Diputación Sevilla
PRODETUR

FEDEME
Federación de Empresarios del Metal

SECTORAL STUDY
ABOUT THE

METAL
INDUSTRY

IN SEVILLE AND ITS PROVINCE
2024 - 2025

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Foreword

GREETINGS FROM THE PRESIDENT OF THE PROVINCIAL COUNCIL OF SEVILLE

The Seville Provincial Council, through Prodetur SAU, has had the privilege of collaborating with FEDEME in preparing this report about the metal industry in Seville, analysing its current situation and highlighting its strategic role in the province's economic development.

The study reveals that the sector's main activity — aeronautical and space construction, along with associated machinery — places Seville as the second-largest province in Spain, behind Madrid.

The report emphasises the existence of a well-established business ecosystem driven by a strategic location that combines excellent connectivity with proximity to major markets. This is complemented by an effective public-private partnership, an accessible and clear regulatory environment, and a range of grants and incentives that favor investment and business growth.

Seville's metal industry is consolidating its position as a key player in the industrial value chain, both nationally and internationally. In the international sphere, the sector has a significant presence, exporting to over 90 countries across five continents. This geographical diversification is evidence of a mature commercial strategy and solid competitive capacity in diverse markets, both developed and emerging.

Through this report, we aim to promote social and territorial cohesion within the sector in the province, as well as fostering new synergies between public administrations and companies. We really appreciate the collaboration of all those involved in this study .

The report's conclusions also highlight new development opportunities in strategic sectors such as railways, agriculture and the food industry, commercial aviation, and defence. This opens up a promising future for the sector.

In short, Seville's metal industry and its surrounding area are establishing the region as a southern European industrial benchmark based on innovation, automation and sustainability.

Javier Fernández de los Ríos
President of the Seville Provincial Council

GREETINGS FROM THE PRESIDENT OF THE METAL BUSINESS FEDERATION (FEDEME)

It is an honour for me to present this sectorial study on the metal industry of Seville and its province for the years 2024 and 2025. This work is the result of close collaboration between FEDEME and Prodetur MP SAU, a public company of the Provincial Council of Seville. Since 2019, Prodetur MP SAU has accompanied us in various initiatives to support the metal industry, and this alliance constitutes an exemplary model of public-private cooperation.

This study wanst to provide an accurate overview of the metal industry in the provincial area for the first time. Through quantitative and qualitative analysis of the current situation, the report provides a solid basis for understanding the industry's structure, strengths, and challenges, and to serve as a strategic tool for promoting its development.

This work will enable us to identify new opportunities, anticipate trends, inform support policies, and encourage innovation, improve productivity, competitiveness, and better-quality employment. It will also facilitate the promotion of training and vocational training, as well as the adoption of new technologies and organisational models. In short, it is a useful instrument for promoting sustainable and cohesive growth connected to the needs of the territory.

Special thanks to the companies that contributed to this study by sharing their experience and vision, and to all those who collaborated in its preparation. Thanks to their contributions, we have been able to gain a rigorous and detailed understanding of our sector.

We hope that the results of this work will be a guide and source of inspiration for everyone involved, and reinforce the strategic role of the metal industry in Seville and its surrounding area.

With my most sincere appreciation,

Francisco Javier Moreno Muruve
President of FEDEME

1. Presentation of the sectoral study about the metal industry in Seville and its surrounding area

EXPLANATORY MEMORANDUM

The Metal industry is one of Andalusia's strategic sectors, both in terms of the number of companies it brings together and in terms of employment and interaction with the extractive sector and other industrial, service and construction sectors. **In 2020, the sector generated a turnover of almost 7,430 million euros, representing 11.4% of the total generated by Andalusian industry**, That same year, the sector employed more than 28,360 people, representing 11.9% of the total number employed in industry.

Furthermore, **metal mining in Andalusia** stands out due to its relationship with the processing industry, reaching a turnover of 4,500 million euros in 2023 — a **12.5%** increase compared to 2022. This growth is mainly attributed to the revaluation of metals such as copper in international markets, according to data from the sector. Both the metallurgical industry and metal mining have experienced significant growth in recent years.

According to 2023 data from the National Statistics Institute (INE), Catalonia has the highest number of companies in the Metal industry sector, followed by Andalusia. According to the INE, **Andalusia led the way in terms of investment in material assets in regional metallurgy** in 2020, investing 1,241 million euros (**32.5%** of the total invested in Andalusian industry), well ahead of Catalonia, which invested 357 million euros in the same year.

Andalusia stands out for its significant contribution to **Spain's Metal industry, representing a major sector of industry, services and trade. According to data published by the Labour Force Survey (EPA), the Metal industry comprises around 220.000 companies and over one million workers nationwide**. According to data from the Spanish Confederation of Metal Business Organisations (Confemetal), the number of people employed in the Metal industry (CNAE 2009 divisions 24 to 30 and 33) reached 1,052,600 in the first quarter of 2024, in addition to 320,000 self-employed workers and 76 member organisations, including the Metal Business Federation of Seville (FEDEME).

Seville is among the top ten provinces in Spain in terms of the number of affiliates in the Metal sector, which includes industry, services and commerce. Specifically, the Metal sector in Seville represents 11.8% of employment in the province, underlining its importance as a relevant economic engine and generator of employment.

Moreover, it accounts for 34.6% of the gross value added (GVA) in the Metal sector in Andalusia and 7.8% of the total regional GVA, establishing itself as a strategic pillar for economic development at regional and local levels.

“Andalusia stands out for its significant contribution to Spain’s metal industry, services and metal trade”

In 2023, the Metal industry sector saw a **3.2%** increase in industrial production, according to the Metal Production Index (IPIMET), with a parallel increase in the sector’s turnover. Exports of metal products increased by **8.9%** during this period, while imports grew more modestly by **4.6%.**

The Metal industry sector is broad, present in all activity segments and territories. It is mainly made up of SMEs and groups together the different operators involved in the entire industrial value chain, mostly in essential economic sectors.

Its main activities include: metallurgy and foundry; engineering, assembly, maintenance and industrial services; manufacturing and distributing electrical, electronic and telecommunications equipment and components; manufacturing and distributing capital goods and machine tools; manufacturing and distributing electrical, electronic and telecommunications equipment and components; manufacturing and distributing telecommunications equipment; manufacturing and distributing capital goods; manufacturing and distributing machine tools; manufacturing and distributing refrigeration and air conditioning equipment; industrial assembly and maintenance; plumbing, gas and air conditioning maintenance and installation; thermal installations in buildings; lighting; rest equipment; packaging; the distribution and maintenance of household appliances; the manufacture and maintenance of lifts; the manufacture and distribution of automobile spare parts; automobile repair; the manufacture and distribution of electrical materials; and waste recovery and recycling, among others.

In Andalusia, large companies are dedicated to extracting and producing metals. They are

benchmarks in sectors such as stainless steel, copper and aluminium, as well as in the recovery of ferrous and non-ferrous waste. These companies belong to the leading business groups in the metallurgical and iron and steel industries. They play a key role in the industrial development of the region, as well as in maintaining and generating employment, **especially in key areas such as Seville, Huelva and Campo de Gibraltar.**

The metal production and manufacturing sector faces important challenges for the future related to improving competitiveness and productivity by incorporating advanced technological and management systems, and transitioning to Industry 5.0. This in turn requires qualified people who can adapt to these challenges and help companies position themselves to compete in increasingly demanding markets.

Addressing these challenges requires advancing **business and technological cooperation** in an administrative environment that favours the development of industrial activities and investment. This will achieve greater integration of the value chain, starting with the important metal mining industry — a national leader and European benchmark. For this reason, it is necessary to reinforce its activities with support from public administrations, especially in ecological and energy transition processes, which are also being addressed.

In 2023 the '**CRECE Metallurgical Industry in Andalusia Value Chain Plan**' was launched with the participation of the main economic and social agents, such as CEA, trade unions, UGT and CCOO of Andalusia, in collaboration with the main sectorial entities, such as the Association of Chemical Industries, Basic and Energy Industries Association of Huelva AIQBE, the Association of Large Industries of Campo de Gibraltar AGI, the Association of Research, Extraction, Mining-Metallurgical, Auxiliary and Services Transforming Companies AMINER, or the Metal Business Federation, FEDEME, among others.

The plan aims to commit firmly to digitalisation and energy efficiency in processes to increase business competitiveness and follow in the footsteps of leading European metallurgy countries. The plan establishes environmental sustainability as its primary objective in relation to the growth of the sector in the short and long term, focusing on achieving emission neutrality and promoting of circular economy, improvement of energy efficiency and the use of renewable energies.

In this context, **the Provincial Council of Seville, through Prodetur MP SAU and the Metal Business Federation (FEDEME)**, whose aims include the promotion of greater economic and social development of the Metal business community, have launched a study process


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to deepen the knowledge of this sector in a particular way in the territorial scope of Seville and its province, given that at present there is a lack of a specific diagnosis of its situation at provincial level.

The present study aims to be, on the one hand, **a decisive instrument for the knowledge of the reality of the Metal industry sector in the province of Seville, its situation and prospects for a strategic sector in the territory, which will highlight both its capabilities and the identification of opportunities and future development trends. On the other hand, it aims to be a key tool for forecasting and guiding its development and progress.**

In short, it will be a useful tool for anticipating and promoting the implementation of initiatives aimed at improving the competitiveness, productivity, and quality of employment of the Metal industry sector in Seville and its province. It will also promote training and professional qualifications, as well as the incorporation of new technologies, management systems, and organisational systems.

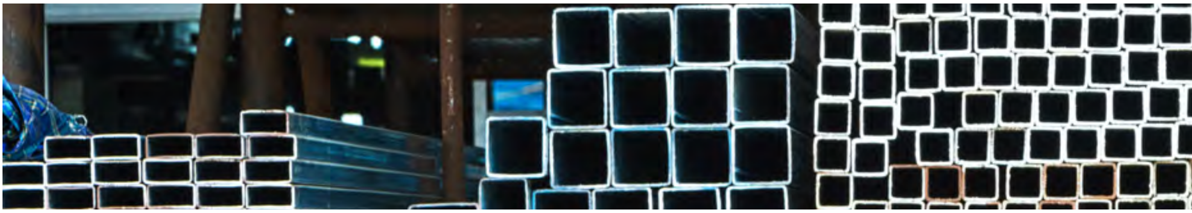
In summary, this study has two objectives:

1. **To define and understand the entire business landscape of the Metal industry in Seville and its province,** paying particular attention to its capabilities and specialisation areas.

2. **Identifying future trends to improve competitiveness, productivity, and employment quality** in the Metal industry sector in Seville and its province.

This statistical study combines quantitative and qualitative information on the current situation and prospects of the Metal industry sector in the province of Seville, the aim is to establish a solid foundation: a detailed analysis of its occupational and productive structure, as well as other significant factors. The study also seeks to **promote the sector's social and territorial cohesion, as well as its impact on the local economy and areas of influence**. The ultimate goal is to **foster long-term, sustainable relationships with local communities and social stakeholders, and to promote cooperation between companies in the sector.**

"The study aims to contribute to the social and territorial cohesion of the sector by boosting its impact on the local economy and areas of influence"



METHODOLOGY

In order to study the metal industry sector in Seville and its province, a research methodology combining quantitative and qualitative perspectives was adopted to provide the most comprehensive and varied approach to the analysed reality.

The report is based on the collection of official data and information obtained through a survey addressed to companies in the sector located in the province. To contextualise the productive fabric and evolution of the sector, an exhaustive **search and compilation of scarce documentation and bibliography on the metal industry in Seville has been carried out to offer a comprehensive overview of its history, tradition, and current situation.**

In short, both primary and secondary data sources have been taken into account. Primary information refers to data generated during the development of this study, obtained through a questionnaire sent to companies in the metal industry sector in Seville and its province. Secondary information was drawn from documentary and statistical sources provided by key stakeholders representing the sector.

The methodological summaries are provided below. They outline the techniques used during the fieldwork, the information collection processes, and the types of analysis performed—both quantitative and qualitative—in line with the methodological approach briefly described above.

Tools designed for the collection of primary information: Seville and province

Survey for companies in the metal sector in Seville and its province:

I. Classification and dimension of the company's activity, certifications and accreditations.

II. Current situation and expectations.

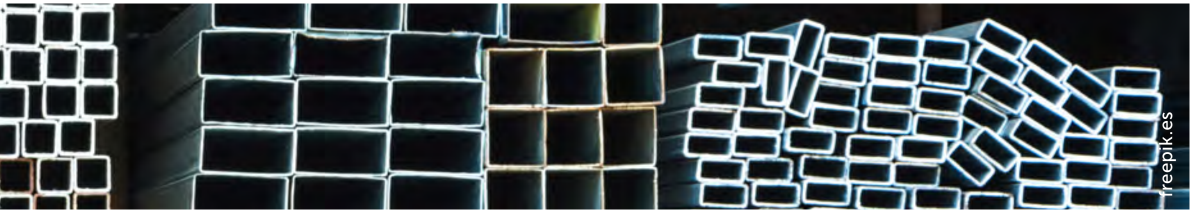
III. Identification of markets (customers and suppliers).

Sources of information for constructing the universe of target companies

Three types of information sources were taken into account for the definition of the population universe:

1. Firstly, a sector database including associated companies, provided by the Metal Business Federation (FEDEME).

2. Secondly, a list of companies with registered offices in the province of Seville and economic activities 24, 25, 26, 27, 28, 29, 30, 310 and 321 and 325, provided by the Institute of Cartography of Andalusia. This list is based on information collected in the Directory of Companies and Establishments with Economic Activities in Andalusia (1 January 2022), consulted through the Andalusian Multi-territorial Information System (SIMA). The list does not include information on companies owned by natural persons.



The study focuses on the economic activities of the metal sector in Seville and its province.

- CNAE 24: Metallurgy; manufacture of iron, steel and ferro-alloy products.
- CNAE 25: Manufacture of metal products, except machinery and equipment.
- CNAE 27: Manufacture of electrical materials and equipment.
- CNAE 28: Manufacture of other machinery and equipment.
- CNAE 29. Manufacture of motor vehicles, trailers and semi-trailers.
- CNAE 30. Manufacture of other transport equipment.
- CNAE 310. Manufacture of furniture.
- CNAE 321: Manufacture of jewellery, costume jewellery and similar articles.
- CNAE 325: Manufacture of medical and dental instruments and supplies.

  3. Thirdly, the 2021 Directory of Companies in the Metal Industry in Seville, published by Prodetur, S.A.U., the Provincial Council of Seville, in collaboration with FEDEME (Metal Business Federation).

Based on the established criteria for company selection, the initial database was completed by researching other sources and conducting direct telephone consultations to update company information.

- **Information collection process**: Fieldwork involved carrying out a survey, which was provided and disseminated online through a survey system that allows form responses to be administered. Subsequently, contact was made via email and personalised telephone calls to reinforce the request for responses.
- **Analysis techniques**
- **Documentary analysis**: For the documentary analysis, the Metal Business Federation (FEDEME) made available documents related to the metal sector and sectoral sources for the purposes of the study.
- **Discourse Analysis**: A form with open-ended questions was created to systematise the opinions of the surveyed companies, thus incorporating qualitative aspects into the analysis and conclusions of the study.
- **Descriptive statistical analysis**: In accordance with the data obtained from the companies' responses, information has been inferred based on variables such as frequency and averages. Crossovers of variables are fundamental to understanding the relationships between different parameters (multivariate analysis). This analysis has been applied to quantitative information obtained from primary sources (i.e. surveys).

The industrial metal sector in Seville and its surrounding area is under study

To define the metal industry in Seville and its province as precisely as possible, a set of specific criteria was applied to select the companies that make up the sample. The inclusion criteria for companies in the study were as follows:

- Having their tax headquarters located in Seville or its province.
- No minimum turnover threshold has been established for inclusion in the sample.
- However, a limit has been set regarding company size, with only companies employing more than 20 people included.

In short, the study was based on **an initial universe of 1,249 companies. After applying the selection criteria to deepen our knowledge of the metal industry sector in Seville and its province, the sample was limited to 365 companies in total.**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2. Radiography of the metal industry sector in the province of Seville

CONTEXTUAL SITUATION OF THE METAL INDUSTRY SECTOR IN SEVILLE AND ITS PROVINCE

According to the Sector Map prepared by Confemetal in 2020, Andalusia is positioned as the third autonomous community after Catalonia and Madrid in the **metal industry, services and trade sector, with a total of 11.9% of members (222,113 affiliates)**. Within this sector, metal services have the highest ratio at **4%**, followed by commerce at **3.5%** and the metal industry at **2.9%**. Regarding the predominant size, the metal services and commerce sectors in Andalusia are dominated by micro and small companies, while the metal industry sector is dominated by medium and large companies.

In other words, services are the most important activity, accounting for **38.5%**, while commerce accounts for **33.7%** and industry for 27.7%. Therefore, **the predominant activity of the metal industry in Andalusia is services, although the difference with commerce is reduced and increases with respect to industry.**

By province, Seville ranks fourth nationally — after Madrid, Barcelona and Valencia — with a total of 62,022 affiliates in the metal industry sector, including industry, services and commerce. This figure represents **3.3%** of the sector's total affiliates nationwide.

In terms of sectoral distribution, Seville has 19,762 members in industry, 22,392 in services, and 19,868 in commerce. **While Seville slightly out performs in services, representing 3.8% of the total metal sector in the province, employment is relatively evenly distributed across the three sub-sectors: industry (31.9%), services (36.1%), and commerce (32%).**

The metal industry in Seville is structured into 14 activity branches. The most relevant sector in the metal industry, according to the percentage of affiliation, is **Aeronautics and space construction, as well as their machinery**. This represent **27.4%**

of the provincial total and **21.6%** at a national level. This makes Seville the **second Spanish province** for this activity, behind Madrid. It should be noted that the concentration of affiliates in this sector is mainly found in **medium-sized and large companies.**

Second place goes to the **manufacture of metal carpentry**, with **11.4%** of affiliates in Seville (compared to **4.3%** nationally), which This places Seville as the **fifth province** for this activity. In this case, the business weight is mainly concentrated in **micro and small companies.**

Other notable activities in the province are the manufacture of metal structures and Seville is third in the country for the **manufacture of metal structures** and their components. nationally, as well as the production of lifting and handling machinery.

Nationally, Seville holds the **fifth place in the manufacture of instruments and apparatus for measuring and verification and navigation.**

BRANCHES OF ACTIVITY IN THE METAL SECTOR INDUSTRIAL SECTOR IN THE PROVINCE OF SEVILLE

	1 to 9 Micro	10 to 49 Small	50 to 249 Medium	250 or bigger	TOTAL	% s/ total (1)	Total %	% s/ national CNAE
3030-Manufacture of aircraft, spacecraft and related machinery	53	347	1.198	3.824	5.422	27,4%	27,4%	21,6%
2512-Manufacture of metalwork	1075	866	312	0	2253	11,4%	38,8%	4,3%
2511-Manufacture of metal structures and components	183	554	798	299	1834	9,3%	48,1%	7,2%
2932-Manufacture of other components, parts and accessories for motor vehicles	29	37	188	1194	1.448	7,3%	55,4%	1,9%
2822-Manufacture of lifting and handling machinery	61	211	397	351	1.020	5,2%	60,6%	5,3%
2562-Mechanical engineering on behalf of others	154	285	165	0	604	3,1%	63,7%	1,7%
2712-Manufacture of electrical distribution and control apparatus	8	25	235	285	553	2,8%	66,5%	6,4%
2410-Manufacture of basic iron and ferro-alloy products	38	125	0	389	552	2,8%	69,3%	2,0%
2592-Manufacture of light metal containers and packaging	2	81	349	0	432	2,2%	71,4%	5,2%
2442-Production of aluminium	20	27	366	0	413	2,1%	73,5%	4,9%
2893-Manufacturing of machinery for the food, beverage and tobacco industries	53	294	59	0	406	2,1%	75,6%	4,6%
2899-Manufacture of other special-purpose machinery n.c.o.p.	67	149	93	0	309	1,6%	77,1%	1,7%
2920-Manufacturing of bodies for motor vehicles and trailers	94	195	0	0	289	1,5%	78,6%	3,2%
3250-Manufacturing of medical and dental instruments and supplies	154	123	0	0	277	1,4%	80,0%	2,0%

Source: Confemetal Technical Services

The Metal industry in Seville is predominantly service-oriented and its main activities are grouped into six branches. The first and the most important one is **electrical installations**, accounting for **32.3%** of affiliates in the province and **4.5%** of the national total. This makes **Seville the fourth province in this field**. This activity is characterised by a high concentration of affiliates in **small and medium-sized companies**, although **large companies** are also present.

Secondly, is the **maintenance and repair of motor vehicles**, accounting for **24.0%** of affiliates in the province and **3.6%** nationally, ranking **Seville fifth in the country**. Third place goes to **plumbing, heating and air-conditioning installations**, accounting for **9.8%** of affiliates in the province and **3.3%** nationally. In these last two activities, the business fabric is mainly made up of **micro and small companies.**

As for the national comparison:

- For **electrical installations**, the provinces with the highest number of affiliates are Madrid (**17.3%**), Barcelona (**13.6%**), Valencia (**5.1%**), Seville (**4.5%**) and Vizcaya (**3.1%**).
- Madrid (**15.4%**), Barcelona (**10.7%**), Valencia (**5%**), Alicante (**3.8%**) and Seville (**3.6%**) top the ranking for **maintenance and repair of motor vehicles.**
- **Plumbing, heating and air conditioning installations**, with **9.8%** in the province and **3.3%** at national level.

BRANCHES OF ACTIVITY OF THE SERVICES SECTOR IN THE PROVINCE OF SEVILLE

	1 to 9 Micro	10 to 49 Small	50 to 249 Medium	250 or bigger	TOTAL	% s/ total (1)	Total %	% s/ national CNAE
4321-Electrical installations	1.741	2.461	2.048	945	7.195	32,3%	32,3%	4,5%
4520-Motor vehicle maintenance and repair	3.066	1.673	620	0	5.359	24,0%	56,3%	3,6%
4322-Plumbing, heating and air-conditioning systems installation	1.032	1.068	80	0	2.180	9,8%	66,1%	3,3%
7120-Technical testing and analysis	208	473	205	504	1.390	6,2%	72,3%	4,4%
4329-Other construction site installations	511	480	126	0	1.117	5,0%	77,3%	2,6%
3312-Machinery repair	403	542	61	0	1.006	4,5%	81,8%	2,7%

Source: Confemetal Technical Services

Lastly, Seville's second main profile is **metal trading**, comprising a total of **16 activities**. The most significant of these is the **retail trade of hardware, paint and glass in specialised establishments**, accounting **11.6%** of affiliates. This is followed by the sale of **automobiles and light motor vehicles**, accounting for **10.8%** of affiliates, making Seville the fourth largest province in Spain for this activity. Third place goes to the **retail sale of furniture, lighting equipment, and other household items in specialised establishments**, accounting for **6.7%** of affiliates.

The concentration of affiliates in these activities is primarily found in **micro and small enterprises**, although **medium-sized enterprises** are also represented, along with some **large enterprises** in specific sectors.

In terms of the wholesale trade of **electronic and telecommunications equipment and components, the retail trade of motor vehicle parts and accessories, and the wholesale trade of scrap metal and waste materials, Seville ranks fourth nationally.**

BRANCHES OF ACTIVITY OF THE METAL TRADE SECTOR IN THE PROVINCE OF SEVILLE

	1 to 9 Micro	10 to 49 Small	50 to 249 Medium	250 or bigger	TOTAL	% s/ total (1)	Total %	% s/ national CNAE
4752-Retail trade of hardware, paint and glass in specialised shops	1.169	299	231	599	2.298	11,6%	11,6%	4,1%
4511-Sale of cars and light motor vehicles	663	946	527	0	2.136	10,8%	22,4%	3,8%
4759-Retail sale of furniture, lighting equipment and other household articles in specialised shops	883	349	88	0	1.320	6,7%	29,1%	4,3%
4532-Retail trade of motor vehicle parts and accessories	513	482	62	258	1.315	6,6%	35,7%	6,0%
4764-Retail sale of sporting goods in specialised shops	183	256	272	564	1.275	6,4%	42,2%	3,7%
4677-Wholesale trade of scrap metal and waste products	454	396	251	0	1.101	5,6%	47,8%	5,0%
4669-Wholesale of other machinery and equipment	409	452	63	0	924	4,7%	52,4%	2,6%
4742-Retail sale of telecommunications equipment in specialised shops	299	484	96	0	879	4,4%	56,9%	4,2%
4649-Wholesale trade of other watches and jewellery	273	412	161	0	846	4,3%	61,2%	3,1%
4652-Wholesale trade of electronic and telecommunications equipment and components thereof	297	236	237	0	770	3,9%	65,1%	3,3%
4672-Wholesale trade of metals and metal ores	265	396	0	0	661	3,3%	68,4%	4,5%
4754-Retail sale of electrical household appliances in specialist shops	241	129	270	0	640	3,2%	71,6%	4,1%
7739-Renting of other machinery, equipment and tangible goods n.c.o.p.	145	165	250	0	560	2,8%	74,5%	5,4%
7711-Rental of cars and light motor vehicles	88	310	137	0	535	2,7%	77,2%	2,5%
4643-Wholesale trade in household appliances	229	285	0	0	514	2,6%	79,8%	2,5%
7732-Rental of construction and civil engineering machinery and equipment	156	227	130	0	513	2,6%	82,4%	5,0%

Source: Confemetal Technical Services

THE METAL INDUSTRY SECTOR: HISTORY, TRADITION AND INNOVATION

Seville's metal industry has a long history dating back to the creation of the **Royal Artillery Factory** in 1565. However, **it was during the industrialisation of Spain that Andalusia began to consolidate its industrial sector, emerging as a pioneering region in this process at a national level in the 19th century. Seville played a particularly significant role, leading the way in the adoption of steam power in industry and transport.**

A significant milestone was the navigation of the first steamboat in Spain on the Guadalquivir River in 1817. Subsequently, in 1835, the Seville factory 'Tejidos e Hilados de Algodón' became the first in Spain to use steam engines in its production process. Important iron and steel industries were also established in Andalusia during this period, consolidating the region's heavy industrial presence.

By the end of the 19th century, Seville province had more than 700 companies employing almost 50,000 people. Seville thus became the industrial city of Andalusia par excellence. However, **Seville's heavy industry entered a period of decline in the late 19th and early 20th centuries** due to a shortage of coal and strong competition from other regions. While industry in other areas of Spain experienced notable growth, investment in Seville was scarce. Nevertheless, a new sector emerged **at the end of the 19th century: the electrical sector. This began to play an increasingly important role in the city's industrial development.**

Sevillian industry experienced growth during the First World War and the Ibero-American Exposition of 1929, but subsequently suffered the effects of the economic crisis of 1929 and the Spanish Civil War. During the 20th century, Andalusian industry excelled in the metallurgy and food sectors, although its growth was lower than the national average. The post-war period saw the imposition of an autarkic model which considerably affected industrial development in Seville.

Despite the lack of institutional support, **some notable companies emerged during this period, including Hytasa** (Hilandera y Tejedora Andaluza Sociedad Anónima) **and CASA** (Construcciones Aeronáuticas S.A.). **These companies played a pivotal role in revitalising the local industry**. In the 1960s, a **significant entrepreneurial spirit emerged in the region. Companies such as Abengoa demonstrated the city's innovative and industrial potential.**

Nevertheless, **Seville's industry has shown remarkable adaptability and resilience throughout its history, establishing itself as a leader in strategic sectors such as aeronautics, energy, and technology.**

However, at the end of the 1960s and throughout the 1970s, Seville's economy faced a crisis exacerbated by rising oil prices. The service sector predominated, but industry depended on state investment. Inflation and credit restrictions hit businesses hard. Seville became a focus of workers' mobilisation.

"By the end of the 19th century, Seville province had over 700 companies employing more than 50,000 people. Seville became the industrial city of Andalusia par excellence"

Between 1975 and 1979, Seville lost 88 industrial companies. Despite a consensus to boost industry, Siderúrgica del Sur was established in Valencia instead of Seville, which was thus excluded from industrial development. Faced with labour chaos and the inaction of the authorities, businesspeople began to organise to defend their interests. In 1970, the Seville School of Industrial Engineering was founded to train key professionals for a new, more technical and modern business model.

Business associations

The awakening of the Sevillian business community in the face of economic crisis and labour unrest led to a profound renewal of the Trade Union Organisation (OS). A new team of professional business technicians took on the active defence of the province's interests, promoting the mobilisation of both employers and workers. Sevillian businesspeople campaigned intensively in Madrid, seeking government support for the local economy. However, their efforts were largely in vain, as evidenced by the awarding of the IV Steel Plant to Sagunto and the decision to install the Ford plant in Almussafes. These decisions left Seville on the margins of industrial development. In response, Manuel Otero Luna, president of the Provincial Business Council (CPE), along with its secretary general, Santiago Herrero León, pushed for more proactive strategies. Otero Luna called for the business community to unite within the trade union organisation, demanding greater representation and a more decisive role in political and economic restructuring.

In 1976, Otero Luna took over the presidency of the Seville Chamber of Commerce, thereby consolidating the CPE's influence in the business sphere. However, not all businessmen agreed with the CPE's strategy. This resulted in the establishment of the **Metal Business Federation of Seville (FEDEME), which was the first employers' organisation to be set up in Spain was made up of entrepreneurs and was led by entrepreneurs from the metal industry sector in each of its stages**. It was supported by two multinationals, **Abengoa and Cobre Las Cruces**, from its beginnings.

As the legal framework prevented them from becoming a formal employers' organisation, they resorted to the Law on Civil Associations, which was the only viable option at the time. At the same time, they began an intensive recruitment campaign for small and medium-sized enterprises in the sector, supported by key companies such as Abengoa and ISA. Within a short period of time, they had gathered around 500 entrepreneurs.

The 1977 Law on the Regulation of the Right of

Trade Union Association allowed FEDEME to develop democratic associationism in Spain, and it was officially constituted on 3rd May 1977 by the Executive Committee of the Metal Business Federation of Seville (FEDEME). Juan Miguel Salas Tornero presided over the committee, and Antonio María Fernández Palacios was secretary.

In 1979, **Confemetal** (the Spanish Confederation of Metal Business Organisations) was founded, **with FEDEME as one of the main promoters and driving forces**. Bringing together the most representative sectoral associations, it consolidated itself as **the main voice of the metal industry in Spain and as a key player within the CEOE and Cepyme.**

FEDEME in Seville

FEDEME was born with the aim of **leading social dialogue and negotiating collective agreements in the metal sector, initially representing sectors such as the automotive trade, iron and electrical appliance stockists, and especially the iron and steel sector.** During its first decades, the organisation was characterised by a professionalised bargaining strategy, in which trade unions had numerous delegates while technical experts provided representation. This allowed FEDEME to consolidate its influence and prestige in Seville.

One of FEDEME's most notable achievements was signing the first democratic collective bargaining agreement, making Seville's metal workers the second highest paid in the country, behind only the Basque Country.

In the 1980s, in the middle of an economic crisis characterised by high unemployment, inflation and low competitiveness, FEDEME prioritised the implementation of initiatives such as the Urgency Plan for Andalusia (PUA) and accession to the European Economic Community (EEC).

At the beginning of the decade, FEDEME and Confemetal produced studies on the sectoral crisis, reflecting the stagnation of the steel industry, the fall in exports, and job losses in the processing industry. The situation worsened due to the impact of the construction crisis, which severely affected Seville's metallurgical companies. In response, FEDEME launched initiatives such as the 'credita-taller', in collaboration with El Monte de Piedad, to finance vehicle repairs in affiliated workshops.

The economic situation and fall in investment remained problematic in the mid-1980s. During Carlos Ferrer Salat's visit to Metal entrepeneurs, the president of the CEOE highlighted the need for labour reforms and a reduction in financial costs, as well as greater flexibility in the labour market. During this period, FEDEME promoted initiatives such as partnerships with auxiliary shipbuilding companies and the creation of industrial parks, despite increasing unfair competition and the industry's difficulties.

In 1984, the metal industry accounted for 25% of industrial production and provided 750,000 jobs. Spain's accession to the Common Market in 1986 caused concern in the sector, which had to adapt to new regulations. In the late 1980s and early 1990s, FEDEME intensified its activity in an economic crisis context, promoting the creation of groups of tractor companies, subcontracting days, industrial subcontracting workshops, and industrial parks.

Participation in the Seville Universal Exposition of 1992 was an important milestone. Seville in 1992 was a significant event for the metallurgical sector. During the 1990s, FEDEME also encountered challenges within the aeronautical and naval industries. The crisis saw several companies close and the need to win large contracts, such as the 'Leopard Programme'. One of the priority objectives was to win large contracts, such as the 'Leopard Programme', in the face of the crisis in the aeronautical industry and the closure of several companies.

At the beginning of the 21st century, the metallurgical sector in sector in Seville was still losing competitiveness against competitors from other regions. FEDEME promoted meetings with large companies, such as CASA, Renault and Andalucía Aerospace, and promoted the creation of new, better equipped industrial areas that were better equipped. The crisis in the automotive and aeronautical sector, marked by a drop in sales and the slowdown of key programmes, severely impacted the local economy. Despite this, FEDEME continued its work, promoting key projects such as the 'FEDEME Advantages Programme' and fighting for the internationalisation of metal companies.

In 2003, and with the arrival of the A380 assembly in Seville, employment boosted in the province. During the Complementary Industry Fair (FIC) at FIBES, key contracts such as the A400M, the manufacture of gearboxes at Renault and the production of Leopard tanks at General Dynamics (SBB Armoured) were highlighted, consolidating the reactivation of the sector.

In the early years of the 21st century, one of FEDEME's main objectives was its modernisation, focused on **improving competitiveness, promoting continuous training, promoting cooperation between companies and support the development of strategic sectors. During this period, FEDEME also worked on the creation of industrial clusters and the development of strategic sectors and the consolidation of**

“FEDEME was the first employers’ association in Spain. It has been led by metal sector entrepreneurs throughout its history, and has had the support of two multinationals, Abengoa and Cobre Las Cruces, from the outset”

international alliances. The Federation also focused on improving the organisational structure and support to the aeronautical and naval aerospace and maritime auxiliary industry.

Over the years, FEDEME has played a key role in promoting the industrial sector in Seville and Andalusia. The organisation has always sought to adapt to new challenges, encouraging collaboration between employers, workers and public administrations in order to strengthen the sector. FEDEME continues to support its members by improving their competitiveness, sustainability, technological innovation and internationalisation. **The organisation is committed to strategic sectors such as aerospace, renewable energies and the automotive industry, in which Seville has managed to establish itself as a leading national and international player.**

Training and innovation are fundamental to this new stage, during which FEDEME has developed training programmes tailored to the specific needs of companies, enabling their employees to stay up to date in an ever-evolving industrial landscape. In short, FEDEME’s **main objective is to strengthen the industrial sector by supporting companies in adapting to new challenges and fostering collaboration with different social sectors.**

“A total of 365 companies in the tractor and auxiliary sectors in Seville were consulted”

THE FIGURES FOR THE INDUSTRIAL METAL SECTOR

Business ecosystem: number of companies, size and location, activity

Number of companies

As detailed in Chapter I of the **Presentation of the Sectoral Study on the Metal Industry in Seville and its Province**, an **initial universe of 1,249 companies** was used as a starting point in the **Explanatory Memorandum and Methodology section**. From this, a more **exhaustive monitoring of 365 companies was carried out.**

A consultation was carried out by means of surveys of the **365 companies** identified, including both tractor and auxiliary companies in Seville and its province. Of these, **68% agreed to participate in the study**, representing a significant proportion of the total business fabric surveyed.

However, it should be noted that this business fabric is smaller than that considered by official sources, as factors such as having a workforce of more than **20 people** were taken into account when selecting the companies.

After the documentary analysis of the database, companies engaged in another activity, those in **bankruptcy proceedings or liquidation**, and those without their **tax headquarters in Seville** and its province, despite being located in the territory, were excluded.

Sample: List of companies in the metal industry sector in the province of Seville

1. 226innova24h, S.L.

2. A.C.A. Montajes Y Reparaciones Industriales S.L.

3. Aceros para la construcción, S.A. “Acecsa”.

4. Aciturri Aerostructures S.L.U.

5. Actren mantenimiento ferroviario, S.A.

6. Adf Dgh Maintenance, S.L.

7. Aercal Aerospace, S.A.

8. Aeroespace Engineering Group S.L.

9. Aeroestructuras Sevilla, S.L.

10. Aerosertec, S.L.

11. Aeroserv Puerto Real S.L.

12. Aerotecnic Assembly, S.L.
13. Aerotecnic Composites, S.L.
14. Aerotecnic Metallic, S.L.U.
15. Aertec Solutions S.L.
16. Airbus Defence and Space S.A.
17. Airgrup S.L.
18. Airtificial Aerospace & Defense Engineering, S.A.
19. Aislamientos Galsur S.L.
20. Al2 Grúas S.L.
21. Alcalaman S.L.
22. Alestis Aerospace S.L.
23. Alter Technology Tüv Nord S.A.
24. Aluminios El Moni S.L.
25. Aluminios Jafran S.L.
26. Aluminios y cristales del Aljarafe S.R.L.
27. Ampuero Grupo Industrial 10 S.L.
28. Anches Sport S.L.
29. And & Or S.A.
30. Andaluza de oficinas S.L.
31. Ansema 2010 S.L.
32. Antonio Alcon Fernandez S.L.
33. Antonio Matachana S.A.
34. Apelsa Water Service S.L.
35. Apelsa Water Solutions S.L.
36. Arg Bottling, S.L.
37. Arias Naranjo, José (cristalería Cantillana).
38. Armazones y alquileres Écija S.L.
39. Ascensores Carbonell Sevilla S.A.
40. Ascensores Ingar S.A.
41. Asistencia Técnica Industrial Asturiana S.L.
42. Astilleros del Guadalquivir S.L.
43. Astipersi S.L.
44. Atexis S.L.
45. Atis Ibérica Derichebourg S.L.
46. Automatismos Del Sur S.L.
47. Auxiliar Conservera S.A.
48. Axion Infraestructuras de Telecomunicaciones S.A.
49. Ayesa Air Control Ingeniería Aeronáutica S.L.
50. Ballestas Chía S.L.
51. Bamer España Comercio Y Distribucion S.L.
52. Básculas Guadalquivir, S.L.U.
53. Bética de Desarrollos Tecnológicos S.L.
54. Bextron Power, S.L.
55. Bidegain Vega S.L.
56. Bosado S.L.
57. BRINNER S.A.
58. Ca Infraestructuras T&I S.L.
59. Cablebox S.L.
60. Cables Y Eslingas S.L.
61. Calderería Rivero S.L.
62. Cameleon Modules S.L.
63. Canagrosa Lab & Services S.L.
64. Canteras La Molinera S.L.
65. Capitas S.L.

66. Carpintería Metálica Movisol S.L.
67. Carrocerías César S.A.
68. Carrocerías Y Volquetes Gómez S.L.
69. Ceamar Distribuciones S.L.
70. Cercados de la Barrera S.R.L.
71. Cerrojos andaluces de seguridad S.L.
72. Cidepa Sincron S.L.
73. Circet Cableven S.L.
74. Circutor S.A.
75. Citius Solutions S.L.
76. Cobre Las Cruces S.A.
77. Colaboración Andaluza S.L.
78. Comainox S.L.
79. Compañía Española De Sistemas Aeronáuticos S.A.
80. Comvi S.L.
81. Condaplast S.A.
82. Construcción Industrializada Modular Prefabricada S.L.
83. Construcciones Mecánicas Gonver S.L.
84. Construcciones Metálicas Del Guadalquivir S.L.
85. Construcciones Metálicas Mairena S.L.U.
86. Construcciones Sanchez Dominguez Sando S.A.
87. Constructora San José S.A.
88. Consur S.A.
89. Cortes Y Aceros Del Sur S.L.
90. Cristalauto Andalucía S.L.
91. Crown Packaging Manufacturing Spain S.L.
92. Cuadros Eléctricos Araujo S.L.
93. Cuadros Eléctricos Nazarenos S.L.
94. Cubiertas Arahal S.L.
95. Daikin Ac Spain S.A.
96. DCA Sistemas de Cierre S.L.
97. Deluxe Lighting S.L.
98. Deprom S.L.
99. DGH Robótica Automatización y Mantenimiento Industrial S.A.
100. Digi Spain Telecom S.L.
101. Dionisio Cáceres e Hijos S.A.
102. DiPuertas Reyes Lozano S.L.
103. Diseño de Soluciones Medioambientales S.L.
104. Diseño Y Automatización Ningenia S.L.
105. Diseño Y Producción Avanzada Fresado 5-Ejes S.L.
106. División de Frío Andaluza S.L.
107. Dorlet S.A.
108. DSV Empresa Constructora y Ferroviaria S.L.
109. Edmi Spain S.L.
110. Electromecánica Andaluza S.L.
111. Electromecánica Sito S.L.
112. Element Materials Technology Seville S.L.
113. Eleva Grúas Torre S.L.
114. Elimco Aerospace S.L.
115. Equilibrados y Mecanizados Chía S.L.
116. Esasolar Energy System S.L.

117. Espirales y Maquinaría de Transporte S.L - Chia.
118. Estructuras y Cerrajería del Aljarafe S.L.
119. Europamills Instalaciones Industriales S.L.
120. Eviosys Embalajes España Sa / Eviosys Packaging Closures Spain S.L.
121. Fábrica De Útiles Y Herramientas Nusac S.L.
122. HORSE (Planta de Sevilla)
123. Faraone Ibérica S.L.
124. Faroles y Columnas Híspalis S.L.
125. Feniks Cleaning & Safety S.L.
126. Fermupe S.L.
127. Fernando Lama S.L.
128. Ferroinsa Fortes S.L.
129. Fitland International Equipment S.R.L.
130. Forjaroda S.L.
131. Forjas del Guadalquivir S.L.
132. Fundición Maceda S.L.
133. Fundiciones Barreiro S.L.
134. Galisur, Protecciones y Lacados S.L.
135. Galvatec Aeroestructuras S.L.
136. Galvatec Laboratorio S.L.
137. Galvatec Ts Y Eqp S.L.
138. Galvatec S.L.
139. Gas Vapor S.R.L.
140. Gazc Sevilla Mecanizados S.L.
141. General de Metalisteria Maquetas y Diseños S.L.
142. Gewiss Ibérica S.A.
143. Glassinox S.L.
144. Global Fap S.L.
145. Gnes Innovación S.L.
146. Gng Factory Spain S.L.
147. Gp Manufacturas de Acero S.A.
148. Gri Towers Sevilla S.L.
149. Grupo Alquivir Montajes Ferroviarios S.L.
150. Heliopol S.A.
151. Hergonde Descanso S.L.
152. Hermanos Martínez Morillo S.L.
153. Hidral S.A.
154. Hiplus Aire Acondicionado S.L.
155. Hispabaño S.L.
156. Hispano-Lusitana de Aviación S.L.
157. Hnos. Sánchez Lafuente S.A.
158. Hostelería e Inoxidable S.L.
159. Ibercool Waterblocks S.L.
160. Ibérica Renovables S.L.
161. Idemo XXI Ingeniería de Montaje S.L.
162. Impermeabilizaciones Safer S.L.
163. Indaero Grupo Emergy S.L.
164. Industria de Turbo Propulsores S.A.U.
165. Industria Especializada en Aeronáutica S.A.
166. Industria Sevillana del Caucho S.L.
167. Industria Siderometalúrgica Gienense S.L.
168. Industrial de Elevación S.A.
169. Industrias Aeronáuticas Inasor S.L.U.

170. Industrias Relente S.L. “I.R.”

171. Inerco Acústica S.L.

172. Inespro Ingeniería y Gestión Medioambiental, S.L.

173. Inferstahl S.L.

174. Ingeniería del Agua y la Energía Inagen S.L.

175. Ingeniería E Instalaciones Aliter S.L.

176. Ingeniería Fabricación de Estructuras Metálicas y Cerrajería S.L.

177. Ingeniería, Calderería y Mecanizados S.L.

178. Ingesur Seguridad, S.A. / Ingesur S.A.

179. Innovación y Desarrollo fe Herrajes S.L.

180. Inselma S.A.

181. Instalaciones Brenes S.L.

182. Instalaciones Hosteleras Barrero y García S.A.

183. Instalaciones Mecánicas Industriales Pynacle S.L.

184. Integra Ascensores S.L.

185. Internacional Hispacold S.A.

186. Irenzo S.L.

187. Isotérmica S.L.

188. Iturri S.A.

189. J. Huesa Water Technology S.L.

190. Jimeca S.L.

191. Jiménez Cáliz Hermanos S.L.

192. Jose Delgado Alvarez S.L.L.

193. José Rodríguez Doblas e Hijos S.L.

194. Juan Feria S.A.

195. Juan León Osuna e Hijos S.L.

196. Keyter Technologies S.L.

197. Ksb Itur Spain S.L.

198. La Fonte Ardennaise España S.L.

199. Laboratorio Oftálmico Andaluz S.L.

200. Lama Sistemas de Filtrados S.L.U.

201. Lamaignere Aeroservice S.L.

202. Láser Guadalquivir S.L.

203. Latesys Iberia S.L.

204. Lecitrailer Andalucía S.L.

205. Legrand Group España S.L.

206. Lumelco S.A.

207. Mac Puar Ascensores S.L.

208. Mac-Puar S.A.

209. Mafrisur 2012 S.L.

210. Mamparas Doccia S.L.

211. Mantenimiento Integral de Industrias Metalúrgicas Ardyvel S.L.

212. Maquinaria y Materiales de Embalaje S.L.

213. Maquinre S.Coop. And.

214. Marchenera de Actividades Electrónica S.C.A.

215. Mateo Bermudo, José Antonio

216. Matricería Del Sur S.L.

217. Maysobar Y Servicios S.L.

218. Mecaldegra S.L.

219. Mecaniperz S.L.

220. Mecanizaciones del Sur S.L.

221. Mecanizado Virtual S.L.
222. Mecanizados Calonge S.L.
223. Mecanizados Cano Sancha S.L.
224. Mecanizados Je-Ju S.L.L.
225. Mecanizados Talleres Cruz S.L.
226. Mecanizados y Transformaciones Lopez S.L.
227. Metal Improvement Company L.L.C.
228. Metalgráfica Del Sur S.L.
229. Metalia Estructuras Cubiertas y Montajes S.L.L.
230. Metálica Dumar S.L.
231. Metálicas Coysa S.L.
232. Metálicas Sierra Sur S.L.L.
233. Meupe S.L.
234. Minas de Aguas Teñidas S.A.
235. Moldes Tecnológicos para el Hormigón S.L.
236. Mon Unic S.L.
237. Moncolan S.L.
238. Mondaivalia S.L.
239. Montajes Industriales y Mecánica Sevillana S.L.
240. Montajes y Cerramientos del Sur S.L.
241. Mp Productividad S.A.
242. Noirrac S.L.
243. Nube Soluciones Integrales S.L.
244. Occidental Mantenimiento y Servicios S.L.
245. Ofiteca Technology S.L.
246. Olives Foods Machinery S.L.
247. Omeca S.A.
248. Orfebrería Villarreal S.A.
249. Orona S. Coop.
250. Otis Mobility S.A.
251. Paneles Dimasa La Campiña S.R.L.
252. Passion Motorbike Factory S.L.
253. Pegasus Aero Group S.A.
254. Perea Mmp Energy S.L.
255. Plaza Sistemas S.L.
256. Poliguadaira S.L.
257. Postemel S.L.
258. Potez Aeronáutica Ibérica S.L.
259. Prefabricación Naval y Calderería S.L.
260. Prefabricados Hermanos Quijada S.L.
261. Procesos De Envases Metálicos S.A.U.
262. Proci S.A.
263. Producciones Agasa S.L.
264. Proinsener Energia S.L.
265. Promesur Industrial Components S.L.
266. Promotora Electrónica Andaluza S.L.
267. Proyectos Instalaciones y Mantenimientos Andaluces S.A.
268. Puertas Automáticas Jimatic S.L.
269. Puertas Automáticas Talleres Gallego S.L.
270. Puvenac S.L.
271. Rahemo S.L.
272. Rectificados Hermanos Hurtado S.L.
273. Reductores y Variadores Del Sur S.A.

274. Refractarios Alfran S.A.

275. Rejillas Calibradas S.L.

276. Renfe Fabricación y Mantenimiento Sociedad Mercantil Estatal S.A.

277. Renta de Maquinaria S.L.U.

278. Reparaciones de Maquinarias de Obras Públicas S.L.

279. Reyplas Revestimientos y Plásticos S.L.

280. RGD Mape S.L.

281. Rhenus LTK Warehousing Solutions S.L.

282. Rioglass Solar Sch S.L.

283. Robles Eleser S.L.

284. Sabin Montero Contract S.L.

285. Salfer Aluminios S.L.

286. Santa Barbara Sistemas S.A.

287. Satys Sealing & Painting Spain S.A.U.

288. Savilcon Energía S.L.

289. Savilcon Montaje Industrial S.L.

290. Schindler S.A.

291. Scoobic Med S.L.

292. Seram Proyectos e Instalaciones S.L.

293. Serveo Servicios en Industria S.A.

294. Servicio Total de Hostelería S.L.

295. Servicios Informáticos Y Económicos S.L.

296. Servistructuras Los Palacios S.L.

297. Sevilla Control S.A.

298. Sevillana De Aluminio Y PVC S.L.

299. Sevillana De Control Y Gestión Mecanizada S.L.

300. Siderúrgica Sevillana S.A.

301. Sigal Innovaciones Tecnológicas S.L.

302. Siplan Ibérica S.L.

303. Sistemas De Interconexión S.A.

304. Skylife Engineering S.L.

305. Sociedad Andaluza de Producciones Sostenibles S.L.U.

306. Sociedad Ibérica de Construcciones Eléctricas S.A.

307. Sofitec Aero S.L.

308. Soldasur S.A.

309. Soluciones Férricas Del Sur S.L.U.

310. Somg Confort y Descanso S.L.

311. Sp Consultores y Servicios S.L.

312. Squadra Electric S.L.

313. Steel Designs and Structures S.L.

314. Strugal 2 S.L.

315. Strugal Solar S.L.

316. Suministros Fresados y Grabados S.L.

317. Suministros Jugar S.L.

318. Surestructura Técnica y Desarrollo Aplicativo S.L.

319. Surtidores Andrés Ledo S.L.

320. Surtruck S.L.

321. Tach S.A.

322. Taller de Orfebrería Marmolejo S.L.

323. Talleres Ángel Torres S.L.

324. Talleres Antonio Román S.L.

325. Talleres Bando S.L.

326. Talleres De Carpintería Figueroa S.L.
327. Talleres Díaz Guerra S.L.
328. Talleres Escalera Arcas S.L.
329. Talleres Gonzalez y Paris S.L.
330. Talleres Ibercar S.L.
331. Talleres José Luis Granado S.L.
332. Talleres Lori Alde S.L.
333. Talleres Mayma S.L.
334. Talleres Metálicos Coria 2007 S.L.
335. Talleres Rosex S.L.
336. Talleres Tagonsa S.A.
337. Tecade S.A.
338. Tecaer Sevilla S.L.
339. Técnica Recanteado Composites S.L.
340. Tecnipaint Pintura S.L.
341. Tecnología Mecanica del Sur S.L.
342. Tecnología Productiva para Mecanizado y Calderería S.L.
343. Tecnotrans Bonfiglioli S.A.
344. Tejwheels S.L.
345. Tekno Service S.L.
346. Termicol Energía Solar S.L.
347. Todopersianas Pueblaper S.L.
348. Toscano Línea Electrónica S.L.
349. Toyota Material Handling España S.A.
350. Trescal España De Metrología S.A.
351. TRH ZF Sevilla S.L.
352. Troqueles Sánchez e Hijos S.L.
353. Trox España S.A.
354. Tuberías y Montajes Orgaz S.L.
355. Umi Aeronáutica S.L.
356. Unex Aparellaje Eléctrico S.L.
357. Unirain S.A.
358. Veolia Servicios Lecam S.A.
359. Volquetes Del Sur S.C.A.
360. Silort Corcoles S.L.U.
361. Lo Más Rápido S.L.U.
362. Juaman Estructuras Metálicas S.L.
363. Mecanizados Carrión S.L.
364. Electromecánica Andaluza S.L.
365. Mecanizados Y Transformaciones López S.L.U.

This first survey has provided valuable information never published before, enabling the two objectives of the study to be met. The first objective was to find out about the existing business landscape, and the second was to identify relevant aspects such as expectations, trends and challenges for the future of businesses operating in Seville and its province.

The answers have been compiled into a database, enabling the perspectives provided by the companies to be analysed. This section describes the results from the fieldwork and presents the analysis results.

“The metal industry in Seville and its surrounding area is predominantly made up of small and medium-sized enterprises”

Size and location

A sectorial study of the metal industry in Seville and its province reveals that it is predominantly made up of small companies. 45.36% of these are **medium-sized companies** (with fewer than 50 employees), which together with **micro-companies** (with fewer than 10 employees) represent **72.16%** of the total. Next are **SMEs** with **50–250 employees** (**21.64%**), followed by **large enterprises** with more than 250 employees (**6.18**%).

SMEs play a fundamental role in the metal industry in Seville and its province. Although it is made up of a small number of large companies, such as Airbus Defence and Space, HORSE and Cobre las Cruces, it also has key companies in areas such as industrial engineering and automation (CEN Solutions, DGH Robotics, Automation and Industrial Maintenance), air conditioning system manufacturing (Hispacold), and services, logistics, maintenance and engineering in the metal industry (Rhenus and Sofitec).

The metalworking industry in Seville and its province is based primarily on a large number of small companies. These large companies are supported by a significantly larger number of smaller suppliers. In some cases, as in the aerospace sector, these are highly specialised in terms of technology and products, with a great deal of accumulated know-how.

Size by number of employees	Size % of total
+250 employees	6,18
50-250 employees	21,64
10-49 employees	45,36
0-9 employees	26,8

Source: Own elaboration

Location

The Metal industry in the province of Seville is primarily located in the Andalusian capital and surrounding towns in the metropolitan area, including La Rinconada, Alcalá de Guadaíra and Dos Hermanas. These areas account for nearly 60% of the total. Including other municipalities considered to be within the metropolitan belt, such as Alcalá del Río, Camas, Coria del Río, La Puebla de los Infantes, Los Palacios y Villafranca, Mairena del Aljarafe, Mairena del Alcor and Valencina de la Concepción, **almost eight out of ten companies (77.31%) are headquartered in this area.**

The Andalusian Aerospace Technology Park, Aerópolis is located in La Rinconada. Born in 1999 and inaugurated in November 2003, provides an ideal environment for R+D+i. **It is the only site in Spain dedicated exclusively to the aeronautical and aerospace industry**. Aerópolis is located next to Seville Airport in La Rinconada, near the Airbus Defence and Space factory. It currently brings together more than 60 companies involved in major international aeronautical programmes with manufacturers such as Airbus, Embraer, Eurofighter, Boeing, Sikorsky and Bombardier.

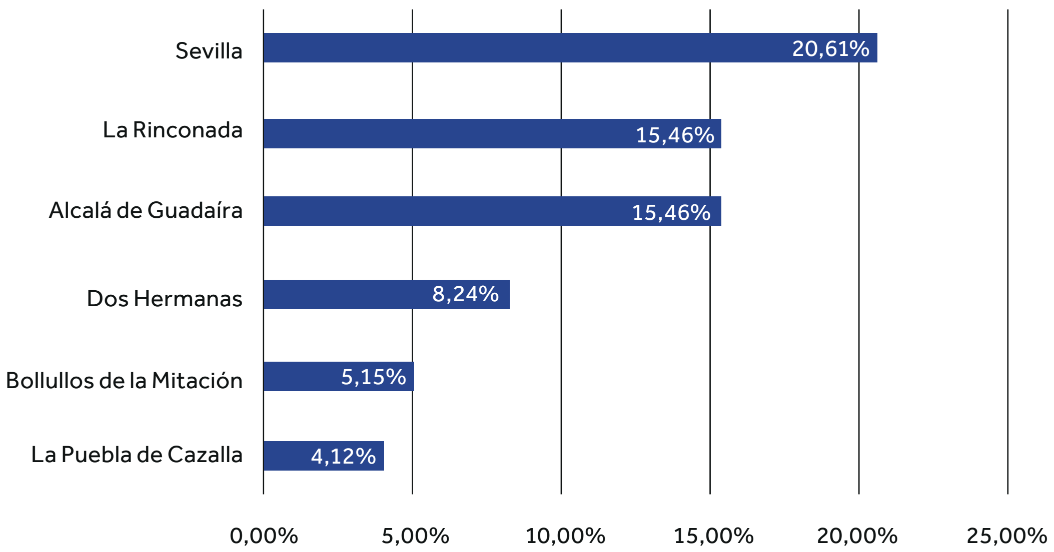
Companies that have chosen to locate in Aerópolis include: The major European manufacturer Airbus Defence and Space, as well as two of the three Spanish Tier 1 companies: Aernnova and Aciturri. Since its inauguration, companies have consistently expressed interest in the enclave, and the aerospace sector is currently generating new jobs and leading to a high level of employment. A monographic study of the situation and expectations of the aerospace sector in Seville and its province shows that most companies in this sector are in San José de la Rinconada within the Aerópolis Technology Park. Seville follows with **28%**, while the remaining **20%** are located elsewhere in the Seville metropolitan area.

> “Eight out of ten companies are headquartered in Seville and its metropolitan area”

Alcalá de Guadaíra has an important industrial park which houses companies from different sectors, including Metallurgy. Activities in this sector **include metal carpentry, construction, machinery repair and maintenance, aluminium production, and iron foundry work. In Dos Hermanas, several companies in the metal sector specialised in metal carpentry, metallurgy, electrical work and boilermaking.**

There is also a dispersion of companies in other municipalities in the province, including: **Brenes, Bollullos de la Mitación, Carmona, Constantina, Écija, Gerena, Guillena, La Puebla de Cazalla, La Roda de Andalucía, Las Cabezas de San Juan, Luisiana, Marchena, Pilas and Utrera**. Outside the metropolitan area, two towns stand out: **Bollullos de la Mitación and La Puebla de Cazalla.**

CONCENTRATION IN THE MAIN MUNICIPALITIES IN THE PROVINCE OF SEVILLE (%)



Source: Own elaboration

Activity

Of the companies surveyed, **76.08%** belong entirely to the METAL industry sector in Seville and its province. Meanwhile, **18.47%** also share activities with the METAL services sector (repair, installation and technical consultancy), and **5.43%** share activities with the commerce sector (intermediation and sale of METAL products). **The following activities stand out, in this order:**

1. **Aeronautical and space construction and its machinery.**
2. **Manufacture of metal carpentry.**
3. **Manufacture of lifting and handling machinery.**
4. **Mechanical engineering on behalf of third parties.**

The activities of the Metal industry sector in Seville and its surrounding area, according to the sample, are detailed below.

BRANCHES OF ACTIVITY OF THE INDUSTRIAL METAL SECTOR IN THE PROVINCE OF SEVILLE ACCORDING TO THE SAMPLE

CNAE classification The Metal industry sector in Seville and its province	Manufacture and production activities
0729	Extraction of other non-ferrous metal ores
2410	Manufacture of basic iron, steel and ferroalloy products
2442	Aluminium production
2451	Iron foundry
2461	Treatment and coating of metals
2511	Manufacture of metal structures and components
2512	Metal carpentry manufacturing
2561	Metal processing and coating
2562	Mechanical engineering on behalf of others
2572	Manufacture of locks and fittings
2573	Manufacture of tools
2599	Manufacture of other fabricated METAL products n.c.o.p.
2611	Manufacture of electronic components
2711	Manufacture of electric motors, generators and transformers
2712	Manufacture of electrical distribution and control apparatus
2790	Manufacture of other electrical materials and equipment
2815	Manufacture of bearings, gears, and mechanical transmission components
2822	Manufacture of lifting and handling machinery
2825	Manufacture of non-domestic ventilation and cooling machinery
2830	Manufacture of agricultural and forestry machinery
2849	Manufacture of other machine tools
2893	Manufacture of machinery for the food, beverage and tobacco industries
2894	Manufacture of machinery for the textile, apparel and leather industries
2909	Manufacture of other motor vehicles
2010	Manufacture of motor vehicles
2920	Manufacture of bodies for motor vehicles and trailers/semi-trailers
3030	Manufacture of aircraft, spacecraft, and related machinery
3091	Manufacture of motorbikes
3254	Manufacture of products for human health
3320	Installation of industrial machinery and equipment

Source: Own elaboration

This is followed by companies whose main activities belong to the **Metal services sector, such as repair, installation and technical consultancy**. According to companies in Seville and its surrounding area who took part in the survey, **activities relating to other building finishes, technical engineering services, and technical consultancy and machinery repair stand out**. The following is a list of the main activities of the Metal services sector in Seville and its province, as represented by the sample.

SHARED BRANCHES OF ACTIVITY OF THE METAL SERVICES SECTOR IN THE PROVINCE OF SEVILLE ACCORDING TO THE SAMPLE

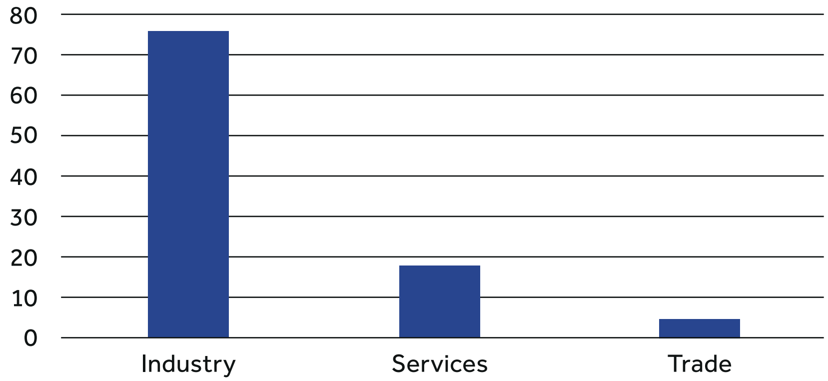
CNAE classification The Metal industry sector in Seville and its province	Activities (Repair, installation and technical consultancy)
3312	Repair of machinery
4291	Construction of fluid networks
4322	Installation of plumbing, heating and air-conditioning systems
4329	Other construction site installations
4332	Joinery installation
4339	Other building completion and finishing
4619	Agents involved in the sale of miscellaneous goods (including commercial representation)
5210	Warehousing and storage
7112	Engineering and related technical consultancy services and other engineering activities
7732	Renting and leasing of machinery and equipment for construction and civil engineering
86	Health care activities (although not specific to the METAL sector, these could include occupational medical examinations)

Source: Own elaboration

Finally, in the trade sector (i.e. the intermediation and sale of metal products), intermediaries specialising in the **trade of fuels, minerals, metals, and industrial chemical products (CNAE 4612), as well as those specialised in the wholesale trade of machine tools (CNAE 4662) and aeronautical maintenance services (CNAE 5223), stand out.**

As can be seen in the table, the companies surveyed **(76.08%) in the metal industry sector in Seville and its province, some of them share other activities in the service sector (18.47%), and in the metal trade sector (5.43%).**

IMPORTANCE OF THE METAL SECTORS IN SEVILLE AND ITS PROVINCE (%)



Source: Own elaboration

According to the sector map prepared by Confemetal in 2020, the profile of the metal sector in Seville and its province is distributed among the three metal sectors, according to the indicator of affiliates, by autonomous communities in industry, services and commerce.

The results of the survey indicate that the **main activities in Seville's industrial metal sector are aeronautical and space construction and machinery, making it the second-largest province in Spain after Madrid, as well as metal carpentry.**

> "The main activities in Seville and its province are aeronautical and space construction and machinery, making it the second province at national level after Madrid, alongside the manufacture of metal carpentry"

Turnover and employability (2024/25)

With regard to job creation in the Metal industry in Seville province, the data collected in this report (provided by **26.57%** of the surveyed companies) represent 5,951 direct jobs.

According to Confemetal's 2020 Metal Sector Map, Seville is the fourth Spanish province in terms of sector membership, behind Madrid, Barcelona and Valencia.

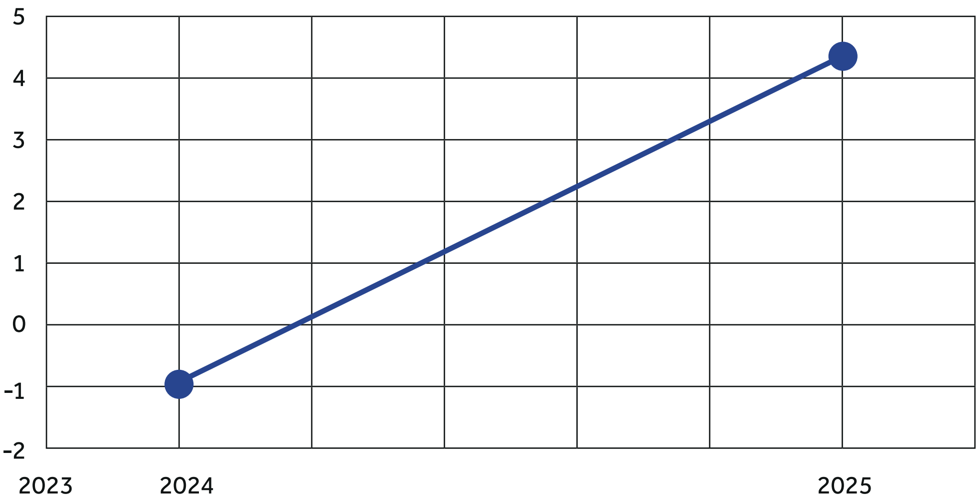
Therefore, the sample included in the report represents around **10%** of total employment in the sector in the province, making the analysed data highly reliable and reinforcing its validity as a reflection of the general situation of the Metal industry in Seville.

These data demonstrate the sector's importance in terms of employment generation and consolidate Seville's position as one of the country's most significant industrial centres in this strategic area.

Regarding the turnover of companies in the Metal industry sector in Seville and its province, a general trend of stability can be observed, with sensible maintenance of this evolution. According to data compiled by companies in the sector, turnover in the 2024 financial year fell slightly by -0.88% compared to the previous year.

However, forecasts for the current year are more optimistic. In a January 2025 survey, companies expressed an average growth expectation of 4.38%, reflecting gradual recovery and moderate confidence in market evolution during 2025. This suggests a gradual revival of economic activity in the sector.

GROWTH OF THE METAL SECTOR IN SEVILLE AND ITS PROVINCE COMPARED TO TURNOVER FORECAST FOR 2024/2025



Source: Own elaboration

Territorial origin and sectoral profile of clients

According to the data collected during the consultation with companies in the Metal industry in Seville and its surrounding area, there is clear orientation towards the national market: **98.96% of companies operate within Spain**. However, it is worth noting that **41.23% also export, meaning that four out of every ten companies have presence in international markets** and employ a mixed commercial strategy. A small percentage of companies (**1.03%**) are exclusively export-focused and do not operate at a national level.

In terms of territorial coverage within Spain, the Metal industry sector in Seville is well established, with activity in all **17 autonomous communities**, as well as the **two autonomous cities** of Ceuta and Melilla.

The national markets with the greatest weight are as follows, in order of importance:

1. **Andalusia**, as a natural market due to its geographical proximity and economic links.

2. **The Community of Madrid**, thanks to its industrial dynamism and importance as a logistics hub.

3. **Extremadura**, due to its proximity and synergies with complementary productive sectors.

4. **The Basque Country** is an industrial benchmark in northern Spain, with strong demand for specialised metallurgical products and services.

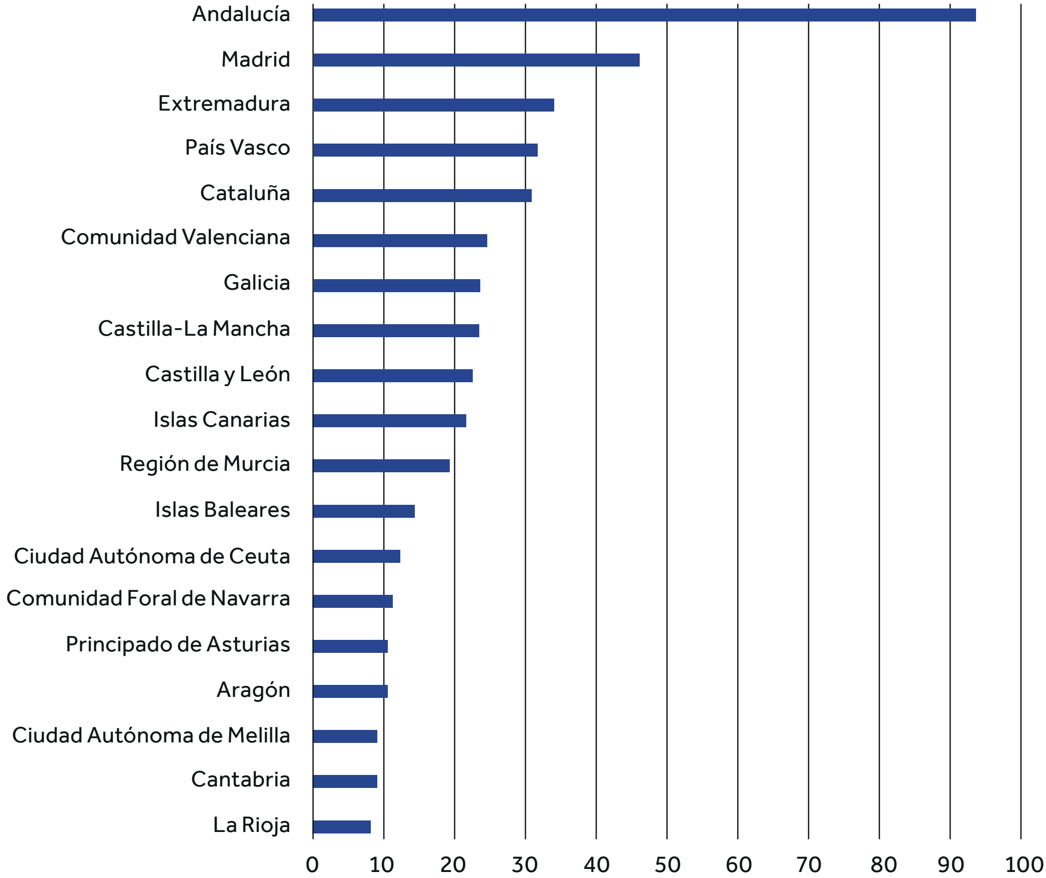
5.**Catalonia** is a key player in exporting and industry, and plays a pivotal role as a gateway to the European market.

6. **Valencia**, which has a significant manufacturing and port industry.

This distribution map reflects the sector's clear national vocation, its capacity to adapt to different production contexts within the country, and its growing international projection. Sevillian METAL industry companies are taking advantage of both proximity and geographical diversification to expand their client portfolio and consolidate their position as important players in the regional and industrial value chains.

"“Four out of ten companies operate in international markets”

IMPORTANCE OF THE METAL INDUSTRY IN SEVILLE AND ITS PROVINCE IN THE NATIONAL MARKET (%)

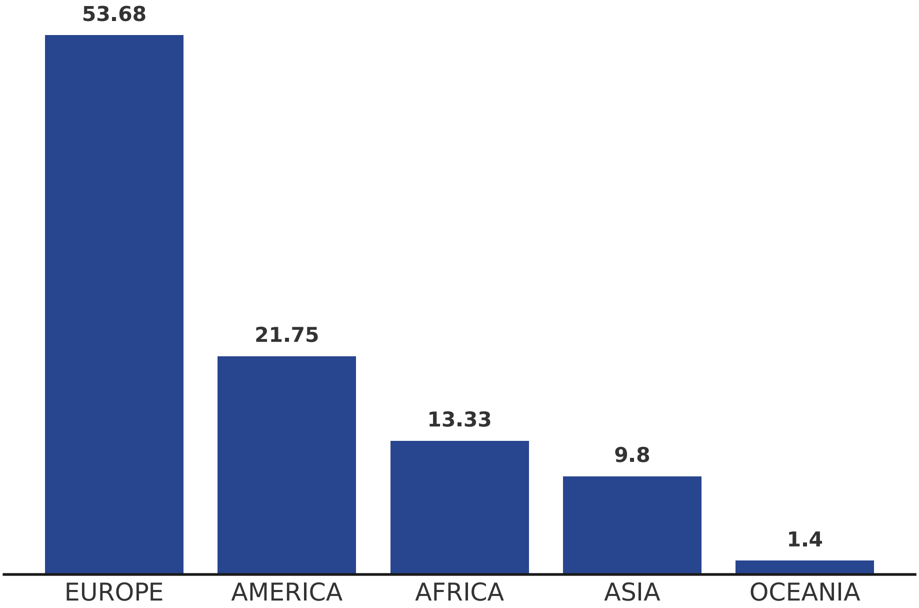


Source: Own elaboration

International presence of the Metal industry sector in Seville and its province

Seville's Metal industry sector has a strong international presence, exporting to over 90 countries across five continents. This geographical diversification reflects a mature commercial strategy and competitive capacity in diverse markets, including both developed and emerging economies.

INTERNATIONAL MARKETS OF THE SEVILLE METAL INDUSTRY (%)



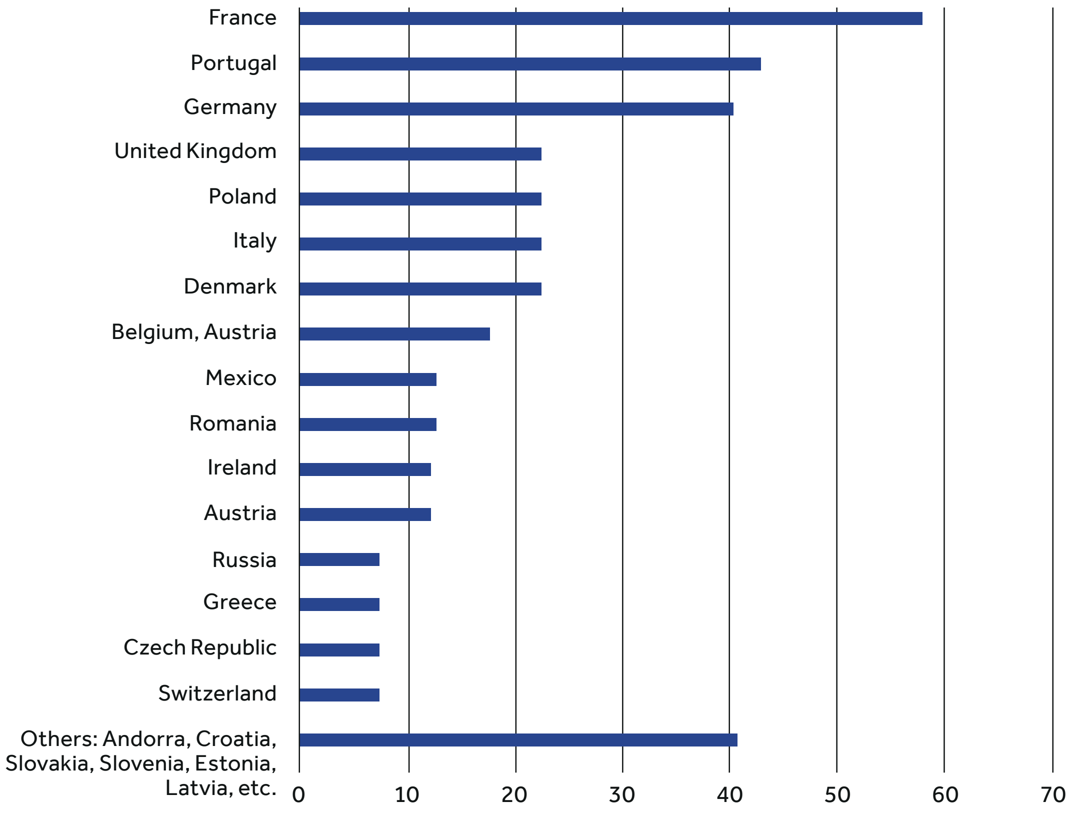
Source: Own elaboration

> "The Seville Metal industry sector demonstrates a solid international presence, exporting to over 90 countries across five continents"

International exports are mainly concentrated on the following continents, ranked by their share of the total number of commercial destinations:

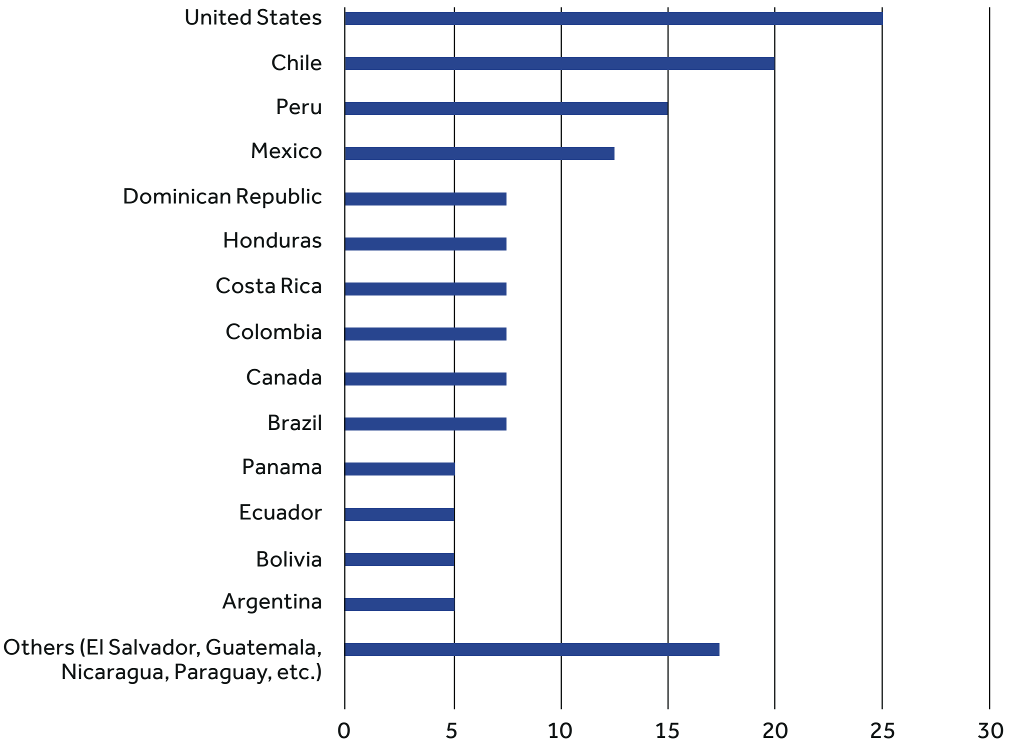
- **Europe**: Representing **53.68%** of the total, Europe is the main destination for exports, with **France, Portugal, Germany, Italy, Poland and the United Kingdom** standing out in particular. This European dominance is due to geographical proximity, established trade links, and integration into the European Common Market.
- **America**: is in second place with **21.75%,** covering both North and South America. The **United States, Chile, Peru, Mexico, Colombia and Brazil** account for most of the activity in this region and have shown **significant growth in trade with Latin American countries.**
- **Africa:** represents **13.33%** of total exports. Morocco, Algeria, Tunisia and Egypt are among the most important markets, reinforcing North Africa's role as a strategic partner for Seville's METAL industry.

PRESENCE IN DESTINATION COUNTRIES IN EUROPE (%)



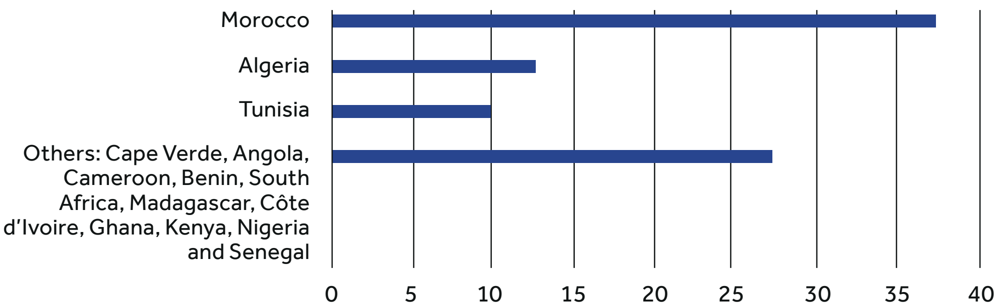
Source: Own elaboration

PRESENCE IN COUNTRIES OF DESTINATION IN AMERICA (%)



Source: Own elaboration

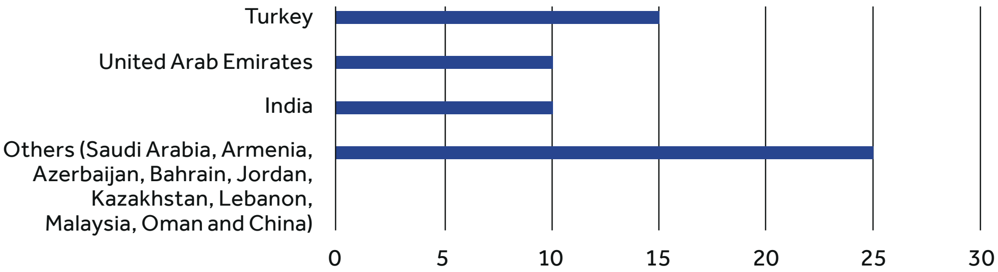
PRESENCE IN DESTINATION COUNTRIES IN AFRICA (%)



Source: Own elaboration

- **Asia**: with **9.8%**, this continent is positioned as an **emerging region in the internationalisation strategy**. Destinations such as **Turkey, India, the United Arab Emirates, Israel and Kuwait show a growing demand for the sector's products and services.**
- **Oceania**: With its **1.4%, Australia and New Zealand are present as niche markets with potential for future growth.**

PRESENCE IN DESTINATION COUNTRIES IN ASIA (%)



Source: Own elaboration

This distribution reflects a clear commitment to geographical diversification, with a strong presence in consolidated markets and progressive expansion towards new strategic destinations.

Profile of clients in the Metal industry in Seville and its surrounding area

Clients in this sector in Seville and its province show notable diversity, reflecting the sector's adaptability to various productive, industrial and service environments. The main sectoral profiles, grouped by area of activity and according to the companies consulted, are detailed below:

Sector	Subsectors / Customer Typology
Public administrations and municipal services	• Local administrations (city councils and municipal entities). • Public general services companies. • Urban cleaning services. • Entities managing agricultural and land maintenance services.
Construction and infrastructure	• Construction companies. • Manufacturers and assemblers of metal structures. • Communities of owners specialising in refurbishment, enclosures and maintenance of facilities.
Industry and transformation	• Manufacturers of industrial machinery. • Distributors and technical maintenance companies. • Bottling and packaging industries. • Hardware stores and metal product warehouses (grey, ornamental and structural iron) • Industrial packaging companies. • Suppliers of parts for agricultural machinery.
Agri-food	• Companies in the agro-industrial and olive oil sectors. • Suppliers of metal components for agricultural machinery and irrigation systems.
Mobility, transport and automotive	• Automotive companies. • Bus manufacturers and coachbuilders (combustion and electric). • Companies in the railway sector.
Metal, aeronautics and aerospace	• Companies linked to the Metal industry and artistic locksmithing. • Subcontractors of parts for the aeronautical and aerospace sectors.
Health and services	• Companies in the health sector, especially those supplying metal components for hospital furniture and functional structures. • Horeca services (hotels, restaurants and catering), particularly with regard to metal installations and industrial furniture. • Companies in the agricultural and cleaning services sectors.

Source: Own elaboration

This wide range of sectors demonstrates the Metal industry's capacity to integrate as a **key supplier in multiple value chains, in both traditional sectors and industries with high technological specialisation.**

"The sector stands out for its ability to integrate as a key supplier in both traditional sectors and industries with high technological specialisation"

Origin of suppliers in the Metal industry in Seville and its surrounding area

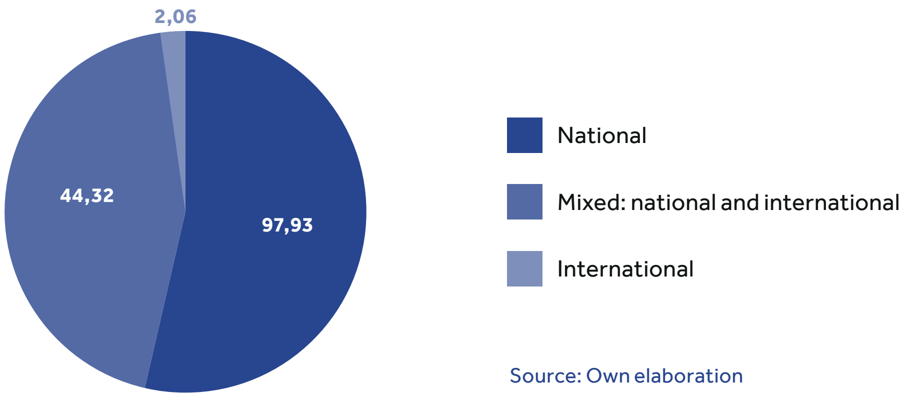
According to data collected from companies in this sector, there is a clear trend in terms of the origin of their suppliers:

- **Exclusive national sphere**: the majority of companies in the sector (approximately **50%**) purchase their supplies and materials exclusively from national suppliers. This preference can be attributed to factors such as geographical proximity, logistical ease, confidence in the quality of local products and established commercial relationships within the domestic market.
- **Combination of national and international spheres**: around **48%** of companies diversify their sources of supply by collaborating with both national and international suppliers. This strategy enables them to access a wider variety of products and technologies at competitive prices, allowing them to benefit from the advantages offered by global markets while maintaining local relationships.
- **Exclusive international sphere**: just **2%** of companies rely exclusively on international suppliers to meet their supply needs. This choice may be motivated by the specialisation of certain products or technologies unavailable on the domestic market or by the search for more favourable economic conditions in foreign markets.

This distribution reflects the strategy of most companies in Seville's METAL industry sector to strengthen national supply chains while opening up significantly to international markets. Combining local and international suppliers enables companies to benefit from both areas, **optimising costs, quality and delivery times.**

Furthermore, **this diversification of suppliers contributes to greater resilience in the supply chain, enabling companies to adapt more flexibly to potential global market fluctuations and logistical challenges.**

ORIGIN OF SUPPLIERS IN THE METAL INDUSTRY IN SEVILLE AND ITS PROVINCE



Source: Own elaboration

The supplier ecosystem serving the Metal industry in Seville and its province is diverse **in terms of both geographical origin and typology.**

Based on the answers collected in the business survey, the main sectors of origin of the suppliers were identified as follows:

SUPPLIERS BY SECTOR OF ACTIVITY

Sector	Subsectors / Customer Typology
Iron and steel industry and industrial raw materials	• Steel, iron, wood and polyethylene. • Iron and steel raw materials for transformation processes. • Industrial paints and components for assembly. • Industrial hardware stores specialising in metal supplies.
Industrial components and supplies	• Precision machining. • Electrical equipment. • Standardised components for assembly and manufacturing processes. • Suppliers specialised in technical and industrial supplies.
Foundry and metal transformation	• Suppliers of specific products for foundries and steelworks. • Sale of materials and technologies for casting and moulding processes.
Metal manufacturing industry	• Industrial components. • Metal structures. • Mechanical systems for industrial applications.
Automotive sector	• Suppliers of components and technical materials for vehicle production. • We supply car manufacturers and auxiliary companies in the sector.
Aerospace	• Suppliers of specific materials and advanced technology for aeronautical processes. • Suppliers oriented towards the civil and military aerospace supply chain.
Other complementary sectors	• Companies in the service, construction and ancillary industries. • Suppliers of diverse equipment, technologies and solutions for multiple industrial applications.

Source: Own elaboration

Innovation and technological transformation in the Metal industry sector in Seville and its province

Companies in the Metal industry in Seville and its province that participated in this study have shown an increasing commitment to innovation, particularly in adopting new technologies that are transforming their processes and business models.

Most companies confirm they have incorporated digital technologies at various stages of their operations. The areas with the highest implementation are:

- **Artificial Intelligence (AI)**: applied to process optimisation, predictive maintenance and data analytics.
- **Specialised hardware and software**: is used for production control, assisted design (CAD/CAM), industrial simulations and traceability.
- **Industrial robotics**: is used in production lines and for repetitive or high-risk tasks.
- **Cybersecurity**: is implemented in response to growing digital dependency, as well as to protect industrial data and intellectual property.
- **Communication systems, media, and e-commerce platforms**: These are key tools for customer relations, suppliers and global marketing.

Companies in the sector have advanced not only in digitalisation, but also in their vision of an evolution towards more disruptive and innovative technologies and virtual production processes, advanced digital transformation, with technological convergence (DigitalTwinning: virtual replicas of production processes for real-time control and simulation; **SmartManufacturing: technologies such as RTM/ResinTransfer Molding, LRI/Liquid Resin Infusion and additive manufacturing; and total Industrial eIoT connectivity**: sensors, connected systems and real-time data analysis).

All these areas are aligned with the principles of **Industry 5.0**, which aims to foster closer collaboration between humans and machines by integrating artificial intelligence, personalisation and sustainability.

The main emerging areas include:

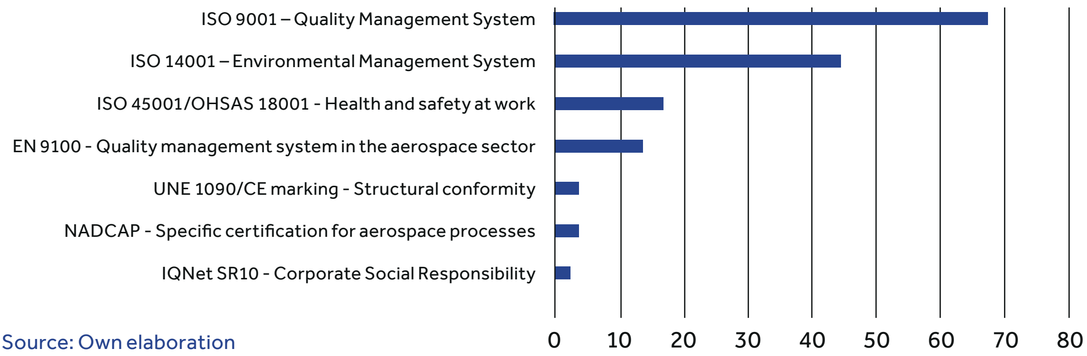
- **Automation and advanced robotisation**: optimisation of production lines, internal logistics and assembly processes using collaborative robots (cobots).
- **Intelligent logistics**: involves the implementation of technologies to improve the efficiency of transport, storage and traceability.
- **Electromobility and new mobility**: involves adapting to demand for components for electric and hybrid vehicles, as well as sustainable transport solutions.

Certifications and approvals

According to the results obtained from the questionnaire, the companies in the Metal industry sector in Seville and its province have shown a high degree of regulatory compliance, standing out for their commitment to quality, the environment, occupational safety and innovation. Below is a summary of the main certifications detected in the sample analysed, most of which are **ISO 9001 - Quality Management System** (International Standard for Quality Management Systems); **ISO 14001 - Environmental Management System** (Environmental Management Certification Standard); **ISO 45001 / OHSAS 18001 - Occupational Health and Safety** (Standards to ensure safe and healthy working conditions).

Other companies have certifications in their sectoral speciality: **EN 9100 - Quality management in the aerospace sector** (Specific certification for companies in the aerospace sector); **NADCAP - Specific certification for aerospace processes** (International recognition for suppliers in the aerospace sector in areas such as non-destructive testing, chemical processes or assembly of aerostructures); **UNE 1090 / CE Marking - Structural conformity** (Standards that certify the conformity of metallic structures according to European requirements), among others.

MAIN CERTIFICATIONS OF THE METAL INDUSTRY IN SEVILLE AND ITS PROVINCE (%)



Source: Own elaboration

Other certifications and approvals are present in residual form in companies in the Metal industry sector. These include: **ISO/TS 22163** (management system for the railway industry); **UNE-EN 15085** (welding in railway vehicles and components); **ISO 50001** (energy efficiency); and **ISO 37001, UNE 19601** and **ISO 14064** (anti-bribery, criminal compliance and management of greenhouse gas emissions). **IATF 16949** (quality management for the automotive sector); **Pyme Innovadora** (recognition from the Ministry of Science and Innovation); and the **Etiqueta Doñana XXI label** (created by the Doñana 21 Foundation **to highlight the distinctive qualities of companies and products from the Doñana region).**

"Opportunities are opening up in sectors such as railways, the agri-food and agricultural industry, commercial aviation and defence"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3. Current events and future prospects

INVESTMENT TRENDS AND STRATEGIES IN THE METAL INDUSTRY SECTOR

According to the conclusions of the study carried out among companies in the Metal industry sector in Seville and its province, opportunities are opening up in sectors such as the **railway industry**, for the manufacture of elements for high-speed trains and intelligent signalling systems; in the **agri-food and agricultural industry,** in machinery and specific technological solutions; commercial **aviation and defence**, thanks to the growing demand in aviation and expectations of investment in the defence sector, with opportunities for the supply of complex parts, structural systems and associated services, etc. One of the issues most valued by companies is the **geostrategic position of the province of Seville**, which is considered a key factor in the decision to locate. The **geographical situation** offers significant advantages in terms of **accessibility**, which facilitates access to both national and international markets, and positions the province as a strategic point for business development.

The proximity to major logistics hubs, competitive labour costs, and a well-established business ecosystem influence the decision to locate here. Companies find in Seville a strategic location, not only because of its connectivity and proximity to key markets, but also because of the range of aid and incentives on offer to boost investment and business growth. These incentives, coupled with a clear and accessible regulatory environment, contribute to reduce the cost of business.

“The province of Seville is positioned as an area where the Metal industry sector is firmly moving towards a model based on innovation, automation and sustainability”

Accessibility and logistics also play a key role. Companies setting up in Seville **can benefit from its excellent transport and communications network**, which provides easy access to suppliers, international markets and key resources. This optimises distribution times and operating costs.

The ease of bureaucratic procedures, such as licences and regulations, is another relevant aspect, as it helps to reduce the administrative burden on companies and giving a favourable environment for investment and expansion.

For all these reasons, **Seville is becoming a leading location for the Metal industry, moving firmly towards a model based on innovation, automation and sustainability. Expectations of growth in strategic sectors such as railways, agribusiness and agriculture, and commercial aviation and defence suggest a promising future.**

Current **digitalisation** and technological development will create **new opportunities for growth, diversification and international competitiveness**, establishing Seville as a leading industrial hub in southern Europe. All this, with a **perfect balance of operating costs, geographic accessibility and a skilled** workforce that supports long-term business growth.

4. Conclusions

- **The metallurgical industry is one of Andalusia's strategic sectors, in terms of both the number of companies it encompasses and its contribution to employment, as well as its interaction with the extractive sector and other industrial service and construction sectors. In 2020 the sector generated a turnover of almost 7,430 million euros, representing 11.4% of the total generated by Andalusian industry.** The same year, the sector employed **over than 28,360 people,** accounting for **11.9%** of the total number employed in industry.

- According to the INE, **Andalusia is the national leader in terms of investment in material assets in regional metallurgy**. In 2020, it invested 1,241 million euros (**32.5%** of the total invested in Andalusian industry), which is ahead of Catalonia's investment of 357 million euros in the same year.

- **Andalusia is home to major companies specialised in the extraction and production of metals. These companies are leaders in sectors such as stainless steel, copper and aluminium, as well as the recovery of ferrous waste**. These companies are part of major business groups in the metallurgy, iron, and steel sectors. **They play a vital role in the industrial development of the region and the creation and maintenance of jobs, particularly in key areas such as Seville, Huelva and Campo de Gibraltar.**

- **In 2023, the 'CRECE Metal Industry Value Chain Plan in Andalusia' was launched, with the participation of the main economic and social agents, such as CEA, trade unions, UGT and CCOO of Andalusia, in collaboration with the main sectorial entities, such as the Metal Business Federation (FEDEME), among others**. The Plan aims to make a firm

"Seville occupies fourth position nationally, after Madrid, Barcelona and Valencia, with a total of 62,022 members in the Metal sector"

"Although Seville stands out slightly in the field of services in terms of employment, the weight is relatively evenly distributed among the three sub-sectors: industry, services and commerce"

commitment to **digitalisation and energy efficiency** in processes, with the objective of increasing business competitiveness, following the path of the leading countries in European metallurgy.

- **The Metal industry sector in Andalusia represents 11.9% of the total number of affiliated workers in Spain, with 222,113 workers. Seville occupies fourth place nationally — after Madrid, Barcelona and Valencia — with 62,022 members in the Metal industry sector, including those in industry, services and commerce. This figure represents 3.3% of the total number of affiliates in the sector across the whole country.**

- **By sectoral distribution, Seville has 19,762 members in industry, 22,392 in services, and 19,868 in commerce. Although Seville stands out slightly in the services sector, which represents 3.8%** of the total Metal industry in the province, employment is relatively evenly distributed between the three sub-sectors.

- **The metal industry in the province of Seville is divided into 14 branches of activity**. The most relevant, according to the percentage of affiliation in the industrial Metal industry sector, is **aeronautical and space construction and machinery**, which represents **27.4%** of the provincial total and **21.6%** at national level. This places Seville as the **second Spanish province** in this activity, only behind Madrid. It is worth noting that the concentration of affiliates in this branch is mainly in medium-sized and large companies. In second place is the **manufacture of metal carpentry**, with **11.4%** of affiliates in Seville (compared with **4.3%** at the national level), which places Seville as the fifth province in this activity. In this case, the business weight is mainly concentrated in micro and small companies. Other outstanding activities in the province are the **manufacture of metal structures and their components**, where Seville is in third place nationally, and the **manufacture of lifting and handling machinery**, where it is in fifth place. Seville is also in fifth place nationally in the **manufacture of measuring, testing and navigation instruments and apparatus.**

- **Within the predominantly service-oriented profile of the Metal sector in the province of Seville,** the main activities are grouped into six branches, the most relevant are **electrical installations, which accounts for 32.3% of the affiliates in the sector in the province and represents 4.5% of the national total, which places Seville as the fourth province in this field**. This activity is characterised by a high concentration of affiliates in medium-sized and small companies, although there is also a presence of large companies. It is followed by the **maintenance and repair of motor vehicles**, with **24.0%** of affiliation in the province and **3.6%** at national level, ranking **Seville fifth in the country as a whole**. In third place is **plumbing, heating and air-conditioning installations**, with **9.8%** of affiliation in the province and **3.3%** at national level. In these last two activities, the business fabric is mainly made up of micro and small companies.

- Finally, Seville has the second most prevalent profile **in the metal trade**, comprising 16 main activities. The most significant of these is **the retail trade of hardware, paint and glass in specialised establishments**, accounting for **11.6%** of affiliates. This is followed by the **sale of automobiles and light motor vehicles** with **10.8%**, **making Seville the fourth province nationally in this activity**. Third place goes to the **retail trade of furniture, lighting equipment, and other household items in specialised establishments**, accounting for **6.7%** of affiliates. The concentration of affiliates in these activities is mainly in micro and small enterprises, although medium-sized enterprises are also represented, as are large enterprises in some sectors.

- **This study of the Metal industry in Seville and its province was promoted by the Provincial Council of Seville through Prodetur MP SAU and the Metal Business Federation (FEDEME). A total of 365 companies were consulted. Most of the companies are small. 45.36% are medium-sized (with fewer than 50 employees), and together with micro-companies (with fewer than 10 employees), they represent 72.16% of the total**. Next are SMEs with 50–250 employees (**21.64%**), followed by large enterprises with more than 250 employees (**6.18%**).

- SMEs play a fundamental role in the Metal industry in Seville and its province. Although the sector is dominated by a few **large companies, such as Airbus Defence and Space, HORSE (Seville plant) and Cobre las Cruces**, it also includes key companies in areas such as industrial engineering and automation (**CEN Solutions, DGH Robotics, Automation and Mantenimiento Industrial**), air conditioning system manufacturing (**Hispacold**), and metal-related services, logistics, maintenance and engineering (**Rhenus and Sofitec**). These large companies are supported by **a significantly larger number of smaller suppliers. In some cases, as in the aerospace sector, these are highly specialised companies in terms of technology and products** with extensive accumulated knowledge.

- **The Metal industry sector in the province of Seville is mainly concentrated in the Andalusian capital and in nearby towns in the first metropolitan area, such as La Rinconada, Alcalá de Guadaíra and Dos Hermanas, which account for almost 60%. If we add other municipalities that are considered to be within the metropolitan belt** (Alcalá del Río, Camas, Coria del Río, La Puebla de los Infantes, Los Palacios y Villafranca, Mairena del Aljarafe, Mairena del Alcor and Valencina de la Concepción)**, almost eight out of every ten companies (77.31%) are based in Seville and its metropolis.**

- Regarding the main activities carried out by the companies surveyed, and according to the National Classification of Economic Activities (CNAE), the following activities stand out, in this order: **Aeronautical and space construction and its machinery, being the second province at national level after Madrid; Manufacture of metal carpentry; Manufacture of lifting and handling machinery, and, lastly, Mechanical engineering on behalf of third parties.**

- Among the shared services activities (**repair, installation and technical advice**), the companies from Seville and its province that participated in the survey identified the following as the most notable: **other building finishing activities, technical engineering services, and other activities related to technical advice and machinery repair. Seville is the fourth province at national level for activities related to electrical installations. Finally, in the commerce sector** (intermediation and sale of metal products), **intermediaries in the trade of fuels, minerals, metals, and industrial chemicals, as well as the wholesale trade of machine tools and aeronautical maintenance services, stand out.**

- Finally, in the commerce **sector** (intermediation and sale of metal products), **the activity of intermediaries in the trade of fuels, minerals, metals, and industrial chemical products, as well as the wholesale trade of machine tools and aeronautical maintenance services, is notable.**

- **In relation to the turnover data of companies in the METAL industry in Seville and its province, a general trend of stability can be observed, with sensible maintenance of evolution.** According to data compiled by companies in the sector, turnover in the 2024 financial year fell slightly by **-0.88%** compared to the previous year. **However, forecasts for the current year are more optimistic. In a January 2025 survey, companies reported average growth expectations of 4.38%, reflecting gradual recovery and moderate confidence in market developments in 2025.**

- According to the data collected in the survey of companies in the Metal industry sector in Seville and its province, **there is a clear orientation towards the national market: 98.96% of the companies operate within Spain. However, it is worth noting that 41.23% also export, which means that four out of every ten companies are present in international markets, thus combining a mixed commercial strategy**. Residually, a small percentage of companies (**1.03%**) can be identified whose activity is exclusively focused on exports, without operating domestically. This distribution map **reflects a clear national vocation of the sector, with a capacity to adapt to different production contexts within the country and a growing international projection.** Sevillian metal companies are taking advantage of both proximity and geographical diversification to expand their client portfolio, consolidating their position as relevant players in the industrial value chain both regionally and globally.

- In terms of **territorial coverage within Spain**, the Metal industry in Seville is well established, with **activity in all 17 autonomous communities, as well as the two autonomous cities of Ceuta and Melilla**. The most important national markets are: **Andalusia, the Community of Madrid, Extremadura, the Basque Country, Catalonia and the Community of Valencia.**

- **The Metal industry in Seville has a strong international presence, exporting to over 90 countries across five continents. This geographical diversification reflects a mature commercial strategy and competitive capacity in diverse markets in both developed and emerging economies.**

  - **Europe**: represents the main destination for exports, accounting for **53.68%** of the total. Countries such as France, Portugal, Germany, Italy, Poland and the United Kingdom stand out in particular. This European leadership is due to geographical proximity, established trade links, and integration into the European common market.

  - **America**: is in second place with **21.75%**, covering both North and South America. The United States, Chile, Peru, Mexico, Colombia and Brazil account for most of the activity in this region and have shown significant growth in trade with Latin American countries.

  - **Africa**: represents **13.33%** of total exports. Morocco, Algeria, Tunisia and Egypt are among the most important markets, reinforcing North Africa's role as a strategic partner for Sevillian METAL companies.
  - **Asia**: with **9.8%**, this continent is positioned as an emerging region in the internationalisation strategy. Destinations such as Turkey, India, the United Arab Emirates, Israel and Kuwait show a growing demand for the sector's products and services.
  - **Oceania**: although residual at **1.4%**, Australia and New Zealand are present as niche markets with potential for future growth.

- The clients of the Metal industry sector in Seville and its province present a notable sectorial diversity, which reflects the **versatility and adaptability of the companies in the sector to different productive, industrial and service environments, such as public administrations and municipal services, construction and infrastructures, industry and transformation, agri-food, mobility, transport and automotive, metal, aeronautics and aerospace and health and services**. This wide range of sectors demonstrates the capacity of the Metal industry sector to integrate as a **key supplier in multiple value chains, both in traditional sectors and in industries with high technological specialisation.**

- **With regard to the origin of suppliers**, this reflects the strategy of most companies in the Metal industry in Seville and its surrounding area to **strengthen national supply chains while opening up significantly to international markets**. Combining local and international suppliers enables companies to reap the benefits of both, optimising costs, quality and delivery times. **This diversification of supplier sourcing contributes to greater supply chain resilience, enabling companies to adapt more flexibly to potential global market fluctuations and logistical challenges.**

- **The Metal industry sector in Seville and its province has a diverse ecosystem of suppliers, both in terms of geographical origin and typology**. These include iron and steel and industrial raw materials; industrial components and supplies; foundry and metal transformation; and the metal manufacturing, automotive and aerospace sectors, as well as other complementary sectors.

- Companies in the Metal industry in Seville and its province that participated in the business consultation **have expressed a growing commitment to innovation, particularly in adopting new technologies that are transforming their processes and business models**. The majority of companies state that they have incorporated digital technologies at various stages of their operations. The areas with the greatest implementation are **artificial intelligence (AI), specialised hardware and software, industrial robotics, cybersecurity, communication systems, media, and e-commerce platforms.**

- Companies in the sector envisage an evolution towards more disruptive technologies and intelligent processes, as well as advanced digital transformation with technological convergence. This includes **Digital twins** (virtual replicas of production processes for real-time control and simulation), **Smart Manufacturing** (technologies such as **RTM/Resin Transfer Moulding, LRI/Liquid Resin Infusion and additive manufacturing**), **and total connectivity and industrial IoT** (sensors, connected systems and real-time data analysis). This is all aligned with the principles of Industry 5.0, which integrate artificial intelligence, personalisation and sustainability. The main emerging areas are **automation and advanced robotisation, smart logistics and electrification.**

- **According to the survey of companies in the Metal industry sector in Seville and the surrounding area, there are opportunities in sectors such as the railway industry** for manufacturing elements for high-speed trains and intelligent signalling systems, **as well as in the agri-food and agricultural industry** for machinery and specific technological solutions. There are also opportunities in **commercial aviation and defence**, which have recently been boosted by growing demand in aviation and investment expectations in the defence sector. These opportunities include supplying complex parts, structural systems and associated services.

- **Companies in the Metal industry find Seville to be a strategically important location. This is due not only to its connectivity and proximity to key markets, but also to the aid and incentives on offer to promote investment and business growth.**

- **According to these companies, Seville is becoming a leading location for the Metal industry, moving firmly towards a model based on innovation, automation and sustainability.** Growth expectations in strategic sectors such as railways, the agri-food industry and agriculture, commercial aviation, and defence augur well for the future.

- **They are also confident that current digitalisation and technological development will create new opportunities for growth, diversification and international competitiveness, establishing Seville as a leading industrial hub in southern Europe. This is all possible thanks to a perfect balance between operating costs, geographical accessibility and a skilled workforce that supports long-term business growth.**

"The current digitalisation process and technological developments will create new opportunities for growth, diversification and international competitiveness, establishing Seville as a leading industrial hub in southern Europe"

5. Sources

In preparing and drafting this document, which analyses the situation and prospects of the Metal industry sector in Seville and its province, multiple sources and bibliographical references were used.

Statistical sources:

- Database provided by companies associated with the Metal Business Federation (**FEDEME**).
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In addition to these sources and references, a lot of the information and conclusions reflected in this report were developed by the project team using data obtained from participating companies and institutions during the information collection process.

6. Acknowledgements

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