

INDUSTRIAL PRODUCTION INDEX. OCTOBER 2025

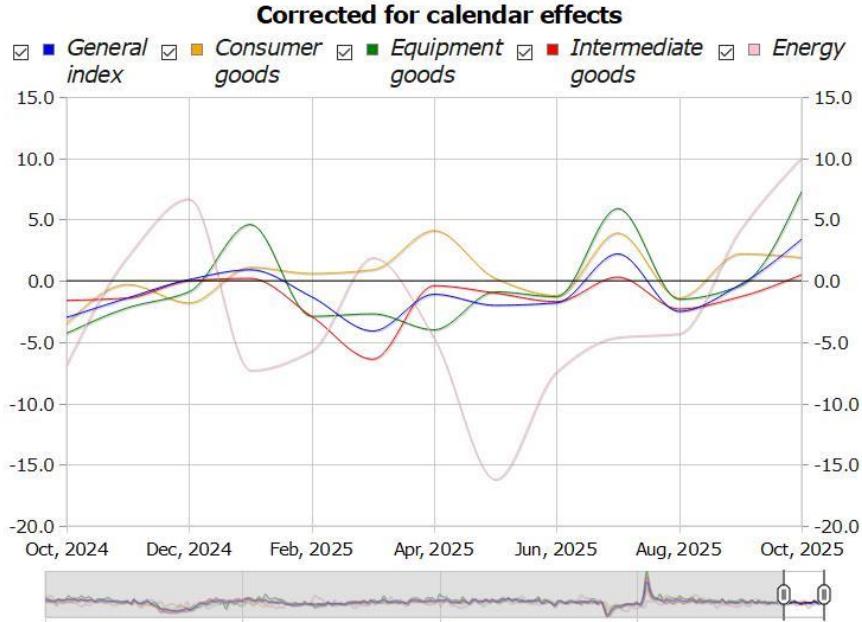
Industrial activity in the Basque Country increased by 3.4% in October 2025

Compared to the previous month, September 2025, industrial production was up 0.9%

The industrial production of the Basque Country increased by 3.4% in October 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 0.9% this November, 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 October 2025, with a 1.9% increase in production for the sector as a whole. This increase was fundamentally due to the performance of *Consumer Durables*, whose production rose by 10.7%, given that production of *Consumer Non-durables* was down, in respect of October 2024, by 0.1%. 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, increased by 7.3% compared to the previous October.

In *Intermediate Goods*, which includes metallurgy and manufacturing of metal products, the chemical industry and manufacturing of rubber and plastic products, production rose by 0.5% in year-on-year terms.

Finally, *Energy* production increased by 10.1% in October 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). October 2025

| | Data corrected for calendar effects | | Deseasonalised data |
|---|-------------------------------------|--------------|---------------------|
| | m / m-12 | Am / A(m-12) | m / m-1 |
| General index | | | |
| Basque Country | 3.4 | -0.6 | 0.9 |
| Araba/Álava | -4.9 | -4.4 | 1.7 |
| Bizkaia | 6.7 | 0.0 | 2.3 |
| Gipuzkoa | 4.8 | 0.8 | -0.7 |
| INDEXES BY ECONOMIC DESTINATION OF THE GOODS | | | |
| Consumer goods | 1.9 | 1.3 | -1.0 |
| Durable consumer goods | 10.7 | 1.1 | -2.1 |
| Nondurable consumer goods | -0.1 | 1.3 | -0.7 |
| Equipment goods | 7.3 | 0.5 | 3.5 |
| Intermediate goods | 0.5 | -1.5 | 0.1 |
| Energy | 10.1 | -3.6 | 4.4 |

(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 December 4, 2025

Source: Eustat. Industrial production index

The year-on-year evolution of the Industrial Production Index in October 2025 was negative in Álava, with a drop of 4.9%. However, in Bizkaia and Gipuzkoa production increased in year-on-year terms by 6.7% and 4.8%, respectively.

At a more disaggregated level, among the largest sectors in Basque industry, those that posted the greatest increases in production in year-on-year terms in October 2025 were: *Electricity, Gas & Steam*, with a rise of 22.1%; *Transport Material*, up 13.5%; and *Electrical Material & Equipment*, with an increase of 10.8%. Conversely, the *Machinery and Equipment* sector experienced a year-on-year reduction in production of 0.5%.

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

| | m / m-12 |
|---|----------|
| Food industry, beverages, tobacco products | 0.7 |
| Timber, paper and printing and reproduction | 0.2 |
| Rubber and plastic | 2.9 |
| Metallurgy and metal products | 0.5 |
| Electrical equipment | 10.8 |
| Machinery and equipment | -0.5 |
| Transport material | 13.5 |
| Electricity, gas and steam | 22.1 |

(p)Provisional data

Data corrected for calendar effects

(1)Sectors with greatest weight in basque industry

Date December 4, 2025

Source: Eustat. Industrial production index

CUMULATIVE BALANCE FOR OCTOBER 2025

In the cumulative total for the first ten months of the year, the Industrial Production Index was down 0.6%. Cumulative production until October was down 3.6% in *Energy* and 1.5% in *Intermediate Goods*. In contrast, production in the sectors of *Consumer Goods* and *Capital Goods*, compared to the same cumulative period of the previous year, increased by 1.3% and 0.5%, respectively.

By province, the cumulative total for the first ten months of 2025 closed with a positive balance in Gipuzkoa, with an increase in production of 0.8%. In Bizkaia, cumulative production remained constant, however, in Álava, production fell by 4.4% 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 **87.39%** coverage of the sample.

For further information:

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