

INDUSTRIAL PRODUCTION INDEX. AUGUST 2025

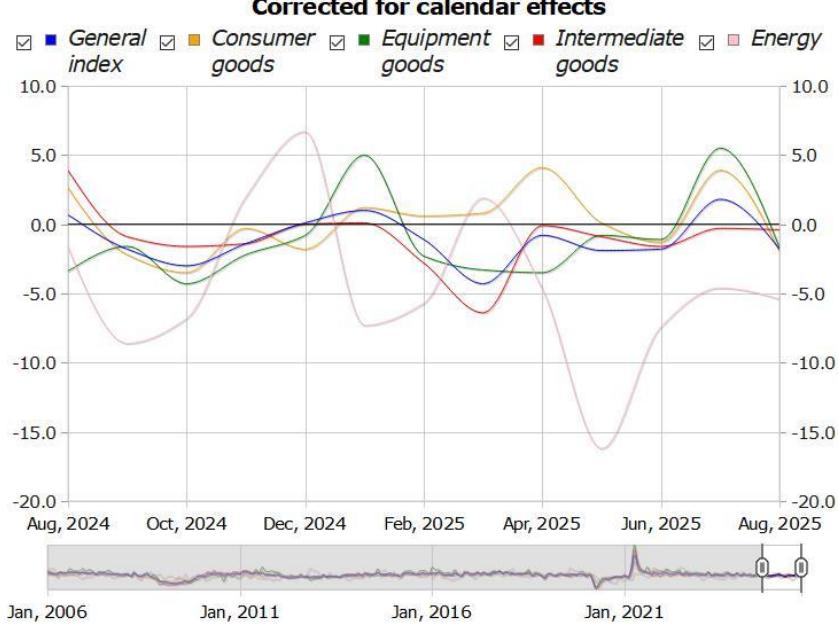
Industrial activity in the Basque Country was down 1.8% in August 2025

Compared to the previous month, July 2025, industrial production increased by 0.1%

The industrial production of the Basque Country was down 1.8% in August 2025 compared to the same month of the previous year, in homogeneous terms of the working calendar according to Eustat data.

In relation to the previous month, industrial activity in the Basque Country increased by 0.1% this August, once corrected for seasonal effects.

Year-on-year variation rate of the industrial production index in the Basque Country (%)



By economic destination of goods, production in *Consumer Goods* posted a negative year-on-year performance in August 2025, with a 2.0% decrease in production for the sector as a whole. This decrease was fundamentally due to the performance of *Consumer Non-Durables*, whose production was down 3.8%, since production of *Consumer Durables* increased by 7.6% compared to August 2024. Among other activities, *Consumer Durables* includes the manufacture of furniture and domestic appliances. *Consumer Non-durables* includes the activities of processing and conserving foodstuffs; the manufacture of cleaning and hygiene products; pharmaceutical products; and the manufacture of clothing.

Production of *Capital Goods*, which include the manufacturing of motor vehicles; construction of locomotives and railway material; and naval construction and the manufacture of aircraft, decreased by 1.7% compared to the previous August.

In *Intermediate Goods*, which includes metallurgy and manufacturing of metal products, the chemical industry and manufacturing of rubber and plastic products, production fell by 0.4% in year-on-year terms.

Lastly, *Energy* production decreased by 5.4% in August 2025 in relation to the same month of the previous year. This sector includes the production and supply of electricity and oil refining.

Industrial production index of the Basque Country by province and economic destination of the goods. Rates of variation (p). August 2025

	Data corrected for calendar effects		Deseasonalised data m / m-1
	m / m-12	Am / A(m-12)	
General index			
Basque Country	-1.8	-1.1	0.1
Araba/Álava	-2.4	-3.2	0.5
Bizkaia	-3.0	-1.1	-1.6
Gipuzkoa	-0.1	-0.1	1.6
INDEXES BY ECONOMIC DESTINATION OF THE GOODS			
Consumer goods	-2.0	1.0	-2.5
Durable consumer goods	7.6	-1.5	0.2
Nondurable consumer goods	-3.8	1.6	-3.1
Equipment goods	-1.7	-0.3	-3.5
Intermediate goods	-0.4	-1.7	1.8
Energy	-5.4	-6.2	-2.6

(p)Provisional data

m / m-12 Year-on-year variation rate of the last observed month (m) compared to the same month of the previous year (m-12)

Am / A(m-12) Year-on-year variation rate for the accumulated period from January to the last month observed (Am) with respect to the same accumulated period in the previous year (A(m-12))

m / m-1 Variation rate of the last observed month (m) compared to the previous month (m-1)

Date October 3, 2025

Source: Eustat. Industrial production index

The year-on-year evolution of the Industrial Production Index was negative across all three provinces in August 2025: it was down 3.0% in Bizkaia, 2.4% in Álava, and 0.1% in Gipuzkoa.

At a more disaggregated level, among the largest sectors in Basque industry, those that posted an increase in production during August 2025 in year-on-year terms were *Electrical Material & Equipment* and *Metallurgy and metal products*, up 9.3% and 2.6% respectively. In contrast, the most pronounced year-on-year decreases in production were in *Electricity, Gas and Steam*, with a 10.9% decrease, and *Timber, Paper and Graphic Arts*, down 9.9%.

Industrial production index of the Basque Country. Key A38 Sectors (1). Year-on-year growth rates (p). August 2025

	m / m-12
Food industry, beverages, tobacco products	-2.7
Timber, paper and printing and reproduction	-9.9
Rubber and plastic	-5.0
Metallurgy and metal products	2.6
Electrical equipment	9.3
Machinery and equipment	-1.0
Transport material	-4.1
Electricity, gas and steam	-10.9

(p)Provisional data

Data corrected for calendar effects

(1)Sectors with greatest weight in basque industry

Date October 3, 2025

Source: Eustat. Industrial production index

CUMULATIVE BALANCE IN AUGUST 2025

In the cumulative total for the first eight months of the year, the Industrial Production Index was down 1.1%. Cumulative production until August was down 6.2% in *Energy*, 1.7% in *Intermediate Goods*, and 0.3% in *Capital Goods* in relation to the same cumulative period of the previous year. However, production in the *Consumer Goods* sector increased by 1.0%.

By province, the cumulative total of the first eight months of 2025 closed with a negative balance in all three provinces. Compared to the same cumulative period of 2024, production decreased by 3.2% in Álava, 1.1% in Bizkaia, and finally, by 0.1% in Gipuzkoa.

NOTE

Eustat would like to thank all the establishments that have collaborated with gathering information. As a result, the index for this month was calculated with **85.43%** coverage of the sample.

For further information:

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