

FLANDERS INVESTMENT & TRADE MARKET SURVEY



<u>AUTOMOTIVE INDUSTRY IN</u>

SLOVENIA

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FLANDERS INVESTMENT & TRADE

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GENERAL INFORMATION ON SLOVENIA'S ECONOMY

In 2020 Slovenia has not managed to avoid a large contraction in economic activity because of the COVID-19 pandemic. The uncertainties and challenges brought by the epidemic have changed the spending habits of households, who have sharply increased their savings, while firms have significantly reduced their investment activity and have postponed investments to the following years, when the situation is expected to improve.

The emergency measures prevented a more pronounced downturn on the labour market and helped firms to maintain a stable liquidity position and to reduce the decline in economic activity. Alongside the domestic measures, assistance packages have also been put in place at the EU level.

The export-oriented part of the Slovenian economy was not notably affected due to the deterioration in epidemiological conditions at the end of last and the beginning of this year as the export market share strengthened significantly in the last quarter of last year. The decline in domestic demand during the epidemic, together with rising energy prices, had a strong impact on the evolution of consumer prices, as well as on the widening of the current account surplus. The decline in the number of registered unemployed persons strengthened somewhat further in March. At the beginning of the year, employment otherwise fell the most year on year in accommodation and food service activities and administrative and support service activities, which were hit hardest by restrictive corona measures, while it rose the most in health and social work. This segment also recorded the largest year-on-year increase in wages, particularly due to allowances for hazardous working conditions and additional workload.

Spring 2021 Economic Forecast published on May 5th by the European Commission:

Indicators	2019	2020	2021	2022
GDP growth (%, year on year)	3,2	-5,5	4,9	5,1
Inflation (%, yoy)	1,7	-0,3	0,8	1,7
Unemployment (%)	4,5	5,0	5,0	4,8
General government balance (% of GDP)	0,4	-8,4	-8,5	-4,7
Gross public debt (% of GDP)	65,6	80,8	79,0	76,7
Current account balance (% of GDP)	5.7	5.4	4.3	3,3

2. FLANDERS – SLOVENIA: BILATERAL TRADE IN VEHICLES AND TRANSPORT EQUIPMENT

> Export of vehicles and transport equipment from Flanders to Slovenia in 2020:

Product digit level: 8	2018	2019	2020	Share 2020 in %	2018 - 2019	2019 - 2020
Total (x 1000 eur)	518.955	542.976	492.741	100%	+4,63%	-9,25%

- transport equipment (digit level 0)	105.874	119.903	85.003	17,25%	+13,25%	-29,11%
87033290 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with only diesel engine of a cylinder capacity > 1.500 cm ³ but <= 2.500 cm ³ , used (excl. vehicles for travelling on snow and other specially designed vehicles of subheading <u>870310</u>)	18.056	18.497	19.311	3,92%	+2,44%	+4,40%
87012010 - Road tractors for semi-trailers, new	15.278	18.862	14.767	3,00%	+23,46%	-21,71%
87032319 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with only spark-ignition internal combustion reciprocating piston engine, of a cylinder capacity > 1.500 cm ³ but <= 3.000 cm ³ , new (excl. those of subheading <u>870310</u> and motor caravans)	17.868	21.033	13.188	2,68%	+17,71%	-37,30%
87034010 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with both spark-ignition internal combustion reciprocating piston engine and electric motor as motors for propulsion, new (excl. vehicles for travelling on snow, other specially designed vehicles of subheading 870310 and plug-in hybrids).	4.980	21.685	10.960	2,22%	+335,42%	-49,46%

> Import of vehicles and transport equipment from Slovenia to Flanders in 2020:

Product digit level: 8	2018	2019	2020	Share 2020 in %	2018 - 2019	2019 - 2020
Total (x 1000 eur)	243.676	291.489	288.061	100%	+19,62%	-1,18%

- transport equipment (digit level 0)	78.790	97.004	93.798	32,56%	+23,12%	-3,31%
87032110 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with only spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ , new (excl. vehicles for travelling on snow and other specially designed vehicles of subheading 870310)	20.070	57.589	49.724	17,26%	+186,94%	-13,66%
87033290 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with only diesel engine of a cylinder capacity > 1.500 cm ³ but <= 2.500 cm ³ , used (excl. vehicles for travelling on snow and other specially designed vehicles of subheading <u>870310</u>)	18.056	18.497	19.311	3,92%	+2,44%	+4,40%
87032319 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with only spark-ignition internal combustion reciprocating piston engine, of a cylinder capacity > 1.500 cm ³ but <= 3.000 cm ³ , new (excl. those of subheading <u>870310</u> and motor caravans)	10.554	15.179	13.612	4,73%	+43,83%	-10,33%
87032210 - Motor cars and other motor vehicles principally designed for the transport of <10 persons, incl. station wagons and racing cars, with only spark-ignition internal combustion reciprocating piston engine, of a cylinder capacity > 1.000 cm³ but <= 1.500 cm³, new (excl. vehicles for travelling on snow and similar vehicles of subheading <u>870310</u>)	8.148	11.733	8.936	3,10%	+44,00%	-23,84%
87033219 - Motor cars and other motor vehicles, principally designed for the transport of <10 persons, incl. station wagons, with only diesel engine of a cylinder capacity > 1.500 cm³ but <= 2.500 cm³, new (excl. motor caravans and vehicles for travelling on snow and other specially designed vehicles of subheading <u>870310</u>)	7.404	2.816	5.661	1,97%	-61,97%	+101,05%
87089997 - Parts and accessories for tractors, motor vehicles for the transport of ten or more persons, motor cars and other motor vehicles principally designed for the transport of persons, motor	1-1	1.148	5.493	1,91%	-32,93%	+378,28%
vehicles for the transport of goods and special purpose motor vehicles, n.e.s. (excl. of closed-die forged steel)	1.712					

Source: Instituut voor de Nationale Rekeningen (NBB)

3. THE ROLE OF AUTOMOTIVE INDUSTRY FOR SLOVENIA

The turnover generated by the *automotive sector represents* 10% of Slovenia's total GDP. The sector accounts for about 20% of the exports of goods. More than 40.000 Slovenians work in the auto industry (directly and indirectly, 17.000 in some 270 companies), accounting for 4.5% of all jobs in Slovenia. Slovenia has highly qualified people for the competitive and sustainable auto industry.

The automotive industry is one of the most promising parts of the Slovenian economy. Its contribution to added value, innovation and investments in R&D is above average. It gives more than 25% award-winning innovations in Slovenia every year.

Slovenian exporters, suppliers to the automotive industry, meet all international standards and are competent suppliers in the global market with key customers in Germany, where the Slovenian car industry exports 40% of its production. Other export markets are: France, Italy, Austria, Turkey, the United Kingdom and the United States.

The only car manufacturer in Slovenia is Revoz - https://revoz.si/en/- owned by Groupe Renault with about 2.200 employees in 2020.

4. KEY PLAYERS IN AUTOMOTIVE INDUSTRY (DOMESTIC AND FOREIGN-OWNED ENTERPRISES) AND THE MAIN PRODUCT GROUPS:

ADIENT NOVO MESTO

a leader in automotive seating

Address: Kandijska cesta 60, 8000 Novo mesto

Tel: +386 7 620 0333

E-mail: infoadientnm@adient.com

Web: www.adient.com

ADRIA MOBIL

- one of Europe's leading companies in the recreational vehicle and mobile home markets

Address: Straška cesta 50. 8000 Novo Mesto

Tel: +386 7 393 7100 E-mail: <u>info@adria-mobil.si</u>

Web: www.adria-mobil.com; https://be-fl.adria-mobil.com/

AGIS TECHNOLOGIES d.d.

- a manufacturer of pneumatic, pneumatic-hydraulic and hydraulic brake aggregates, clutch servos for trucks, trailers, tractors, buses of different producers

Address: Rajšpova ulica 16, 2250 Ptuj

Tel: +386 2 780 7802

E-mail: <u>info@agis-technologies.com</u>
Web: <u>www.agis-technologies.com</u>

AKRAPOVIČ

- a manufacturer of premium exhaust systems for motorcycles and performance cars

Address: Malo Hudo 8a, 1295 Ivančna Gorica

Tel: +386 1 787 8404 E-mail: <u>info@akrapovic.si</u> Web: <u>www.akrapovic.com/en</u>

BOXMARK Leather

- a manufacturer of upholstery leather for car cabin interiors

Address: Industrijsko naselje 10, 2325 Kidricevo

Tel: +386 2 799 1600

E-mail: si.office@boxmark.com
Web: www.boxmark.com

CARTHAGO SLOVENIJA

- a manufacturer of motor homes; the German parent company plans to expand its production capacity in Slovenia which should have been finished till 2023 (25 million investment would create 500-600 new jobs)

Address: Rovando center, Pohorska cesta 6b, 2380 Slovenj Gradec

Tel: +386 2 883 1680 E-mail: prodaja@robeta.si

Web: www.carthago-slovenija.si/

CECOMP d.o.o.

- activity: sheet metal stamping

Address: Brezence 8, 8216 Mirna Peč

Tel: +386 7 343 5670 E-mail: <u>info@cecomp.si</u> Web: <u>www.cecomp.it</u>

DOMEL

- activity: development, design and construction of special drives aimed at the automotive market; EC and DC motors, stepper motors and other components

Address: Otoki 21, 4228 Železniki

Tel: +386 4 511 7100 E-mail: <u>info@domel.com</u> Web: <u>www.domel.com</u>

EBM PAPST SLOVENIJA

- a producer of small electrical motors and fans

Address: Podskrajnik 16, 1380 Cerknica

Tel: +386 1 709 0455

E-mail: <u>info@si.embpapst.com</u>

Web: www.ebmpapst.si

FILC

- is part of the Freudenberg Performance Materials; the company offers a wide range of cable insulations and noise absorbers which suit different demands by Audi, BMW, Ford, Porsche, Suzuki, Škoda, VW); it offers also decorative nonwoven materials that are also used as seat covers

Address: Trata 48, 4220 Škofja Loka

Tel: +386 4 297 7200

E-mail: infofilc@freudenberg-pm.com

Web: www.filc.si

GKN Driveline Slovenija d.o.o.

 supplier of all-wheel drive systems, eDrive systems, driveline components, roller bearings

Address: Rudniška cesta 20. 3214 Zrece

Tel. +386 3 757 4410

E-mail: i@gknautomotive.com Web: www.gknautomotive.com/

GRAMMER AUTOMOTIVE SLOVENIJA

- a manufacturer of interior components (head rests, consoles and arm rests)

Address: Celjska 45, 2380 Slovenj Gradec

Tel: +386 2 882 3300 E-mail: <u>info@grammer.com</u> Web: <u>www.grammer.com</u>

HELLA SATURNUS SLOVENIJA

- a producer of electronics and vehicle lighting solutions, i.e. headlamps, auxiliary fog lamps, daytime running lamps as well as single- and multi-function lamps, interior lighting

Address: Letališka 17, 1000 Ljubljana

Tel: +386 1 520 3333 E-mail: <u>hss.info@hella.com</u> Web: www.hella.com

HIDRIA AET

- a manufacturer of electrical and electronic equipment for motor vehicles

Address: Poljubinj 89a, 5220 Tolmin

Tel: +386 5 382 10 00 E-mail: <u>info@hidria.com</u> Web: www.hidria.com

KLS LJUBNO

- a producer of rings for engine flywheels

Address: Loke 36, 3333 Ljubno ob Savinji

Tel: +386 3 839 32 00 E-mail: <u>info@kls.si</u> Web: www.kls.si

LTH CASTINGS

- a manufacturer of automotive components (aluminium and magnesium), such as transmission and engine components, steering and breaking systems components

Address: Vincarje 2, 4220 Škofja Loka

Tel: +386 4 511 2109

E-mail: <u>info@lthcastings.com</u> Web: <u>www.lthcastings.com</u>

MAHLE ELECTRIC DRIVES BOVEC

 a manufacturer of electrical and electronic equipment for motor vehicles: air conditioning, cylinder components, mechatronics, fuel management

Address: Industrijska cona 3, 5230 Bovec

Tel: +386 5 387 9001

E-mail: si.info.bovec@si.mahle.com

Web: www.mahle.com

MARIBORSKA LIVARNA MARIBOR

- a manufacturer of different tools and mechanical treated aluminium die-castings that are designed for the automotive industry

Address: Oreško nabrežje 9, 2000 Maribor

Tel: +386 2 234 6100 E-mail: <u>info@mlm-mb.si</u> Web: <u>www.mlm-mb.si/en/</u>

NOVEM CAR INTERIOR DESIGN

- a producer of decorative and functional components for car interiors

Address: Ložnica pri Žalcu 53a, 3310 Žalec

Tel: +386 3 713 5400 E-mail: <u>info@novem.si</u> Web: <u>www.novem.de</u>

ODELO SLOVENIJA

- a producer of innovative vehicle light systems with sophisticated design, a supplier for premium vehicle manufacturers (BMW, Daimler, Audi, Renault, VW, Fiat)

Address: Tovarniška cesta 12, 3312 Prebold

Tel: +386 3 703 4500 E-mail: <u>info@odelo.si</u> Web: www.odelo.si

PARAMETAL

- a producer of metal parts and accessories for motor vehicles: parts for glow plugs, regulators, brackets, coupling elements, etc)

Address: Slovenska vas 5, 8232 Šentrupert

Tel: +386 7 343 5602 E-mail: <u>info@parametal.si</u> Web: <u>www.parametal.si</u>

RESISTEC UPR

- a manufacturer of resistors for automotive industry

Address: Krška cesta 8, 8311 Kostanjevica na Krki

Tel: +386 7 481 0200 E-mail: <u>info@resistec.si</u> Web: <u>www.resistec.si</u>

REVOZ

- the only car manufacturer in Slovenia; it's part of Groupe Renault. In addition to Renault models Twingo and Clio, the Revoz plant produces also the electric cars – Twingo Electric and Smart EQ forfour within a business partnership with Daimler)

Address: Belokranjska cesta 4, 8000 Novo mesto

Tel: +386 7 331 5000

E-mail: info.revoz@reanult.si Web: www.revoz.si/en/

RONDAL

 a manufacturer of high quality punched and sawn slugs from pure aluminium or aluminium alloys; application of slugs in automotive industry: fuel filter casings, airconditioner noise attenuators, air bag system components, parking sensor casings, braking system components

Address: Partizanska 38, 2310 Slovenska Bistrica

Tel: +386 2805 5600 E-mail: <u>info@rondal.si</u> Web: <u>www.rondal.si</u>

ROTIS

- a producer of slewing bearings

Address: Brodišče 5. 1236 Trzin

Tel: +386 1 530 0960 E-mail: rotis@rotis-lj.si Web: www.rotis-lj.si/en/

SOGEFI FILTRATION

- a manufacturer of flexible suspension components, air & cooling systems and filtration systems for car industry

Address: Ladja 11, 1215 Medvode

Tel: +386 1 362 9011

E-mail: <u>domen.zlebir@sogefigroup.com</u>

Web: www.sogefigroup.com

STARKOM

- a 100% subsidiary of Daimler AG based in Maribor, Slovenia. Main products are vehicle frames for the Mercedes-Benz G-Class, integral carriers, rear axle carriers and axle components for Mercedes-Benz cars and other renowned customers all over the world

Address: Cesta k Tamu 18, 2000 Maribor

Tel: +386 2 460 1731 E-mail: <u>info@starkom.si</u> Web: <u>www.starkom.si</u>

SUMIDA SLOVENIJA

- a producer of automotive electronics: ABS coils, actuator coils, keyless antennas, rotor position sensors, etc.

Address: Blejska dobrava 124, 4273 Blejska dobrava

Tel: +386 4 620 9211 E-mail: <u>info@sumida.si</u> Web: www.sumida.si

TAB

- a producer of lead-acid and li-ion batteries; they have customers all over the globe.

Address: Polena 6, 2392 Mežica

Tel: +386 2 870 2300 E-mail: <u>info@tab.si</u> Web: www.tab.si

TAM-EUROPE

- a producer of buses (coaches, airport and electric buses)

Address: Cesta k Tamu 33, 2000 Maribor

Tel: +386 2 621 7800

E-mail: <u>info@tam-durabus.eu</u>
Web: www.tam-motors.eu

TBP – Bowden cables and plastic

- Parts and accessories for motor vehicles: bowden cables for electric car window regulators and for hand brakes in cars and lorries, etc.

Address: Gradiška cesta 3, 2230 Lenart

Tel: +386 2 729 16 00 E-mail: <u>info@tbp.si</u> Web: <u>www.tbp.si</u>

TPV GROUP

- a producer of automotive components

Address: Kandijska cesta 54, 8000 Novo mesto

Tel: +386 7 391 8100 E-mail: <u>tpv@tpv.si</u> Web: www.tpv.si

TPV PRIKOLICE

- one of the leading manufacturers of light trailers; it was established by the companies TPV d.o.o., Novo mesto, Slovenia and Böckmann Fahrzeugwerke GmbH, Germany. The head office is located in Ptuj, Slovenia.

Address: Rajšpova ulica 16, 2250 Ptuj

Tel: +386 2 787 5210 E-mail: <u>tpv-prikolice@tpv.si</u> Web: <u>www.tpv-prikolice.si</u>

5. E-MOBILITY IN SLOVENIA

Slovenia promotes e-mobility in several ways. The government encourages the purchase of e-vehicles through the Eco Fund, which offers grants to individuals and legal entities. 5 million euros were allocated for e-mobility in 2019. The Eco Fund also offers grants to municipalities for the installation of e-charging stations.

Compared to 2019 the number of passenger cars on hybrid drive increased by 38% to about 9,400 at the end of 2020, which is 0.8% of all registered passenger cars. The number of passenger cars on electric drive increased by 84% to 3,670 at the end of 2020, which is 0.3% of all registered passenger cars.

Currently there are 630 public charging stations available in Slovenia. The country has set out an ambitious plan to support faster e-vehicle entry into the Slovenian market, with the goal of achieving at least 17% of all passenger cars or 200,000 electric or hybrid vehicles by 2030. By 2023 Slovenia plans to set up 50 new public e-stations, which will be financed through EU cohesion funds.

Different Slovenian institutes and companies are involved in development process of components for electric vehicles. The Slovenian National Institute of Chemistry is engaged in research and development of modern battery materials. They are leading two European projects on the development of lithium-sulphur batteries that have at least twice the energy density of lithium-ion batteries. Considerable attention is paid to the development of batteries made of materials the basis of which is not lithium. Sodium, for example, can successfully replace lithium.

Hidria, that ranks among the leading European manufacturers of electrical and electronic equipment for motor vehicles, also contributes to the green mobility segment with state-of-the-art sustainable solutions for future cars (laminations for electric and hybrid cars, among others).

More information on e-mobility in Slovenia: https://emobility.si/en/landing_4-2/

6. RESEARCH INSTITUTIONS AND ASSOCIATIONS

- ACS Automotive Cluster of Slovenia https://www.acs-giz.si/en Contact: Mrs Tanja Mohorič, E-mail: tanja.mohoric@acs-giz.si
- <u>Car industry institution RTC</u> <u>https://rtc.si/home-2/</u>
 Contact: Mr Sašo Emin, E-mail: <u>rtc@rtc.si</u>
- <u>TECOS Slovenian Tool and Die Development Centre https://www.tecos.si/index.php/en/</u>Contact: Mr Aleš Hančič, E-mail: <u>spela.bordon@tecos.si</u>
- <u>Tool-making Cluster of Slovenia</u> info@toolscluster.net/en/
- SRIP-ACS+ Business interest association ACS Automotive cluster of Slovenia and Transport Association at the Chamber of Commerce and Industry of Slovenia -https://www.acs-giz.si/en/members
 Contact: Mr Rok Bank, E-mail: rok.ban@acs-giz.si
- AMZS National automobile association https://www.amzs.si/en
 Contact: Mrs Anita Drev, PR, E-mail: mediji@amzs.si

7. FAIR

Car and Maintenance Fair – a biennial fair that takes place together with Utility Vehicles and Logistics and the Moto Boom fair.

Organiser: Celje Fairgrounds

More info: https://ce-sejem.si/en/fairs/may-fairs/car-and-maintenance/

8. SOURCE OF INFORMATION

- Institute of Macroeconomic Analysis and Development https://www.umar.gov.si/en/
- Spirit Slovenia https://www.investslovenia.org/
- Statistical Office of the Republic of Slovenia www.stat.si
- ACS Automotive Cluster of Slovenia https://www.acs-giz.si/en

- Instituut voor de Nationale Rekeningen (NBB) https://inr-icn.fgov.be/nl
- European Commission, Economic Forecast for Slovenia

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