

Automotive Industry in Slovakia

MICHAL BARTOŠ, OCTOBER 2018



History

- the automotive industry has a strong tradition in Slovakia and became the most important sector and driving force of the Slovak economy
- over the past 20 years it has been an important source of foreign direct investment
- in 1947 366 motorcycles was produced
- in 1948 this number increased 30x
- in 1982, the first 257 cars were made, after this year of growth there was a decrease to 1 car per year
- in 1991, the situation improved significantly by Volkswagen's entry
- in 1992 1630 cars was produced
- automotive industry has acquired a dominant position within the Slovak industry, mainly coming large foreign investors, has seen a growing share of rising

Overview of the Automotive Industry In Slovakia

- the automotive industry has a strong tradition in Slovakia and became the most important sector and driving force of the Slovak economy
- over the past 20 years it has been an important source of foreign direct investment

129,000

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People employed directly by the 3 car producers — VW, PSA, Kia & Tier 1 suppliers

40%

40%

Share of the automotive industry of the total industrial export of Slovakia

250,000

250,000

People employed directly & indirectly by the automotive industry

26 BN €

26 BN €

Volume of industrial export generated by the automotive industry

44%

44%

Share of the automotive industry of the country's total industrial production

11,3%

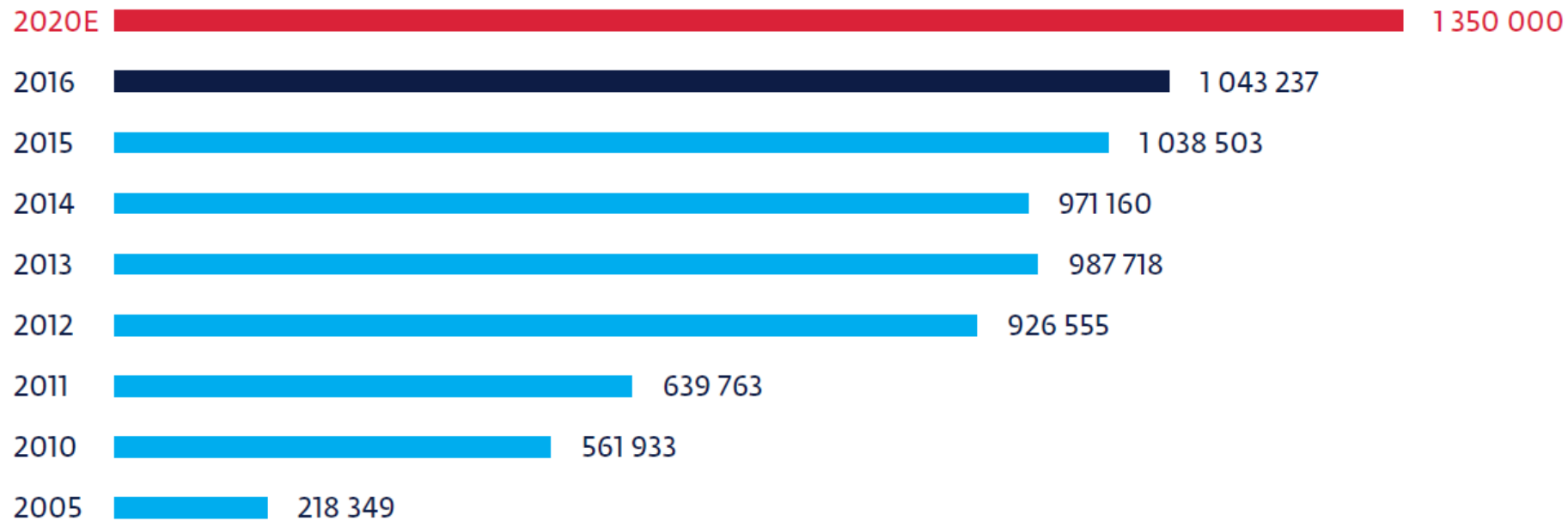
11,3% (2014—2015)

YoY growth of value added in automotive industry

Growing car production

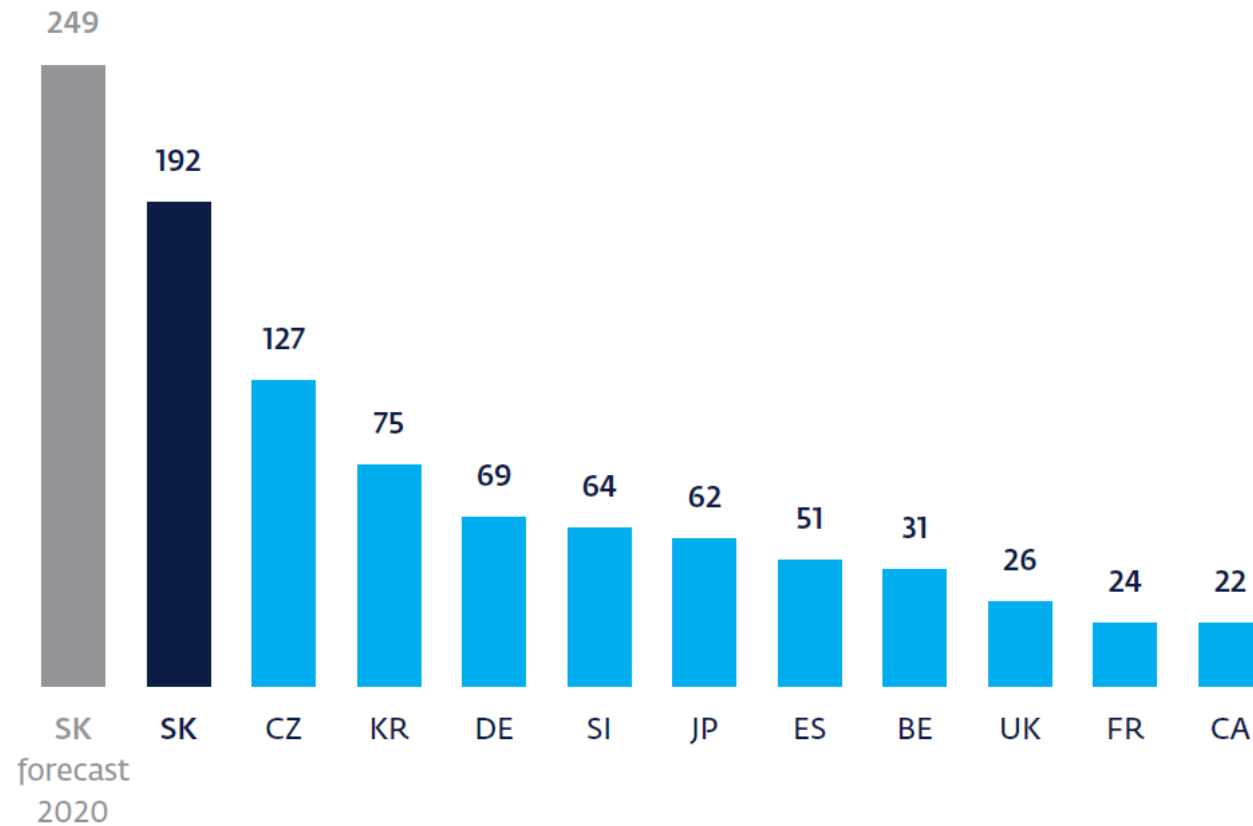
- the Slovak automotive sector gradually grew to a global scale
- nowadays Slovakia belongs to the 20 biggest car producers in the world with production of more than one million cars per year.

Car Production on Slovakia in numbers



Car Production per 1000 Inhabitants

- Taking into consideration the number of inhabitants, Slovakia is by far the global leader in car production per 1000 inhabitants



The impact of the automotive industry

> 44%

The share of automotive production in the industrial production of Slovakia

> 125 000

People are directly employed in the automotive industry

> 40,2%

Share of the automotive industry on the total export of Slovakia

> 250 000

Job places (Including indirect jobs)

> 26 000 000 000 €

Slovak industrial export generated by the automotive industry

Employment in the Slovak Automotive Industry

125 848
Employees in the Slovak Automotive Industry

18 116

Number of employees at car manufacturers

107 732

Number of employees at suppliers of the automotive industry

1 717 045 487 €

Wages paid to employees of the Automotive industries in 2014

Automotive Producers in Slovakia

VOLKSWAGEN SLOVAKIA

Year of establishment: 1991
Production (2016): 388,687 vehicles
Turnover: € 7.6 bn
Number of employees: 12,300
Models: Volkswagen Touareg,
Volkswagen Up! & e-Up!, Audi Q7 & Q8,
Škoda Citigo, SEAT Mii, Porsche Cayenne



The only
plant in the
world producing
5 brands under
one roof

Kia's first
and only factory
in Europe

Car
manufacturer
in Slovakia with
its own engine
production



KIA MOTORS SLOVAKIA

Year of establishment: 2004
Production (2016): 339 500 vehicles
Turnover: € 5.56 bn
Number of employees: 3,800
Models: Kia cee'd, Kia cee'd Sportswagon,
Kia pro_cee'd, GT, Kia Sportage,
Kia Venga



Automotive Producers in Slovakia

PSA PEUGEOT CITROËN SLOVAKIA

Year of establishment: 2003
Production (2016): 315,050 vehicles
Turnover: € 5.51 bn
Number of employees: 3,500
Models: Citroën C3, Picasso Peugeot 208,
new Citroën C3



The most profitable plant in the PSA group



Largest investment in Europe in the last 7 years

The most sophisticated production site of the JLR group

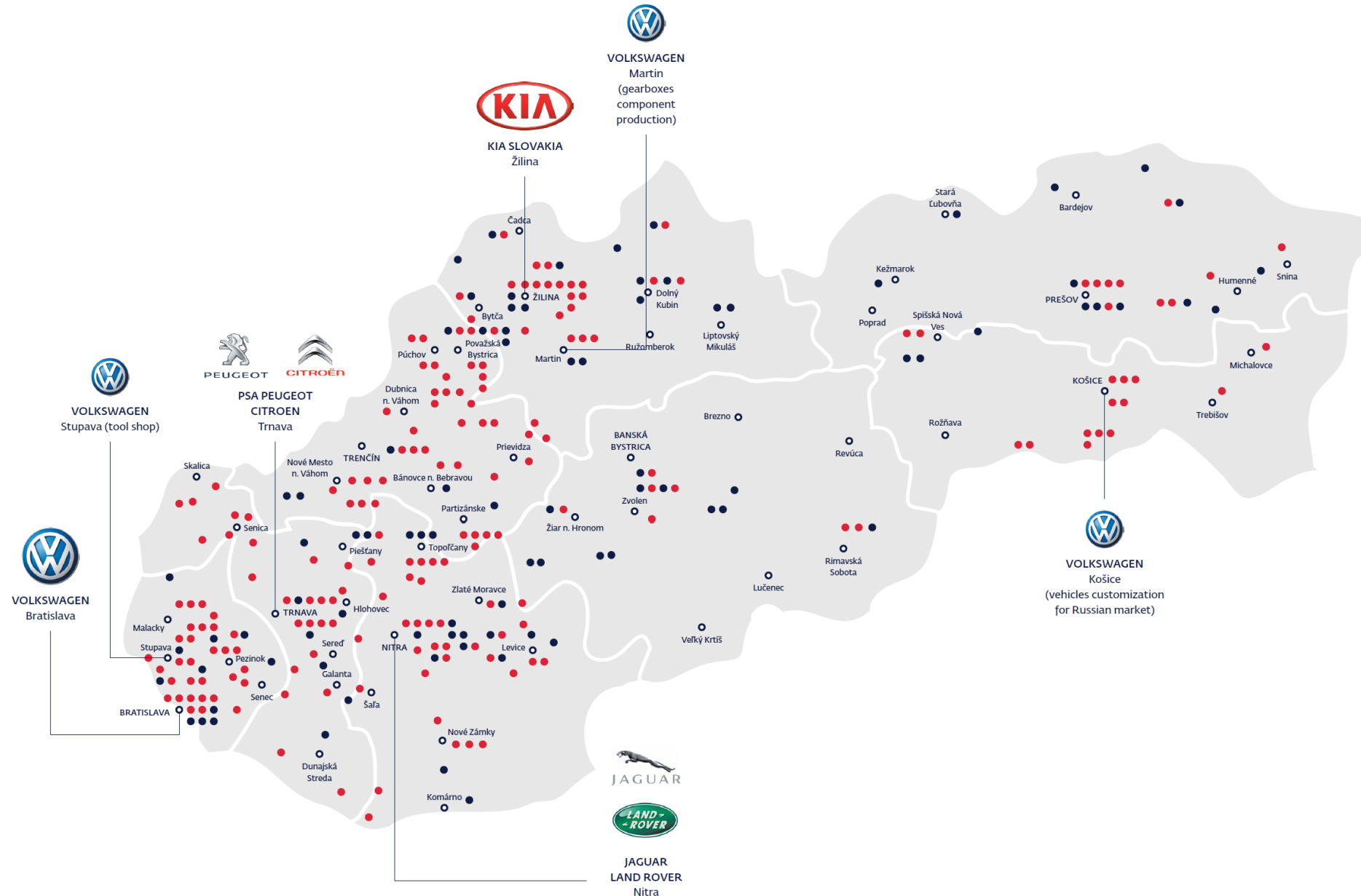


JAGUAR LAND ROVER

Year of establishment: 2015
Start of operation: 2018
Production capacity: 300,000
Estimated number of employees: 2,800
Models: Discovery & other premium SUVs
Announced investment: establishment of the new manufacturing facility (1.5 bn € investment)



Automotive Suppliers in Slovakia



- not only the three established automotive producers make the core of the Slovak automotive industry but also a **well developed and high-quality supplier network** - their suppliers also export their products to plants located around Europe and to other overseas locations.

- 1st Supplier
- 2nd Supplier

Overview of major 1st & 2nd Suppliers in the Slovak Automotive Industry

INTERIOR MODULES, DASHBOARDS

Daejung, Faurecia, Eurostyle Systems, Reydel Automotive, Hanil E-Hwa, IAC Group, KOAM, LPH Vranov, Synothec, Lear Corporation, SAS Automotive, Grupo Antolin, Treves, Eissmann, Z Industries, CRW Slovakia, Bourbon Automotive plastics, Magneti Marelli, Mobis Slovakia, Yanfeng Automotive

TEXTILE, COVERS, LEATHER

Eissmann Automotive, ADTOOL, HOWE, IAC Group, Jobelsa, Heiland Sinoc Automotive, Automotive group SK, Treves, Trim Leader

SEATS

Adient, Faurecia, Lear Corporation,

WIRING HARNESES & ELECTRONIC COMPONENTS

Delphi Slovensko, Leoni, SE Bordnetze, Calearo, Yazaki, Kromberg & Schubert, JOHRAmont, Yura Corporation, PRETTL, Konfektion E, CRT Electronic, DongYang E&P, PANASONIC Industrial devices, Molex, Mkem, SIIX EMS, Služba Nitra, MTA, CEMM THOME

MIRRORS

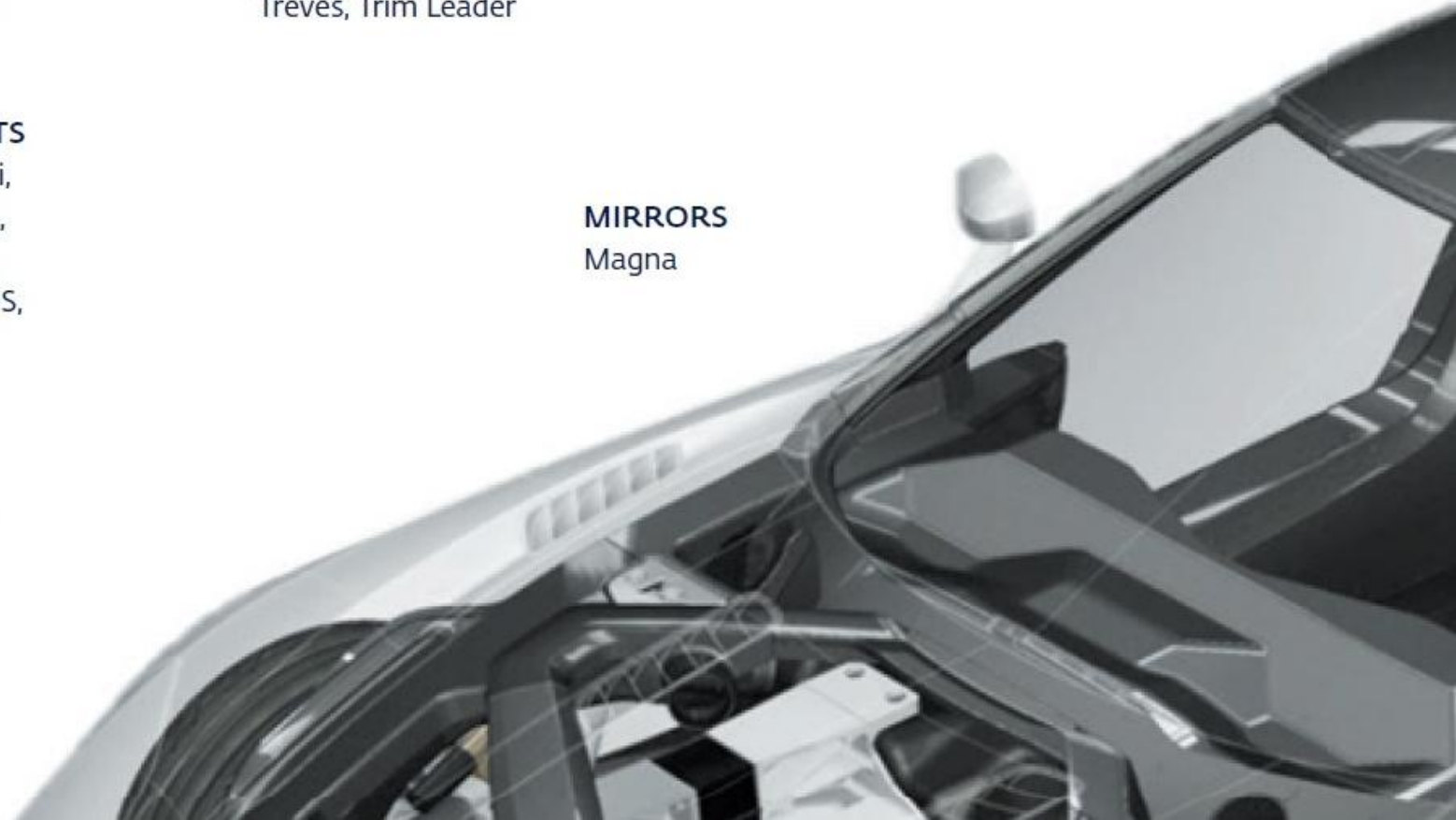
Magna

STEERING WHEELS

ADTOOL, TRW Automotive

AIR-CONDITIONING

Hanon Systems Slovakia, Mahle Behr



MODUL FRONT END

HBPO, Mobis, Faurecia

SHOCK ABSORBERS

Plastic Omnium, Mobis,
Rehau, Matador, ZF

ENGINE, ENGINE PARTS & COMPONENTS

Mobis, Pankl, Miba Sinter, Nemač, Magna Getrag
Transmissions, MAR SK, Hriňovské strojárne, ZF,
Honeywell Turbo, CCN Group Slovakia,
Magneti Marelli, EUROPALT, Miba Steeltec,
ZWL Slovakia, HUHN PressTech, Plastic Omnium,
Nissens, Mahle Behr, GeWiS, Panasonic-Sanyo, Streit

SPRINGS

C.E.P. Scherdel, PFS, Subtil Slovakia

BEARINGS

KINEX, Omnia KLF, GGB, DANEX,
INA Kysuce / Skalica, MAHLE, ZVL Auto

EXTERIOR LIGHTS

OSRAM, SEC, CEMM THOME, HELLA Front Lighting,
HELLA Signal Lighting, Služba Nitra, ZKW, Hella Innenleuchten



CABRIO SYSTEMS

Webasto Donghee, Matador, Webasto
Edscha Cabrio, INALFA Roof systems,
INTEVA Products

ANTENNAS

CALEARO

MODUL REAR END

Mobis

SAFETY EQUIPMENT

Garay, Belt & Buckle, IEE Sensing

FUEL TANKS & SYSTEMS

Plastic Omnium Auto Inergy,
Donghee, Martinrea, Nobel
Automotive, Coavis, Oerlikon,
Hyundam

BODY AND BODY STAMPINGS

ArcelorMittal Gonvarri SSC, COMAX TT,
Autotest Bratislava, Benteler, Matador,
Švec a Spol, Donghee, TOWER
Automotive, Bekaert, DURA Automotive,
Sungwoo Hitech, Farguell, Gestamp

EXHAUST SYSTEMS

TAJCO, SEJONG, Faurecia, Matador
Automotive, Liaz

PLASTIC COMPONENTS

POLYTEC, Fremach Slovakia, HTP,
THERMOPLASTIK, Nobel Automotive,
Bourbon Automotive, Rehau, RF, K-plast,
MTA, Steep Plast, Z Industries, Polytec
Composites, Versaco, Rochling





BRAKES, BRAKE SYSTEMS, DAMPERS

Fragokov , Continental Automotive Systems, Europalt, FTE Automotive, HUHN PresTech, Nobel Automotive, Ti-Hanil, TI Automotive, Mobis, Akebono Brake

DOOR SYSTEMS & MODULES

Brose, PHA Slovakia, Dura Automotive, Bourbon Automotive Plastics, Pyeong Hwa Automotive, Slovakian Door Comnapy, U – Shin, Dongwon, Faurecia, Grupo Antolin

SUSPENSIONS

Donghee, Iljin

DRIVELINE, MECHANICAL OPERATIONS

Küster, GAMMA, Kongsberg Automotive, Bauer Gear Motor

TYRES, BALANCE WEIGHTS

Continental Matador Rubber, Continental Matador Truck Tires, Rotobalance, Bekaert

SEALS AND SILENTBLOCS & OTHER RUBBER COMPONENTS

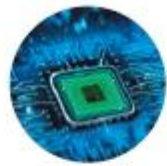
ALDOBEC, CIKAUTO, COBA Automotive, DONGIL RUBBER BELT, Elastomer Solutions, Eldisy, MIKON, Rubena, Vegum, SaarGummi, Contitech, Boge Elastmetall

Automotive Subsectors

- the flexible and developed supply network shows great potential to supply a broad range of industries other than automotive, etc:



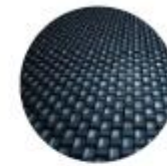
Plastics
& Chemical
Industry



Electrical
Engineering



Mechanical
Engineering



Composite
Materials



Iron & Steel
Industry



Aluminium
Industry



Textile
Industry



Design
Engineering

Thank you for your attention

