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LEAD GENERATION PROGRAMME

Priority sectors development trends in Visegrad Group Countries

Market Analysis
November, December.2021

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 **SPIRIT**
SLOVENIA

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INTRODUCTION

This document summarizes all findings from Visegrad group market analysis performed by Dun & Brandstreet company in **December 2021**. This analysis is a part of **Phase I of a “Lead Generation” program** activities leading to identification and qualification of high-quality contacts of potential foreign buyers in the markets of Visegrad Group in order to connect Slovenian and foreign business partners.

Funds for the organization and implementation of the “Lead Generation” program to identify qualified contacts of potential foreign buyers on the markets of the Visegrad Group to connect Slovenian and foreign business partners, financed from item SN 4211 SM 042 - Connecting SLO and foreign business partners are co-financed by the Republic of Slovenia and the European Union - European Regional Development Fund (www.eu-skladi.si).

According to the performed study/analysis of the COVID-19 economic effects and the effects of the supportive environment measures on the stimulating investments and internationalization of the Slovenian economy program, activities related to the “Lead Generation” program is to focus on priority markets and sectors where Slovenia has a recognizable competitive advantage. In doing so, focus is **on the Visegrad Group markets (Poland, Hungary, Czech Republic, Slovakia)**, which were identified as a group of priority markets for internationalization of Slovenian SMEs.

Connecting Slovenian and foreign business partners and identifying qualified “Lead Generation” contacts of potential buyers, is being implemented in accordance with the study/analysis on the Visegrad Group markets with an emphasis on the **following set of priority sectors**: vehicles and automotive parts, electrical and electronic equipment, machinery and equipment, wood products, furniture and optical, technical, medical and other devices, and the food processing industry.

Data from Eurostat, country statistical offices and Dun & Brandstreet databases were used for analysis. **Only “active” business entities in November 2021 in Manufacturing, Wholesale and Retail industry were considered in markets potential analysis and statistics calculations.**

MANAGEMENT SUMMARY (1/6)

PERFORM MARKETS ANALYSIS

This document summarizes all findings from Visegrad group market analysis performed by [Dun & Brandstreet](#) company during **November - December 2021**. This analysis is a part of a **“Lead Generation” program** activities leading to identification and qualification of high-quality contacts of potential foreign buyers in the markets of Visegrad Group in order to connect Slovenian and foreign business partners.

Visegrad Group means the following countries: **Poland, Czechia, Slovakia, Hungary**. Only Manufacturing, Wholesale and Retail industry using international industry classification [NACE](#).

The analysis focused on determining the target market segments with the greatest potential for new business relations of Slovenian exporters, however, clear selection criteria determined by the conditions of the tender significantly guided the direction of the analysis.

Within the identified priority sectors in the designated markets, the application of initial conditions to the size of target companies, a **total of 257 companies were identified**. In phase 2, these companies will be evaluated in terms of current economic stability, risk and subsequently contacted in order to verify their real interest in possible cooperation.

The dominant sector of the Visegrad countries is **car production**, which occupies a significant part of the industrial production of these countries. German, Korean and French international concerns manufacture their vehicles in this area. **These markets provide ample scope for the expansion** of all manufacturing companies with a focus on processing the **metals, plastics and electronics that are needed for manufacturing, especially electric vehicles in upcoming years**. Certainly, the **risk** of these markets may be the fact that most target companies are part of foreign corporations, which may have **limited local powers** in the search for new potential suppliers because of centralized purchasing processes.

Based on the size of the sales potential in the selected sectors as well as the size of the group of relevant Slovenian companies that can participate in the program, the sectors were ranked as follows:

1. **Vehicles and automotive parts**
2. **Machinery and equipment**
3. **Electrical and Electronic equipment**
4. Food processing
5. Optical, Technical, Medical Devices
6. Wood products
7. Furniture

Companies in those sectors have similar target group of potential buyers, therefore USPs (Unique Selling Proposition materials) were grouped as follows:

- **Automotive**
- **Machining & Metalworking** (Metals production on “suppliers’ site” were included)
- **Electrical & Electronics**
- **Wood Processing & Furniture**

PHASE 2 SELECT & QUALITY LEADS

PHASE 3 INITIATE RELATIONSHIPS

PHASE 4 ENABLE SUCCESSFUL PARTNERSHIP

PHASE 5 DEVELOP ACTION PLAN

This analysis had two main objectives:

A. Finding and rank the most potential sector of buyers in the markets of the Visegrad Group on which the SPIRIT lead generation program should focus on

B. Determine and rank the Slovenian market sectors which will be involved (meaning could be interested to participate because they have something to offer those potential buyers)

Visegrad group markets were analyzed:

- Poland
- Czechia
- Hungary
- Slovakia

These industries were analyzed:

- Manufacturing
- Wholesale & Retail

These sectors were considered as Priority ones:

- Vehicles and automotive parts,
- Electrical and electronic equipment,
- Machinery and equipment,
- Food processing,
- Wood products,
- Furniture,
- Optical, technical, medical and other devices

This market analysis was processed in 3 main steps:

STEP 1



FIND THE MOST POTENTIAL SECTORS IN VISEGRAD GROUP COUNTRIES

An analysis of the current state and trends of individual markets in the context of the main economic indicators, the development and structure of imports to individual countries, firmographics and the structure of active companies in the priority sectors of the given markets was performed.

The **TARGET** segment of companies within the ranked priority sectors for the next phase of the program was evaluated (referred to as **LEADS**).

STEP 2



SELECT & RANK RELEVANT SLOVENIAN SECTORS TO SUPPORT

An analysis of the current situation was performed, including the **development** of the Slovenian economy, the amount and structure of overall global developments as well as **exports to the V4 countries** and the **firmographics** of active Slovenian small, medium and large companies.

Priority sectors were identified and ranked according to their relevance to current needs and trends on the part of potential suppliers and the size of the given sectors in the context of possible capacities and the structure of the products offered.

STEP 3



IDENTIFY LEADS & SET A QUALIFICATION FRAMEWORK IN PHASE 2

Based on the size of the **TARGET** market segment, the **PRIORITY SECTORS** of the Slovenian market, the **analysis of the purchasing and trading behavior of potential buyers**, the **RANKING** of priority market sectors and the list of **POTENTIAL BUYERS** (so-called **LEADS**) in the Visegrad Group countries were proposed.

STEP I - FINDING THE MOST POTENTIAL SECTORS (POTENTIAL SUPPLIERS)

FROM TARGET MARKET SEGMENTS TO LEADS LIST OF POTENTIAL BUYERS

The following key factors were considered for **TARGET** market segment (Potential buyers):

- **Industry** the company do business in (Manufacturing, Wholesale & Retail)
- **Company Size** (Definition by Tender requirements)
- **Potential signals** about new suppliers needs or expanding their supply chains (disruption of current ones, supply shortages, etc.)

Target segment was narrowed down to **LEADS** using **Priority Sectors** selection the further investigation should focus on.

Each **LEAD** will be analyzed in detail to prepare a list of high-quality contacts in Phase 2.

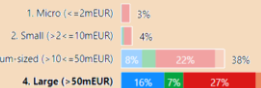
TARGET Segments

G - Wholesale and retail trade: repair of motor vehicles and motorcycles

C - Manufacturing

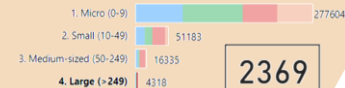
Number of Companies in Market Sector by Size

● Czechia ● Hungary ● Poland ● Slovakia



Number of Companies in Market Sector by Size

● Czechia ● Hungary ● Poland ● Slovakia

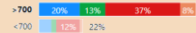


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2

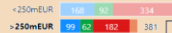
Number of Companies by Number of Employees

● Czechia ● Hungary ● Poland ● Slovakia



Number of Companies by Annual Revenue

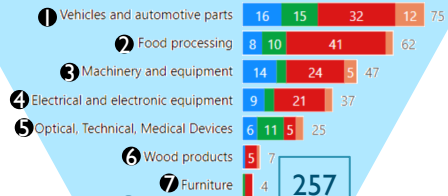
● Czechia ● Hungary ● Poland ● Slovakia



381

LEADS

3



257

HIGH QUALITY CONTACTS

4

234k companies in Wholesales & Retail trade and 115k in Manufacturing Industry are doing a real business in Visegrad group countries. In Total **349k** active companies no matter the size.

If we look on segment of **LARGE** companies only applying both key criteria together (by EU definition), **TARGET** market segment has shrieked to **2.369 LARGE** companies.

If we narrow the segments using criteria on company size, the total number of potential Buyers is down to **381 Companies** applying Industry and Size.

If we narrow the segments on Priority Sectors, we get a list of **257 LEADS** as potential Buyers. Priority Sectors are ranked from most to at least potential ones.

257 LEADS comply with all initial requirements on market target segments by industry, market sectors and size in terms of annual revenue and number of companies. Detail analysis of their financials, risks, etc. to identify and rank the most potential ones **will be in Phase 2.**

SLOVENIAN EXPORT TRENDS

In the context of the share of industrial exports, Slovenia is a strongly exporting country, exporting its products worldwide. The share of exports to the countries of the Visegrad Group is about 10% of the total, which indicates a large scope for growth in exports to these countries.

In the group of priority sectors, exports of electrical engineering, vehicles, machinery and other metal products are the most successful.

SECTORS RANKING

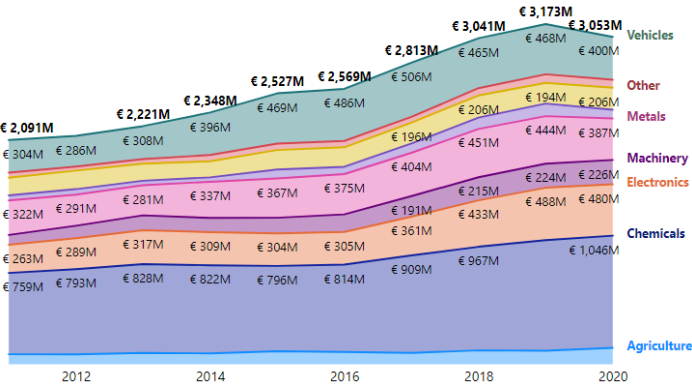
The size of the sector according to the number of employees and the total amount of annual sales as well as the relevance of the production range in the context of the current needs of potential buyers was considered when prioritizing the Slovenian sectors.

PRIORITY SECTORS SIZE

Applying priority sectors and size of potential company, 1222 SM + Large Companies could be considered as potential supplier.

MANAGEMENT SUMMARY (4/6) STEP 2 - RANK RELEVANT SLOVENIAN SECTORS (POTENTIAL SUPPLIERS)

Slovenian Export to V4 Countries by Industry (mil. EUR)



Priority	Sector	RANKING
Priority	Electrical and electronic equipment	6
Priority	Machinery and equipment	7
Priority	Vehicles and automotive parts	11
Priority	Food processing	19
Priority	Wood products	19
Priority	Optical, Technical, Medical Devices	27
Priority	Furniture	38
	Metal products	9
	Basic metals	23
	Plastic products	15
	Chemicals	25
	Textiles	29
	Others	39
	Printing	38

Number of Companies in Market Sector



1222

of Slovenian companies as a new potential supplier

Slovenian Priority Sectors Size

PRIORITY_SECTOR	Total Annual Revenue	Total Number of Employees
Electrical and electronic equipment	€ 3,766,092,094	18489
Vehicles and automotive parts	€ 3,350,478,653	14012
Metal products	€ 3,246,162,685	30058
Machinery and equipment	€ 2,986,351,272	23760
Basic metals	€ 2,364,167,461	8806
Food processing	€ 2,281,265,285	14450
Plastic products	€ 1,976,305,421	14034
Wood products	€ 1,819,402,835	11127
Chemicals	€ 1,504,495,910	6556
Optical, Technical, Medical Devices	€ 852,989,986	5621
Textiles	€ 727,923,685	6465
Other	€ 434,919,675	3623
Printing	€ 379,254,750	3219
Furniture	€ 371,870,941	3882
Total	€ 26,061,680,652	164103

PRIORITY SECTORS RANKING

The following key factors influenced the final sectors ranking:

- Potential Buyers Target sector Size in terms of number of Companies which fit the criterias
- Potential Suppliers priority sector Size in terms of Annual Revenue and No. of employees
- Demand – Supply fit using Trading data (More buyers need the product they product, the better)

LEADS

In total, **257 companies** operating in the Visegrad Group countries meet all the requirements for potential buyers and can be classified as LEAD for further analysis in Phase 2.

ULTIMATE OWNERSHIP

The analysis of the Ultimate owners revealed a possible risk for the next phases of the program. The vast majority of companies classified as LEAD are owned by a foreign mother company. The decision-making powers of local procurement departments will be part of the Phase 2 investigation.

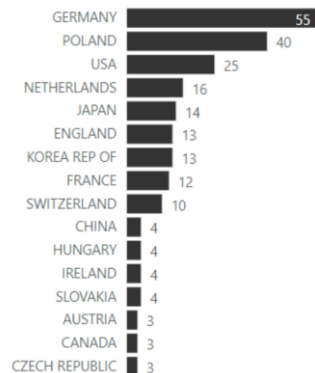
MANAGEMENT SUMMARY (5/6)

STEP 3 - LEADS IDENTIFICATION IN PRIORITY SECTORS

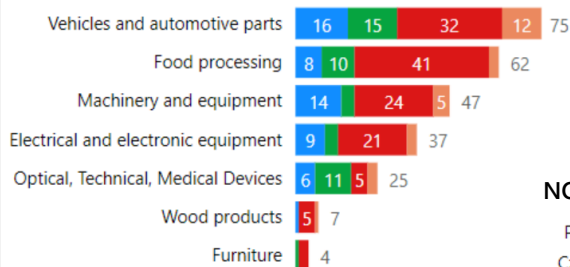
PRIORITY SECTORS RANKING BY COMPLEX ASSESSMENT

Rank	Priority Sector
1	Vehicles and automotive parts
2	Machinery and equipment
3	Electrical and electronic equipment
4	Food processing
5	Optical, Technical, Medical Devices
6	Wood products
7	Furniture

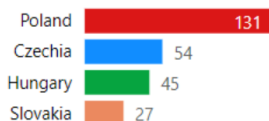
NO. OF LEADS BY COMPANY ULTIMATE OWNER COUNTRY



NO. OF LEADS BY PRIORITY SECTORS



NO. OF LEADS BY COUNTRY



257

LEADS meet criteria all Phase I requirements

TOP15 MANUFACTURING COMPANIES BY ANNUAL REVENUE

COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
ŠKODA AUTO a.s.	Czechia	€ 17,240,862,745	Manufacture of motor vehicles
VOLKSWAGEN SLOVAKIA, a.s.	Slovakia	€ 9,785,295,000	Manufacture of motor vehicles
AUDI HUNGARIA Zártkörűen Működő Részvénytársaság	Hungary	€ 7,517,629,000	Manufacture of motor vehicles
Hyundai Motor Manufacturing Czech s.r.o.	Czechia	€ 4,840,879,686	Manufacture of motor vehicles
Kia Slovakia s. r. o.	Slovakia	€ 4,596,607,000	Manufacture of motor vehicles
VOLKSWAGEN POZNAŃ SP Z O O	Poland	€ 3,484,067,447	Production of heavy goods vehicles
PCA Slovakia, s.r.o.	Slovakia	€ 3,457,724,000	Manufacture of motor vehicles
Mercedes-Benz Manufacturing Hungary Korlátolt Felelősségű Társaság	Hungary	€ 3,411,819,239	Manufacture of motor vehicles
Samsung Electronics Magyar Zártkörűen Működő Részvénytársaság	Hungary	€ 2,733,284,036	Manufacture of communication equipment
Flextronics International Termelő és Szolgáltató Vámszabadterületi Korlátolt Felelősségű Társaság	Hungary	€ 2,468,745,083	Manufacture of consumer electronics
LG ELECTRONICS MŁAWA SP Z O O	Poland	€ 2,258,695,526	Manufacture of consumer electronics
FCA POLAND S A	Poland	€ 2,227,736,349	Production of passenger cars
Foxconn European Manufacturing Services s.r.o.	Czechia	€ 2,049,608,902	Manufacture of computers and peripheral equipment
Robert Bosch Elektronika Gyártó Kft.	Hungary	€ 1,706,860,908	Manufacture of loaded electronic boards
ANIMEX FOODS SP Z O O	Poland	€ 1,691,775,745	Production of meat and poultry meat products

TOP3 WHOLESALERS COMPANIES BY ANNUAL REVENUE

COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
KITE Mezőgazdasági Szolgáltató és Kereskedelmi Zártkörűen Működő Részvénytársaság	Hungary	€ 880,064,446	Wholesale of agricultural machinery, equipment and supplies
ARCELORMITTAL DISTRIBUTION SOLUTIONS POLAND SP Z O O	Poland	€ 667,202,206	Wholesale of metals and metal ores
THYSSENKRUPP MATERIALS POLAND S A	Poland	€ 568,988,446	Wholesale of metals and metal ores

FROM LEAD TO HIGH QUALITY CONTACT FRAMEWORK FOR PHASE 2



The detail company assessment will be performed for **LEADS ranking**:

- a. **Business Activity review** (online data will be analyzed, collected information on firms from D&B database, trade information between industries and industrial interdependencies on activity and product basis, etc.)
- b. **Detail Financials & Risk review.** This will cover a following analysis:
 - ✓ **Financial Stability** review using Dun & Bradstreet Failure Score and Credit Rating
 - ✓ **Compliance** review using Dun & Bradstreet Sanction and PEP lists, relevant negative events of company as well as parent ones
 - ✓ **Financial Performance** review (Liquidity, Leverage, Profitability, Efficiency/Productivity (using Added Value Ratio))

To qualify and rank the **HIGH QUALITY CONTACTS** the detail investigation will be done:

- a. **Investigate contacts on key decision makers** (Business Development Manager, Purchasing Manager, Sourcing Manager, company management)
- b. **Contact them and verify** if they have **plans** to expand or renew their supply chain and if they are **interested** in the presentation and meetings with potential Slovenian partners

STEP I

What are **the most potential sectors** in V4 countries for Slovenian exporters in terms of actual businesses needs / demand on “buyers site”?

VISEGRAD GROUP MARKET OPPORTUNITIES

KEY HIGHLIGHTS for 2020

Group covers Poland, Hungary, Czechia, Slovakia

Total Population: 63 732 331

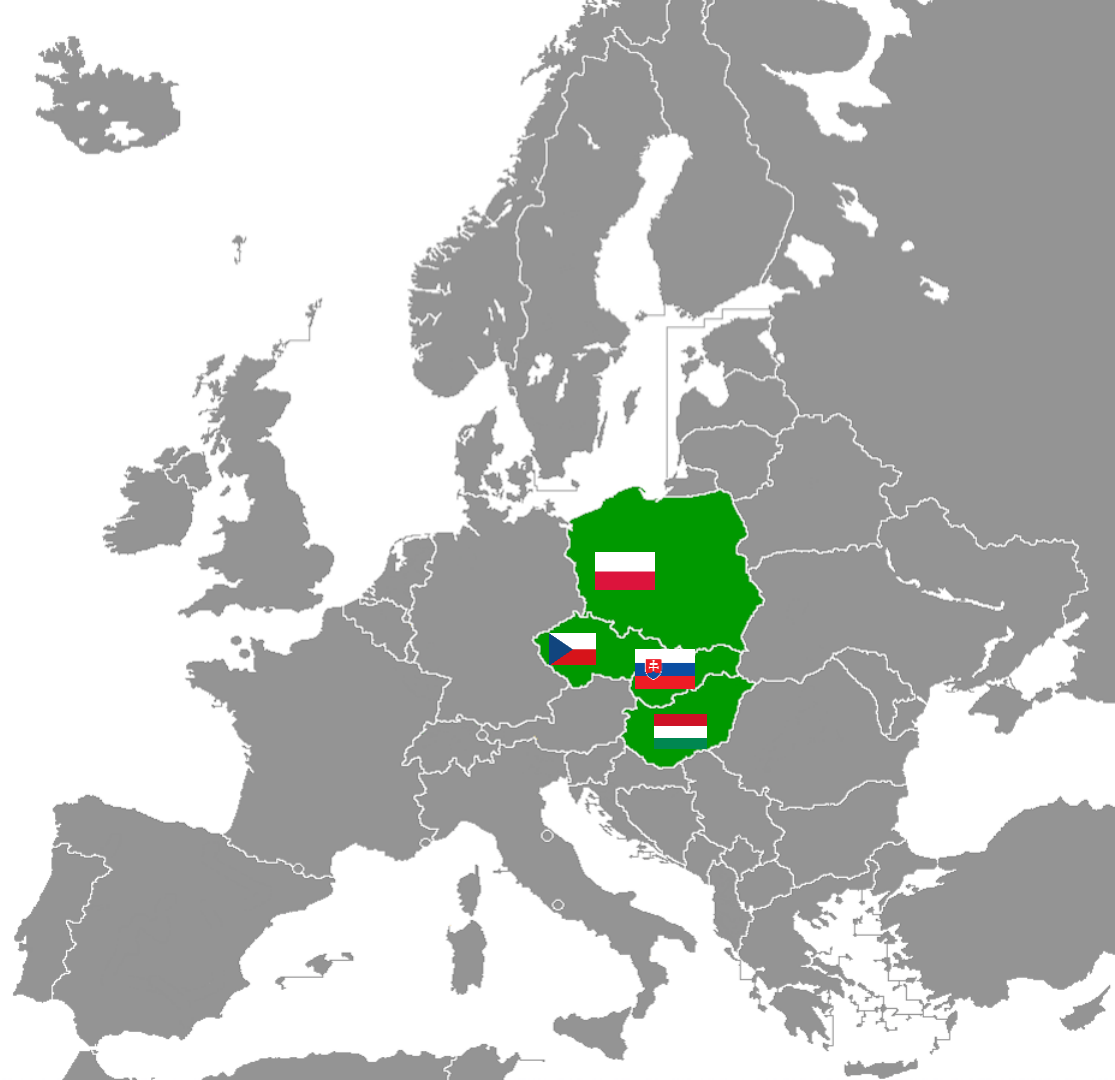
Total Real GDP : 968 bEUR

(avg. 15 tEUR per capita)

Total Imports: 553 bEUR

No. of **active** Businesses in selected Sectors:

- 138k Micro
- 35k Small & Medium
- 2k Large



GDP

GDP as an indicator for a countries economic situation is showing that almost each EU country was growing in average 3,6% till 2019 before COVID pandemic situation has come. 2020 Covid lockdowns and restrictions brought decrease by **-4,4%** in the whole EU zone. Hungary was hit by **-6,5%**, Czechia **-4,6%**, Slovakia **-2,1%** and Poland **-1,9%**. Despite COVID pandemic in 2021 we can see a strong rebound with GDP growth of **5,2%** in EU with projection to expand by **4,3%** in 2022 and **2.5%** in 2023. Growth will be supported by strong consumption, with households reducing their saving rate, and higher investments owing in part to national and European recovery plans. Unemployment is projected to decline to close to pre-crisis levels. With the rapid reopening of the economy, supply chain bottlenecks and the rebound in energy prices are pushing up inflation. ([OECD forecast in December 2021](#))

TOTAL IMPORTS

In 2020, the international trade was hit hard by the COVID-19 pandemic as well. V4 countries imported goods in **553 bEUR** in total in 2020 (**-5,4%** YoY). Although looking at total trade balances of **+34 bEUR** in 2020 (CZ +18 bEUR (0,5%), PL +11 (789%), HU +4(41%), SK +2(**-523%**)). **V4 countries are rather the exporting markets** driven mostly by automotive industry.

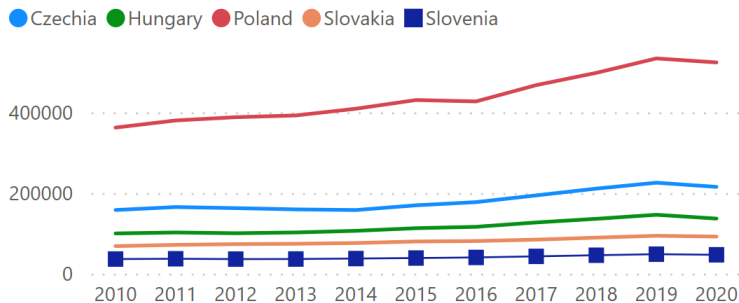
ECI

V4 markets indicates very sophisticated, highly specialized capabilities with highly diversified set of complex products. **This opens a wide range of new exporting opportunities.**

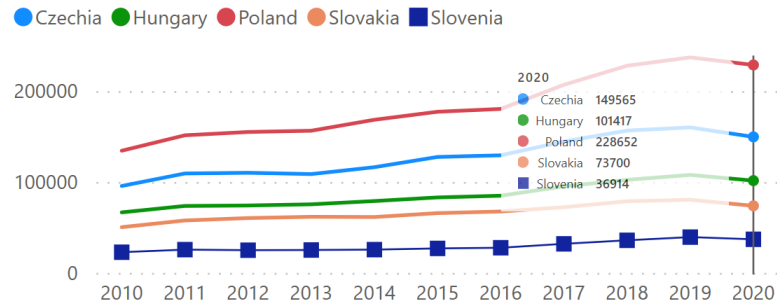
MARKETS SIZE & TRENDS

MARKETS OVERALL PERFORMANCE

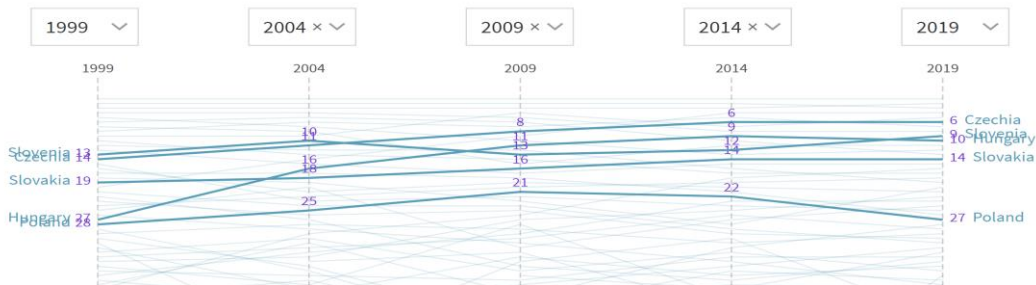
GD at market prices (mil. EUR)



Total Import of All Products (mil. EUR)



V4 Countries Ranking by Economic Complexity Index (ECI)



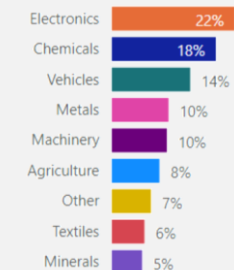
Source: [The Atlas of Economic Complexity \(harvard.edu\)](#)

The **Economic Complexity Index (ECI)** is a ranking of countries based on the diversity and complexity of their export basket. High complexity countries are home to a range of sophisticated, specialized capabilities and are therefore able to produce a highly diversified set of complex products. Determining the economic complexity of a country depends not only on the productive knowledge of a country. Information about how many capabilities the country has is contained not only in the absolute number of products that it makes, but also in the ubiquity of those products (the number of countries that export the product) and in the sophistication and diversity of products those other countries make. Economic complexity expresses the diversity and sophistication of the productive capabilities embedded in the exports of each country. The Economic Complexity Index (ECI) has been shown to explain income differences across countries and predict future growth better than any other single measure.

More detail analysis about trends in International Trade on [Eurostat portal](#).

IMPORT BY INDUSTRY

The following graph shows structure of all imports in V4 in 2020:



Pandemic hit mostly Minerals (-28% YoY), Vehicles (-15%) and Metals (-9%).

Trend in last 5 years is positive (+19% in 2020 since 2015). Electronics by 24bEUR (+27%), Chemicals by 17bEUR (21%), Vehicles by 10bEUR (+16%), Machinery by 6bEUR (12%), Textile import has grown by 9bEUR (41%) Only Minerals decrease by -3,5bEUR (-11%).

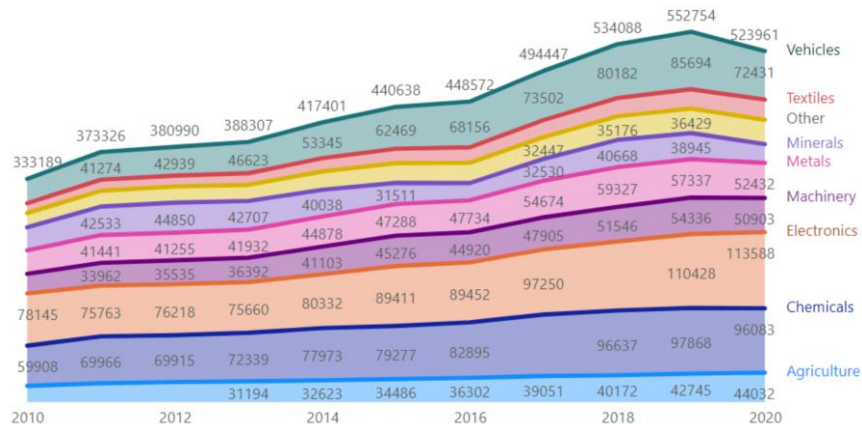
This import growth in last 5 years was primary done by Poland (63% of total changed value), 20% by Hungary, 9% by Slovakia and 8% by Czechia.

All countries have similar import product groups ranking, few changes can be seen in graphs.

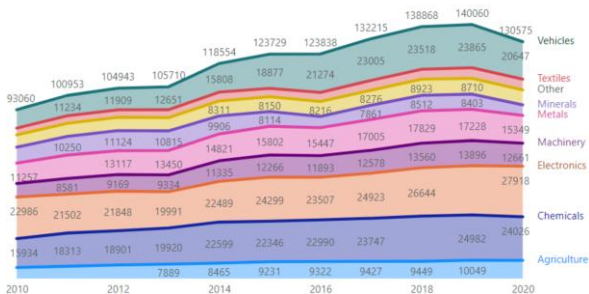
This confirms the priority sectors selected has significant room for further export development.

MARKETS SIZE & TRENDS IMPORT TRENDS BY INDUSTRY

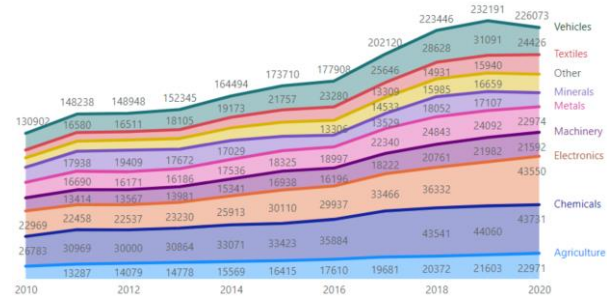
V4 Countries Import Trends by Industry (in mil. EUR)



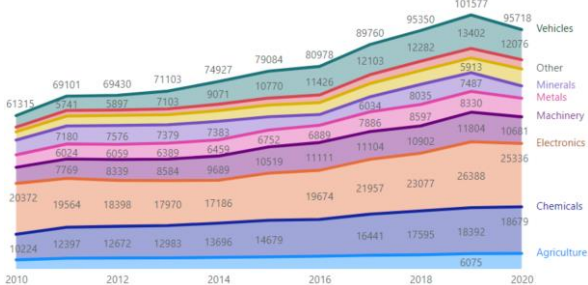
Czechia Import by Industry (mil. EUR)



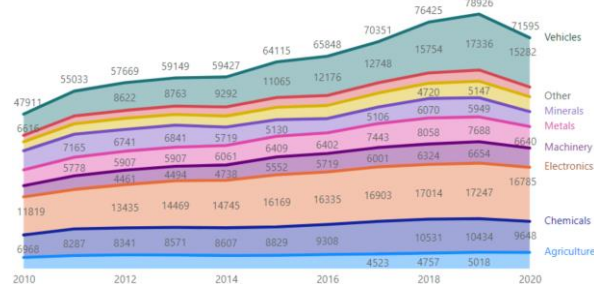
Poland Import by Industry (mil. EUR)



Hungary Import by Industry (mil. EUR)



Slovakia Import by Industry (mil. EUR)



INDUSTRY

Based on target definition only companies within (C) Manufacturing, (G) Wholesale and Retail Industries were analyzed. [NACE Level 1]

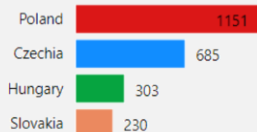
BUSINESS STRUCTURE

There are hundred of thousands of businesses in these industries on V4 markets, but majority of them in Micro & Small segment (79% Micro, 15% Small, 5% Medium and only 1% of Large companies)

Only **2.369** companies within a whole Visegrad are **LARGE** in terms of **Annual Revenue** AND **Number of Employees** which is a target group for further potential analysis.

74% of them do Manufacturing (1.753), 26% Trade (612).

Number of LARGE companies by Markets



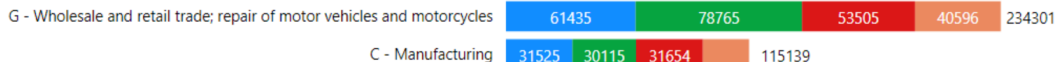
49% of them are from Poland, 29% from Czechia, 13% from Hungary and 9% from Slovakia.

In Manufacturing, Food products, vehicles, metal, rubber and plastic products are the most frequent ones.

MARKETS SIZE & TRENDS

MARKET SECTORS BY SELECTED INDUSTRIES

Number of Companies in Wholesales, Retail and Manufacturing Industry [NACE L1]



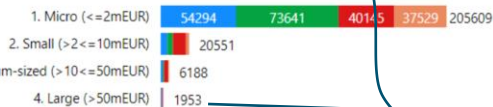
(G) Wholesale and retail trade

Number of Companies by Annual Turnover Size

● Czechia ● Hungary ● Poland ● Slovakia



Number of Companies by Annual Turnover Size



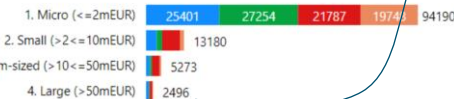
(C) Manufacturing

Number of Companies by Annual Turnover Size

● Czechia ● Hungary ● Poland ● Slovakia



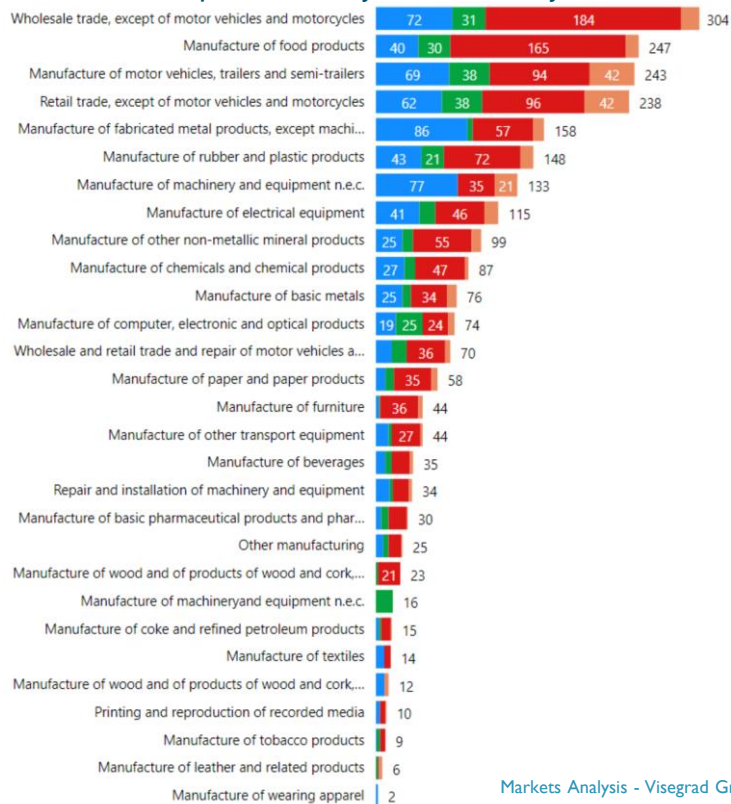
Number of Companies by Annual Turnover Size



2369

LARGE companies

Number of LARGE Companies (G+C) by Business Activity [NACE L2]



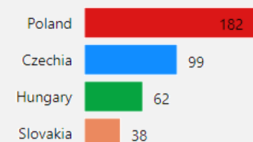
TARGET

Tender requirements on size of Targets are as follows:

- company has **more than 700 employees**
- company has **>250 mil. EUR Annual Revenue**

These requirements filtered potential Target group to **381** companies only.

COMPANIES BY COUNTRIES



COMPANIES BY ACTIVITY [NACE L1]



COMPANIES BY ACTIVITY [NACE L2]

Very large wholesale & retail stores chains operates on V4 markets (30% of Target group) and giant automotive related factories.

PRIORITY SECTORS

If we "re-group" companies using Priority sectors mapping, 135 (14%) of them do nonpriority activities and was cut out from the Target group.

MARKETS SIZE & TRENDS

LARGE ENOUGH TO MEET TENDER CRITERIA ON SIZE?

Number of LARGE Companies by NACE L2 meeting Criteria on Size

● All LARGE Companies ● LARGE Companies with >700 Empls and 250 mEUR Revenue



SPIRIT PRIORITY SECTORS

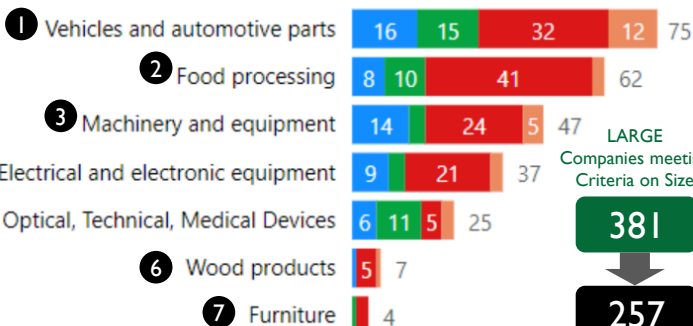
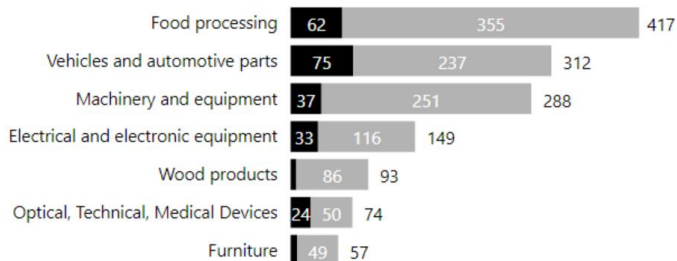
	All LARGE Companies	LARGE Companies with >700 Empls and 250 mEUR Revenue	Ratio
No	979	135	13.8%
Retail trade, except of motor vehicles and motorcycles	130	31	23.8%
Wholesale trade, except of motor vehicles and motorcycles	169	19	11.2%
Manufacture of chemicals and chemical products	87	16	18.4%
Manufacture of basic metals	76	14	18.4%
Manufacture of rubber and plastic products	148	14	9.5%
Manufacture of fabricated metal products, except machinery and equipment	158	11	7.0%
Manufacture of basic pharmaceutical products and pharmaceutical preparations	30	9	30.0%
Manufacture of other non-metallic mineral products	99	8	8.1%
Manufacture of coke and refined petroleum products	15	5	33.3%
Manufacture of tobacco products	9	4	44.4%
Other manufacturing	25	2	8.0%
Manufacture of textiles	14	1	7.1%
Manufacture of wearing apparel	2	1	50.0%
Manufacture of leather and related products	6		
Printing and reproduction of recorded media	10		
Wholesale and retail trade and repair of motor vehicles and motorcycles	1		
Vehicles and automotive parts	312	75	24.0%
Manufacture of motor vehicles, trailers and semi-trailers	243	68	28.0%
Wholesale and retail trade and repair of motor vehicles and motorcycles	69	7	10.1%
Food processing	417	62	14.9%
Manufacture of food products	247	23	9.3%
Retail trade, except of motor vehicles and motorcycles	68	21	30.9%
Wholesale trade, except of motor vehicles and motorcycles	67	12	17.9%
Manufacture of beverages	35	6	17.1%
Machinery and equipment	37	12.8%	
Manufacture of machinery and equipment n.e.c.	133	18	13.5%
Manufacture of other transport equipment	44	7	15.9%
Retail trade, except of motor vehicles and motorcycles	11	5	45.5%
Wholesale trade, except of motor vehicles and motorcycles	50	5	10.0%
Manufacture of machinery and equipment n.e.c.	16	2	12.5%
Repair and installation of machinery and equipment	34		
Electrical and electronic equipment	149	33	22.1%
Manufacture of electrical equipment	115	24	20.9%
Retail trade, except of motor vehicles and motorcycles	16	7	43.8%
Wholesale trade, except of motor vehicles and motorcycles	18	2	11.1%
Optical, Technical, Medical Devices	74	24	32.4%
Manufacture of computer, electronic and optical products	74	24	32.4%
Furniture	57	8	14.0%
Retail trade, except of motor vehicles and motorcycles	13	5	38.5%
Manufacture of furniture	44	3	6.8%
Wood products	93	7	7.5%
Manufacture of paper and paper products	58	5	8.6%
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	23	2	8.7%
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	12		
Total	2369	381	16.1%

MARKETS SIZE & TRENDS

PRIORITY SECTORS RANKING

Number of Companies in Priority Sectors meeting criteria on Size

● Criteria OK ● Criteria NotOK



LARGE Companies meeting Criteria on Size

381

257

LEADS meeting criteria on size AND are in Priority Sectors

SPIRIT_PRIORITY_SECTOR

Czechia Hungary Poland Slovakia Total

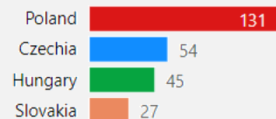
Electrical and electronic equipment	9	4	21	3	37
Manufacture of electrical equipment	8	3	11	2	24
Retail trade, except of motor vehicles and motorcycles		1	9	1	11
Wholesale trade, except of motor vehicles and motorcycles	1		1		2
Food processing	8	10	41	3	62
Manufacture of beverages	2	1	3		6
Manufacture of food products	1	2	20		23
Retail trade, except of motor vehicles and motorcycles	4	6	9	2	21
Wholesale of mining, construction and civil engineering machinery		1			1
Wholesale trade, except of motor vehicles and motorcycles	1		9	1	11
Furniture		1	3		4
Manufacture of furniture			3		3
Retail trade, except of motor vehicles and motorcycles		1			1
Machinery and equipment	14	4	24	5	47
Manufacture of machinery and equipment n.e.c.	11		4	3	18
Manufacture of machinery and equipment n.e.c.		2			2
Manufacture of other transport equipment		1	5	1	7
Retail trade, except of motor vehicles and motorcycles	2		13		15
Wholesale of mining, construction and civil engineering machinery		1			1
Wholesale trade, except of motor vehicles and motorcycles	1		2	1	4
Optical, Technical, Medical Devices	6	11	5	3	25
Manufacture of computer, electronic and optical products	6	11	5	3	25
Vehicles and automotive parts	16	15	32	12	75
Manufacture of motor vehicles, trailers and semi-trailers	14	14	28	12	68
Wholesale and retail trade and repair of motor vehicles and motorcycles	2	1	4		7
Wood products	1		5	1	7
Manufacture of paper and paper products	1		3	1	5
Manufacture of wood and of products of wood and cork, except furniture			2		2
Total	54	45	131	27	257

RANKING

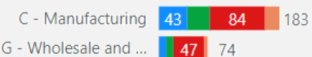
A size of potential market sectors in term of number of companies and total annual turnover volume were used for ranking.

Potential Target group within Priority Sectors only has **257 LEADS (potential buyers)**, which meet all initial requirements on size and business activity and is worth to continue with detail analysis in Phase 2.

LEADS BY COUNTRY



LEADS BY ACTIVITY [NACE LI]



30% of Leads are in Vehicles and automotive parts sector, 25% in Food processing, 15% in Machinery, 13% Electronics, 10% other devices and 6% Furniture and other Wood products.

MARKETS SIZE & TRENDS

BUYERS NEEDS IN PRIORITY SECTORS

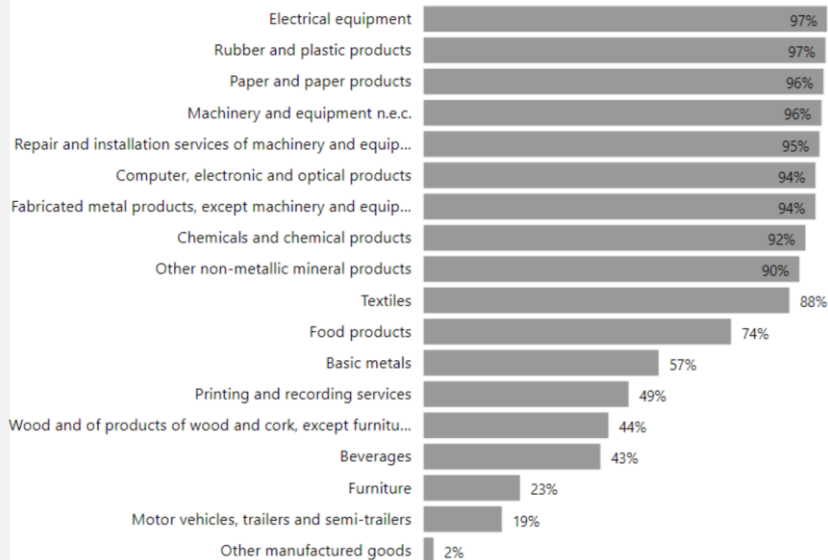
DEMAND vs SUPPLY

Anonymized payment information collected by D&B in V4 markets were used to identify standard buying behavior patterns of companies in each market sector.

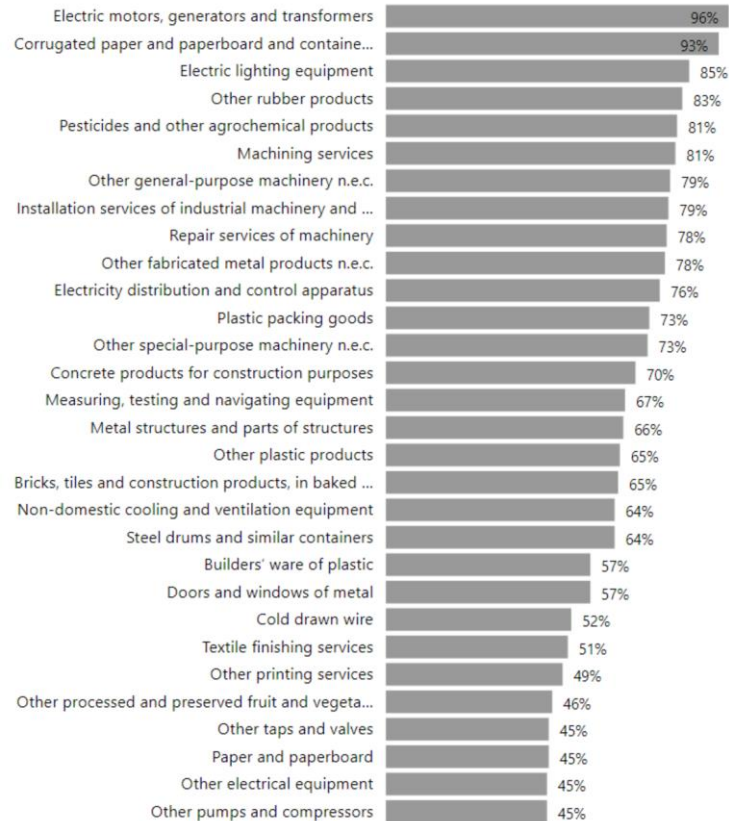
The following graphs show how much of potential Lead companies we selected typically buy these products from the others into their manufacturing or trading purposes.

These graphs indicates **what kind of Slovenian suppliers should be involved in further phases of Lead Generation Program**, companies which can offer their great products and services.

What Products Group LEADs buy from their Suppliers (% of all "LEAD" Companies)



Top30 most frequent Products LEADs buy from their Suppliers



RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN VEHICLES & AUTOMOTIVE PARTS

LEADS in Priority Sectors

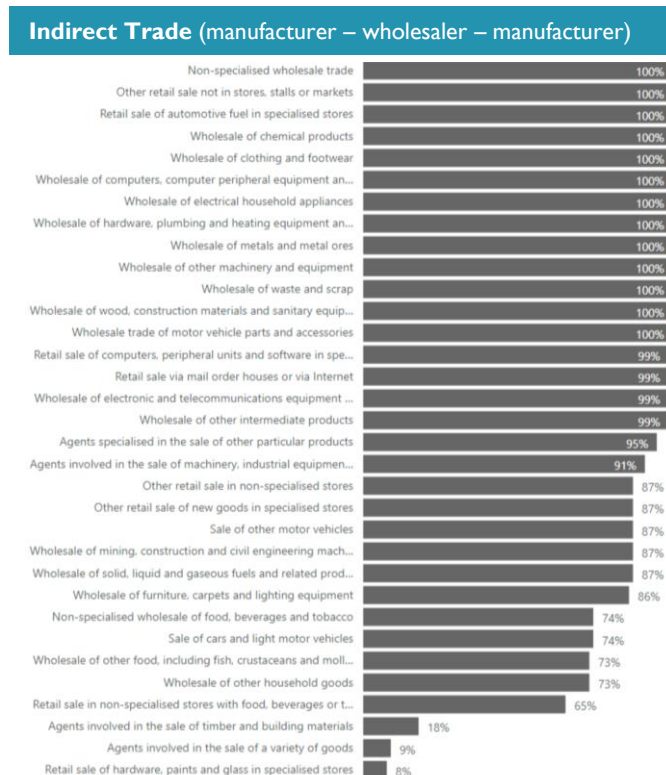
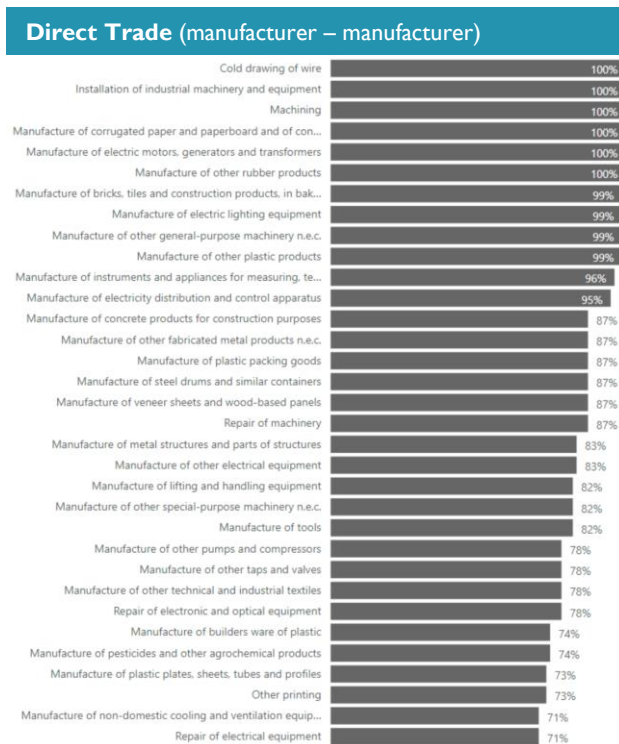


DIRECT / INDIRECT TRADE

Trading relationship can be split using NACEs of Buyers and Suppliers. If both parties were from Manufacturing, then this trade is classified as "Direct Trade". If Buyer was in Manufacturing and Supplier was Wholesaler, then this trade is classified as "Indirect".

In this analysis, we will primarily focus on the **direct sales relationship, which best indicates the list of potential Slovenian suppliers to work with.**

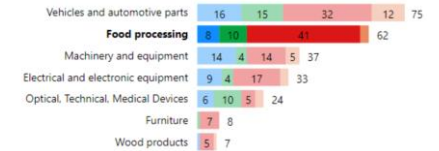
Who are the **typical supplier** for **Vehicle & Automotive parts Sector?**
(Measured by number of Target companies with a trade evidence in % of total using NACE/CPA taxonomy)



RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN FOOD PROCESSING

LEADS IN Priority Sectors

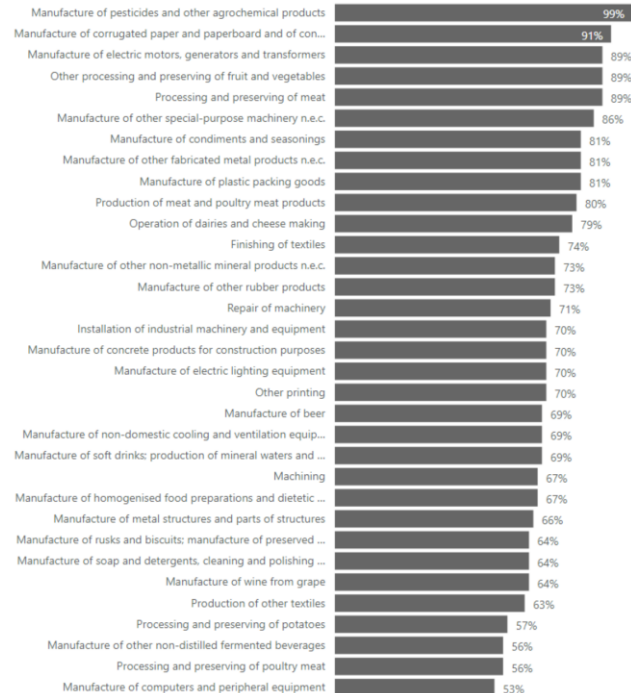
● Czechia ● Hungary ● Poland ● Slovakia



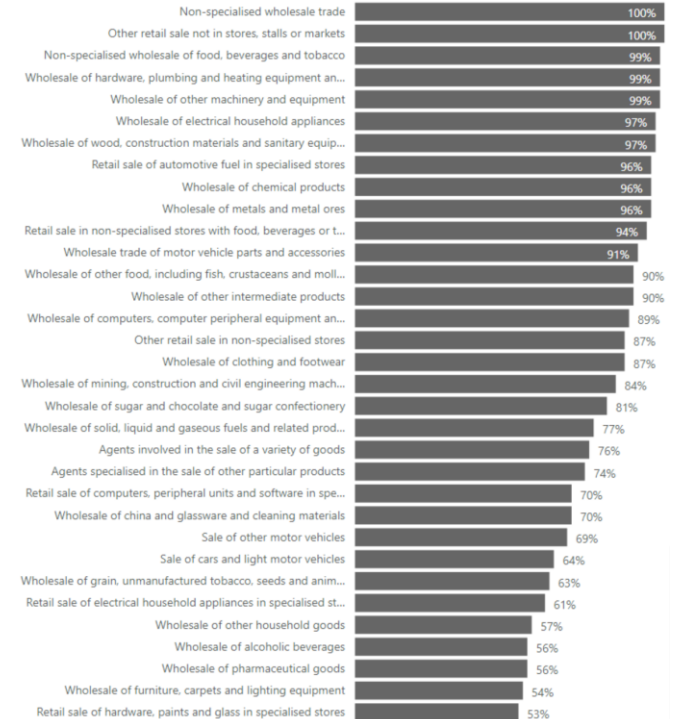
Who are the typical supplier for Food Processing Sector?

(Measured by number of target companies with a trade evidence in % of total using NACE L2 taxonomy)

Direct Trade (manufacturer – manufacturer)



Indirect Trade (manufacturer – wholesaler – manufacturer)

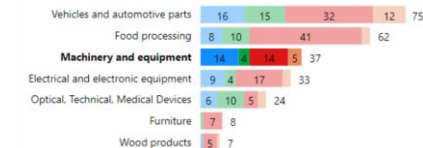


RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN MACHINERY & EQUIPMENT

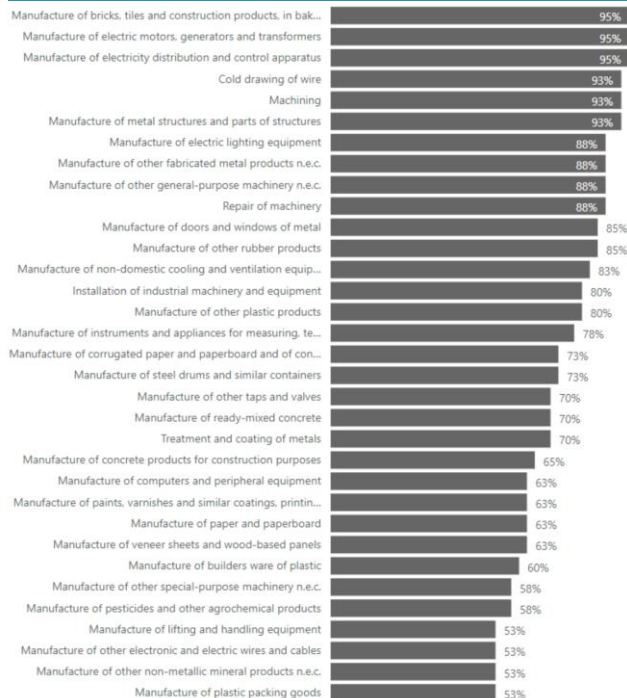
Who are the typical supplier for Machinery & equipment Sector?
(Measured by number of target companies with a trade evidence in % of total using NACE L2 taxonomy)

LEADS in Priority Sectors

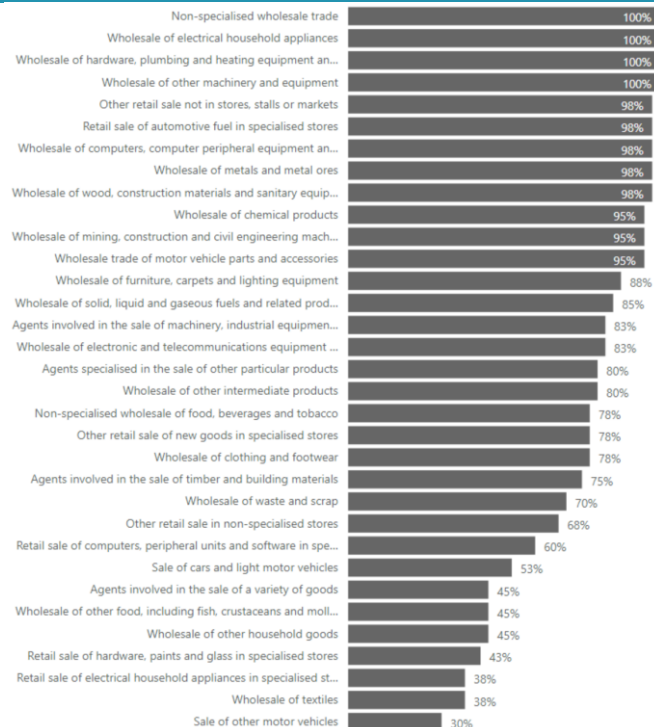
● Czechia ● Hungary ● Poland ● Slovakia



Direct Trade (manufacturer – manufacturer)



Indirect Trade (manufacturer – wholesaler – manufacturer)



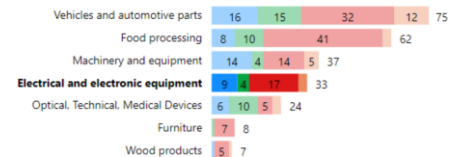
RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN ELECTRONIC EQUIPMENT

Who are the typical supplier for **Electronic equipment** Sector?

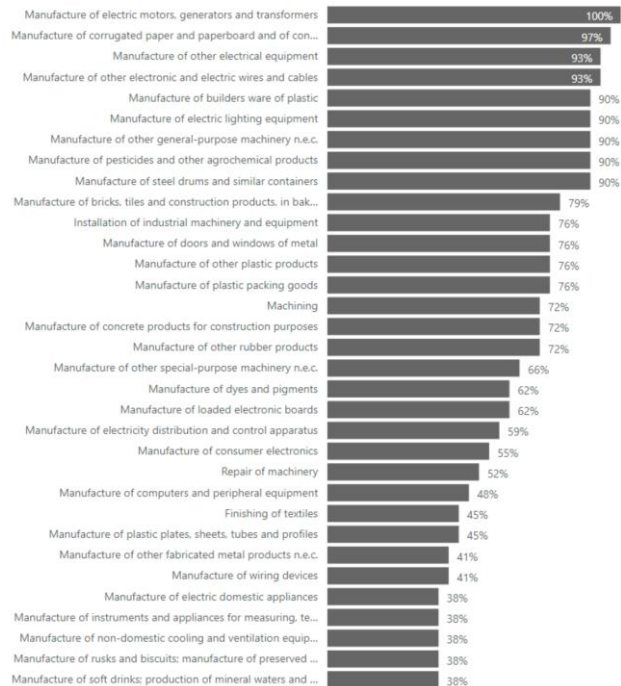
(Measured by number of target companies with a trade evidence in % of total using NACE L2 taxonomy)

LEADS IN Priority Sectors

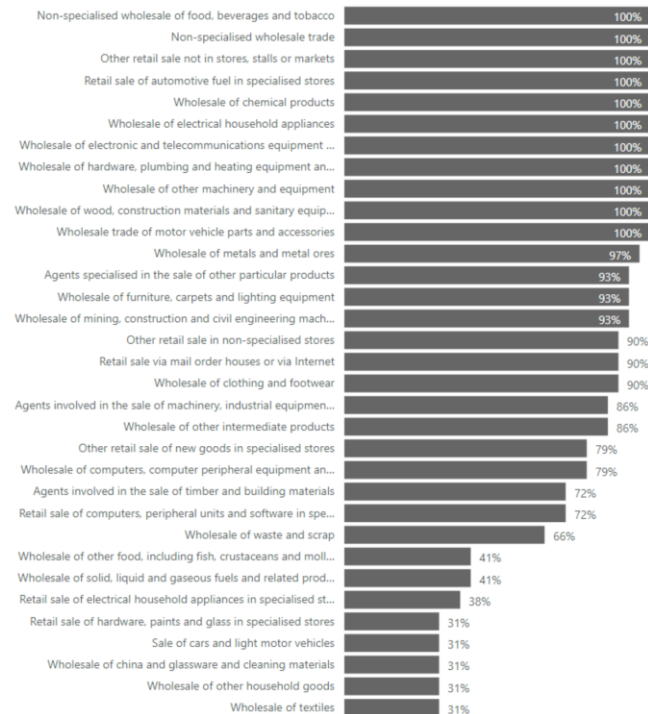
● Czechia ● Hungary ● Poland ● Slovakia



Direct Trade (manufacturer – manufacturer)



Indirect Trade (manufacturer – wholesaler – manufacturer)



RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN OPTICAL, TECHNICAL, MEDICAL DEVICES

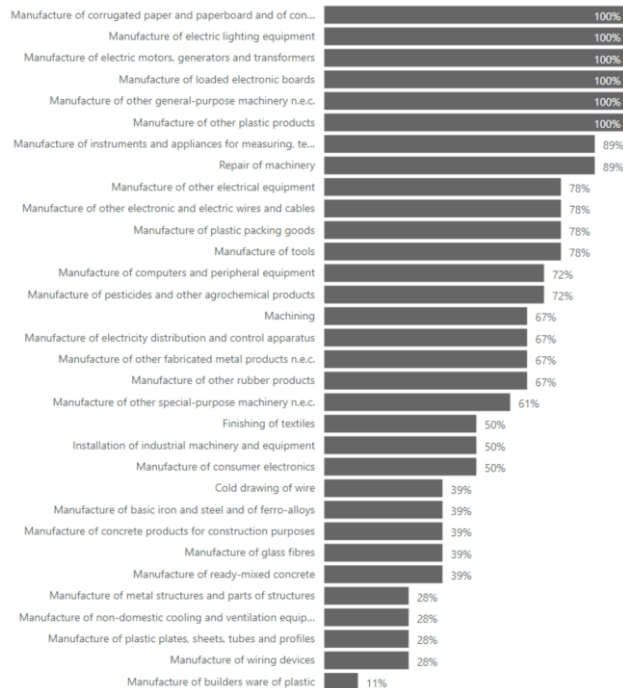
Who are the typical supplier for **Optical, Technical, Medical Devices** Sector?
(Measured by number of target companies with a trade evidence in % of total using NACE L2 taxonomy)

LEADS in Priority Sectors

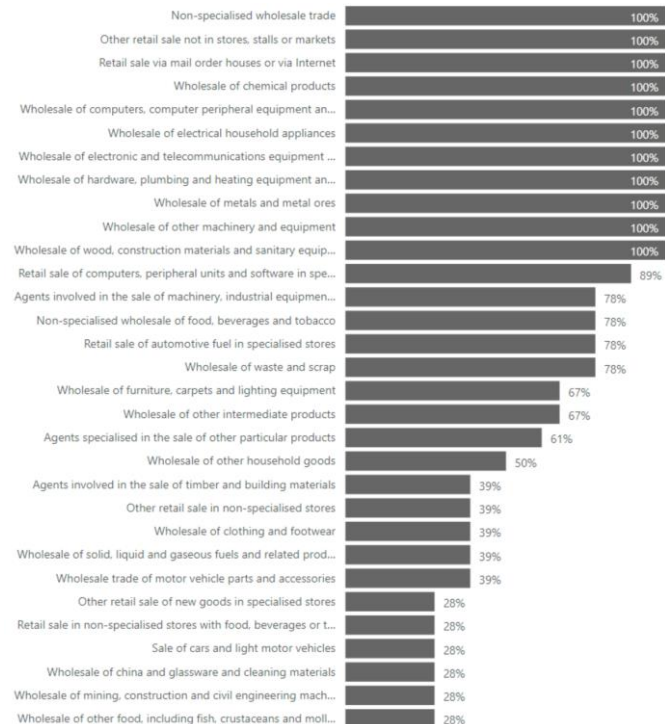
● Czechia ● Hungary ● Poland ● Slovakia

Vehicles and automotive parts	16	15	32	12	75
Food processing	8	10	41		62
Machinery and equipment	14	4	14	5	37
Electrical and electronic equipment	9	4	17		33
Optical, Technical, Medical Devices	6	10	5		24
Furniture	7				8
Wood products	5				7

Direct Trade (manufacturer – manufacturer)



Indirect Trade (manufacturer – wholesaler – manufacturer)



RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN FURNITURE

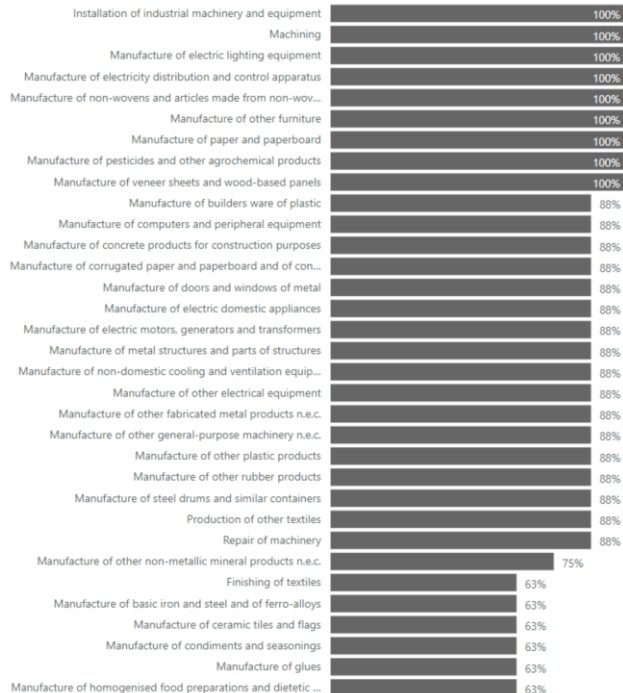
Who are the typical supplier for Furniture Sector?

(Measured by number of target companies with a trade evidence in % of total using NACE L2 taxonomy)

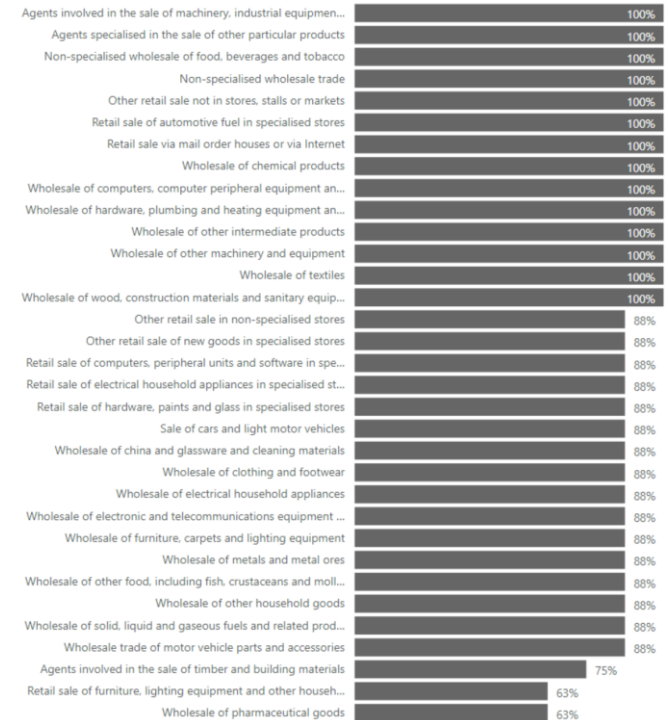
LEADS in Priority Sectors



Direct Trade (manufacturer – manufacturer)



Indirect Trade (manufacturer – wholesaler – manufacturer)



RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN WOOD PRODUCTS

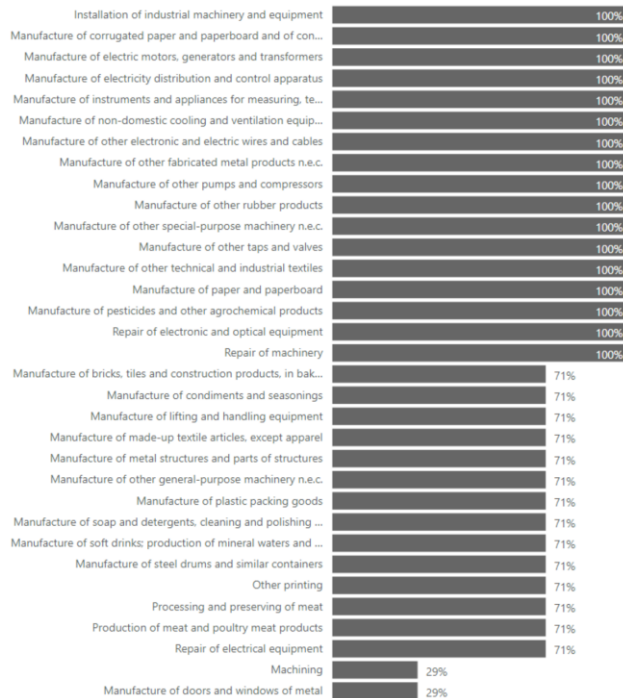
Who are the typical supplier for Wood Products Sector?

(Measured by number of target companies with a trade evidence in % of total using NACE L2 taxonomy)

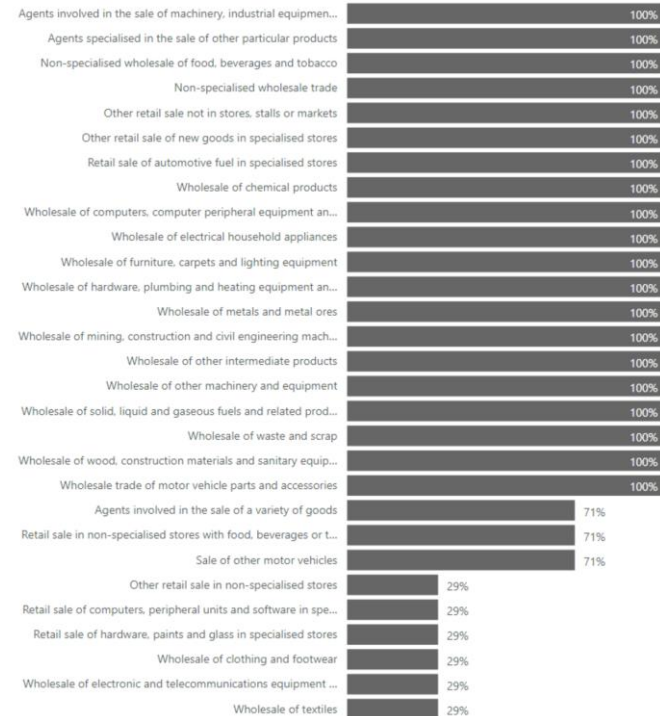
LEADS in Priority Sectors



Direct Trade (manufacturer – manufacturer)



Indirect Trade (manufacturer – wholesaler – manufacturer)



STEP2

What are **the most potential sectors** in V4 countries for Slovenian exporters in terms of actual businesses offering on “supplier site”?

SLOVENIA MARKET POTENTIAL FOR GROWTH

Slovenia in 2020

Population: 2 108 977

Employees: 1 039 780 (49,3%)

Real GDP : 47 bEUR (19 720 EUR per capita)

Total Imports: 36,9 bEUR

Total Exports: 26,4 bEUR

No. of **active** Companies in
selected industries:

- 22k Micro
- 3k Small & Medium
- 176 Large



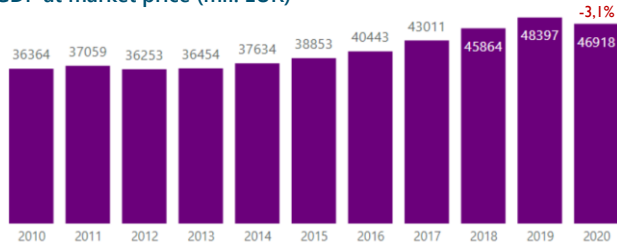
SLOVENIAN MARKET MARKET OVERALL PERFORMANCE

GDP TREND

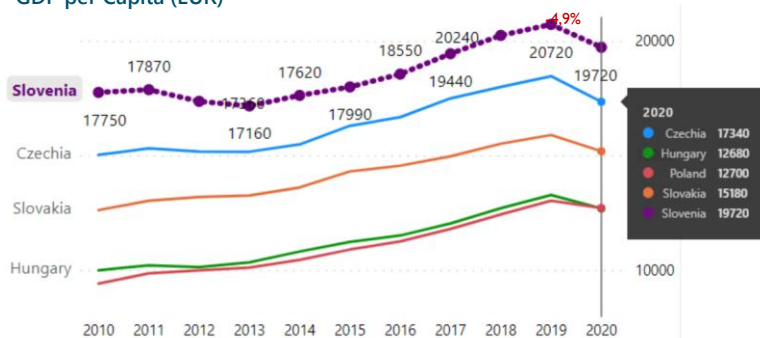
Looking at GDP growth, the Slovenian economy has been growing continuously since 2012 until 2019. The Covid pandemic also affected Slovenia, when it fell by -3.1%.

Real GDP per capita is the highest in comparison with the V4 countries, which indicates the orientation of exports towards products with higher added value than the supply of basic raw materials. (for comparison, the EU average is 26k EUR, Germany 34k, Norway 69k EUR)

GDP at market price (mil. EUR)



GDP per Capita (EUR)



Source: Eurostat

EXPORTS

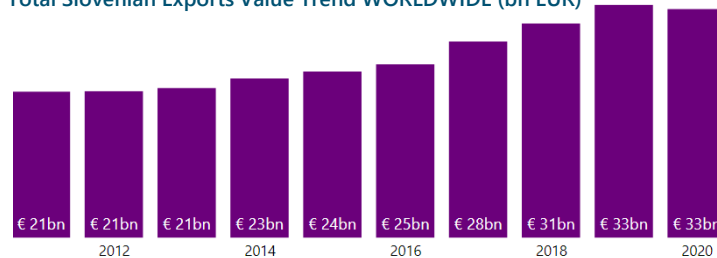
The long-term trend of Total exports copies the development of the whole economy. From 2012, it has been growing continuously until 2019, with a slight decline in 2020.

EXPORTS TO V4

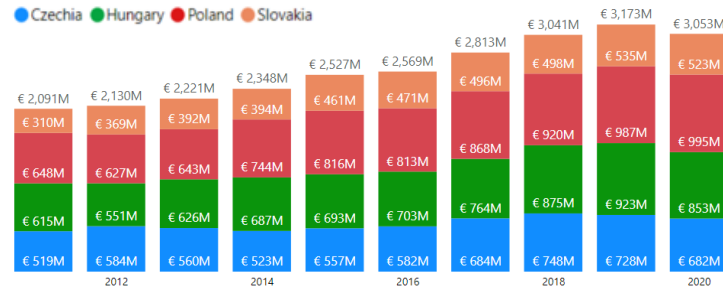
Of the total 33 bn EUR in 2020, only 10% goes to the V4 countries.

Of the total 3 bn EUR in 2020, 33% goes to Poland, 28% to Hungary, 22% to the Czech Republic and 17% to Slovakia.

Total Slovenian Exports Value Trend WORLDWIDE (bn EUR)

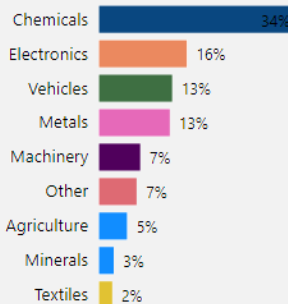


Total Exports Value Trend in V4 (mil. EUR)



SLOVENIAN MARKET SLOVENIAN EXPORT TRENDS BY PRODUCTS

EXPORTS TO V4 IN 2020 BY PRODUCT GROUPS

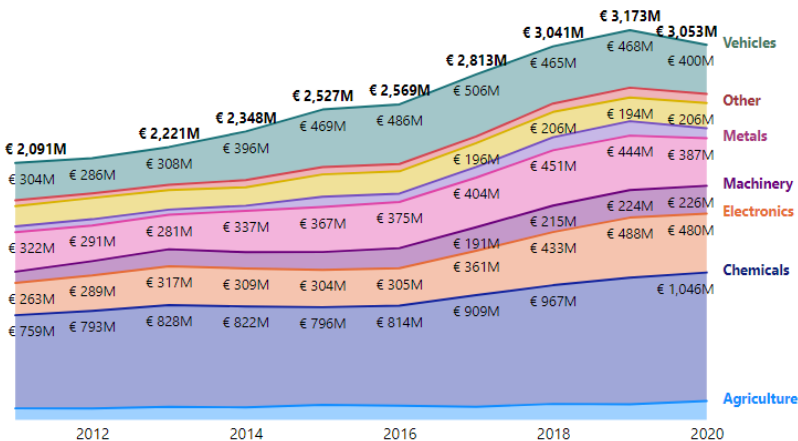


TRENDS

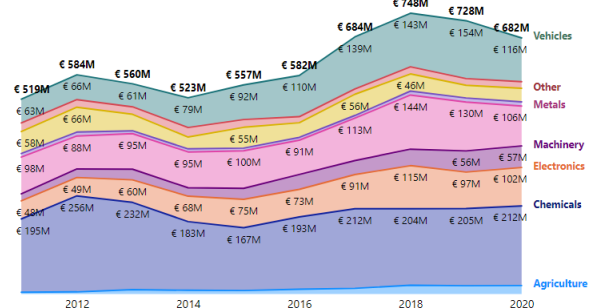
Slovenian Exports to the V4 countries have increased by 43% since 2012. The largest (absolute) increase was Chemicals (+ 252m EUR, + 32%), Electronics (+ 191m EUR, + 66%) and Vehicles (+ 114m EUR, 40%).

The largest increase in exports was to Poland (+368m EUR, +59%), Hungary (+302m, +55%), Slovakia (+154m, +42%), the Czech (+98m, +17%). Exports to the Czech grew significantly in 2016-2018 (+29%) but have been declining since that year (-9%).

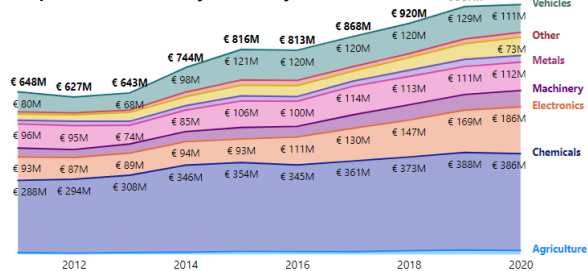
Slovenian Export to V4 Countries by Industry (mil. EUR)



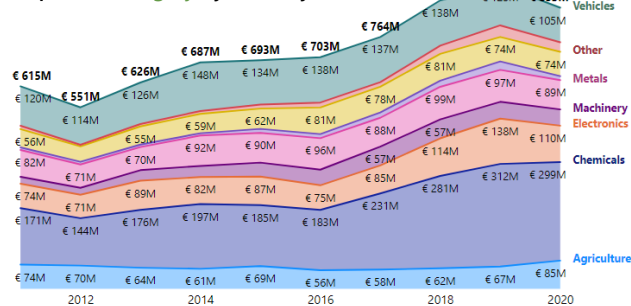
Export to Czech by Industry (mil. EUR)



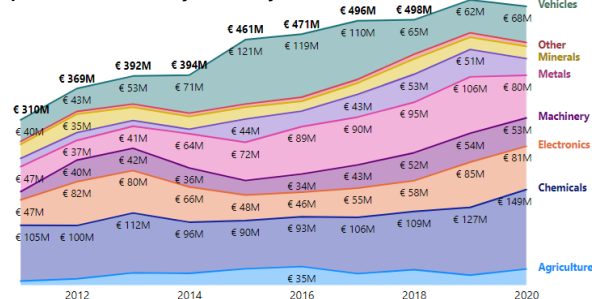
Export to Poland by Industry (mil. EUR)



Export to Hungary by Industry (mil. EUR)



Export to Slovakia by Industry (mil. EUR)



SLOVENIAN MARKET

SLOVENIAN TOTAL VS V4 EXPORTS STRUCTURE IN 2020

EXPORTS BY INDUSTRY

Slovenia's largest export assortment worldwide in 2020 to the V4 countries was the group of chemicals (pharmaceuticals, chemicals and plastic products).

Within the set **priority sectors** of the manufacturing industry, products related to the production of vehicles, electronics, machinery and the production of basic metal components and materials are the most exported worldwide.

EXPORTS BY COUNTRY

Within the priority sectors, electronics are most exported to the V4 countries to Poland (186 mEUR in 2020), parts for the automotive industry to the Czech Republic (116 mEUR), machinery and equipment to Poland (66 mEUR).

The total share of exports to the V4 countries in the total exports of goods related to Slovenia's production is **only 9.3%**.

Such a low share in the relatively large volume of global exports indicates a large scope for its growth in the coming years, if the capacity of the Slovenian manufacturing sector is sufficient.

Total vs. Exports to V4 by Product Groups in 2020 (EUR)

PRODUCT GROUP	TOTAL EXPORTS	EXPORTS TO V4	%
☐ Chemicals	€ 11,105,681,475	€ 1,045,817,999	9.4%
☐ Vehicles	€ 5,344,239,092	€ 400,038,144	7.5%
☐ Electronics	€ 4,268,531,290	€ 479,967,729	11.2%
☐ Metals	€ 3,156,316,902	€ 387,232,641	12.3%
☐ Other	€ 3,118,715,136	€ 206,137,105	6.6%
☐ Machinery	€ 2,692,549,982	€ 225,806,630	8.4%
☐ Agriculture	€ 1,657,174,325	€ 153,838,122	9.3%
☐ Minerals	€ 770,348,373	€ 81,371,247	10.6%
☐ Textiles	€ 736,327,599	€ 73,100,531	9.9%
Total	€ 32,849,884,174	€ 3,053,310,148	9.3%

Exports to V4 by Product Groups in 2020 (EUR)

PRODUCT GROUP	Czechia	Hungary	Poland	Slovakia	Total
☐ Chemicals	€ 212,024,242	€ 299,166,223	€ 385,587,077	€ 149,040,457	€ 1,045,817,999
☐ Electronics	€ 102,160,042	€ 110,390,393	€ 186,105,297	€ 81,311,997	€ 479,967,729
☐ Vehicles	€ 116,459,099	€ 105,081,689	€ 110,760,990	€ 67,736,366	€ 400,038,144
☐ Metals	€ 106,086,853	€ 88,775,205	€ 112,392,687	€ 79,977,896	€ 387,232,641
☐ Machinery	€ 57,492,475	€ 49,452,850	€ 65,784,614	€ 53,076,691	€ 225,806,630
☐ Other	€ 35,978,922	€ 73,983,202	€ 73,173,167	€ 23,001,814	€ 206,137,105
☐ Agriculture	€ 22,554,407	€ 85,477,546	€ 15,596,503	€ 30,209,666	€ 153,838,122
☐ Minerals	€ 11,285,921	€ 12,060,516	€ 26,688,691	€ 31,336,119	€ 81,371,247
☐ Textiles	€ 17,715,902	€ 28,765,950	€ 19,226,730	€ 7,391,949	€ 73,100,531
Total	€ 681,757,863	€ 853,153,574	€ 995,315,756	€ 523,082,955	€ 3,053,310,148

PRODUCT GROUP	TOTAL EXPORTS	EXPORTS TO V4	%
☐ Chemicals	€ 11,105,681,475	€ 1,045,817,999	9.4%
Manufacture of basic pharmaceutical products and pharmaceutical preparations	€ 7,146,889,950	€ 559,695,175	7.8%
Manufacture of chemicals and chemical products	€ 1,785,591,212	€ 214,986,773	12.0%
Manufacture of rubber and plastic products	€ 1,525,824,160	€ 180,239,724	11.8%
Manufacture of coke and refined petroleum products	€ 647,376,153	€ 90,896,327	14.0%
☐ Vehicles	€ 5,344,239,092	€ 400,038,144	7.5%
Manufacture of motor vehicles, trailers and semi-trailers	€ 4,143,033,391	€ 244,934,133	5.9%
Manufacture of other transport equipment	€ 1,201,205,701	€ 155,104,011	12.9%
☐ Electronics	€ 4,268,531,290	€ 479,967,729	11.2%
Manufacture of electrical equipment	€ 3,020,920,236	€ 327,647,061	10.8%
Manufacture of computer, electronic and optical products	€ 1,247,611,054	€ 152,320,668	12.2%
☐ Metals	€ 3,156,316,902	€ 387,232,641	12.3%
Manufacture of basic metals	€ 1,760,238,097	€ 250,104,941	14.2%
Manufacture of fabricated metal products, except machinery and equipment	€ 1,396,078,805	€ 137,127,700	9.8%
☐ Other	€ 3,118,715,136	€ 206,137,105	6.6%
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	€ 874,780,265	€ 24,548,035	2.8%
Manufacture of paper and paper products	€ 659,164,386	€ 67,672,102	10.3%
Other manufacturing	€ 561,828,575	€ 71,902,473	12.8%
Electricity, gas, steam and air conditioning supply	€ 324,690,853	€ 0	0.0%
Waste collection, treatment and disposal activities; materials recovery	€ 289,073,491	€ 27,091,919	9.4%
Manufacture of furniture	€ 250,214,193	€ 9,596,389	3.8%
Publishing activities	€ 158,151,714	€ 5,309,571	3.4%
Creative, arts and entertainment activities	€ 342,698	€ 10,652	3.1%
Architectural and engineering activities; technical testing and analysis	€ 154,895	€ 647	0.4%
Libraries, archives, museums and other cultural activities	€ 150,284	€ 4,345	2.9%
Other personal service activities	€ 139,534	€ 0	0.0%
Other professional, scientific and technical activities	€ 24,069	€ 972	4.0%
Motion picture, video and television programme production, sound recording and music publishing activities	€ 179	€ 0	0.0%
☐ Machinery	€ 2,692,549,982	€ 225,806,630	8.4%
Manufacture of machinery and equipment n.e.c.	€ 2,692,549,982	€ 225,806,630	8.4%
☐ Agriculture	€ 1,657,174,325	€ 153,838,122	9.3%
Manufacture of food products	€ 1,059,976,327	€ 113,877,813	10.7%
Agriculture, forestry and fishing	€ 364,613,618	€ 30,328,478	8.3%
Manufacture of beverages	€ 142,802,112	€ 7,473,524	5.2%
Forestry and logging	€ 89,466,069	€ 2,157,014	2.4%
Manufacture of tobacco products	€ 294,307	€ 1,293	0.4%
Fishing and aquaculture	€ 21,892	€ 0	0.0%
☐ Minerals	€ 770,348,373	€ 81,371,247	10.6%
Manufacture of other non-metallic mineral products	€ 673,295,125	€ 78,232,878	11.6%
Other mining and quarrying	€ 70,945,145	€ 3,081,998	4.3%
Extraction of crude petroleum and natural gas	€ 25,259,021	€ 19,801	0.1%
Mining of coal and lignite	€ 626,763	€ 30,848	4.9%
Mining of metal ores	€ 222,319	€ 5,722	2.6%
☐ Textiles	€ 736,327,599	€ 73,100,531	9.9%
Manufacture of textiles	€ 352,008,065	€ 34,466,596	9.8%
Manufacture of wearing apparel	€ 233,114,748	€ 18,668,241	8.0%
Manufacture of leather and related products	€ 151,204,786	€ 19,965,694	13.2%
Total	€ 32,849,884,174	€ 3,053,310,148	9.3%

SLOVENIAN MARKET SLOVENIAN ECONOMY VS EXPORT STRUCTURE IN 2020

REVENUES BY INDUSTRY

According to available financial data from 2020, Slovenian companies generated a total of 97 billion euros in annual revenues. The largest part is trade 32% and manufacturing 31%. The available data confirm the export character of the Slovenian manufacturing industry. A large part of the goods is intended for export.

REVENUE IN MANUFACTURING

The largest revenues in 2020 were generated by the manufacture of electrical equipment (EUR 3.7 billion), the manufacture of vehicles (EUR 3.4 billion) and the manufacture of metal products (EUR 3.2 billion). The average net profitability of the manufacturing industry was 4.5%.

The most profitable sector according to the absolute value of net business result was pharmaceutical (14%), production of metal products (3.9%) and production of chemicals (7.8%).

Business Activity (NACE L1)	Total Revenue in 2020	Sum of Net business result for the accounting period	Total Exports in 2020	Exports to V4 in 2020
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	€ 31.442.123.919	\$672.500.128		
MANUFACTURING	€ 30.016.202.309	\$1.355.743.258	€ 31.526.001.630	€ 2.985.268.181
ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY	€ 6.933.124.337	(\$384.575.300)	€ 324.690.853	€ 0
TRANSPORTATION AND STORAGE	€ 5.274.047.953	\$300.736.202		
CONSTRUCTION	€ 4.248.862.503	\$142.690.822		
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	€ 4.949.427.673	\$281.607.128	€ 178.964	€ 1.619
INFORMATION AND COMMUNICATION	€ 3.627.269.354	\$193.987.218	€ 158.151.893	€ 5.309.571
FINANCIAL AND INSURANCE ACTIVITIES	€ 3.027.276.923	\$299.949.375		
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	€ 1.566.342.880	\$44.991.729		
WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES	€ 1.322.290.984	\$34.977.604	€ 289.073.491	€ 27.091.919
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	€ 1.262.961.944	(\$93.343.471)		
REAL ESTATE ACTIVITIES	€ 1.016.081.770	\$79.559.793		
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	€ 543.239.814	\$41.116.809		
ARTS, ENTERTAINMENT AND RECREATION	€ 421.790.559	(\$8.524.093)	€ 492.982	€ 14.997
AGRICULTURE, FORESTRY AND FISHING	€ 418.875.448	\$11.061.667	€ 454.101.579	€ 32.485.492
MINING AND QUARRYING	€ 290.656.927	(\$909.506)	€ 97.053.248	€ 3.138.369
OTHER SERVICE ACTIVITIES	€ 179.022.800	\$2.660.693	€ 139.534	€ 0
EDUCATION	€ 97.399.769	\$2.877.212		
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	€ 7.344.622	\$48.480		
Total	€ 97.122.282.489	\$2.877.555.742	€ 32.849.884.174	€ 3.053.310.148

NACE_L1_Description	Total Revenue in 2020	Sum of Net business result for the accounting period	Total Exports in 2020	Exports to V4 in 2020
MANUFACTURING	€ 30.016.202.309	\$1.355.743.258	€ 31.526.001.630	€ 2.985.268.181
Manufacture of electrical equipment	€ 3.738.451.850	\$75.121.846	€ 3.020.920.236	€ 327.647.061
Manufacture of motor vehicles, trailers and semi-trailers	€ 3.356.914.907	\$52.055.662	€ 4.143.033.391	€ 244.934.133
Manufacture of fabricated metal products, except machinery and equipment	€ 3.247.608.407	\$125.724.943	€ 1.396.078.805	€ 137.127.700
Manufacture of basic pharmaceutical products and pharmaceutical preparations	€ 2.818.237.413	\$400.948.778	€ 7.146.889.950	€ 559.695.175
Manufacture of basic metals	€ 2.408.151.198	(\$11.725.773)	€ 1.760.238.097	€ 250.104.941
Manufacture of machinery and equipment n.e.c.	€ 2.050.987.856	\$80.961.537	€ 2.692.549.982	€ 225.806.630
Manufacture of rubber and plastic products	€ 2.050.011.953	\$99.486.537	€ 1.525.824.160	€ 180.239.724
Manufacture of food products	€ 2.047.465.563	\$97.011.555	€ 1.059.976.327	€ 113.877.813
Manufacture of chemicals and chemical products	€ 1.508.556.061	\$118.227.937	€ 1.785.591.212	€ 214.986.773
Manufacture of other non-metallic mineral products	€ 985.698.339	\$73.835.673	€ 673.295.125	€ 78.232.878
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	€ 981.550.700	\$49.202.325	€ 874.780.265	€ 24.548.035
Manufacture of computer, electronic and optical products	€ 863.533.714	\$32.026.539	€ 1.247.611.054	€ 152.320.668
Manufacture of paper and paper products	€ 858.229.685	\$46.326.890	€ 659.164.386	€ 67.672.102
Repair and installation of machinery and equipment	€ 807.686.605	\$22.919.578		
Other manufacturing	€ 415.888.348	\$16.363.830	€ 561.828.575	€ 71.902.473
Printing and reproduction of recorded media	€ 415.370.784	\$16.868.504		
Manufacture of furniture	€ 370.165.425	\$10.566.789	€ 250.214.193	€ 9.596.389
Manufacture of textiles	€ 342.767.621	\$22.738.210	€ 352.008.065	€ 34.466.596
Manufacture of leather and related products	€ 261.565.757	(\$2.883.387)	€ 151.204.786	€ 19.965.694
Manufacture of beverages	€ 236.880.096	\$14.733.828	€ 142.802.112	€ 7.473.524
Manufacture of other transport equipment	€ 149.947.136	\$7.923.418	€ 1.201.205.701	€ 155.104.011
Manufacture of wearing apparel	€ 138.763.905	\$7.581.842	€ 233.114.748	€ 18.668.241
Manufacture of coke and refined petroleum products	€ 1.530.312	(\$221.646)	€ 647.376.153	€ 90.896.327
Manufacture of tobacco products	€ 238.674	(\$52.158)	€ 294.307	€ 1.293
Total	€ 30.016.202.309	\$1.355.743.258	€ 31.526.001.630	€ 2.985.268.181

SLOVENIAN MARKET MARKET SECTORS SIZE BY NUMBER OF COMPANIES

SLOVENIAN FIRMOGRAPHICS

As part of the analysis of the Slovenian market, we focused mainly on small, medium and large companies in the production segment, as well as the wholesale and retail, transport and storage segments. We excluded micro companies with up to 10 employees from the analysis.

Of the Manufacturing SM+LB companies, 66% are Small (2-10 mEUR Annual Revenue), 27% Medium and 16% Large. However, the ratio of total revenues of these industry is almost the opposite. 60% of revenues are generated by Large, 26% by Medium and 13% by Small companies.

Number of Companies by Industry (NACE L1)

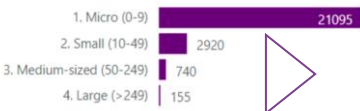


Number of Companies by Annual Turnover size



Number of SMB+L Companies by Industry (NACE L1)

Number of Companies by No. of Employees size

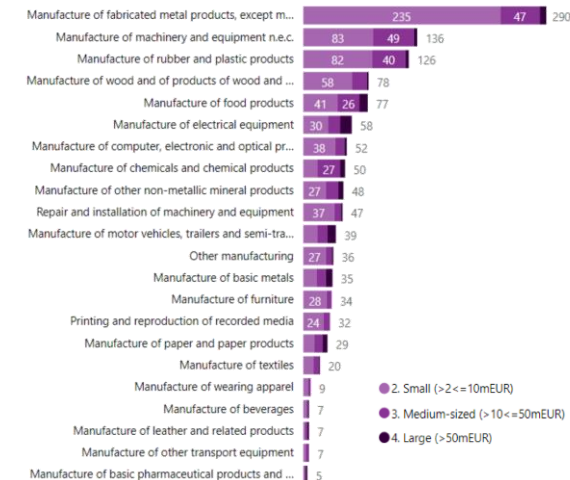


Total Annual Revenue in 2020 by SM+LB Companies by Industry (NACE L1)



C - MANUFACTURING

Number of Companies in Market Sector



1222

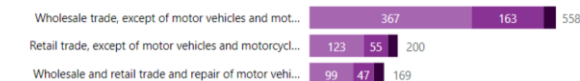
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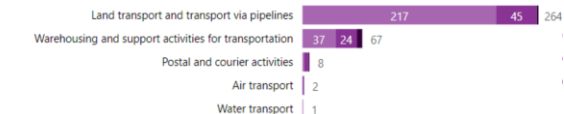
G - WHOLESALES AND RETAIL TRADE

Number of Companies in Market Sector



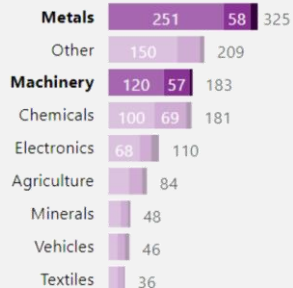
H - TRANSPORTATION

Number of Companies in Market Sector

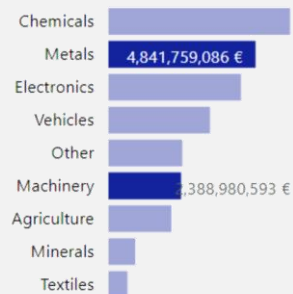


FIRMOGRAPHICS IN METAL AND MACHINERY SECTOR / PRODUCT GROUP

Number of SM+Large manufacturing companies in Slovenia focus on Metals and Machinery production are as follows:



In terms of Total Annual revenue in 2020:



SLOVENIAN MARKET MANUFACTURING (1/5)

TOP COMPANIES IN METAL PRODUCT GROUP

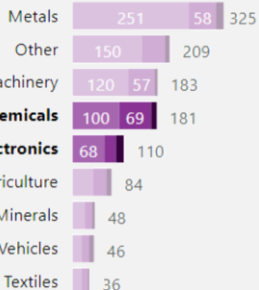
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
UNIOR d.d.	1675	146,242,223 €	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
LTH Castings d.o.o.	1672	230,222,419 €	Casting of light metals
SUJ ACRONI d.o.o.	1306	370,868,431 €	Manufacture of basic iron and steel and of ferro-alloys
TALUM d.d. Kidričevo	1186	268,255,108 €	Aluminium production
SUJ METAL RAVNE d.o.o.	937	157,677,000 €	Manufacture of basic iron and steel and of ferro-alloys
ARCONT d.d.	637	76,749,119 €	Manufacture of metal structures and parts of structures
CIMOS d.d.	579	158,850,883 €	Casting of light metals
KOVINOPLASTIKA LOŽ d.o.o.	523	49,457,563 €	Manufacture of locks and hinges
ŠTORE STEEL d.o.o.	501	89,732,692 €	Manufacture of basic iron and steel and of ferro-alloys
Titus d.o.o. Dekani	454	94,644,974 €	Manufacture of locks and hinges
MLM d.d.	426	32,890,300 €	Machining
IMPOL PCP d.o.o.	426	71,018,057 €	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
Aluminium Kety Emmi d.o.o.	372	27,963,675 €	Manufacture of other fabricated metal products n.e.c.
TRIMO d.o.o.	301	84,112,380 €	Manufacture of metal structures and parts of structures
PREIS SEVNICA d.o.o.	281	24,430,496 €	Manufacture of other tanks, reservoirs and containers of metal
NIKO, d.o.o., Železniki	266	32,915,019 €	Manufacture of other fabricated metal products n.e.c.
CNC P&K-PUŠNIK d.o.o.	261	17,879,882 €	Machining
IMPOL FT d.o.o.	257	58,530,491 €	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
KOVIS-LIVARNA d.o.o.	255	29,638,647 €	Casting of iron
BAUMULLER DRAVINJA, d.o.o.	248	24,029,791 €	Manufacture of other fabricated metal products n.e.c.
MONTER DRAVOGRAD d.o.o.	225	19,315,107 €	Manufacture of metal structures and parts of structures
MAGNETI LJUBLJANA, d.d., Ljubljana	222	15,162,441 €	Manufacture of other fabricated metal products n.e.c.
VALJI d.o.o.	216	28,459,463 €	Manufacture of other fabricated metal products n.e.c.
DIFA d.o.o.	211	21,604,183 €	Casting of other non-ferrous metals
EMO - Orodjarna d.o.o.	208	14,685,169 €	Manufacture of other tools
MAROVTO d.o.o.	208	24,119,965 €	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
ŠUMER d.o.o.	200	22,166,499 €	Manufacture of other fabricated metal products n.e.c.
Gorenje Orodjarna, d.o.o.	196	14,340,000 €	Manufacture of other tools
DOM-TITAN d.d.	195	14,695,006 €	Manufacture of locks and hinges
REM d.o.o.	188	33,467,849 €	Manufacture of metal structures and parts of structures
METREL Mehanika d.o.o.	184	11,848,652 €	Manufacture of metal structures and parts of structures
Total	29565	4,841,759,086 €	

TOP COMPANIES IN MACHINERY PRODUCT GROUP

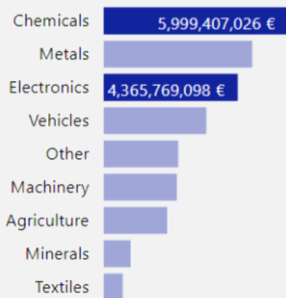
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
SŽ - VIT, d.o.o.	1778	119,977,365 €	Repair and maintenance of other transport equipment
PALFINGER d.o.o.	782	120,842,431 €	Manufacture of lifting and handling equipment
HTZ Velenje, I.P., d.o.o.	754	33,059,379 €	Repair of machinery
ADK d.o.o.	636	121,398,319 €	Manufacture of lifting and handling equipment
DANFOSS TRATA, d.o.o.	493	116,972,722 €	Installation of industrial machinery and equipment
SUJ RAVNE SYSTEMS d.o.o.	487	43,908,969 €	Manufacture of machinery for metallurgy
GKN Driveline Slovenija, d.o.o.	370	86,906,443 €	Manufacture of bearings, gears, gearing and driving elements
FARMTECH d.o.o.	319	48,229,872 €	Manufacture of agricultural and forestry machinery
OMEGA AIR d.o.o. Ljubljana	296	31,588,532 €	Manufacture of other pumps and compressors
Počlain Hydraulics d.o.o.	268	33,694,895 €	Manufacture of fluid power equipment
LITOSTROJ POWER d.o.o.	250	38,787,268 €	Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
BRINOX d.o.o.	247	46,196,736 €	Manufacture of other special-purpose machinery n.e.c.
Herz d.o.o.	236	42,232,711 €	Manufacture of other taps and valves
SIP, d.d. Šempeter v Savinjski dolini	234	32,172,603 €	Manufacture of agricultural and forestry machinery
BELIMED d.o.o.	234	39,868,092 €	Manufacture of other general-purpose machinery n.e.c.
ADRIA TEHNIKA, d.o.o.	231	29,444,423 €	Repair and maintenance of aircraft and spacecraft
Tajfun Planina d.o.o.	226	30,214,865 €	Manufacture of agricultural and forestry machinery
PIŠEK - VITLU KRAPAN, d.o.o.	222	34,311,124 €	Manufacture of agricultural and forestry machinery
A.M Montaža d.o.o.	208	19,530,056 €	Installation of industrial machinery and equipment
LESTRO-LEDINEK d.o.o.	205	12,374,029 €	Manufacture of other machine tools
OC IMP Klima d.o.o.	203	14,129,616 €	Manufacture of non-domestic cooling and ventilation equipment
GOSTOL-GOPAN d.o.o. Nova Gorica	199	31,308,673 €	Manufacture of machinery for food, beverage and tobacco processing
TKO d.o.o.	198	15,505,910 €	Manufacture of other special-purpose machinery n.e.c.
LEDINEK ENGINEERING d.o.o.	196	62,268,542 €	Manufacture of other machine tools
KOLEKTOR ORODJARNA d.o.o.	179	11,593,286 €	Installation of industrial machinery and equipment
PODKRIŽNIK d.o.o.	170	22,094,877 €	Manufacture of bearings, gears, gearing and driving elements
HaM Montaža d.o.o.	167	7,657,850 €	Installation of industrial machinery and equipment
ŠKRLJ d.o.o.	164	17,876,688 €	Manufacture of machinery for food, beverage and tobacco processing
MTD BIO d.o.o.	163	17,593,472 €	Installation of industrial machinery and equipment
ARMATIRE d.o.o.	153	20,393,944 €	Manufacture of other taps and valves
Total	18458	2,388,980,593 €	

FIRMOGRAPHICS IN CHEMICALS NAD ELECTRONICS

Number of SM+Large manufacturing companies in Slovenia focus on Chemicals and Electronics production are as follows:



In terms of Total Annual revenue in 2020:



SLOVENIAN MARKET MANUFACTURING (2/5)

TOP COMPANIES IN CHEMICALS PRODUCT GROUP

COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
KRKA, d.d., Novo mesto	6005	1,513,605,000 €	Manufacture of pharmaceutical preparations
Lek d.d.	4276	1,234,350,000 €	Manufacture of pharmaceutical preparations
GOODYEAR SLOVENIJA, d.o.o.	1469	204,219,599 €	Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
CINKARNA Celje, d.d.	838	175,779,045 €	Manufacture of dyes and pigments
Helios TBLUS d.o.o.	803	212,820,000 €	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
AquafilSLO d.o.o.	776	155,722,215 €	Manufacture of man-made fibres
Trelleborg Slovenija, d.o.o.	655	94,434,000 €	Manufacture of other rubber products
HENKEL MARIBOR d.o.o.	492	39,071,180 €	Manufacture of perfumes and toilet preparations
SILIKO d.o.o.	411	68,517,416 €	Manufacture of other rubber products
KOLPA, d.o.o., Metlika	410	42,791,856 €	Manufacture of builders' ware of plastic
JUB d.o.o.	340	66,366,346 €	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
TOMPLAST, d.o.o.	318	45,014,234 €	Manufacture of other plastic products
ContiTech Slovenija, d.o.o.	302	61,812,655 €	Manufacture of other rubber products
KOLEKTOR ATP d.o.o.	288	24,069,364 €	Manufacture of other plastic products
GEBERIT proizvodnja d.o.o.	268	43,841,610 €	Manufacture of other plastic products
POLYCOM Škofja Loka d.o.o.	265	34,604,795 €	Manufacture of other plastic products
TKK d.o.o.	248	66,913,841 €	Manufacture of paints, varnishes and similar coatings, printing ink and mastics
PLASTIKA SKAZA d.o.o.	244	31,896,250 €	Manufacture of other plastic products
GRAMMER AUTOMOTIVE SLOVENIJA d.o.o.	235	38,595,234 €	Manufacture of other plastic products
SIBO G. d.o.o.	233	44,516,888 €	Manufacture of plastic packing goods
SENSILAB d.o.o.	230	45,458,701 €	Manufacture of pharmaceutical preparations
PLAMA-PUR d.o.o.	229	46,756,298 €	Manufacture of plastic plates, sheets, tubes and profiles
ISOKON, d.o.o., Slovenske Konjice	222	33,946,984 €	Manufacture of plastic plates, sheets, tubes and profiles
Tastepoint d.o.o.	221	79,411,125 €	Manufacture of essential oils
PLASTOFORM ŠMARJETA d.o.o.	215	23,976,033 €	Manufacture of other plastic products
OPLAST, d.o.o.	199	20,921,481 €	Manufacture of other plastic products
FRAGMAT TIM d.o.o.	199	29,062,092 €	Manufacture of builders' ware of plastic
DONIT TESNIT, d.o.o.	186	15,999,806 €	Manufacture of other chemical products n.e.c.
MELAMIN d.d., Kočevje	182	49,032,249 €	Manufacture of plastics in primary forms
AJM OKNA-VRATA-SENČILA d.o.o.	181	20,745,115 €	Manufacture of builders' ware of plastic

Total 29074 5,999,407,026 €

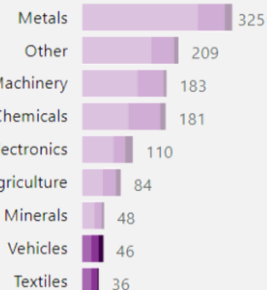
TOP COMPANIES IN ELECTRONICS PRODUCT GROUP

COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
Gorenje, d.o.o.	3143	1,210,416,000 €	Manufacture of electric domestic appliances
HELLA SATURNUS SLOVENIJA d.o.o.	1852	278,810,397 €	Manufacture of electric lighting equipment
HIDRIA d.o.o.	1497	204,380,361 €	Manufacture of electric motors, generators and transformers
BSH HIŠNI APARATI d.o.o. Nazarje	1169	379,812,115 €	Manufacture of electric domestic appliances
DOMEL, d.o.o.	1069	148,581,785 €	Manufacture of electric motors, generators and transformers
ISKRA, d.o.o.	807	106,625,867 €	Manufacture of electricity distribution and control apparatus
ETA d.o.o., Cerkno	781	44,476,395 €	Manufacture of electric domestic appliances
ETI, d.o.o.	759	111,058,629 €	Manufacture of electricity distribution and control apparatus
ISKRAEMECO, d.d.	681	124,298,853 €	Manufacture of instruments and appliances for measuring, testing and navigation
TAB d.d.	674	232,518,555 €	Manufacture of batteries and accumulators
KOLEKTOR SIKOM d.o.o.	600	84,272,596 €	Manufacture of electric motors, generators and transformers
ISKRATEL, d.o.o., Kranj	542	77,827,000 €	Manufacture of communication equipment
ISKRA MEHANIZMI, d.o.o.	527	84,156,737 €	Manufacture of other electrical equipment
ELRAD ELECTRONICS d.o.o.	488	103,516,864 €	Manufacture of consumer electronics
KOLEKTOR ETRA d.o.o.	464	133,636,219 €	Manufacture of electric motors, generators and transformers
ebm-papst Slovenija d.o.o.	415	76,729,231 €	Manufacture of electric motors, generators and transformers
BOSCH REXROTH d.o.o.	304	32,195,000 €	Manufacture of electric motors, generators and transformers
CABLEX-T d.o.o.	303	37,910,902 €	Manufacture of other electrical equipment
EUREL d.o.o.	296	27,041,358 €	Manufacture of electronic components
CABLEX-M d.o.o.	272	56,481,089 €	Manufacture of other electrical equipment
ITW Appliance Components d.o.o.	247	70,019,663 €	Manufacture of electric domestic appliances
METREL d.d.	226	23,293,274 €	Manufacture of instruments and appliances for measuring, testing and navigation
INTERBLOCK d.d.	212	47,546,253 €	Manufacture of other electrical equipment
RLS d.o.o.	210	30,024,194 €	Manufacture of instruments and appliances for measuring, testing and navigation
XAL SVETILA d.o.o.	200	6,482,422 €	Manufacture of electric lighting equipment
KOLEKTOR ASCOM d.o.o.	181	27,977,685 €	Manufacture of electric motors, generators and transformers

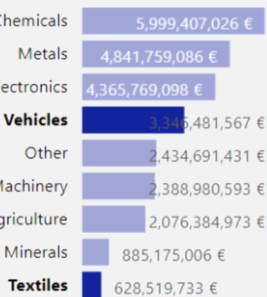
Total 22476 4,365,769,098 €

FIRMOGRAPHICS IN VEHICLES AND TEXTILES

Number of SM+Large manufacturing companies in Slovenia focus on Vehicles and Textiles production are as follows:



In terms of Total Annual revenue in 2020:



SLOVENIAN MARKET MANUFACTURING (3/5)

TOP COMPANIES IN VEHICLES PRODUCT GROUP

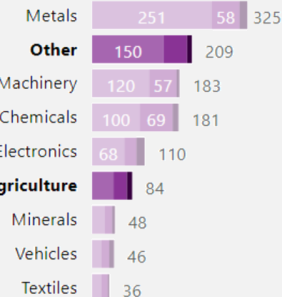
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
REVOZ d.d.	2276	1,402,505,000 €	Manufacture of motor vehicles
MAHLE Electric Drives Slovenija d.o.o.	1878	243,599,252 €	Manufacture of electrical and electronic equipment for motor vehicles
odelo Slovenija d.o.o.	1356	181,779,139 €	Manufacture of other parts and accessories for motor vehicles
Akrapovič d.d.	1209	132,007,567 €	Manufacture of other parts and accessories for motor vehicles
ADRIA MOBIL d.o.o. Novo mesto	1112	406,731,969 €	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
CARTHAGO d.o.o.	826	215,878,168 €	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
TBP d.d.	748	53,741,939 €	Manufacture of other parts and accessories for motor vehicles
TPV AUTOMOTIVE d.o.o.	742	76,148,687 €	Manufacture of other parts and accessories for motor vehicles
SUMIDA SLOVENIJA, d.o.o.	371	29,780,638 €	Manufacture of electrical and electronic equipment for motor vehicles
SOGEFI FILTRATION d.o.o.	324	49,817,000 €	Manufacture of other parts and accessories for motor vehicles
STARKOM d.o.o.	268	64,817,301 €	Manufacture of other parts and accessories for motor vehicles
Adient Novo mesto d.o.o.	265	66,737,903 €	Manufacture of other parts and accessories for motor vehicles
KLS LJUBNO d.o.o.	241	41,913,486 €	Manufacture of other parts and accessories for motor vehicles
MAHLE Electric Drives Bovec d.o.o.	231	29,741,216 €	Manufacture of electrical and electronic equipment for motor vehicles
MAGNA STEYR d.o.o.	195	21,549,506 €	Manufacture of motor vehicles
TAM-EUROPE d.o.o.	162	4,260,232 €	Manufacture of motor vehicles
ROSENBAUER, d.o.o.	154	35,758,719 €	Manufacture of motor vehicles
KOVIS d.o.o.	141	49,063,488 €	Manufacture of railway locomotives and rolling stock
LIV SYSTEMS d.o.o.	138	16,254,460 €	Manufacture of bicycles and invalid carriages
SG AUTOMOTIVE, d.o.o.	137	17,045,809 €	Manufacture of electrical and electronic equipment for motor vehicles
SVP AVIO d.o.o.	127	19,504,214 €	Building of pleasure and sporting boats
CIMOS IP d.o.o.	115	3,116,600 €	Manufacture of other parts and accessories for motor vehicles
IFAS-CAS d.o.o.	100	9,954,108 €	Manufacture of motor vehicles
TPV PRIKOLICE d.o.o.	88	16,202,468 €	Manufacture of bodies (coachwork) for motor vehicles;
Total	14166	3,346,481,567 €	

TOP COMPANIES IN TEXTILES PRODUCT GROUP

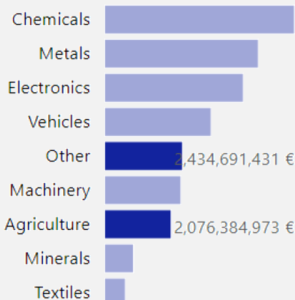
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
BOXMARK LEATHER d.o.o.	976	100,237,540 €	Manufacture of luggage, handbags and the like, saddlery and harness
DANI AFC d.o.o.	365	50,954,597 €	Tanning and dressing of leather; dressing and dyeing of fur
FILC d.o.o.	354	90,518,417 €	Manufacture of non-wovens and articles made from non-wovens, except apparel
ALPINA, d.o.o.	340	38,191,715 €	Manufacture of footwear
Wolford d.o.o.	250	6,090,100 €	Manufacture of knitted and crocheted hosiery
PREDILNICA LITUA d.o.o.	237	31,595,399 €	Preparation and spinning of textile fibres
PLANIKA TURNIŠČE d.o.o.	226	34,123,517 €	Manufacture of footwear
LISCA d.o.o.	211	21,576,205 €	Manufacture of underwear
KAAP d.o.o.	171	16,895,724 €	Manufacture of made-up textile articles, except apparel
AFIT, d.o.o.	159	12,491,128 €	Manufacture of footwear
KONUS KONEX d.o.o.	157	24,223,764 €	Manufacture of non-wovens and articles made from non-wovens, except apparel
INTERSOXES d.o.o., Kočevje	143	37,833,345 €	Manufacture of knitted and crocheted hosiery
Moda MI & LAN d.o.o.	141	2,593,316 €	Manufacture of other outerwear
BETI d.d.	139	8,106,778 €	Preparation and spinning of textile fibres
A&E Europe d.o.o.	123	17,653,725 €	Preparation and spinning of textile fibres
KO-SI d.o.o.	93	11,393,141 €	Manufacture of non-wovens and articles made from non-wovens, except apparel
INPLET d.o.o.	87	5,252,528 €	Manufacture of knitted and crocheted fabrics
DOREMA, d.o.o.	84	9,375,812 €	Manufacture of made-up textile articles, except apparel
ECOTIP d.o.o.	78	6,226,100 €	Manufacture of other technical and industrial textiles
KOPITARNA SEVNICA D.D.	78	6,037,197 €	Manufacture of footwear
ODEJA d.o.o.	75	4,003,295 €	Manufacture of made-up textile articles, except apparel
LOKATEKS, Škofja Loka, d.o.o.	70	4,876,161 €	Preparation and spinning of textile fibres
TT OKROGLICA d.d.	69	13,712,415 €	Manufacture of other technical and industrial textiles
PREVENT-HALOG d.o.o.	47	4,917,613 €	Manufacture of made-up textile articles, except apparel
SENCILA MEDLE d.o.o.	45	5,127,175 €	Manufacture of made-up textile articles, except apparel
UNI&FORMA d.o.o.	45	16,834,476 €	Manufacture of other outerwear
PGP INDE d.o.o.	40	4,164,271 €	Manufacture of footwear
MEGA TEKSTIL, d.o.o.	39	10,343,826 €	Manufacture of other technical and industrial textiles
UNIDEL d.o.o.	30	2,351,204 €	Manufacture of workwear
PREVENT&DELOZA d.o.o.	28	9,630,317 €	Manufacture of workwear
PRELET, d.o.o.	25	4,547,767 €	Manufacture of workwear
CO, ANDRAŽ d.o.o.	24	2,329,212 €	Manufacture of other outerwear
VATA d.o.o.	18	2,264,837 €	Manufacture of non-wovens and articles made from non-
Total	5006	628,519,733 €	

FIRMOGRAPHICS IN CHEMICALS NAD ELECTRONICS

Number of SM+Large manufacturing companies in Slovenia focus on Agriculture and Others production are as follows:



In terms of Total Annual revenue in 2020:



SLOVENIAN MARKET MANUFACTURING (4/5)

TOP COMPANIES IN AGRICULTURE PRODUCT GROUP

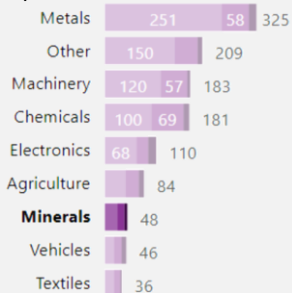
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
PERUTNINA PTUJ d.o.o.	1583	185,681,000 €	Processing and preserving of poultry meat
ŽITO d.o.o.	751	98,156,413 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
LIUBLJANSKE MLEKARNE d.o.o.	593	177,476,837 €	Operation of dairies and cheese making
Pivovarna Laško Union d.o.o.	574	148,101,068 €	Manufacture of beer
MLINOTEST d.d.	510	61,298,315 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
Atlantic Droga Kolinska d.o.o.	498	179,713,000 €	Processing of tea and coffee
INCOM d.o.o.	481	77,662,730 €	Manufacture of ice cream
PIVKA d.d.	409	45,105,901 €	Processing and preserving of poultry meat
PEKARNA PEČJAK d.o.o.	341	33,485,057 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
CELJSKE MESNINE d.o.o.	330	86,197,529 €	Production of meat and poultry meat products
FRUCTAL d.o.o.	313	40,622,283 €	Manufacture of fruit and vegetable juice
Panvita MIR d.d.	312	65,577,749 €	Processing and preserving of meat
Don Don d.o.o.	288	30,988,496 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
RADENSKA d.o.o.	269	34,701,696 €	Manufacture of soft drinks; production of mineral waters and other bottled waters
JATA EMONA d.o.o.	267	75,555,279 €	Manufacture of prepared feeds for farm animals
MLEKARNA CELEIA, d.o.o.	192	58,721,619 €	Operation of dairies and cheese making
HLEBČEK d.o.o.	184	12,463,783 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
KRAS d.o.o.	149	29,492,370 €	Processing and preserving of meat
POMURSKE MLEKARNE d.d.	145	39,375,533 €	Operation of dairies and cheese making
MESO KAMNIK d.d.	140	37,265,973 €	Processing and preserving of meat
ETA Kamnik, d.o.o.	131	20,499,182 €	Other processing and preserving of fruit and vegetables
MLINOPEK d.d. Murska Sobota	128	9,035,032 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
KOTO d.o.o.	116	20,054,506 €	Processing and preserving of meat
Mercator-Emba, d.o.o.	110	16,612,050 €	Manufacture of cocoa, chocolate and sugar confectionery
Dana, d.o.o.	106	15,765,822 €	Manufacture of soft drinks; production of mineral waters and other bottled waters
NEKTAR NATURA d.o.o.	104	12,228,225 €	Manufacture of fruit and vegetable juice
PEKARNA BRUMAT d.o.o.	101	8,775,702 €	Manufacture of bread; manufacture of fresh pastry goods and cakes
KOŠAKI TMI d.o.o.	99	10,921,588 €	Processing and preserving of meat
INTES STORITVE d.o.o.	97	3,398,135 €	Manufacture of bread; manufacture of fresh pastry goods
Total	11773	2,076,384,973 €	

TOP COMPANIES IN OTHERS PRODUCT GROUP

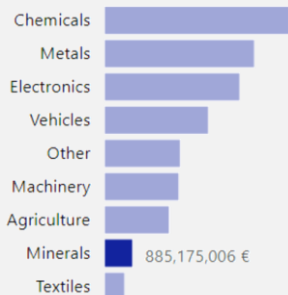
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
NOVEM CAR INTERIOR DESIGN d.o.o.	702	86,878,956 €	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
ELAN, d.o.o.	623	57,476,000 €	Manufacture of sports goods
Paloma d.d.	483	75,223,841 €	Manufacture of household and sanitary goods and of toilet requisites
TOSAMA d.o.o.	434	42,104,053 €	Manufacture of household and sanitary goods and of toilet requisites
DS SMITH SLOVENIJA d.o.o.	428	66,598,677 €	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
MM KOLIČEVO d.o.o.	400	175,002,000 €	Manufacture of paper and paperboard
PODGORJE d.o.o. Šentjernej	378	39,823,309 €	Manufacture of other furniture
FETIS d.d.	295	33,717,138 €	Other printing
COTONA d.o.o.	279	50,847,000 €	Manufacture of medical and dental instruments and supplies
INOTHERM d.o.o.	249	64,777,240 €	Manufacture of other builders' carpentry and joinery
BIOIKS d.o.o.	248	18,978,745 €	Manufacture of medical and dental instruments and supplies
STILLES d.o.o.	248	30,372,404 €	Manufacture of office and shop furniture
INLES d.d.	238	20,032,846 €	Manufacture of other builders' carpentry and joinery
ZLATARNA CELJE d.o.o.	231	38,192,993 €	Manufacture of jewellery and related articles
M BIODOP d.o.o.	231	25,730,641 €	Manufacture of medical and dental instruments and supplies
LIP Bohinj, d.o.o.	223	19,336,769 €	Manufacture of veneer sheets and wood-based panels
GORIČANE, d.d. Medvode	223	67,785,726 €	Manufacture of paper and paperboard
PAPIRNICA VEVČE PROIZVODNJA d.o.o.	222	92,413,758 €	Manufacture of paper and paperboard
LIP BLEED, d.o.o.	210	27,169,390 €	Manufacture of other builders' carpentry and joinery
ETIKETA, d.d.	203	11,659,640 €	Other printing
M SORA d.d.	194	33,524,734 €	Manufacture of other builders' carpentry and joinery
ADRIA DOM d.o.o.	190	34,075,660 €	Manufacture of other builders' carpentry and joinery
EGP d.o.o.	190	21,002,289 €	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
MERKSCHA d.o.o.	181	24,535,635 €	Sawmilling and planing of wood
RADČE PAPIR NOVA, d.o.o.	173	27,174,941 €	Manufacture of paper and paperboard
ESOL d.o.o.	168	10,278,369 €	Manufacture of veneer sheets and wood-based panels
ILMEST d.o.o. Nova Gorica	159	21,935,995 €	Manufacture of kitchen furniture
TIK d.o.o.	145	7,095,766 €	Manufacture of medical and dental instruments and supplies
Total	15777	2,434,691,431 €	

FIRMOGRAPHICS IN MINERALS

Number of SM+Large manufacturing companies in Slovenia focus on Minerals production are as follows:



In terms of Total Annual revenue in 2020:



SLOVENIAN MARKET MANUFACTURING (5/5)

TOP COMPANIES IN MINERALS PRODUCT GROUP

COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
WEILER Abrasives d.o.o.	784	69,291,444 €	Production of abrasive products
STEKLARNA ROGAŠKA d.o.o.	647	37,643,398 €	Manufacture of hollow glass
KNAUF INSULATION, d.o.o., Škofja Loka	458	145,512,091 €	Manufacture of other non-metallic mineral products n.e.c.
STEKLARNA HRASTNIK d.o.o.	439	56,989,000 €	Manufacture of hollow glass
SILKEM d.o.o.	226	56,020,903 €	Manufacture of other non-metallic mineral products n.e.c.
SALONIT ANHOVO, d.d.	221	80,874,087 €	Manufacture of cement
MINERAL d.o.o.	198	21,064,968 €	Cutting, shaping and finishing of stone
URSA SLOVENIJA, d.o.o.	136	37,197,228 €	Manufacture of glass fibres
Eternit Slovenija d.o.o.	135	11,694,932 €	Manufacture of fibre cement
Wienerberger d.o.o.	132	23,216,058 €	Manufacture of bricks, tiles and construction products, in baked clay
MARMOR HOTAVLJE, d.o.o.	122	15,456,720 €	Cutting, shaping and finishing of stone
ERTL GLAS STEKLO d.o.o.	111	13,990,973 €	Manufacture of flat glass
Gorenje Keramika, d.o.o.	111	7,973,366 €	Manufacture of ceramic tiles and flags
TLAKOVCI PODLESNIK d.o.o.	96	10,112,606 €	Manufacture of concrete products for construction purposes
SEVEN REFRACTORIES d.o.o.	96	51,617,134 €	Manufacture of refractory products
MINERALKA d.o.o.	96	17,498,843 €	Manufacture of other non-metallic mineral products n.e.c.
KOGRAD IGEM d.o.o.	94	15,305,438 €	Manufacture of concrete products for construction purposes
Murexin d.o.o.	86	18,141,664 €	Manufacture of other non-metallic mineral products n.e.c.
IMERY'S FUSED MINERALS RUŠE d.o.o.	68	24,028,090 €	Manufacture of other non-metallic mineral products n.e.c.
BAUMIT d.o.o.	60	15,947,383 €	Manufacture of other articles of concrete, plaster and cement
GORIŠKE OPEKARNE d.o.o.	58	8,768,900 €	Manufacture of bricks, tiles and construction products, in baked clay
BMI Adriatic Škofjan, d.o.o.	53	9,319,242 €	Manufacture of concrete products for construction purposes
MARMOR, Sežana d.d.	52	3,229,759 €	Cutting, shaping and finishing of stone
IAK d.o.o.	46	4,640,234 €	Manufacture of lime and plaster
ECOBETON d.o.o.	44	5,320,527 €	Manufacture of ready-mixed concrete
ISOMAT d.o.o.	43	4,272,039 €	Manufacture of other non-metallic mineral products n.e.c.
CEMENTNI IZDELKI GOREC d.o.o.	42	7,087,335 €	Manufacture of concrete products for construction purposes
OBLAK GROUP d.o.o.	42	11,097,576 €	Manufacture of concrete products for construction purposes
Total	5090	885,175,006 €	

SLOVENIAN MARKET

SLOVENIAN SECTORS RANKING BY THE SIZE

SECTORS SIZE

The size of Slovenian sectors was considered as a key factor to determine which sectors should be supported.

Higher annual revenue and number of employees indicates higher changes to meet potential buyers needs, support more companies and employees with public LeadGen program.

The ranking was done using a financial information in 2020.

The Slovenian business demographics shows a strong electrical and machinery equipment, vehicle related and metal products sectors.

Ranking Slovenian sectors by size in terms of Total Annual Revenue in SMB+L segment

[more revenue indicates more capacity to increase the exports]

PRIORITY_SECTOR	Total Annual Revenue	Total Number of Employees
Electrical and electronic equipment	€ 3,766,092,094	18489
Vehicles and automotive parts	€ 3,350,478,653	14012
Metal products	€ 3,246,162,685	30058
Machinery and equipment	€ 2,986,351,272	23760
Basic metals	€ 2,364,167,461	8806
Food processing	€ 2,281,265,285	14450
Plastic products	€ 1,976,305,421	14034
Wood products	€ 1,819,402,835	11127
Chemicals	€ 1,504,495,910	6556
Optical, Technical, Medical Devices	€ 852,989,986	5621
Textiles	€ 727,923,685	6465
Other	€ 434,919,675	3623
Printing	€ 379,254,750	3219
Furniture	€ 371,870,941	3882
Total	€ 26,061,680,652	164103

Ranking Slovenian sectors by size in terms of Total Number of Employees in SMB+L segment

[more employees impacted more public benefits]

PRIORITY_SECTOR	Total Annual Revenue	Total Number of Employees
Metal products	€ 3,246,162,685	30058
Machinery and equipment	€ 2,986,351,272	23760
Electrical and electronic equipment	€ 3,766,092,094	18489
Food processing	€ 2,281,265,285	14450
Plastic products	€ 1,976,305,421	14034
Vehicles and automotive parts	€ 3,350,478,653	14012
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Other	€ 434,919,675	3623
Printing	€ 379,254,750	3219
Total	€ 26,061,680,652	164103

SLOVENIAN MARKET SLOVENIAN SECTORS RANKING BY PROBABILITY OF POTENTIAL BUYERS NEEDS

POTENTIAL BUYERS NEEDS

Information what potential buyers need for their business from their suppliers was considered as a most important factor to determine which sectors should be supported.

Only sectors which are relevant, have something to offer are the sectors which will participate in LeadGen program.

Based on the trading data, prioritized sectors on a buyer's site showed wide range of products they need/buy from their suppliers. All V4 countries are heavily driven by automotive industry, which require complex and wide supply chains.

The most potential sectors in Slovenia by probability that potential buyers need products or services by these industry/sectors.
[by % of Leads-potential buyers buy products & services from]

The most potential sectors in V4 Group to focus on in searching new potential buyers of Slovenian products

[by number of Leads-potential buyers meeting Phase I requirements]

Priority Sector (Supplier Site)	4	2	6	3	5	1	7	Total
	Electrical and electronic equipment	Food processing	Furniture	Machinery and equipment	Optical, Technical, Medical Devices	Vehicles and automotive parts	Wood products	
Machinery and equipment	100%	97%	100%	97%	100%	100%	100%	99%
Electrical and electronic equipment	100%	90%	100%	100%	100%	100%	100%	97%
Plastic products	100%	90%	100%	97%	100%	100%	100%	97%
Wood products	96%	93%	100%	93%	100%	100%	100%	97%
Metal products	96%	90%	100%	93%	81%	100%	100%	94%
Optical, Technical, Medical Devices	96%	87%	88%	93%	100%	100%	100%	94%
Chemicals	100%	100%	100%	83%	75%	87%	100%	92%
Minerals	100%	84%	100%	97%	44%	100%	100%	90%
Textiles	52%	92%	100%	97%	56%	100%	100%	88%
Food processing	84%	97%	88%	59%		87%	71%	78%
Basic metals	40%	8%	88%	93%	44%	100%		57%
Printing	12%	70%	25%	24%		69%	71%	49%
Furniture	8%	30%	100%	28%		20%		23%
Vehicles and automotive parts*				7%		61%		19%
Other				17%				2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

* The Trading data analysis revealed a very unexpected fact about a probable auto part suppliers and final vehicle manufacturer trading relationship. There was almost no evidence in trading data about their trade relationship. The key reason could be that vehicle companies don't share trading data with rating agencies if the payments follow nonstandard, long-term payment and delivery agreements or contracts are mostly on a mother company level. **Despite this fact, we have considered Vehicle and automotive parts sector as one of the most potential ones.**

SLOVENIAN MARKET SLOVENIAN SECTORS RANKING

SUPPLIER SITE RANKING METHODOLOGY

There are the three key factors which were selected for supplier site priority sectors ranking.

Based on a ranking within each factor group, the final ranking was determined (Less point, the better)

The Priority Sectors were ranked and shortlisted by initial lead gen program setup.

Tender Priority	Sector	Ranking by size (Annual Revenue)	Ranking by size (Number of Employees)	Ranking by probability of demand-supply fit	FINAL RANKING
Priority	Electrical and electronic equipment	1	3	2	6
Priority	Machinery and equipment	4	2	1	7
Priority	Vehicles and automotive parts	2	6	3	11
Priority	Food processing	6	4	9	19
Priority	Wood products	8	7	4	19
Priority	Optical, Technical, Medical Devices	10	11	6	27
Priority	Furniture	14	12	12	38
	Metal products	3	1	5	9
	Basic metals	5	8	10	23
	Plastic products	7	5	3	15
	Chemicals	9	9	7	25
	Textiles	11	10	8	29
	Others	12	13	14	39
	Printing	13	14	11	38

STEP3

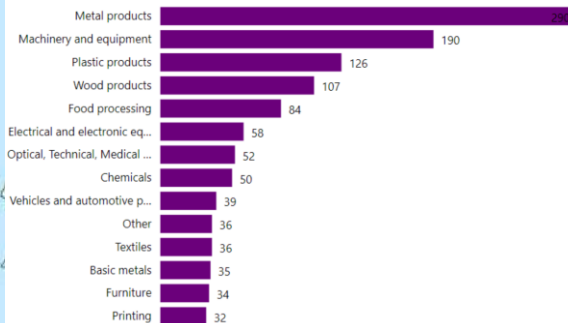
What are **the most potential sectors** in V4 countries for Slovenian exporters (if we map V4 needs & Slovenian export offering) ?

THE MOST POTENTIAL SECTORS TO GENERATE NEW LEADS

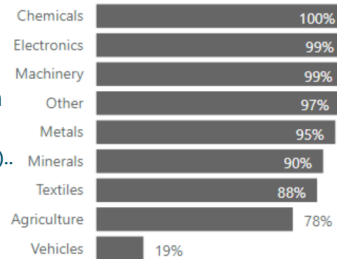
POTENTIAL BUYERS SITE „DEMAND“



POTENTIAL PARTNER SITE „SUPPLY“



MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS FROM LEADS TO POTENTIAL SUPPLIERS



This analysis had these two main objectives:

A. Finding and rank the most potential sector of buyers in the markets of the Visegrad Group on which the SPIRIT lead generation program should focus on

B. Determine and rank the Slovenian market sectors which will be supported (meaning could be interested to participate because they have something to offer those potential buyers)

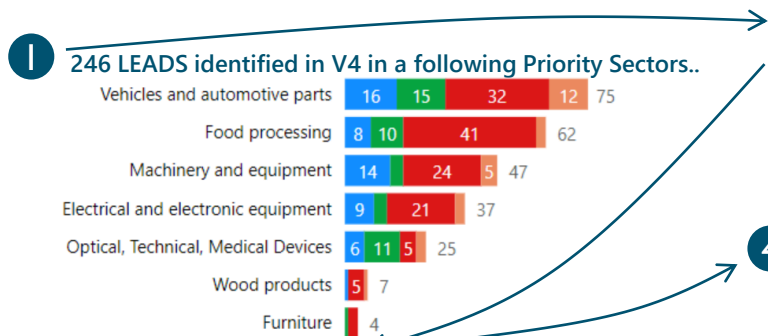
Anonymized trading data enables perfect matching algorithm how to find most potential sectors on both sides to maximize Lead generation program effects.

The concept can be described in these four steps:

1. Applying all relevant rules and requirements on V4 markets, based on a potential size of market sectors, the most potential priority sectors and their ranking were set.

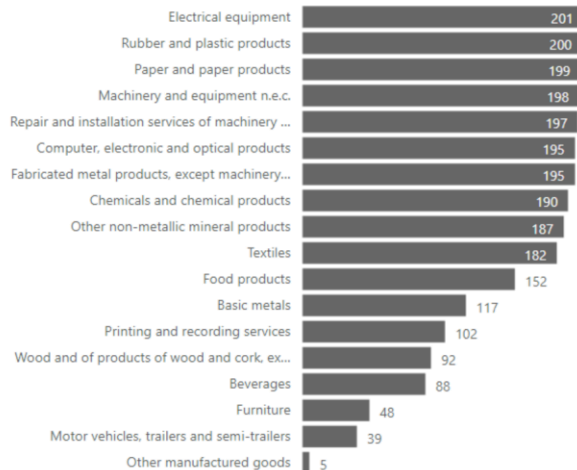
2.+3. Based on a buying behavior of 257 targeted potential buyers (Leads) a list of products needed for their manufacturing lines were detected.

4. Having known what products and services are needed in selected priority sectors in V4, ranking the Slovenian sectors can be match using their official business activity [NACE].



2 ..are buying directly from their suppliers those Product Groups (% of them)..

3 ..namely a following Products using CPA classification (# of them)..



4 ..could be supplied by Slovenian SMB + Large companies in a following sectors (using NACE Business Activity classification)

PRODUCT GROUP / BUSINESS ACTIVITY [NACE L2]	# of Companies	# of Employees	Annual Revenue
Metals	348	29909	€ 4,921,501,977
Manufacture of fabricated metal products, except machinery and equipment	312	12162	€ 2,578,422,460
Manufacture of basic metals	36	8647	€ 2,343,079,517
Electronics	123	22535	€ 4,467,483,673
Manufacture of electrical equipment	64	17687	€ 3,682,660,239
Manufacture of computer, electronic and optical products	59	4848	€ 784,823,434
Machinery	200	18635	€ 2,462,462,576
Manufacture of machinery and equipment n.e.c.	145	12823	€ 1,890,465,801
Repair and installation of machinery and equipment	55	5812	€ 571,996,775
Chemicals	185	18467	€ 3,233,029,681
Manufacture of rubber and plastic products	133	12159	€ 1,764,576,621
Manufacture of chemicals and chemical products	52	6308	€ 1,468,453,660
Other	228	15933	€ 2,503,151,165
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	87	5269	€ 798,047,609
Manufacture of paper and paper products	29	3529	€ 805,487,479
Other manufacturing	39	3125	€ 392,024,666
Manufacture of furniture	37	2167	€ 238,508,663
Printing and reproduction of recorded media	36	1944	€ 269,082,748
Vehicles	48	13543	€ 3,312,668,030
Manufacture of motor vehicles, trailers and semi-trailers	48	13543	€ 3,312,668,030
Agriculture	90	11807	€ 2,095,253,361
Manufacture of food products	83	10707	€ 1,877,363,143
Manufacture of beverages	7	1100	€ 217,890,219
Minerals	55	5165	€ 917,866,455
Manufacture of other non-metallic mineral products	55	5165	€ 917,866,455
Textiles	23	1939	€ 287,310,998
Manufacture of textiles	23	1939	€ 287,310,998
Total	1300	137934	€ 24,200,727,916

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

MOST POTENTIAL SECTORS CONSIDERING BUYERS AND SUPPLIERS

MOST POTENTIAL SECTORS

The final ranking of the sectors was determined on the basis of an evaluation of the priority areas of both imaginary parties of future trade cooperation. On the part of future buyers, priority was set primarily according to the size of the potential market, on the supply side according to the size of the relevant offer of suitable products.

These 3 main sectors with the greatest growth potential were identified for the subsequent outputs and further phases of the program:

1. **Vehicles and automotive parts**
2. **Machinery and equipment**
3. **Electrical and electronic equipment**

The most potential sectors in V4 Group in term of Buyers sectors Size

[by number of Leads-potential buyers meeting Phase I requirements]

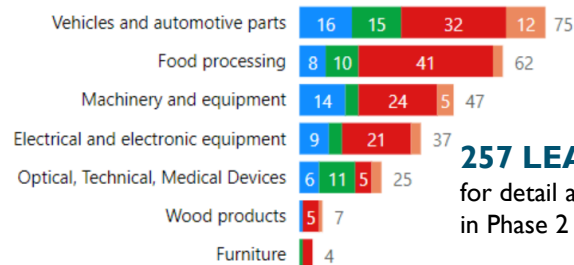
Rank	Priority Sector
1	Vehicles and automotive parts
2	Food processing
3	Machinery and equipment
4	Electrical and electronic equipment
5	Optical, Technical, Medical Devices
6	Furniture
7	Wood products



The Slovenian sectors by Size and Demand-Supply Fit

[by complex ranking evaluation]

Rank	Priority Sector
1	Electrical and electronic equipment
2	Machinery and equipment
3	Vehicles and automotive parts
4	Food processing
5	Wood products
6	Optical, Technical, Medical Devices
7	Furniture



257 LEADS

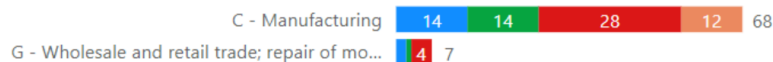
for detail analysis in Phase 2

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

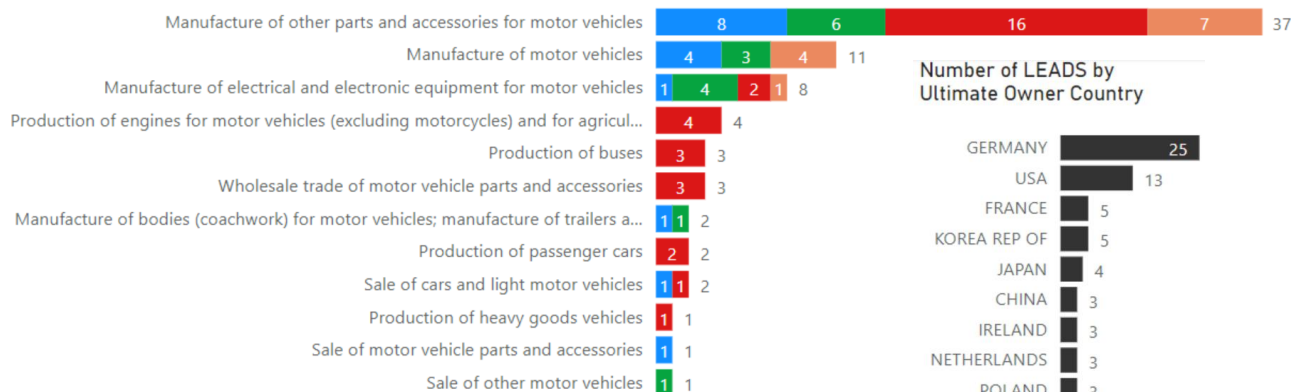
I. VEHICLES AND AUTOMOTIVE PARTS

Number of LEADS by Industry

● Czechia ● Hungary ● Poland ● Slovakia



Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Country



TOP30 Companies in V4

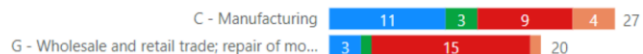
COMPANY_NAME	COUNTRY	ANNUAL REVENUE 2020
ŠKODA AUTO a.s.	Czechia	€ 17,240,862,745
VOLKSWAGEN SLOVAKIA, a.s.	Slovakia	€ 9,785,295,000
AUDI HUNGARIA Zártkörűen Működő Részvénytársaság	Hungary	€ 7,517,629,000
Hyundai Motor Manufacturing Czech s.r.o.	Czechia	€ 4,840,879,686
Kia Slovakia s. r. o.	Slovakia	€ 4,596,607,000
VOLKSWAGEN POZNAŇ SP Z O O	Poland	€ 3,484,067,447
PCA Slovakia, s.r.o.	Slovakia	€ 3,457,724,000
Mercedes-Benz Manufacturing Hungary Korlátolt Felelősségű Társaság	Hungary	€ 3,411,819,239
FCA POLAND S A	Poland	€ 2,227,736,349
Magyar Suzuki Zártkörűen Működő Részvénytársaság	Hungary	€ 1,656,668,327
VOLKSWAGEN MOTOR POLSKA SP Z O O	Poland	€ 1,304,073,522
Toyota Motor Manufacturing Czech Republic, s.r.o.	Czechia	€ 1,269,662,353
Mobis Slovakia s.r.o.	Slovakia	€ 1,227,521,000
Robert Bosch Energy and Body Systems Gépjárműelektromossági Alkatrész Gyártó és Forgalmazó Korlátolt Felelősségű Társaság	Hungary	€ 1,030,796,858
BOSCH DIESEL s.r.o.	Czechia	€ 860,217,176
Faurecia Automotive Slovakia s.r.o.	Slovakia	€ 839,173,000
ZF AUTOMOTIVE SYSTEMS POLAND SP Z O O	Poland	€ 796,877,447
TOYOTA MOTOR MANUFACTURING POLAND SP Z O O	Poland	€ 769,444,963
VOLVO POLSKA SP Z O O	Poland	€ 748,831,702
Robert Bosch, spol. s r.o.	Czechia	€ 743,014,980
SUNGWOOD HITECH s.r.o.	Czechia	€ 731,125,137
SOLARIS BUS & COACH SP Z O O	Poland	€ 697,158,085
Schaeffler Savaria Korlátolt Felelősségű Társaság	Hungary	€ 658,865,301
PORSCHE INTER AUTO POLSKA SP Z O O	Poland	€ 642,429,881
Brose CZ spol. s r.o.	Czechia	€ 611,337,216
SMR Automotive Mirror Technology Hungary	Hungary	€ 609,634,975
OPEL MANUFACTURING POLAND SP Z O O	Poland	€ 588,870,638
Lear Corporation Hungary Autóipari Gyártó Korlátolt Felelősségű Társaság	Hungary	€ 561,683,596
Adient Czech Republic s.r.o.	Czechia	€ 561,569,647

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

2. MACHINERY & EQUIPMENT

Number of LEADS by Industry

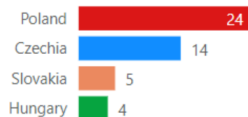
● Czechia ● Hungary ● Poland ● Slovakia



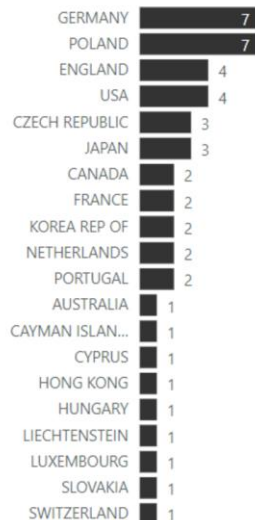
Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Country



TOP30 Companies in V4

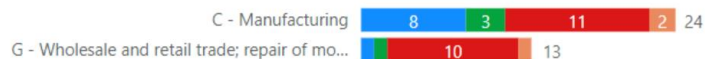
COMPANY_NAME	COUNTRY	ANNUAL REVENUE 2020
Doosan Bobcat EMEA s.r.o.	Czechia	€ 1,204,183,647
Robert Bosch Power Tool Elektromos Szerszámgyártó Korlátolt Felelősségű Társaság	Hungary	€ 776,857,001
Daikin Industries Czech Republic s.r.o.	Czechia	€ 570,626,863
STADLER POLSKA SP Z O O	Poland	€ 561,800,346
Schaeffler Kysuce, spol. s r.o.	Slovakia	€ 521,195,000
CNH INDUSTRIAL POLSKA SP Z O O	Poland	€ 488,317,021
GE Hungary Ipari és Kereskedelmi Korlátolt Felelősségű Társaság	Hungary	€ 463,654,041
GE POWER SP Z O O	Poland	€ 430,372,340
TATRAVAGÓNKA a.s.	Slovakia	€ 425,769,304
POJAZDY SZYNOWE PESA BYDGOSZCZ S A	Poland	€ 416,288,576
Hanon Systems Slovakia s.r.o.	Slovakia	€ 401,236,000
Schaeffler Skalica, spol. s r.o.	Slovakia	€ 396,294,000
DENSO MANUFACTURING CZECH s.r.o.	Czechia	€ 396,225,137
Magna Exteriors (Bohemia) s.r.o.	Czechia	€ 393,713,922
AGROSTROJ Pelhřimov, a.s.	Czechia	€ 369,653,882
KIEKERT-CS, s.r.o.	Czechia	€ 353,828,275
GKN DRIVELINE POLSKA SP Z O O	Poland	€ 349,066,984
International Automotive Components Group s.r.o.	Czechia	€ 346,889,843
ALSTOM KONSTAL S A	Poland	€ 346,784,255
KNORR-BREMSE Vasúti Jármű Rendszerek Hungária Korlátolt Felelősségű Társaság	Hungary	€ 343,736,168
JTEKT Automotive Czech Plzen s.r.o.	Czechia	€ 343,718,588
Carrier Refrigeration Operation Czech Republic s.r.o.	Czechia	€ 297,337,765
MAHLE Behr Mnichovo Hradiště s.r.o.	Czechia	€ 295,897,333
MAHLE POLSKA SP Z O O	Poland	€ 287,318,247
NEWAG S A	Poland	€ 282,099,149
POLSKIE ZAKŁADY LOTNICZE SP Z O O	Poland	€ 257,783,176
MANN + HUMMEL (CZ) v.o.s.	Czechia	€ 254,004,745

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

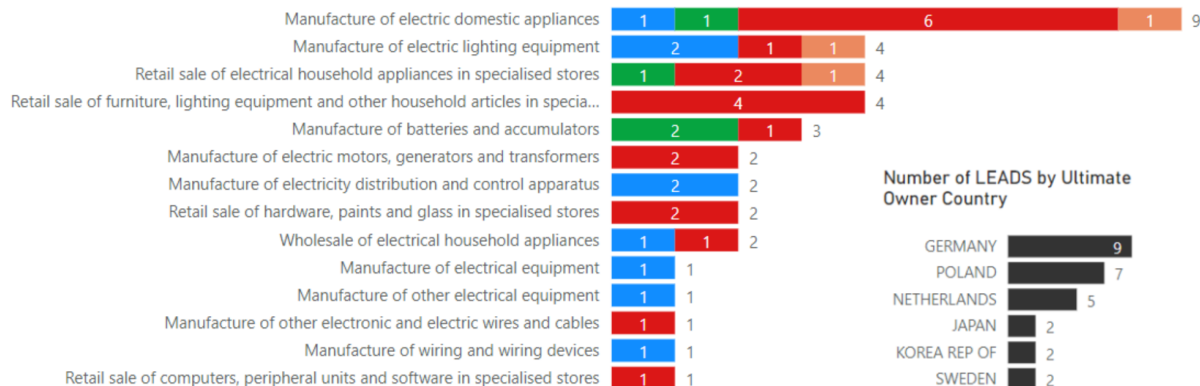
3. ELECTRICAL AND ELECTRONICAL EQUIPMENT

Number of LEADS by Industry

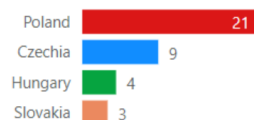
● Czechia ● Hungary ● Poland ● Slovakia



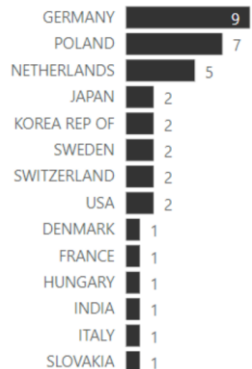
Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Country



TOP30 Companies in V4

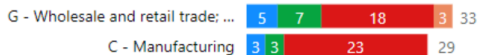
COMPANY_NAME	COUNTRY	ANNUAL REVENUE 2020
EURO NET SP Z O O	Poland	€ 2,131,836,732
CASTORAMA POLSKA SP Z O O	Poland	€ 1,666,785,319
LG ENERGY SOLUTION WROCLAW SP Z O O	Poland	€ 1,642,640,638
TERG S A	Poland	€ 1,632,008,067
BSH SPRZĘT GOSPODARSTWA DOMOWEGO SP Z O O	Poland	€ 1,589,183,617
LEROY MERLIN POLSKA SP Z O O	Poland	€ 1,428,814,894
SIGNIFY POLAND SP Z O O	Poland	€ 1,405,107,872
Samsung SDI Magyarország Gyártó és Értékesítő Zártkörűen Működő Részvénytársaság	Hungary	€ 1,363,175,120
Vitesco Technologies Czech Republic s.r.o.	Czechia	€ 1,229,348,157
Varrac Lighting Systems, s.r.o.	Czechia	€ 1,204,089,569
ELECTROLUX POLAND SP Z O O	Poland	€ 1,154,341,519
WHIRLPOOL COMPANY POLSKA SP Z O O	Poland	€ 1,062,208,936
IKEA RETAIL SP Z O O	Poland	€ 979,494,255
Siemens, s.r.o.	Czechia	€ 870,250,392
SAMSUNG ELECTRONICS POLAND MANUFACTURING SP Z O O	Poland	€ 732,695,319
SUPERHOBBY MARKET BUDOWLANY SP Z O O	Poland	€ 663,982,979
TELE FONIKA KABLE S A	Poland	€ 626,240,712
HELLA AUTOTECHNIK NOVA, s.r.o.	Czechia	€ 621,732,196
JYSK SP Z O O	Poland	€ 582,147,950
X KOM SP Z O O	Poland	€ 526,670,641
Panasonic Automotive Systems Czech, s.r.o.	Czechia	€ 511,020,196
Electrolux Lehel Hűtőgépgyár Korlátolt Felelősségű Társaság	Hungary	€ 451,976,008
FAST ČR, a.s.	Czechia	€ 429,087,765
ABB SP Z O O	Poland	€ 407,045,638
Miele technika s.r.o.	Czechia	€ 398,931,569
Media Markt Saturn Holding Magyarország Kft.	Hungary	€ 386,399,904
AGATA S A	Poland	€ 376,849,820
AMICA S A	Poland	€ 367,255,319
NAY a.s.	Slovakia	€ 322,092,028
TE Connectivity Czech s.r.o.	Czechia	€ 321,715,686

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

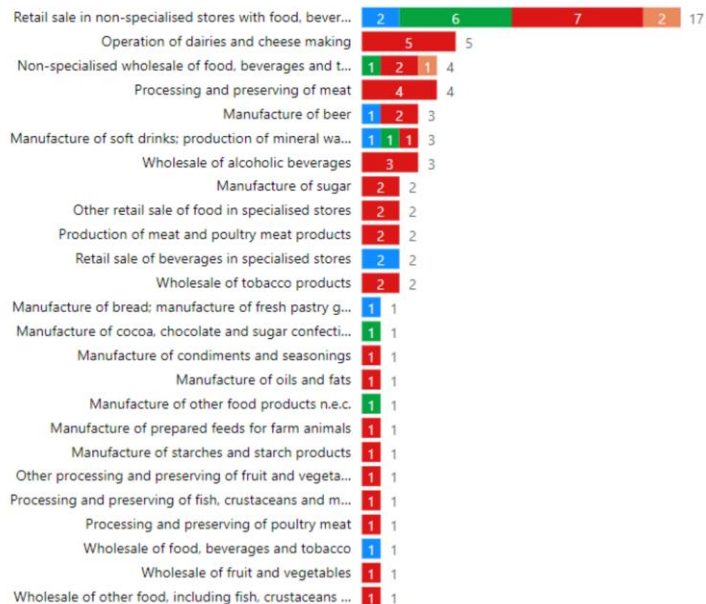
4. FOOD PROCESSING

Number of LEADS by Industry

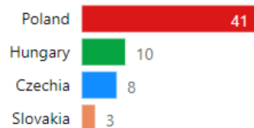
● Czechia ● Hungary ● Poland ● Slovakia



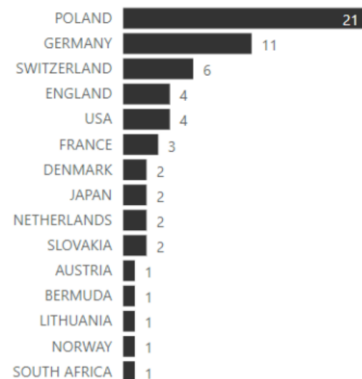
Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Countries



TOP7 COMPANIES IN MANUFACTURING IN V4

COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
ANIMEX FOODS SP Z O O	Poland	€ 1,691,775,745	Production of meat and poultry meat products
SPÓŁDZIELNIA MLECZARSKA MLEKOVITA	Poland	€ 1,196,372,507	Operation of dairies and cheese making
CARGILL POLAND SP Z O O	Poland	€ 1,146,342,766	Manufacture of starches and starch products
SPÓŁDZIELNIA MLECZARSKA MLEKPOL W GRAJEWIE	Poland	€ 964,193,007	Operation of dairies and cheese making
SOKOŁÓW S A	Poland	€ 961,764,681	Processing and preserving of meat
KOMPANIA PIWOWARSKA S A	Poland	€ 924,459,362	Manufacture of beer
CEDROB S A	Poland	€ 870,280,819	Production of meat and poultry meat products
MOWI POLAND S A	Poland	€ 841,040,893	Processing and preserving of fish, crustaceans and molluscs
GRUPA ŻYWIĘC S A	Poland	€ 766,745,532	Manufacture of beer
MARS POLSKA SP Z O O	Poland	€ 745,120,533	Processing and preserving of meat
NESTLE POLSKA S A	Poland	€ 737,690,213	Manufacture of condiments and seasonings
Piżeński Prazdroj, a. s.	Czechia	€ 632,235,294	Manufacture of beer
ZAKŁADY TŁUSZCZOWE KRUSZWICA S A	Poland	€ 629,061,702	Manufacture of oils and fats
WIPASZ S A	Poland	€ 566,393,058	Manufacture of prepared feeds for farm animals
COCA COLA HBC POLSKA SP Z O O	Poland	€ 507,372,553	Manufacture of soft drinks: production of mineral waters and other bottled waters
Nestlé Česko s.r.o.	Czechia	€ 455,475,529	Manufacture of bread: manufacture of fresh pastry goods and cakes
Nestlé Hungária Kft	Hungary	€ 449,665,169	Manufacture of cocoa, chocolate and sugar confectionery

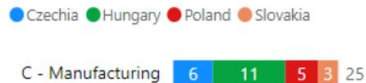
TOP8 COMPANIES IN WHOLESALE

COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
EUROCASH SERWIS SP Z O O	Poland	€ 1,728,121,431	Wholesale of tobacco products
BRITISH AMERICAN TOBACCO POLSKA TRADING SP Z O O	Poland	€ 1,394,351,915	Wholesale of tobacco products
MAKRO CASH AND CARRY POLSKA S A	Poland	€ 1,358,858,588	Wholesale of alcoholic beverages
CEDC INTERNATIONAL SP Z O O	Poland	€ 1,222,452,766	Wholesale of alcoholic beverages
UNILEVER POLSKA SP Z O O	Poland	€ 452,078,701	Wholesale of other food, including fish, crustaceans and molluscs
DISTRIBEV SP Z O O	Poland	€ 422,030,213	Wholesale of alcoholic beverages
CITRONEX I SP Z O O	Poland	€ 333,959,970	Wholesale of fruit and vegetables
Bidfood Czech Republic s.r.o.	Czechia	€ 3,898,180	Wholesale of food, beverages and tobacco

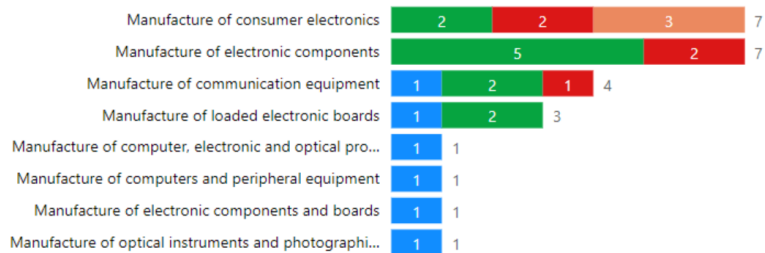
MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

5. OPTICAL, TECHNICAL, MEDICAL DEVICES

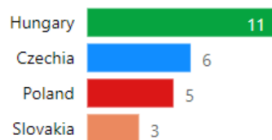
Number of LEADS by Industry



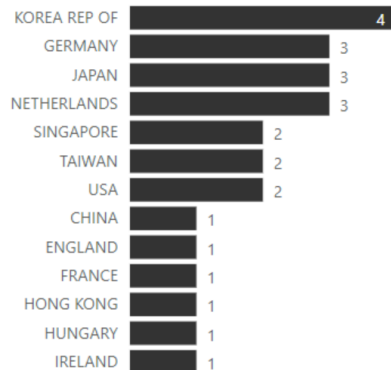
Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Countries



TOP15 COMPANIES IN MANUFACTURING IN V4

COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
Samsung Electronics Magyar Zártkörűen Működő Részvénytársaság	Hungary	€ 2,733,284,036	Manufacture of communication equipment
Flextronics International Termelő és Szolgáltató Vámszabadterületi Korlátolt Felelősségű Társaság	Hungary	€ 2,468,745,083	Manufacture of consumer electronics
LG ELECTRONICS MŁAWA SP Z O O	Poland	€ 2,258,695,526	Manufacture of consumer electronics
Foxconn European Manufacturing Services s.r.o.	Czechia	€ 2,049,608,902	Manufacture of computers and peripheral equipment
Robert Bosch Elektronika Gyártó Kft.	Hungary	€ 1,706,860,908	Manufacture of loaded electronic boards
Harman Becker Gépkocsirendszer Gyártó Korlátolt Felelősségű Társaság	Hungary	€ 1,678,097,191	Manufacture of communication equipment
SAMSUNG Electronics Slovakia s.r.o.	Slovakia	€ 1,315,371,000	Manufacture of consumer electronics
Foxconn Slovakia, spol. s r.o.	Slovakia	€ 1,012,851,000	Manufacture of consumer electronics
Continental Automotive Hungary Korlátolt Felelősségű Társaság	Hungary	€ 921,559,445	Manufacture of electronic components
VALEO AUTOSYSTEMY SP Z O O	Poland	€ 827,414,043	Manufacture of electronic components
TPV DISPLAYS POLSKA SP Z O O	Poland	€ 763,885,681	Manufacture of electronic components
Aptiv Services Hungary Korlátolt Felelősségű Társaság	Hungary	€ 715,776,599	Manufacture of electronic components
Jabil Circuit Magyarország Szerződéses Gyártó Kft.	Hungary	€ 645,163,799	Manufacture of electronic components
Foxconn Technology CZ s.r.o.	Czechia	€ 625,171,176	Manufacture of electronic components and boards
Thermo Fisher Scientific Brno s.r.o.	Czechia	€ 559,016,941	Manufacture of optical instruments and photographic equipment

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

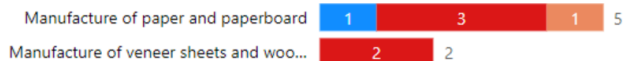
6. WOOD PRODUCTS

Number of LEADS by Industry

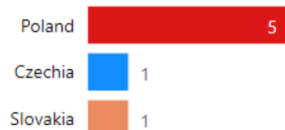
● Czechia ● Poland ● Slovakia



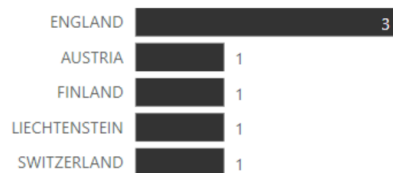
Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Countries



COMPANIES IN MANUFACTURING IN V4

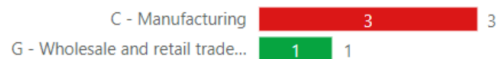
COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
MONDI ŚWIECIE S A	Poland	€ 688,690,213	Manufacture of paper and paperboard
MM KWIDZYN SP Z O O	Poland	€ 487,472,744	Manufacture of paper and paperboard
Mondí Štětí a.s.	Czechia	€ 464,574,000	Manufacture of paper and paperboard
Mondí SCP, a.s.	Slovakia	€ 455,791,000	Manufacture of paper and paperboard
SWISS KRONO SP Z O O	Poland	€ 428,431,915	Manufacture of veneer sheets and wood-based panels
KRONOSPAN POLSKA SP Z O O	Poland	€ 397,640,392	Manufacture of veneer sheets and wood-based panels
STORA ENSO POLAND S A	Poland	€ 284,878,435	Manufacture of paper and paperboard

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

7. FURNITURE

Number of LEADS by Industry

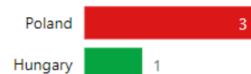
● Hungary ● Poland



Number of LEADS by Business Activity [NACE]



Number of LEADS by Country



Number of LEADS by Ultimate Owner Countries

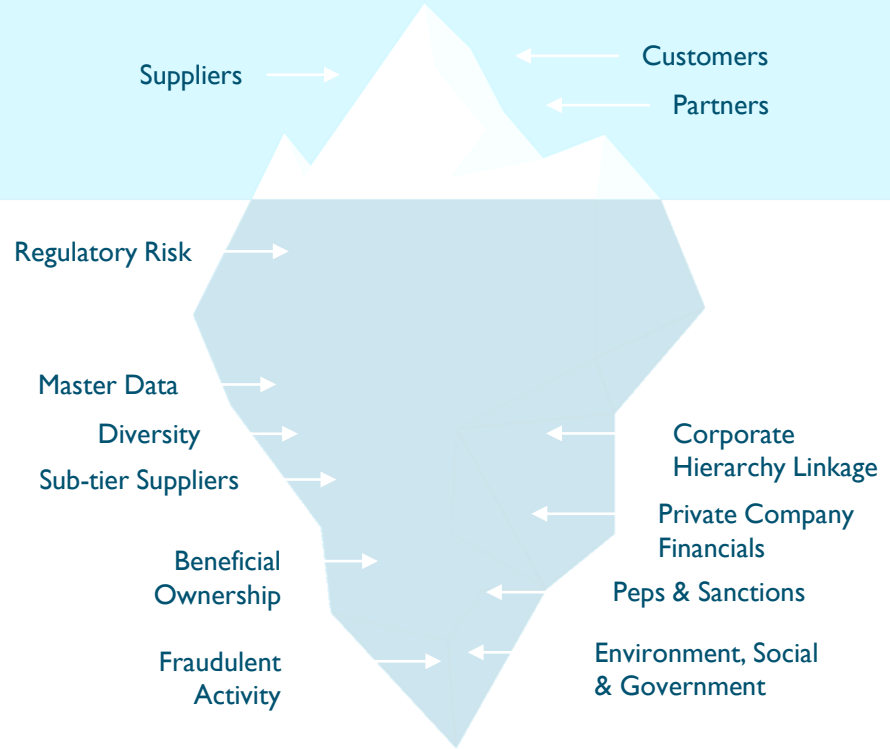


COMPANIES IN MANUFACTURING IN V4

COMPANY NAME	COUNTRY	ANNUAL REVENUE 2020	NACE
IKEA INDUSTRY POLAND SP Z O O	Poland	€ 985,430,603	Manufacture of other furniture
IKEA Lakberendezési Kft.	Hungary	€ 276,793,425	Retail sale of furniture, lighting equipment and other household articles in specialised stores
CORRECT K BŁASZCZYK I WSPÓLNICY SPÓŁKA KOMANDYTOWA	Poland	€ 266,335,272	Manufacture of mattresses
BLACK RED WHITE S A	Poland	€ 258,966,969	Manufacture of other furniture

FRAMEWORK FOR FURTHER IDENTIFICATION OF QUALIFIED HIGH-QUALITY CONTACTS

WHAT YOU KNOW ABOUT THE
ENTITIES YOU DO BUSINESS WITH IS
ONLY THE TIP OF THE ICEBERG

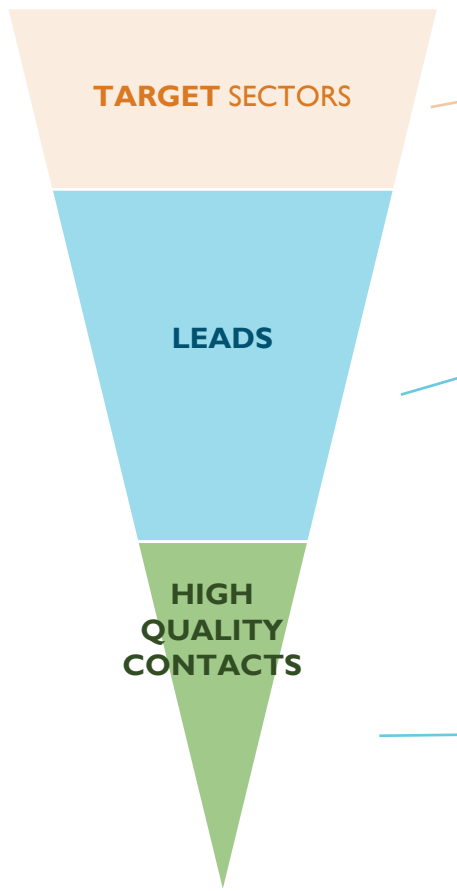


GUIDELINE FOR FURTHER IDENTIFICATION OF QUALIFIED HIGH-QUALITY CONTACTS FROM TARGET TO LEAD AND HIGH-QUALITY CONTACT

To find the best possible business partners, we need to evaluate the following:

- Who can be relevant based on the filtering criteria set out by Spirit – Phase I
- Who can be relevant based on real activity – we use online data, collected information on firms from D&B database, trade information between industries and industrial interdependencies on activity and product basis.
- Coming out of point 1 and 2 we have a set of firms who are meeting Spirit criteria AND activity relevance criteria. This step answers the following question: Who are financially stable companies – We use generic D&B Failure score to evaluate financial risk emerging in the prospect list as well as payment information.
- 1. Who are comparably well performing firms compared to their own activity in the means of: Liquidity, Leverage, Profitability and Efficiency

Based on that logic we provide a final ranked list. For ranking we need to decide which point shall have which weight.



TARGETs for a Leads generations program was defined as:

- Company is doing manufacturing or wholesale business in V4 in a following sectors: Vehicles and automotive parts, food processing, machinery and equipment's, optical, technical and medical devices, furniture and other wood products
- Company has more than 700 employees and more than 250 mil. EUR annual turnover in 2020.

The detail company assessment will be performed for **LEADS ranking**:

- a. **Business Activity review** (online data will be analyzed, collected information on firms from D&B database, trade information between industries and industrial interdependencies on activity and product basis, etc.)
- b. **Detail Financials & Risk review.** This will cover a following analysis:
 - ✓ **Financial Stability** review using Dun & Bradstreet Failure Score and Credit Rating
 - ✓ **Compliance** review using Dun & Bradstreet Sanction and PEP lists, relevant negative events of company as well as parent ones
 - ✓ **Financial Performance** review (Liquidity, Leverage, Profitability, Efficiency/Productivity (using Added Value Ratio))

To qualify and rank the **HIGH QUALITY CONTACTS** the detail investigation will be done:

- a. **Investigate contacts on key decision makers** (Business Development Manager, Purchasing Manager, Sourcing Manager, company management)
- b. **Contact them and verify** if they have **plans** to expand or renew their supply chain and if they are **interested** in the presentation and meetings with potential Slovenian partners

GUIDELINE FOR FURTHER IDENTIFICATION OF QUALIFIED HIGH-QUALITY CONTACTS

RULES & REQUIREMENTS ON A HIGH-QUALITY CONTACT

Several sources have been analyzed to provide detail insight about all four Visegrad Group markets.

Framework how to determine and rank the most potential sectors was, besides other factors, significantly influenced by set of tender rules and requirements application to the assessment of contacts as high quality in next Phase 2.

The following table illustrates which requirements were applied for Potential Sectors and Leads identification and ranking, and which one will be applied in Phase 2 on a company detail level.

Rule & Requirements		Phase 1 Target Sector > Lead	Phase 2 Lead > High Quality Contact
1	Contacts with decision makers in individual companies are ensured (Business Development Manager, Purchasing Manager, Sourcing Manager, company management, etc.)	Not relevant for this phase, all large companies are "contactable"	Yes Contacts on shortlisted Leads will be provided / updated if needed
2	tA large (local) company or a large globally operating foreign company present in the market of the Visegrad Group and operating in at least one of the sectors previously ranked and segmented by the tenderer as the most potential in a particular target market.	Yes	x
3	Company has more than 700 employees.	Yes	x
4	Company generates at least 250 million of annual turnover.	Yes	x
5	Company tenders or produces a wider range of products or services (with "more complex" products and services being preferred), or buys finished products (e.g. in case of a dealer or trade group / company);	Yes	x
6	Company that has an extensive own international supply chain, a diversified global value chain and a wide range of suppliers and is a final manufacturer	Detail investigation will be done for selected Leads in Phase 2	Yes
7	Achieves added value, which is higher than EUR 35,000 per employee, as evidenced by a tenderer with the company's business statement for the last current financial year.	Detail Financial statement analysis will be done for selected Leads in Phase 2	Yes
8	Holds a credit rating of Dun & Bradstreet global or a comparable credit rating of at least A financial stability rating and at least 2 risk rating, as evidenced by a D&B credit report or a comparable credit rating not older than 3 months.	Detail Risk assessment will be done for selected Leads in Phase 2	Yes
9	Company has plans to expand or renew its supply chain or implement suppliers' selections on an annual basis, seeking suppliers for several different product groups, technologies / solutions or services and within the most potential sectors / industries in the mentioned target markets.	Partly Yes Typical trading behavior analyzed; large supply chain detected.	Yes Plans will be verified.
10	Company expressed interest in the presentation and meetings with Slovenian companies within the presentation.	Company will be contacted in Phase 2	Yes

ATTACHEMENTS

TABLE 01 – GDP AT MARKET PRICES

COUNTRY	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Czechia	157,921	165,202	162,588	159,462	157,821	169,558	177,439	194,133	210,928	225,569	215,257
Hungary	99,814	102,194	100,281	102,276	106,298	112,824	116,279	127,046	136,073	146,113	136,622
Poland	362,191	379,860	387,947	392,311	408,968	430,466	427,092	467,427	497,842	533,600	523,668
Slovenia	36,364	37,059	36,253	36,454	37,634	38,853	40,443	43,011	45,864	48,397	46,918
Slovakia	68,492	71,477	73,361	74,217	76,093	79,888	81,014	84,443	89,430	94,048	92,079
European Union - 27 countries (from 2020)	10,980,306	11,323,916	11,391,844	11,520,159	11,783,874	12,214,624	12,552,525	13,076,051	13,531,500	14,015,642	13,393,729

COUNTRY	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Czechia		4.6%	-1.6%	-1.9%	-1.0%	7.4%	4.6%	9.4%	8.7%	6.9%	-4.6%
Hungary		2.4%	-1.9%	2.0%	3.9%	6.1%	3.1%	9.3%	7.1%	7.4%	-6.5%
Poland		4.9%	2.1%	1.1%	4.2%	5.3%	-0.8%	9.4%	6.5%	7.2%	-1.9%
Slovenia		1.9%	-2.2%	0.6%	3.2%	3.2%	4.1%	6.3%	6.6%	5.5%	-3.1%
Slovakia		4.4%	2.6%	1.2%	2.5%	5.0%	1.4%	4.2%	5.9%	5.2%	-2.1%
European Union - 27 countries (from 2020)		3.1%	0.6%	1.1%	2.3%	3.7%	2.8%	4.2%	3.5%	3.6%	-4.4%

Gross domestic product at market prices [TEC00001]

GDP (gross domestic product) is an indicator for a nation's economic situation. It reflects the total value of all goods and services produced less the value of goods and services used for intermediate consumption in their production. Expressing GDP in PPS (purchasing power standards) eliminates differences in price levels between countries, and calculations on a per head basis allows for the comparison of economies significantly different in absolute size.

Measure: Current prices, million euro and YoY changes in %

Source: Eurostat [<https://ec.europa.eu/eurostat/databrowser/view/tec00001/default/table?lang=en>]

Data extracted on 19/11/2021 [ESTAT]

TABLE 02 – TOTAL IMPORTS – ALL PRODUCTS

Total Imports in million ECU/EURO

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Czechia	75,314	95,536	109,285	110,066	108,621	116,203	127,481	129,268	144,483	156,458	159,958	149,565
Hungary	55,750	66,514	73,592	74,078	75,379	78,978	82,947	84,829	95,157	102,261	107,727	101,417
Poland	107,155	134,306	151,291	154,934	156,319	168,366	177,182	180,285	206,821	227,796	236,991	228,652
Slovenia	19,053	22,720	25,526	24,934	25,129	25,551	26,887	27,598	31,917	35,803	39,319	36,914
Slovakia	39,898	50,255	57,602	60,252	61,646	61,405	65,696	67,474	72,192	78,727	80,407	73,700
European Union - 27 countries (from 2020)	1,193,317	1,471,032	1,666,127	1,702,498	1,630,802	1,625,427	1,648,068	1,602,476	1,772,081	1,912,003	1,940,934	1,716,581

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Czechia		26.9%	14.4%	0.7%	-1.3%	7.0%	9.7%	1.4%	11.8%	8.3%	2.2%	-6.5%
Hungary		19.3%	10.6%	0.7%	1.8%	4.8%	5.0%	2.3%	12.2%	7.5%	5.3%	-5.9%
Poland		25.3%	12.6%	2.4%	0.9%	7.7%	5.2%	1.8%	14.7%	10.1%	4.0%	-3.5%
Slovenia		19.2%	12.4%	-2.3%	0.8%	1.7%	5.2%	2.6%	15.7%	12.2%	9.8%	-6.1%
Slovakia		26.0%	14.6%	4.6%	2.3%	-0.4%	7.0%	2.7%	7.0%	9.1%	2.1%	-8.3%
European Union - 27 countries (from 2020)		23.3%	13.3%	2.2%	-4.2%	-0.3%	1.4%	-2.8%	10.6%	7.9%	1.5%	-11.6%

Trade balance in million ECU/EURO

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Czechia	5,669	4,775	7,769	12,165	13,564	15,596	14,883	17,711	16,731	14,803	17,945	18,033
Hungary	3,762	5,510	7,092	6,533	5,566	4,288	5,899	7,244	5,595	3,312	2,852	4,012
Poland	-9,289	-13,823	-15,733	-10,652	-1,975	-2,652	2,351	3,886	565	-4,583	1,188	10,562
Slovakia	310	-511	-304	2,540	2,868	3,508	2,069	2,132	1,598	410	-445	1,886

External trade indicator Imports in million of ECU/EURO [TET00002]

Standard International Trade Classification (SITC Rev. 4, 2006) Total - all products

Geopolitical entity (partner) All countries of the world

Unit of measure: Million euro and YoY index in %

Source: Eurostat [<https://ec.europa.eu/eurostat/databrowser/view/tet00002/default/table?lang=en>]

Data extracted on 19/11/2021 06:35:02 from [ESTAT]

Dataset: International trade, by reporting country, total product [TET00002]

Last updated: 15/11/2021 11:00

TABLE 0X – V4 IMPORTS BY PRODUCT GROUPS

PRODUCT GROUP	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	TOTAL
Agriculture	24,391	28,239	30,066	31,194	32,623	34,486	36,302	39,051	40,172	42,745	44,032	383,301
Chemicals	59,908	69,966	69,915	72,339	77,973	79,277	82,895	91,678	96,637	97,868	96,083	894,539
Electronics	78,145	75,763	76,218	75,660	80,332	89,411	89,452	97,250	103,068	110,428	113,588	989,315
Machinery	29,045	33,962	35,535	36,392	41,103	45,276	44,920	47,905	51,546	54,336	50,903	470,923
Metals	35,148	41,441	41,255	41,932	44,878	47,288	47,734	54,674	59,327	57,337	52,432	523,446
Minerals	34,202	42,533	44,850	42,707	40,038	31,511	25,619	32,530	40,668	38,945	28,067	401,670
Other	21,328	23,552	23,975	24,192	27,364	29,531	30,367	32,447	35,176	36,429	36,204	320,565
Textiles	14,629	16,597	16,238	17,269	19,745	21,390	23,126	25,409	27,312	28,971	30,219	240,905
Vehicles	36,393	41,274	42,939	46,623	53,345	62,469	68,156	73,502	80,182	85,694	72,431	663,008
TOTAL	333,189	373,327	380,991	388,308	417,401	440,639	448,571	494,446	534,088	552,753	523,959	4,887,672

PRODUCT GROUP	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Agriculture		16%	6%	4%	5%	6%	5%	8%	3%	6%	3%
Chemicals		17%	0%	3%	8%	2%	5%	11%	5%	1%	-2%
Electronics		-3%	1%	-1%	6%	11%	0%	9%	6%	7%	3%
Machinery		17%	5%	2%	13%	10%	-1%	7%	8%	5%	-6%
Metals		18%	0%	2%	7%	5%	1%	15%	9%	-3%	-9%
Minerals		24%	5%	-5%	-6%	-21%	-19%	27%	25%	-4%	-28%
Other		10%	2%	1%	13%	8%	3%	7%	8%	4%	-1%
Textiles		13%	-2%	6%	14%	8%	8%	10%	7%	6%	4%
Vehicles		13%	4%	9%	14%	17%	9%	8%	9%	7%	-15%
TOTAL		12%	2%	2%	7%	6%	2%	10%	8%	3%	-5%

EXPORT GAPS

EXPORT POTENTIAL

Another “angle” on market potentials brings International Trade Center calculating potential indicators based on international trade data.

EXPORT POTENTIAL INDICATOR

Potential export value of product *k* supplied by country *i* to market *j*, in dollars, is calculated as $\text{supply} \times \text{demand}$ (corrected for market access) \times $\text{bilateral ease of trade}$. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forward-looking tariffs. The estimated dollar value serves as a benchmark for comparison with actual exports and should not be interpreted as a ceiling value. In reality, the actual trade value may be below or above the potential value.

ACTUAL EXPORTS

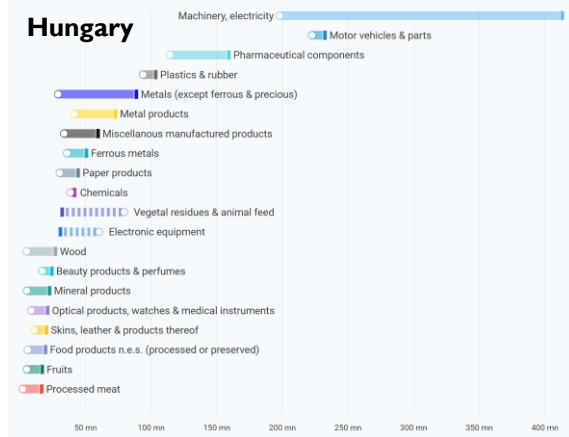
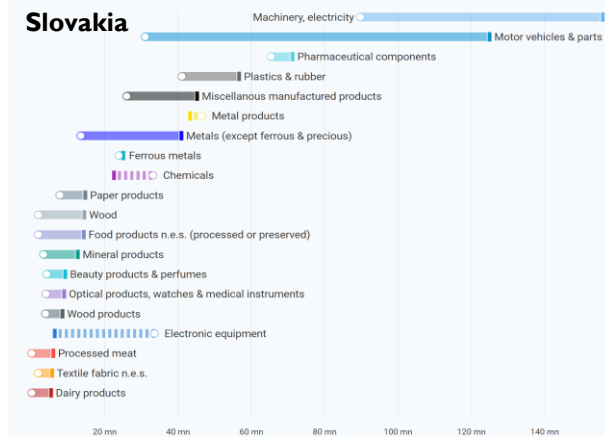
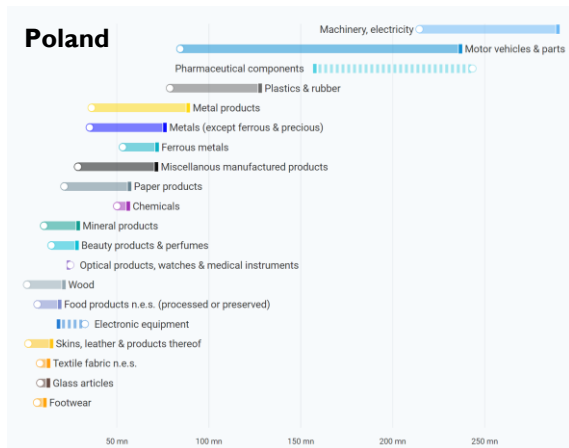
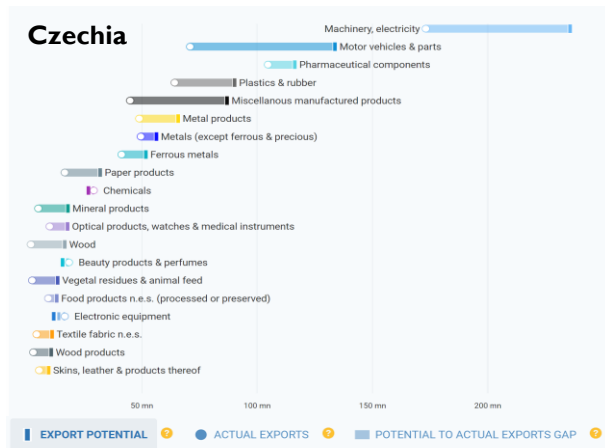
The value of actual exports is calculated as an arithmetic average of direct and mirror data of reliable reporters over the past five years.

REALIZED POTENTIAL

This value captures the extent to which the export potential has already been utilized for this product, market or supplier.

POTENTIAL TO ACTUAL EXPORTS GAP

This is the extent to which potential exports deviate from actual exports.



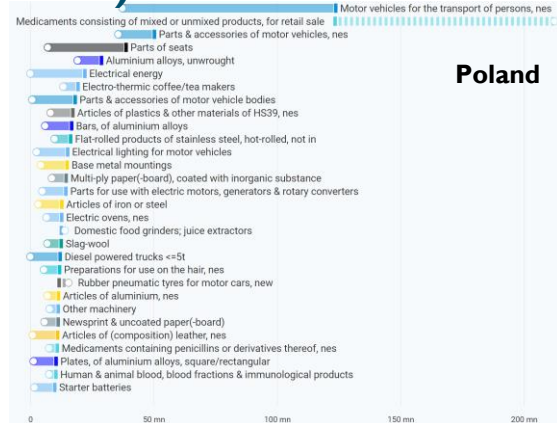
Source: <https://exportpotential.intracen.org/>

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS TOP 30 PRODUCTS PER COUNTRY (ALL SECTORS)

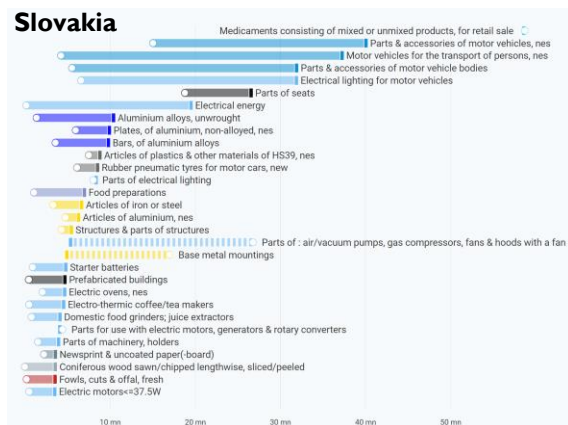
Czechia



Poland



Slovakia



Hungary

