this group was the region of Montaña Alavesa, which, with 60,000 euros, had one of the lowest apparent labour productivity levels in the Basque Country as a whole.

Bizkaia

In Bizkaia, the increase in employment for the province as a whole stood at 2.2% and only one of its seven regions posted a negative annual variation, namely Gernika-Bermeo, with 0.4% fewer jobs. Employment grew in the other regions; the most significant case occurred in Plentzia-Mungia, where it was up 5.7%. Next were Markina-Ondarroa, where employment rose by 4.3%, Encartaciones (3.9%), Gran Bilbao (2.7%), Duranguesado (0.7%) and Arratia-Nervión (0.2%).

With regard to the evolution of turnover, two regions set the negative trend in the province, with a total decrease of 7.9%. These were Gran Bilbao, which absorbed 67.4% of total turnover, and Duranguesado, with 19.2%, together contributing 86.6% of total turnover recorded in Bizkaia. Both these regions experienced a downward trend of 11.0% and 2.4%, respectively, compared to the previous year. The first, where the provincial capital, Bilbao, is located, accounted for 54.7% of employment and the second accounted for 24.5%, equal to almost 80% of total jobs.

Of the remaining regions, another three also posted negative results, although with less pronounced variations than those mentioned above: There was a decline of 2.3% in Encartaciones, 0.4% in Gernika-Bermeo, and 0.3% in Arratia-Nervión. Lastly, two regions in Bizkaia saw an increase in turnover in 2023: Markina-Ondarroa, which stood out with a 6.4% rise in turnover, and Plentzia-Mungia, with 3.5% growth in turnover compared to the previous year.

In turn, Bizkaia was the only province that registered a decrease in value added, with a drop of 0.8%. This downward trend was driven by the only region that posted a negative figure, namely Gran Bilbao, with a decline of 5.0%, which was also the region that accounted for more than half of the value added for the province (58.1%). The remaining regions saw positive trends, especially Encartaciones, with an increase of 25.5%. This region was followed by Markina-Ondarroa (up 15.7%), Arratia-Nervión (up 13.8%), Plentzia-Mungia (up 9.4%), Gernika-Bermeo (up 7.6%) and, at the bottom of the list, Duranguesado, with the lowest growth in value added of 1.3%.

With regard to labour productivity, Bizkaia posted a more modest performance, with seven regions and an average of 78,000 euros. Of particular note was Gran Bilbao, with 84,000 euros, as it was the only region in the province with a figure well above the overall average. Behind it, in an intermediate position, was Duranguesado with 79,000 euros. Further down the list were Arratia-Nervión and Plentzia-Mungia, both with close to 70,000 euros. In less favourable positions were Markina-Ondarroa (64,000), Gernika-Bermeo (63,000), and Encartaciones (58,000), which was the region that recorded the lowest productivity.

Gipuzkoa

Employment in the extraction and manufacturing industry was up 1.9% in Gipuzkoa as a whole, and five of its regions saw their figures improve compared to the previous year. Alto Deba posted the greatest positive variation in employment (4.9%), followed by Donostialdea, with an increase of 3.3%. Between them they accounted for 44% of total employment in the province. These two regions were followed by Goierri, where the number of people employed rose by 1.2%, and Bajo Deba and Bajo Bidasoa, which both registered a 0.8% increase in employment. Tolosaldea and Urola Kosta experienced downturns, with employment falling by 0.1% and 0.7%, respectively.

As was the case with employment, Gipuzkoa ranked in the middle of the Basque provinces in terms of turnover. With a 1.6% increase in turnover, this figure was below the 2.7% registered in Álava and well above the -7.9% recorded in Bizkaia. The percentage weight of the regions in the province as a whole varied between 4.3% for Bajo Bidasoa and 25.2% for Donostialdea. Goierri, with 21.6%, and Alto Deba, with 16.9%, had similar shares.

At regional level, five of the seven regions in this province had a higher turnover in 2023 than in 2022. Bajo Bidasoa saw the most notable increase, with 8.0% more turnover. It was followed by Goierri, with 6.1%, Alto Deba, with 3.1%, and, lastly, Donostialdea and Bajo Deba, which registered growth of 1.1% and 0.9%, respectively. Donostialdea is the region where the provincial capital is located and it accounted for a share of Gipuzkoa's total turnover that was very similar to its share of employment. Donostialdea accounted for 25.2% of turnover and 25.9% of jobs in the province, both of which were lower figures than those of the other regions with provincial capitals in respect of their province. The remaining regions, Urola Kosta and Tolosaldea, closed the year with the same decrease in turnover of 3.6%.

As regards the wealth generated compared to the previous year (value added), Gipuzkoa, with an increase of 10.3%, was the province that saw the highest growth in value added, ahead of Álava (7.0%) and Bizkaia (-0.8%). The trend was positive in all its regions. Among them, the largest growth in value added occurred in Bajo Bidasoa, where it was 14.2% higher than in the previous year, followed by Goierri, up 12.2%, Alto Deba and Urola Kosta, with 10.0% each, Donostialdea (9.9%), Bajo Deba (9.0%) and, lastly, the region of Tolosaldea (8.8%).

This intermediate group in terms of performance included seven regions, with an average of 79,000 euros. The most notable was Goierri with 87,000 euros, followed by Tolosaldea (84,000 euros). The remaining regions recorded figures below the average for the Basque Country: Donostialdea (78,000 euros), Alto Deba (75,000), and Bajo Deba and Urola Kosta, both with 73,000. The region in Gipuzkoa with the lowest result was Bajo Bidasoa, which registered labour productivity of 65,000 euros.

Employed personnel, Turnover, Value added at factor cost and Apparent productivity of the extractive and manufacturing industry in the Basque Country by province and region. 2023

	Employed personnel (number)			Turnover (thousands of euros)			Value added at factor cost (thousand of euros)			Apparent productivity (Thousands of euros)			
	2022	2023	2023/2022 (%)	2022	2023	2023/2022 (%)	2022	2023	2023/2022 (%)	2022	2023	2023/2022 (%)	
Basque Country	195.068	198.667		1.8 64.694.540	63.087.075		-2,5	15.025.244	15.784.932	5,1	77.026	79.454	3,2
Araba/Álava	40.415	40.790		0,9 15.229.377	15.639.454		2,7	3.211.877	3.435.206	7,0	79.472	84.217	6,0
Añan	2.291	2.433	6,2	694.894	728.713	4,9	151.009	201.197	33,2	65.914	82.695	25,5	
Arabako Lautada / Llanada Alavesa	25.764	25.856	0,4	10.457.313	10.829.500	3,6	2.036.500	2.114.995	3,9	79.044	81.799	3,5	
Arabako Mendialdea / Montaña Alavesa	343	327	-4,7	56.765	54.859	-3,4	16.553	19.542	18,1	48.259	59.761	23,8	
Arabako Errioxa / Rioja Alavesa	3.822	3.841	0,5	1.027.922	970.891	-5,5	331.358	336.482	1,5	86.698	87.603	1,0	
Gorbeialdea / Esterribaciones del Gorbea	2.696	2.696	0,0	1.164.945	1.115.825	-4,2	233.143	229.553	-1,5	86.477	85.146	-1,5	
Arabako Kantaularialdea / Cantábrica Alavesa	5.499	5.637	2,5	1.827.538	1.939.666	6,1	443.314	533.437	20,3	80.617	94.631	17,4	
Bizkaia	75.681	77.377		2,2 29.533.494	27.203.860		-7,9	6.146.139	6.095.964	-0,8	81.211	78.783	-3,0
Arratia-Nerbioi / Arratia-Nervión	3.538	3.545	0,2	964.972	962.376	-0,3	217.427	247.510	13,8	61.455	69.819	13,6	
Bilbao Handia / Gran Bilbao	41.224	42.334	2,7	20.600.709	18.335.808	-11,0	3.728.278	3.540.505	-5,0	90.440	83.633	-7,5	
Durangaldea / Duranguesado	18.802	18.942	0,7	5.346.153	5.219.832	-2,4	1.471.774	1.491.628	1,3	78.278	78.747	0,6	
Enkartazioak / Encartaciones	1.398	1.453	3,9	292.625	285.920	-2,3	66.826	83.864	25,5	47.801	57.718	20,7	
Gernika-Bermeo	3.025	3.014	-0,4	713.026	710.129	-0,4	175.471	188.732	7,6	58.007	62.618	7,9	
Markina-Ondarroa	3.181	3.318	4,3	585.552	623.116	6,4	182.666	211.431	15,7	57.424	63.722	11,0	
Plentzia-Mungia	4.513	4.771	5,7	1.030.457	1.066.678	3,5	303.696	332.294	9,4	67.294	69.649	3,5	
Gipuzkoa	78.972	80.500		1,9 19.931.669	20.243.761		1,6	5.667.228	6.253.762	10,3	71.762	77.686	8,3
Bidasoa Behe / Bajo Bidasoa	4.405	4.439	0,8	804.131	868.198	8,0	253.518	289.573	14,2	57.552	65.234	13,3	
Debarabarrena / Bajo Deba	8.119	8.184	0,8	1.703.453	1.718.380	0,9	547.551	596.844	9,0	67.441	72.928	8,1	
Debagoina / Alto Deba	14.231	14.923	4,9	3.312.721	3.416.620	3,1	1.020.917	1.123.263	10,0	71.739	75.271	4,9	
Donostialdea	20.166	20.830	3,3	5.044.854	5.100.981	1,1	1.481.596	1.628.887	9,9	73.470	78.199	6,4	
Goierrí	13.277	13.437	1,2	4.125.961	4.376.920	6,1	1.041.494	1.168.333	12,2	78.443	86.949	10,8	
Tolosaldea	8.171	8.159	-0,1	2.292.673	2.209.455	-3,6	626.401	681.564	8,8	76.661	83.535	9,0	
Urola Kosta	10.603	10.528	-0,7	2.647.876	2.553.206	-3,6	695.751	765.298	10,0	65.618	72.692	10,8	

Date June 13, 2025

Source: Eustat. Industrial Survey

In summary, with an average of 79,000 euros in the Basque Country, Cantábrica Alavesa ranked first in terms of labour productivity, with 95,000 euros per person employed, followed by Rioja Alavesa (88,000) and Goierri (87,000).

Although turnover fell by 2.5% in the Basque Country as a whole, some regions, such as Bajo Bidasoa (8.0%), Markina-Ondarroa (6.4%) and Cantábrica Alavesa (6.1%), registered growth. Despite being the most productive region in Bizkaia (84,000 euros), Gran Bilbao recorded the sharpest drop in turnover (-11.0%).

Industrial employment rose in 15 of the 20 regions; of particular note were the increases in Añana (6.2%), Plentzia-Mungia (5.7%) and Alto Deba (4.9%). By province, employment in the extraction and manufacturing industry was up in Bizkaia (2.2%), Gipuzkoa (1.9%) and Álava (0.9%).

Gross value added grew by 5.1% in the Basque Country, with Añana standing out with an increase of 33.2%.

Methodological note:

The sectorisation used is the National Classification of Economic Activities (CNAE-2009), with B (extractive industries) and C (manufacturing industries) being the only sections included in this disaggregation by regions.

For further information:

Eustat - Euskal Estatistika Erakundea/Basque Statistics Institute

C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz

Press Service: servicioprensa@eustat.es Tel.: 945 01 75 62