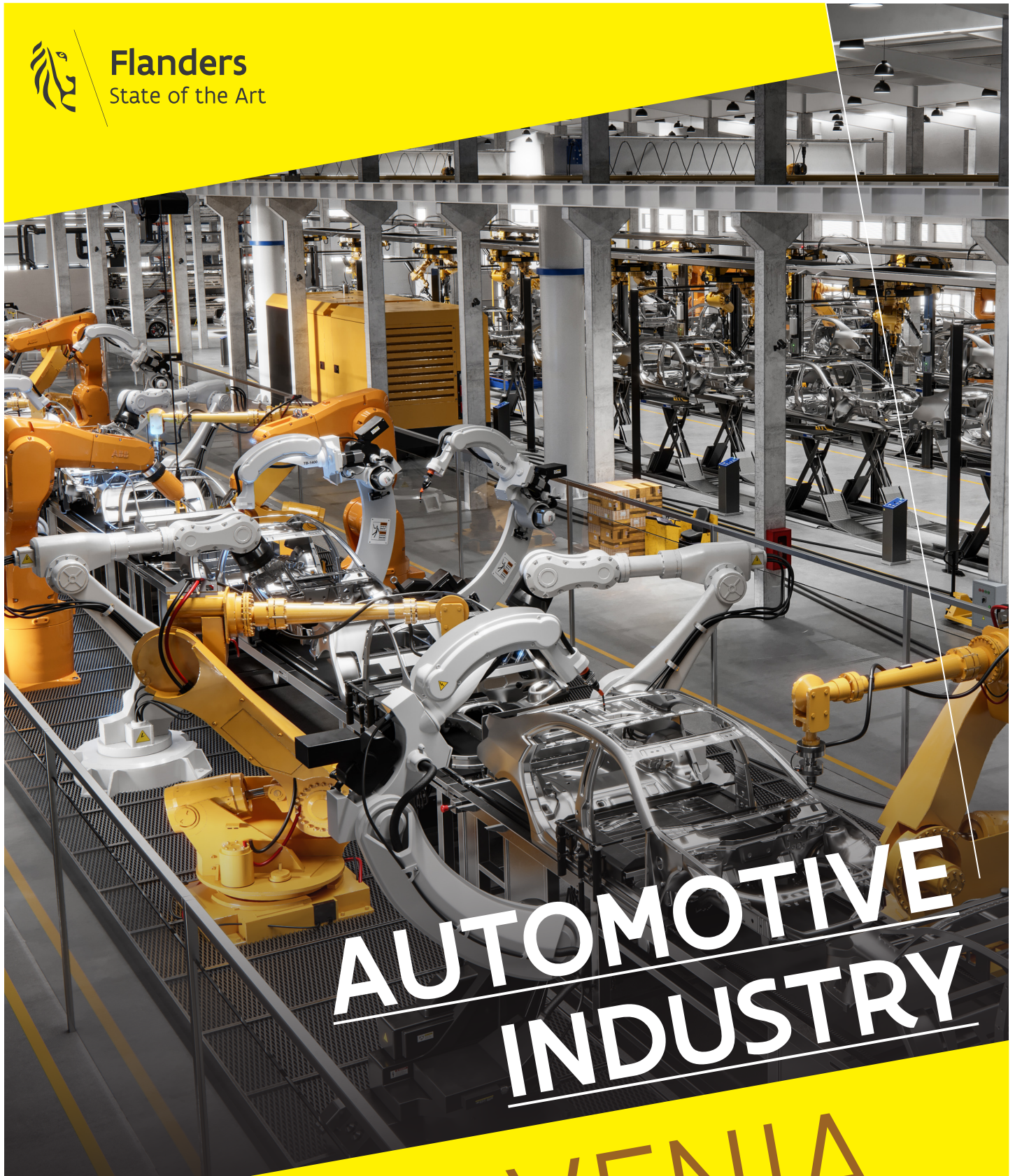




Flanders
State of the Art



AUTOMOTIVE INDUSTRY

IN SLOVENIA

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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AUTOMOTIVE INDUSTRY IN

SLOVENIA

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FLANDERS INVESTMENT & TRADE
c/o Embassy of Belgium
Kuzmiceva 9 | 1000 Ljubljana | Slovenia
T: +386 31 61 95 08 | ljubljana@fitagency.com

1. 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:

<i>Indicators</i>	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

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: info@adria-mobil.si
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: info@agis-technologies.com
Web: www.agis-technologies.com

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: info@akrapovic.si
Web: www.akrapovic.com/en

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: info@cecomp.si
Web: www.cecomp.it



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: info@domel.com

Web: www.domel.com

EBM PAPST SLOVENIJA

- a producer of small electrical motors and fans

Address: Podskrajnik 16, 1380 Cerknica

Tel: +386 1 709 0455

E-mail: info@si.embpapst.com

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: info@grammer.com

Web: www.grammer.com

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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: hss.info@hella.com
 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: info@hidria.com
 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: info@kls.si
 Web: www.kls.si

LTH CASTINGS

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

Address: Vincarje 2, 4220 Škofja Loka
 Tel: +386 4 511 2109
 E-mail: info@lthcastings.com
 Web: www.lthcastings.com

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

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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: tpv-prikolice@tpv.si

Web: www.tpv-prikolice.si

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/



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

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