

INDUSTRIAL PRODUCTION INDEX. SEPTEMBER 2025

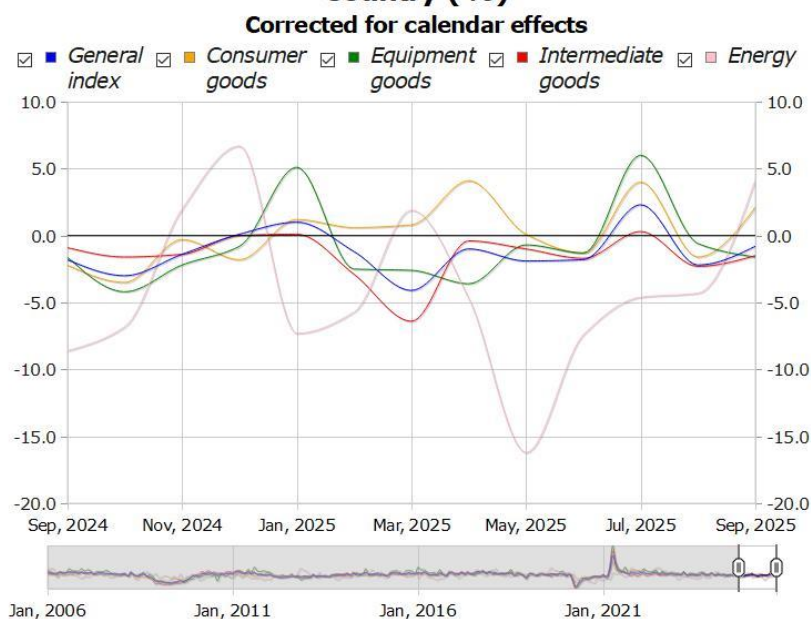
Industrial activity in the Basque Country was down 0.8% in September 2025

Compared to the previous month, August 2025, industrial production increased by 0.6%

The industrial production of the Basque Country was down 0.8% in September 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 0.6% this month, 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 positive year-on-year performance in September 2025, with a 2.1% increase in production for the sector as a whole. This increase was fundamentally due to the performance of *Consumer Durables*, whose production was up 12.3%, since production of *Consumer Non-Durables* decreased by 0.3% compared to September 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 1.6% compared to the previous September.

In *Intermediate Goods*, which includes metallurgy and manufacturing of metal products, the chemical industry and manufacturing of rubber and plastic products, production fell by 1.5% in year-on-year terms.

Finally, *Energy* production increased by 4.2% in September 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). September 2025

	Data corrected for calendar effects		Deseasonalised data
	m / m-12	Am / A(m-12)	m / m-1
General index			
Basque Country	-0.8	-1.1	0.6
Araba/Álava	-10.0	-4.0	-5.9
Bizkaia	0.8	-0.7	1.1
Gipuzkoa	2.5	0.1	3.6
INDEXES BY ECONOMIC DESTINATION OF THE GOODS			
Consumer goods	2.1	1.1	1.3
Durable consumer goods	12.3	0.0	1.0
Nondurable consumer goods	-0.3	1.4	1.4
Equipment goods	-1.6	-0.2	0.4
Intermediate goods	-1.5	-1.8	-0.5
Energy	4.2	-5.1	6.3

(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 November 5, 2025

Source: Eustat. Industrial production index

The year-on-year evolution of the Industrial Production Index in September 2025 was negative in Álava, with a 10.0% decrease. However, in Gipuzkoa and Bizkaia, production increased in year-on-year terms by 2.5% and 0.8%, respectively.

At a more disaggregated level, among the largest sectors in Basque industry, those that posted an increase in production in year-on-year terms during September 2025 were *Electrical Material & Equipment* and *Electricity, Gas & Steam*, up 5.8% and 4.2%, respectively. In contrast, the most pronounced year-on-year decreases in production were concentrated in *Food, Beverages and Tobacco*, down 3.7%; and *Metallurgy & Metal Products*, with a fall of 3.1%.

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

	m / m-12
Food industry, beverages, tobacco products	-3.7
Timber, paper and printing and reproduction	2.6
Rubber and plastic	2.3
Metallurgy and metal products	-3.1
Electrical equipment	5.8
Machinery and equipment	-2.5
Transport material	-1.5
Electricity, gas and steam	4.2

(p)Provisional data

Data corrected for calendar effects

(1)Sectors with greatest weight in basque industry

Date November 5, 2025

Source: Eustat, Industrial production index

CUMULATIVE BALANCE IN SEPTEMBER 2025

In the cumulative total of the first nine months of the year, the Industrial Production Index was down 1.1%. Cumulative production until September was down 5.1% in *Energy*, 1.8% in *Intermediate Goods*, and 0.2% in *Capital Goods* in relation to the same cumulative period of the previous year. However, production in the *Consumer Goods* sector increased by 1.1%.

By province, the cumulative total for the first nine months of 2025 closed with a positive balance in Gipuzkoa, with an increase in production of 0.1%. In contrast, production in Álava and Bizkaia fell by 4.0% and 0.7%, respectively, compared to the same cumulative period of the previous year.

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 **86.91%** coverage of the sample.

For further information:

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