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LEAD GENERATION PROGRAMME

Priority sectors development trends in Visegrad Group Countries

Market Analysis November, December 2021

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Tables – Markets economics & international trade (GDP, Imports, Exports...)

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 & Bratstreet 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)

PHASE 2 SELECT & QUALITY LEADS

PERFORM

MARKETS

ANALYSIS

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PHASE 3 INICIATE RELATIONSH

PHASE 4 ENABLE SUCCESSFUL PARTNERSHIP

PHASE 5 DEVELOP ACTION

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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 <u>total of 257</u> <u>companies were identified</u>. 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:

- I. Vehicles and automotive parts
- 2. Machinery and equipment
- 3. Electrical and Electronic equipment

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- 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

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 dun & bradstreet

MANAGEMENT SUMMARY (2/6) VISEGRAD GROUP MARKETS ANALYSIS FOR LEAD GENERATION

This market analysis was processed in 3 main steps:

STEP I



STEP 2

STEP 3

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 (reffered to as **LEADS**).

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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.

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.

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.)

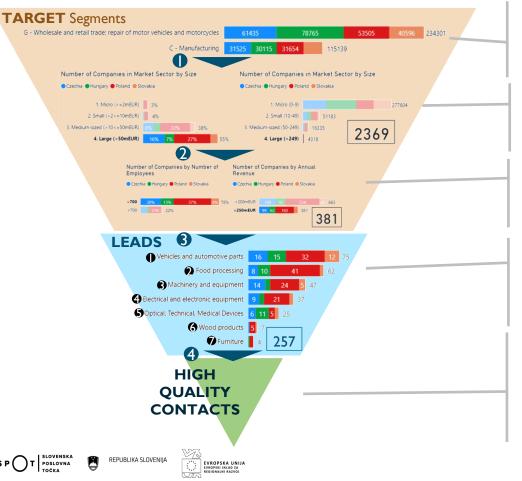
Target segment was narrowed down to LEADS using Priority Sectors selection the further investigation should focus on.

Each LEAD will be analyzed in detail to prepare a list of highquality contacts in Phase 2.

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MANAGEMENT SUMMARY (3/6) STEP I - FINDING THE MOST POTENTIAL SECTORS (POTENTIAL SUPPLIES)



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.

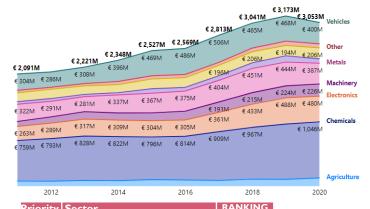
PRIORITY SECTORS SIZE

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

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

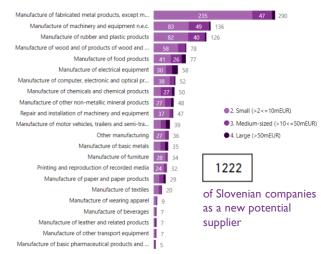
Slovenian Export to V4 Countries by Industry (mil. EUR)



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



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

Markets Analysis - Visegrad Group 7

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%) STEP 3 - LEADS IDENTIFICATION IN PRIORITY SECTORS

PRIORITY SECTORS RANKING BY COMPLEX ASSESSMENT

Ran k	Priority Sector
I	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 PRIORITY SECTORS

Vehicles and automotive parts	16	15 32	12	75	LEADS meet criteria all
Food processing	8 10	41	62		Phase I requirements
Machinery and equipment	14	24 5	47		
Electrical and electronic equipment	9	21 37			
Optical, Technical, Medical Devices	<mark>6</mark> 11 <mark>5</mark>	25		NO. OF	LEADS BY COUNTRY
Wood products	5 7				
	· ·			Poland	131
Furniture	4			Czechia	54
				Hungary	45
				Slovakia	27
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NO. OF LEADS BY COMPANY ULTIMATE OWNER COUNTRY

GERMANY				5
POLAND				40
USA			25	
NETHERLANDS		16		
JAPAN		14		
ENGLAND		13		
KOREA REP OF		13		
FRANCE		12		
SWITZERLAND		10		
CHINA	4			
HUNGARY	4			
IRELAND	4			
SLOVAKIA	4			
AUSTRIA	3			
CANADA	3			
ZECH REPUBLIC	3			
	_			

257

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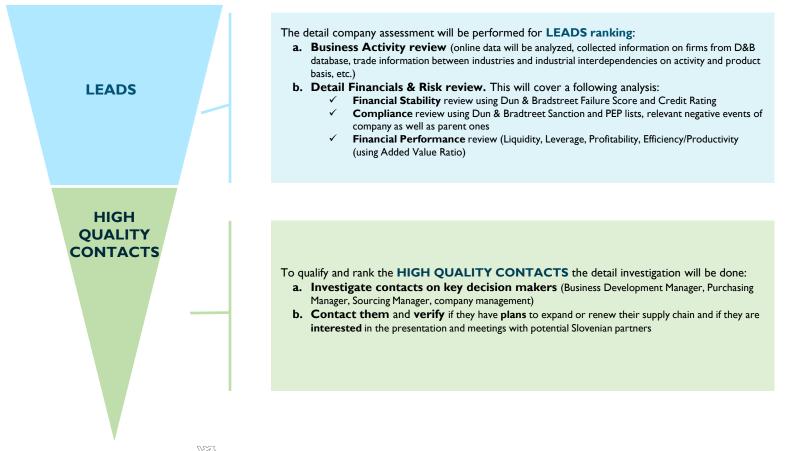
TOP15 MANUFACTURING COMPANIES BY ANNUAL REVENUE

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 WHOLESALES 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

MANAGEMENT SUMMARY (66) FROM LEAD TO HIGH QUALITY CONTACT FRAMEWORK FOR PHASE 2



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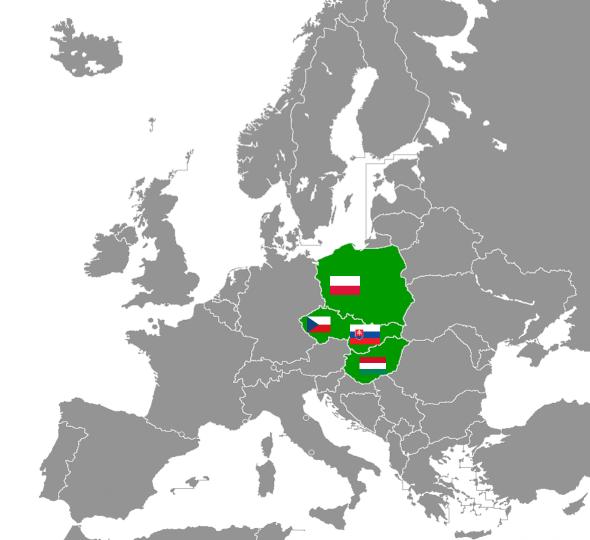
Markets Analysis - Visegrad Group 9

STEPI 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 <u>selected Sectors</u>:
 - I 38k 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(-**5**23%)). V4 countries are rather the exporting markets driven mostly by automotive

industry.

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

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MARKETS SIZE & TRENDS MARKETS OVERALL PERFORMANCE

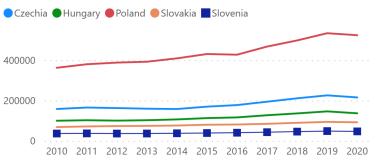
GPD at market prices (mil. EUR)

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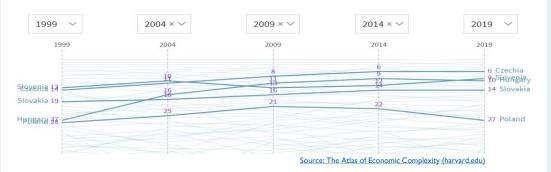
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V4 Countries Ranking by Economic Complexity Index (ECI)



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International Trade on Eurostat portal.

Total Import of All Products (mil. EUR)

● Czechia ● Hungary ● Poland ● Slovakia ■ Slovenia



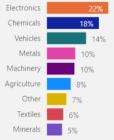
The Economic Complexity Index (ECI) is a ranking of countries based on the diversity and complexity of their export basket. High complexity countries are home to a range of sophisticated, specialized capabilities and are therefore able to produce a highly diversified set of complex products. Determining 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.

Markets Analysis - Visegrad Group

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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.

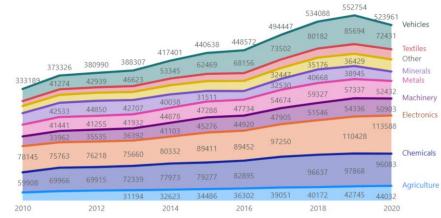
All countries have similar import product groups ranking, few changes can be seen in graphs.

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

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MARKETS SIZE & TRENDS IMPORT TRENDS BY INDUSTRY





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Czechia Import by Industry (mil. EUR)

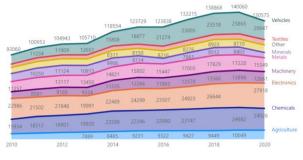
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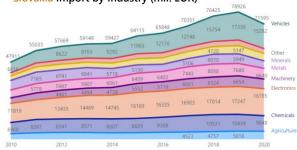


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Poland Import by Industry (mil. EUR)





Slovakia Import by Industry (mil. EUR)

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226073

Vehicles

Textiles

Mineral

Machinery

Electronics

Chemicals

Agriculture

2020

Other

223446

2021

INDUSTRY

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

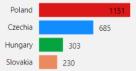
BUSINESS STRUCTURE

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.

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MARKETS SIZE & TRENDS MARKET SECTORS BY SELECTED INDUSTRIES

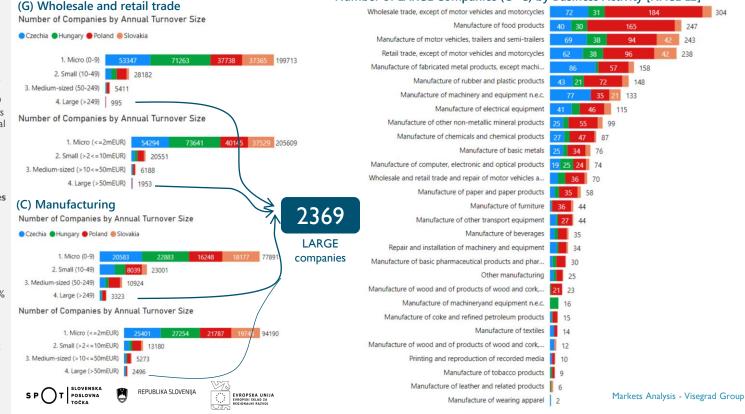
Number of Companies in Wholesales, Retail and Manufacturing Industry [NACE L1]

 G - Wholesale and retail trade; repair of motor vehicles and motorcycles
 61435
 78765
 53505
 40596
 234301

 C - Manufacturing
 31525
 30115
 31654
 115139

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

14



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 LI]



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.

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MARKETS SIZE & TRENDS LARGE ENOUGH TO MEET TENDER CRITERIA ON SIZE?

Number of LARGE Companies by NACE L2 meeting Criteria on Size

Retail trade, except of motor vehicles and motorcycles 69 Manufacture of motor vehicles, trailers and semi-trailers 68 Wholesale trade, except of motor vehicles and motorcycles 38 74 Manufacture of computer, electronic and optical products 24 Manufacture of electrical equipment 24 247 Manufacture of food products 133 Manufacture of machinery and equipment n.e.c. Manufacture of chemicals and chemical products 16 Manufacture of basic metals 14 Manufacture of rubber and plastic products 14 Manufacture of fabricated metal products, except machinery and equipment 30 Manufacture of basic pharmaceutical products and pharmaceutical prepara... Manufacture of other non-metallic mineral products Manufacture of other transport equipment 70 Wholesale and retail trade and repair of motor vehicles and motorcycles 267 Manufacture of beverages Manufacture of coke and refined petroleum products 15 Manufacture of paper and paper products LARGE Manufacture of tobacco products companies Manufacture of furniture Manufacture of machineryand equipment n.e.c. 2369 Manufacture of wood and of products of wood and cork, except furniture; ... Other manufacturing Manufacture of textiles 381 Manufacture of wearing apparel Manufacture of leather and related products **I ARGE** Manufacture of wood and of products of wood and cork, except furniture; ... Companies meeting Printing and reproduction of recorded media Criteria on Size Repair and installation of machinery and equipment

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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 preparation	ons 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	
Manufacture of wearing apparel	2	1	50.0%
Manufacture of leather and related products	6		501010
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	
Wholesale and retail trade and repair of motor vehicles and motorcycles	69		10.1%
Food processing	417		14.9%
Manufacture of food products	247	23	
Retail trade, except of motor vehicles and motorcycles	68		30.9%
Wholesale trade, except of motor vehicles and motorcycles Wholesale trade, except of motor vehicles and motorcycles	67		17.9%
	35		17.9%
Manufacture of beverages	288		12.8%
Machinery and equipment			13.5%
Manufacture of machinery and equipment n.e.c.	133		
Manufacture of other transport equipment	44		15.9%
Retail trade, except of motor vehicles and motorcycles	11	5	
Wholesale trade, except of motor vehicles and motorcycles	50		10.0%
Manufacture of machineryand equipment n.e.c.	16	2	12.5%
Repair and installation of machinery and equipment	34		
Electrical and electronic equipment	149		22.1%
Manufacture of electrical equipment	115		20.9%
Retail trade, except of motor vehicles and motorcycles	16		43.8%
Wholesale trade, except of motor vehicles and motorcycles	18		11.1%
Optical, Technical, Medical Devices	74		32.4%
Manufacture of computer, electronic and optical products	74		32.4%
Furniture	57		14.0%
Retail trade, except of motor vehicles and motorcycles	13	5	0.010.10
Manufacture of furniture	44	3	
Wood products	93	7	
Manufacture of paper and paper products	58	5	
Manufacture of wood and of products of wood and cork, except furniture; ma	anu- 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 Analysis - Visegrad Group 15

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]

C - Manufacturing 43 84 G - Wholesale and ... 47 74

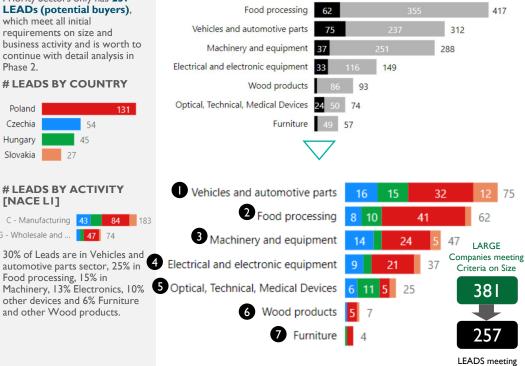
183

30% of Leads are in Vehicles and Food processing, 15% in other devices and 6% Furniture and other Wood products.

MARKETS SIZE & TRENDS **PRIORITY SECTORS RANKING**

Number of Companies in Priority Sectors meeting criteria on Size

Criteria OK Criteria NotOK



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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 machineryand equipment n.e.c.		2			2
Manufacture of other transport equipment		1	5	1	7
	2		13		15
Wholesale of mining, construction and civil engineering machinery		1			1
	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
$\ensuremath{\mathbbm H}$ Wholesale and retail trade and repair of motor vehicles and	2	1	4		7
motorcycles			-		-
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

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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)

Electrical equipment	97%
Rubber and plastic products	97%
Paper and paper products	96%
Machinery and equipment n.e.c.	96%
Repair and installation services of machinery and equip	95%
Computer, electronic and optical products	94%
Fabricated metal products, except machinery and equip	94%
Chemicals and chemical products	92%
Other non-metallic mineral products	90%
Textiles	88%
Food products	74%
Basic metals	57%
Printing and recording services	49%
Wood and of products of wood and cork, except furnitu	44%
Beverages	43%
Furniture	23%
Motor vehicles, trailers and semi-trailers	19%
Other manufactured goods	2%

Top30 most frequent Products LEADs buy from their Suppliers

96%

85%

83%

81%

81%

79%

79%

78%

78%

76%

73%

73%

70%

67%

66% 65% 64% 64% 57% 52% 51% 49% 46% 45% 45% 45% 93%

LADS Duy I	ropso most nequent roddets i
	Electric motors, generators and transformers
	Corrugated paper and paperboard and containe
	Electric lighting equipment
	Other rubber products
	Pesticides and other agrochemical products
	Machining services
	Other general-purpose machinery n.e.c.
	Installation services of industrial machinery and
	Repair services of machinery
	Other fabricated metal products n.e.c.
	Electricity distribution and control apparatus
	Plastic packing goods
	Other special-purpose machinery n.e.c.
	Concrete products for construction purposes
	Measuring, testing and navigating equipment
	Metal structures and parts of structures
	Other plastic products
	Bricks, tiles and construction products, in baked
	Non-domestic cooling and ventilation equipment
	Steel drums and similar containers
	Builders' ware of plastic
	Doors and windows of metal
	Cold drawn wire
	Textile finishing services
	Other printing services
	Other processed and preserved fruit and vegeta
	Other taps and valves
	Paper and paperboard
	Other electrical equipment
	Other pumps and compressors



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LEADS in Priority Sectors Czechia Hungary Poland Slovakia

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

(Measured by number of Target companies with a trade evidence in % of total using NACE/CPA taxonomy)

Who are the typical supplier for Vehicle & Automotive parts Sector?

Vehicles and automotive parts Food processing 211 Machinery and equipment 14 5 37 14 1 Electrical and electronic equipment Optical, Technical, Medical Devices Furniture Wood products 5 7

62

100% 100%

100%

100%

100%

100%

100%

100%

100% 99%

99% 99%

99% 95% 91%

> 87% 87% 87%

87%

87% 86%

74% 74%

73% 73%

Indirect Trade (manufacturer – wholesaler – manufacturer)

	Non-specialised wholesale trade
	Other retail sale not in stores, stalls or markets
	Retail sale of automotive fuel in specialised stores
	Wholesale of chemical products
	Wholesale of clothing and footwear
	Wholesale of computers, computer peripheral equipment an
	Wholesale of electrical household appliances
	Wholesale of hardware, plumbing and heating equipment an
	Wholesale of metals and metal ores
	Wholesale of other machinery and equipment
	Wholesale of waste and scrap
	Wholesale of wood, construction materials and sanitary equip
	Wholesale trade of motor vehicle parts and accessories
	Retail sale of computers, peripheral units and software in spe
	Retail sale via mail order houses or via Internet
	Wholesale of electronic and telecommunications equipment
	Wholesale of other intermediate products
	Agents specialised in the sale of other particular products
	Agents involved in the sale of machinery, industrial equipmen
	Other retail sale in non-specialised stores
	Other retail sale of new goods in specialised stores
	Sale of other motor vehicles
	Wholesale of mining, construction and civil engineering mach
	Wholesale of solid, liquid and gaseous fuels and related prod
	Wholesale of furniture, carpets and lighting equipment
	Non-specialised wholesale of food, beverages and tobacco
	Sale of cars and light motor vehicles
	Wholesale of other food, including fish, crustaceans and moll
	Wholesale of other household goods
	Retail sale in non-specialised stores with food, beverages or t
18%	Agents involved in the sale of timber and building materials
9%	Agents involved in the sale of a variety of goods
8%	Retail sale of hardware, paints and glass in specialised stores

Cold drawing of wire	
Installation of industrial machinery and equipment	
Machining	
Manufacture of corrugated paper and paperboard and of con	
Manufacture of electric motors, generators and transformers	
Manufacture of other rubber products	
Manufacture of bricks, tiles and construction products, in bak	
Manufacture of electric lighting equipment	
Manufacture of other general-purpose machinery n.e.c.	
Manufacture of other plastic products	
Manufacture of instruments and appliances for measuring, te	
Manufacture of electricity distribution and control apparatus	
Manufacture of concrete products for construction purposes	
Manufacture of other fabricated metal products n.e.c.	
Manufacture of plastic packing goods	
Manufacture of steel drums and similar containers	
Manufacture of veneer sheets and wood-based panels	
Repair of machinery	
Manufacture of metal structures and parts of structures	
Manufacture of other electrical equipment	
Manufacture of lifting and handling equipment	
Manufacture of other special-purpose machinery n.e.c.	
Manufacture of tools	
Manufacture of other pumps and compressors	78
Manufacture of other taps and valves	78
Manufacture of other technical and industrial textiles	78
Repair of electronic and optical equipment	78
Manufacture of builders ware of plastic	74%
Manufacture of pesticides and other agrochemical products	74%
Manufacture of plastic plates, sheets, tubes and profiles	73%
Other printing	73%
Manufacture of non-domestic cooling and ventilation equip	71%
Repair of electrical equipment	71%

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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.

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

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)

LEADS in Priority Sectors

Czechia OHungary OPoland OSlovakia



Direct	Trade	(manufacturer –	manufacturer
Direct	ITauc	manulactul el -	manulacturer

Manufacture of pesticides and other agrochemical products	99%
Manufacture of corrugated paper and paperboard and of con	91%
Manufacture of electric motors, generators and transformers	89%
Other processing and preserving of fruit and vegetables	89%
Processing and preserving of meat	89%
Manufacture of other special-purpose machinery n.e.c.	86%
Manufacture of condiments and seasonings	81%
Manufacture of other fabricated metal products n.e.c.	81%
Manufacture of plastic packing goods	81%
Production of meat and poultry meat products	80%
Operation of dairies and cheese making	79%
Finishing of textiles	74%
Manufacture of other non-metallic mineral products n.e.c.	73%
Manufacture of other rubber products	73%
Repair of machinery	71%
Installation of industrial machinery and equipment	70%
Manufacture of concrete products for construction purposes	70%
Manufacture of electric lighting equipment	70%
Other printing	70%
Manufacture of beer	69%
Manufacture of non-domestic cooling and ventilation equip	69%
Manufacture of soft drinks; production of mineral waters and	69%
Machining	67%
Manufacture of homogenised food preparations and dietetic	67%
Manufacture of metal structures and parts of structures	66%
Manufacture of rusks and biscuits; manufacture of preserved	64%
Manufacture of soap and detergents, cleaning and polishing	64%
Manufacture of wine from grape	64%
Production of other textiles	63%
Processing and preserving of potatoes	57%
Manufacture of other non-distilled fermented beverages	56%
Processing and preserving of poultry meat	56%
Manufacture of computers and peripheral equipment	53%
	<u>1472</u>

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Indirect Trade (manufacturer – wholesaler – manufacturer)

Non-specialised wholesale trade Other retail sale not in stores, stalls or markets Non-specialised wholesale of food, beverages and tobacco Wholesale of hardware, plumbing and heating equipment an.. Wholesale of other machinery and equipment Wholesale of electrical household appliances Wholesale of wood, construction materials and sanitary equip... Retail sale of automotive fuel in specialised stores Wholesale of chemical products Wholesale of metals and metal ores Retail sale in non-specialised stores with food, beverages or t... Wholesale trade of motor vehicle parts and accessories Wholesale of other food, including fish, crustaceans and moll.. Wholesale of other intermediate products Wholesale of computers, computer peripheral equipment an... Other retail sale in non-specialised stores Wholesale of clothing and footwear Wholesale of mining, construction and civil engineering mach.. Wholesale of sugar and chocolate and sugar confectionery Wholesale of solid, liquid and gaseous fuels and related prod... Agents involved in the sale of a variety of goods Agents specialised in the sale of other particular products Retail sale of computers, peripheral units and software in spe., Wholesale of china and glassware and cleaning materials Sale of other motor vehicles Sale of cars and light motor vehicles Wholesale of grain, unmanufactured tobacco, seeds and anim.. Retail sale of electrical household appliances in specialised st.. Wholesale of other household goods Wholesale of alcoholic beverages Wholesale of pharmaceutical goods Wholesale of furniture, carpets and lighting equipment

Retail sale of hardware, paints and glass in specialised stores

terials 70% ehicles 69% ehicles 64% anim... 63% erages 57% goods 57% goods 57% pment 54% stores 53% Markets Analysis - Visegrad Group 19

100%

99%

99%

99%

97%

97%

96% 96%

90%

90%

B7%

Czechia Hungary Poland Slovakia



100%

100%

98%

98%

98%

88% 85%

83%

78%

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)

Direct Trade (manufacturer – manufacturer)

95%	Manufacture of bricks, tiles and construction products, in bak
95%	Manufacture of electric motors, generators and transformers
95%	Manufacture of electricity distribution and control apparatus
93%	Cold drawing of wire
93%	Machining
93%	Manufacture of metal structures and parts of structures
88%	Manufacture of electric lighting equipment
88%	Manufacture of other fabricated metal products n.e.c.
88%	Manufacture of other general-purpose machinery n.e.c.
88%	Repair of machinery
85%	Manufacture of doors and windows of metal
85%	Manufacture of other rubber products
83%	Manufacture of non-domestic cooling and ventilation equip
80%	Installation of industrial machinery and equipment
80%	Manufacture of other plastic products
78%	Manufacture of instruments and appliances for measuring, te
73%	Manufacture of corrugated paper and paperboard and of con
73%	Manufacture of steel drums and similar containers
70%	Manufacture of other taps and valves
70%	Manufacture of ready-mixed concrete
70%	Treatment and coating of metals
65%	Manufacture of concrete products for construction purposes
63%	Manufacture of computers and peripheral equipment
63%	Manufacture of paints, varnishes and similar coatings, printin
63%	Manufacture of paper and paperboard
63%	Manufacture of veneer sheets and wood-based panels
60%	Manufacture of builders ware of plastic
58%	Manufacture of other special-purpose machinery n.e.c.
58%	Manufacture of pesticides and other agrochemical products
53%	Manufacture of lifting and handling equipment
53%	Manufacture of other electronic and electric wires and cables
53%	Manufacture of other non-metallic mineral products n.e.c.
53%	Manufacture of plastic packing goods

Indirect Trade (manufacturer – wholesaler – manufacturer)

Non-specialised wholesale trade
Wholesale of electrical household appliances
Wholesale of hardware, plumbing and heating equipment an
Wholesale of other machinery and equipment
Other retail sale not in stores, stalls or markets
Retail sale of automotive fuel in specialised stores
Wholesale of computers, computer peripheral equipment an
Wholesale of metals and metal ores
Wholesale of wood, construction materials and sanitary equip
Wholesale of chemical products
Wholesale of mining, construction and civil engineering mach
Wholesale trade of motor vehicle parts and accessories
Wholesale of furniture, carpets and lighting equipment
Wholesale of solid, liquid and gaseous fuels and related prod
Agents involved in the sale of machinery, industrial equipmen
Wholesale of electronic and telecommunications equipment
Agents specialised in the sale of other particular products
Wholesale of other intermediate products
Non-specialised wholesale of food, beverages and tobacco
Other retail sale of new goods in specialised stores
Wholesale of clothing and footwear
Agents involved in the sale of timber and building materials
Wholesale of waste and scrap
Other retail sale in non-specialised stores
Retail sale of computers, peripheral units and software in spe
Sale of cars and light motor vehicles
Agents involved in the sale of a variety of goods
Wholesale of other food, including fish, crustaceans and moll
Wholesale of other household goods
Retail sale of hardware, paints and glass in specialised stores
Retail sale of electrical household appliances in specialised st
Wholesale of textiles

Sale of other motor vehicles

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٢	REPUBLIKA SLOVENIJA	EVROPSKA UNIJA EVROPSKA UNIJA EVROPSKI SKLAD ZA REGIONALNI RAZVOJ
acture	of plastic packing goods	
metalli	c mineral products n.e.c.	
nu anu	electric wires and cables	

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Czechia Hungary Poland Slovakia



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)

90%

90%

90%

90%

90%

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

Direct Trade (manufacturer - manufacturer)

100	Manufacture of electric motors, generators and transformers
97%	Manufacture of corrugated paper and paperboard and of con
93%	Manufacture of other electrical equipment
93%	Manufacture of other electronic and electric wires and cables
2	Manufacture of builders ware of plastic
2	Manufacture of electric lighting equipment
2	Manufacture of other general-purpose machinery n.e.c.
	Manufacture of pesticides and other agrochemical products
2	Manufacture of steel drums and similar containers
79%	Manufacture of bricks, tiles and construction products, in bak
76%	Installation of industrial machinery and equipment
76%	Manufacture of doors and windows of metal
76%	Manufacture of other plastic products
76%	Manufacture of plastic packing goods
72%	Machining
72%	Manufacture of concrete products for construction purposes
72%	Manufacture of other rubber products
66%	Manufacture of other special-purpose machinery n.e.c.
62%	Manufacture of dyes and pigments
62%	Manufacture of loaded electronic boards
59%	Manufacture of electricity distribution and control apparatus
55%	Manufacture of consumer electronics
52%	Repair of machinery
48%	Manufacture of computers and peripheral equipment
45%	Finishing of textiles
45%	Manufacture of plastic plates, sheets, tubes and profiles
41%	Manufacture of other fabricated metal products n.e.c.
41%	Manufacture of wiring devices
38%	Manufacture of electric domestic appliances
38%	Manufacture of instruments and appliances for measuring, te
38%	Manufacture of non-domestic cooling and ventilation equip
38%	Manufacture of rusks and biscuits: manufacture of preserved
38%	Manufacture of soft drinks: production of mineral waters and

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Indirect Trade (manufacturer – wholesaler – manufacturer)

Non-specialised wholesale of food, beverages and tobacco Non-specialised wholesale trade Other retail sale not in stores, stalls or markets Retail sale of automotive fuel in specialised stores Wholesale of chemical products Wholesale of electrical household appliances Wholesale of electronic and telecommunications equipment Wholesale of hardware, plumbing and heating equipment an. Wholesale of other machinery and equipment Wholesale of wood, construction materials and sanitary equip. Wholesale trade of motor vehicle parts and accessories Wholesale of metals and metal ores Agents specialised in the sale of other particular products Wholesale of furniture, carpets and lighting equipment Wholesale of mining, construction and civil engineering mach.. Other retail sale in non-specialised stores Retail sale via mail order houses or via Internet Wholesale of clothing and footwear Agents involved in the sale of machinery, industrial equipmen. Wholesale of other intermediate products Other retail sale of new goods in specialised stores Wholesale of computers, computer peripheral equipment an.. Agents involved in the sale of timber and building materials Retail sale of computers, peripheral units and software in spe. Wholesale of waste and scrap Wholesale of other food, including fish, crustaceans and moll. Wholesale of solid, liquid and gaseous fuels and related prod.. Retail sale of electrical household appliances in specialised st.. Retail sale of hardware, paints and glass in specialised stores Sale of cars and light motor vehicles Wholesale of china and glassware and cleaning materials Wholesale of other household goods

100% 100% 100% 100% 100% 86%

100%

100%

100%

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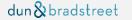
31%

31%

31%

21

Wholesale of textiles



😑 Czechia 🔵 Hungary 🛑 Poland 🥮 Slovakia



100%

100%

100%

100%

100%

100%

100%

100%

22

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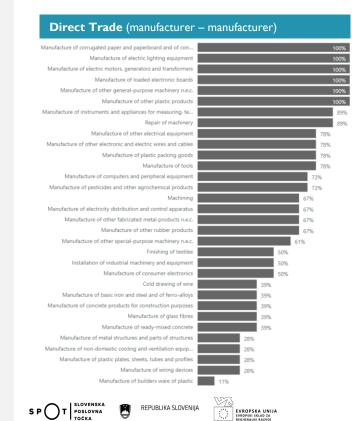
89%

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

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

Indirect Trade (manufacturer – wholesaler – manufacturer)

Non-specialised wholesale trade				
Other retail sale not in stores, stalls or markets				
Retail sale via mail order houses or via Internet				
Wholesale of chemical products				
Wholesale of computers, computer peripheral equipment an				
Wholesale of electrical household appliances				
Wholesale of electronic and telecommunications equipment				
Wholesale of hardware, plumbing and heating equipment an				
Wholesale of metals and metal ores				
Wholesale of other machinery and equipment				
Wholesale of wood, construction materials and sanitary equip				
Retail sale of computers, peripheral units and software in spe				
Agents involved in the sale of machinery, industrial equipmen				
Non-specialised wholesale of food, beverages and tobacco				
Retail sale of automotive fuel in specialised stores				
Wholesale of waste and scrap				
Wholesale of furniture, carpets and lighting equipment				67%
Wholesale of other intermediate products				67%
Agents specialised in the sale of other particular products	1			61%
Wholesale of other household goods			50%	
Agents involved in the sale of timber and building materials		39%		
Other retail sale in non-specialised stores		39%		
Wholesale of clothing and footwear		39%		
Wholesale of solid, liquid and gaseous fuels and related prod		39%		
Wholesale trade of motor vehicle parts and accessories		39%		
Other retail sale of new goods in specialised stores	28%			
Retail sale in non-specialised stores with food, beverages or t	28%			
Sale of cars and light motor vehicles	28%			
Wholesale of china and glassware and cleaning materials	28%			
Wholesale of mining, construction and civil engineering mach	28%			
Wholesale of other food, including fish, crustaceans and moll	28%			





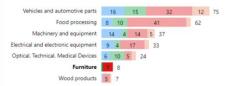
RANKING OF THE MOST POTENTIAL MARKET SECTORS DEMAND VS SUPPLY IN FURNITURE

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

Czechia OHungary Oland Slovakia



100%

100%

100%

100%

100%

100%

100%

100%

100%

100% 100%

88%

88%

88%

88%

889

88%

889

88%

88%

88% 88% 88% 88%

Indirect Trade (manufacturer – wholesaler – manufacturer)

Agents involved in the sale of machinery, industrial equipmen
Agents specialised in the sale of other particular products
Non-specialised wholesale of food, beverages and tobacco
Non-specialised wholesale trade
Other retail sale not in stores, stalls or markets
Retail sale of automotive fuel in specialised stores
Retail sale via mail order houses or via Internet
Wholesale of chemical products
Wholesale of computers, computer peripheral equipment an
Wholesale of hardware, plumbing and heating equipment an
Wholesale of other intermediate products
Wholesale of other machinery and equipment
Wholesale of textiles
Wholesale of wood, construction materials and sanitary equip
Other retail sale in non-specialised stores
Other retail sale of new goods in specialised stores
Retail sale of computers, peripheral units and software in spe
Retail sale of electrical household appliances in specialised st
Retail sale of hardware, paints and glass in specialised stores
Sale of cars and light motor vehicles
Wholesale of china and glassware and cleaning materials
Wholesale of clothing and footwear
Wholesale of electrical household appliances
Wholesale of electronic and telecommunications equipment
Wholesale of furniture, carpets and lighting equipment
Wholesale of metals and metal ores
Wholesale of other food, including fish, crustaceans and moll
Wholesale of other household goods
Wholesale of solid, liquid and gaseous fuels and related prod
Wholesale trade of motor vehicle parts and accessories
Agents involved in the sale of timber and building materials
Retail sale of furniture, lighting equipment and other househ
Wholesale of pharmaceutical goods

Direct Trade	(manufacturer – manu	facturer)
--------------	----------------------	-----------

	100%
	100%
	100%
	100%
	100%
	100%
	100%
	100%
	100%
	88%
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	75%
63%	
63%	
63%	
63%	
63%	
63%	
115-11	
	63% 63% 63% 63% 63%

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● Czechia ● Hungary ● Poland ● Slovakia



100%

100% 100%

100%

100%

100% 100% 100% 100% 100% 100% 100% 100% 100%

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)

Indirect Trade (manufacturer – wholesaler – manufacturer)

	Agents involved in the sale of machinery, industrial equipmen
	Agents specialised in the sale of other particular products
	Non-specialised wholesale of food, beverages and tobacco
	Non-specialised wholesale trade
	Other retail sale not in stores, stalls or markets
	Other retail sale of new goods in specialised stores
	Retail sale of automotive fuel in specialised stores
	Wholesale of chemical products
	Wholesale of computers, computer peripheral equipment an
	Wholesale of electrical household appliances
	Wholesale of furniture, carpets and lighting equipment
	Wholesale of hardware, plumbing and heating equipment an
	Wholesale of metals and metal ores
	Wholesale of mining, construction and civil engineering mach
	Wholesale of other intermediate products
	Wholesale of other machinery and equipment
	Wholesale of solid, liquid and gaseous fuels and related prod
	Wholesale of waste and scrap
	Wholesale of wood, construction materials and sanitary equip
	Wholesale trade of motor vehicle parts and accessories
	Agents involved in the sale of a variety of goods
	Retail sale in non-specialised stores with food, beverages or t
	Sale of other motor vehicles
29%	Other retail sale in non-specialised stores
29%	Retail sale of computers, peripheral units and software in spe
29%	Retail sale of hardware, paints and glass in specialised stores
29%	Wholesale of clothing and footwear
29%	Wholesale of electronic and telecommunications equipment
29%	Wholesale of textiles

Direct Trade	(manufacturer – manu	facturer)
--------------	----------------------	-----------

Installation of industrial machinery and equipment		100%
Manufacture of corrugated paper and paperboard and of con		100%
Manufacture of electric motors, generators and transformers		100%
Manufacture of electricity distribution and control apparatus		100%
Manufacture of instruments and appliances for measuring, te		100%
Manufacture of non-domestic cooling and ventilation equip		100%
Manufacture of other electronic and electric wires and cables		100%
Manufacture of other fabricated metal products n.e.c.		100%
Manufacture of other pumps and compressors		100%
Manufacture of other rubber products		100%
Manufacture of other special-purpose machinery n.e.c.		100%
Manufacture of other taps and valves		100%
Manufacture of other technical and industrial textiles		100%
Manufacture of paper and paperboard		100%
Manufacture of pesticides and other agrochemical products		100%
Repair of electronic and optical equipment		100%
Repair of machinery		100%
Manufacture of bricks, tiles and construction products, in bak	719	6
Manufacture of condiments and seasonings	719	6
Manufacture of lifting and handling equipment	719	6
Manufacture of made-up textile articles, except apparel	719	6
Manufacture of metal structures and parts of structures	719	6
Manufacture of other general-purpose machinery n.e.c.	719	6
Manufacture of plastic packing goods	719	6
Manufacture of soap and detergents, cleaning and polishing	719	6
Manufacture of soft drinks; production of mineral waters and	719	6
Manufacture of steel drums and similar containers	719	6
Other printing	719	6
Processing and preserving of meat	719	6
Production of meat and poultry meat products	719	6
Repair of electrical equipment	719	6
Machining	29%	
Manufacture of doors and windows of metal	29%	
	WZ2	

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STEP2 What are **the most potential sectors** in V4 countries for Slovenian exporters <u>in terms of actual businesses</u> **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
- I76 Large



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)

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.

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SLOVENIAN MARKET MARKET OVERALL PERFORMANCE



GDP per Capita (EUR)

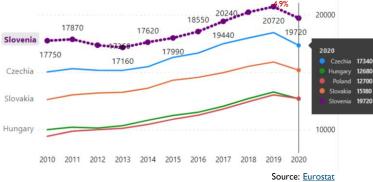
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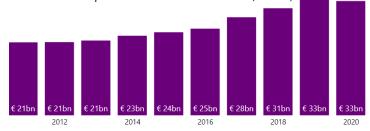
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Total Slovenian Exports Value Trend WORLDWIDE (bn EUR)

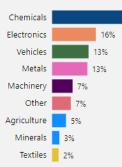


Total Exports Value Trend in V4 (mil. EUR)



SLOVENIAN MARKET SLOVENIAN EXPORT TRENDS BY PRODUCTS

EXPORTS TO V4 IN 2020 BY PRODUCT GROUPS



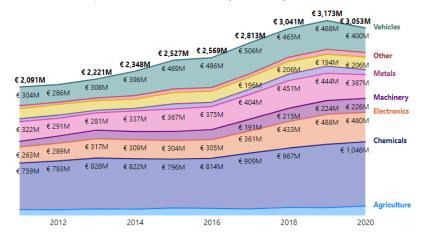
TRENDS

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%).

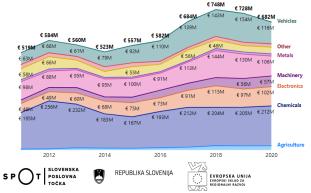
The largest increase in exports was to Poland (+368m EUR, +59%), Hungary (+302m, +55%), Slovakia (+154m, +42%), the Czech (+98m, +17%). Exports to the Czech grew significantly in 2016-2018 (+29%) but have been declining since that year (-9%).

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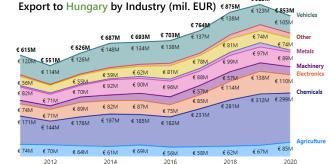
Slovenian Export to V4 Countries by Industry (mil. EUR)

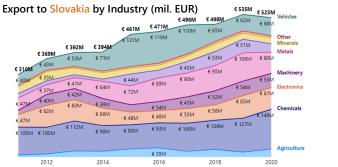


Export to Czech by Industry (mil. EUR)









Markets Analysis - Visegrad Group 28

SLOVENIAN MARKET SLOVENIAN TOTAL VS V4 EXPORTS STRUCTURE IN 2020

PRODUCT GROUP

Manufacture of leather and related products

Total

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.

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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%	•
	€ 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%	L
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%	
	€ 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)

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PRODUCT	Czechia	Hungary	Poland	Slovakia	Total
GROOF					•
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

EVROPSKA UNIJA

EVROPSKI SKLAD ZA REGIONALNI RAZVOJ

REPUBLIKA SLOVENIJA

PF	ODUCT 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%
Ξ	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%
Ξ	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%
Ξ	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%
Ξ	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%
Ξ	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%
Ξ	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%
Ξ	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%
Ξ	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	£ 151 204 706	£ 10 065 60A	12 20/

Markets Analysis - Visegrad Group 29

€ 32,849,884,174 € 3,053,310,148 9.3%

€ 19.965.694 13.2%

€ 151.204.786

TOTAL EXPORTS EXPORTS TO V4

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	result for the accounting period	Total Exports in 2020	Exports to V4 in 2020	NACE_L1_Description	Total Revenue in 2020	Sum of Net business result for the	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				•	accounting period		
MANUFACTURING	€ 30.016.202.309	\$1,355,743,258	€ 31,526,001,630	€ 2,985,268,181	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	(\$384,575,306)	€ 324,690,853	€O	Manufacture of electrical equipment	€ 3,738,451,850	\$75,121,846	€ 3,020,920,236	€ 327,647,061
TRANSPORTATION AND STORAGE	€ 5,774,047,953	\$200,736,202			Manufacture of motor vehicles, trailers and semi-trailers	€ 3,356,914,907	\$52.055.662	€ 4.143.033.391	€ 244.934.133
CONSTRUCTION	€ 5.248.862,503	\$142,690,822			Manufacture of fabricated metal products, except machinery and	€ 3,247,608,407		€ 1,396,078,805	
PROFESSIONAL SCIENTIFIC AND TECHNICAL ACTIVITIES	€ 4,949,427,673	\$281,607,128	€ 178,964	€ 1,619	equipment	0 3,247,000,407	\$120,124,040	0 1,550,010,005	C 107,127,100
INFORMATION AND COMMUNICATION	€ 3,627,269,354	\$193,987,218	€ 158,151,893	€ 5,309,571	Manufacture of basic pharmaceutical products and pharmaceutical	€ 2.818.237.413	\$400,948,778	€ 7.146.889.950	€ 559,695,175
FINANCIAL AND INSURANCE ACTIVITIES	€ 2,007,276,923	\$299,949,375				€ 2,010,237,413	\$400,940,770	€ 7,140,009,930	€ 359,095,175
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	€ 1,566,342,880	\$44,991,729			preparations				
WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND	€ 1,322,290,984	\$34,977,604	€ 289,073,491	€ 27,091,919	Manufacture of basic metals	€ 2,408,151,198	44	€ 1,760,238,097	€ 250,104,941
REMEDIATION ACTIVITIES					Manufacture of machinery and equipment n.e.c.	€ 2,050,987,856		€ 2,692,549,982	
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	€ 1,262,961,944				Manufacture of rubber and plastic products	€ 2,050,011,953	\$99,486,537	€ 1,525,824,160	€ 180,239,724
REAL ESTATE ACTIVITIES	€ 1,016,081,770				Manufacture of food products	€ 2,047,465,563	\$97,011,555	€ 1,059,976,327	€ 113,877,813
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	€ 543,239,814				Manufacture of chemicals and chemical products	€ 1,508,556,061	\$118,227,937	€ 1,785,591,212	€ 214,986,773
ARTS, ENTERTAINMENT AND RECREATION	€ 421,790,559		€ 492,982		Manufacture of other non-metallic mineral products	€ 985.698.339	\$73.835.673	€ 673,295,125	€ 78.232.878
AGRICULTURE, FORESTRY AND FISHING	€ 418,875,448		€ 454,101,579	€ 32,485,492	Manufacture of wood and of products of wood and cork, except	€ 981,550,700		€ 874,780,265	
MINING AND QUARRYING	€ 290,656,927		€ 97,053,248		furniture; manufacture of articles of straw and plaiting materials	€ 501,550,700	\$45,202,323	2 074,700,200	£ 24,540,035
OTHER SERVICE ACTIVITIES	€ 179,022,800		€ 139,534	€0		€ 863,533,714	\$32,026,539	€ 1.247.611.054	€ 152,320,668
EDUCATION	€ 97,339,769				Manufacture of computer, electronic and optical products				
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY	€ 7,344,622	\$448,480			Manufacture of paper and paper products	€ 858,229,685		€ 659,164,386	€ 67,672,102
SOCIAL SECURITY	€ 97,124,282,489	43 477 555 743		€ 3,053,310,148	Repair and installation of machinery and equipment	€ 807,686,605	\$22,919,578		
Total	€ 97,124,282,469	\$2,877,555,742	€ 32,849,884,174	€ 3,053,310,148	Other manufacturing	€ 415,888,348	\$16,363,830	€ 561,828,575	€ 71,902,473
					Printing and reproduction of recorded media	€ 375,370,784	\$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

Manufacture of tobacco products

Total

Manufacture of coke and refined petroleum products





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\$7,581,842

(\$221,646)

(\$52,158)

\$1,355,743,258

€ 233,114,748

€ 647,376,153

€ 31.526.001.630

€ 294,307

€ 18.668.241

€ 90.896.327

€ 2.985.268.181

€ 1,293

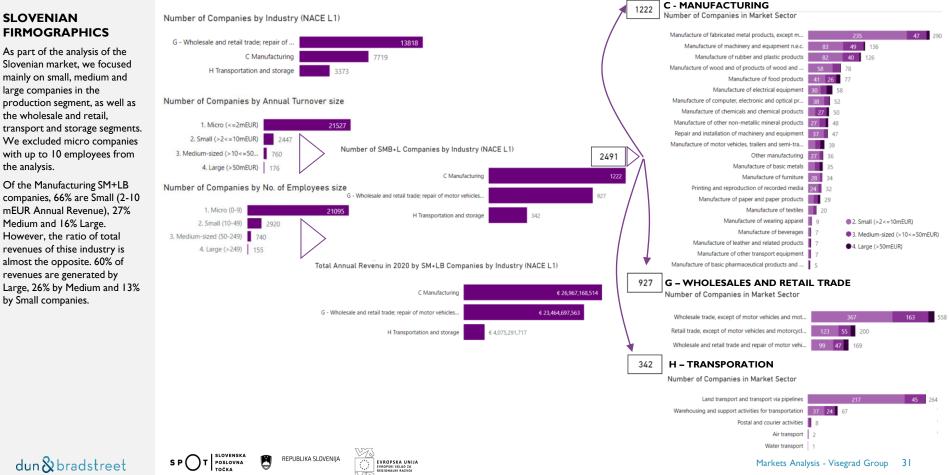
€ 138,763,905

€ 30.016.202.309

€ 1.530.312

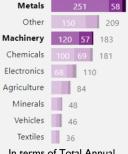
€ 238,674

SLOVENIAN MARKET MARKET SECTORS SIZE BY NUMBER OF COMPANIES

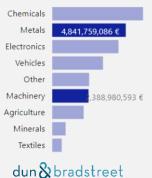


FIRMOGRAPHICS IN METAL AND MACHINERY SECTOR / PRODUCT GROUP

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)

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TOP COMPANIES IN METAL PRODUCT GROUP

COMPANY_NAME	# OF	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
SIJ 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
SIJ 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 o 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
MAROVT 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
DOM-ITIAN d.d.			Manufacture of motol structures and moto of structures
REM d.o.o.	188	33,467,849 €	Manufacture of metal structures and parts of structures
	188 184		Manufacture of metal structures and parts of structures Manufacture of metal structures and parts of structures

EVROPSKA UNIJA

EVROPSKI SKLAD ZA REGIONALNI RAZVOJ

200

TOP COMPANIES IN MACHINERY PRODUCT GROUP

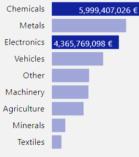
DMPANY_NAME # OF ANNUAL EMPLOYEES REVENUE 2020			NACE
SŽ - VIT, d.o.o.	1778	119,977,365 €	Repair and maintenance of other transport equipment
PALFINGER d.o.o.	782	120,842,431 €	Manufacture of lifting and handling equipment
HTZ Velenje, I.P., d.o.o.	754	33,059,379 €	Repair of machinery
ADK d.o.o.	636	121,398,319 €	Manufacture of lifting and handling equipment
DANFOSS TRATA, d.o.o.	493	116,972,722 €	Installation of industrial machinery and equipment
SIJ 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
Poclain 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 - VITLI KRPAN, 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
ARMATURE	152	20 303 044 E	Manufacture of other tans and values

Markets Analysis - Visegrad Group 32

FIRMOGRAPHICS IN CHEMICALS NAD **ELECTRONICS**

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

Metals					58	325
Other		150		2	209	
Machinery		20	57	18	3	
Chemicals	10	00 6	9	18	1	
Electronics	68		110			
Agriculture		8	4			
Minerals		48				
Vehicles		46				
Textiles		36				
In terms revenue				nn	ual	



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SLOVENIAN MARKET MANUFACTURING (2/5)

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SLOVENSKA

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TOČKA

REPUBLIKA SLOVENIJA

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	181	20,745,115 €	Manufacture of builders' ware of plastic
Total	29074	5,999,407,026 €	

EVROPSKA UNIJA

EVROPSKI SKLAD ZA REGIONALNI RAZVOJ

200

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
SKRA 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 <mark>,00</mark> 0 €	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

FIRMOGRAPHICS IN VEHICLES AND TEXTILES

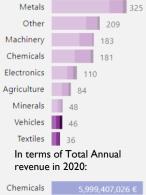
Number of SM+Large manufacturing companies in Slovenia focus on Vehicles and Textiles production are as follows:

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SLOVENSKA

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Chemicals	5,999,407,026 €
Metals	4,841,759,086 €
Electronics	4,365,769,098 €
Vehicles	<mark>3,34</mark> 6,481,567 €
Other	2,434,691,431 €
Machinery	2,388,980,593 €
Agriculture	2,076,384,973 €
Minerals	885,175,006 €
Textiles	628,519,733 €

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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
ITAS-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 €	

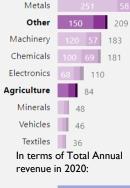
TOP COMPANIES IN TEXTILES PRODUCT GROUP

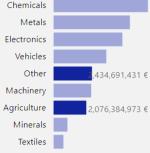
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
BOXMARK LEATHER d.o.o.	976	100,237,540 €	Manufacture of luggage, handbags and the like, saddlery and harness
DANI AFC d.o.o.	365	50,954,597 €	Tanning and dressing of leather; dressing and dyeing of fur
FILC d.o.o.	354	90,518,417 €	Manufacture of non-wovens 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 LITIJA 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
KAAAP 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
INTERSOCKS 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
SENČILA 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 €	

REPUBLIKA SLOVENIJA EVROPSKA UNIJA EVROPSKI SKLAD ZA REGIONALNI RAZVOJ 200

FIRMOGRAPHICS IN CHEMICALS NAD ELECTRONICS

Number of SM+Large manufacturing companies in Slovenia focus on Agriculture and Others production are as follows: 325





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SLOVENIAN MARKET MANUFACTURING (4/5)

SLOVENSKA

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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
LJUBLJANSKE 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
NCOM 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
ATA EMONA d.o.o.	267	75,555,279 €	Manufacture of prepared feeds for farm animals
ILEKARNA 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
(RAS 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
(OTO 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
NTES STORITVE d.o.o.	97	3,398,135 €	Manufacture of bread: manufacture of fresh pastry goods
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TOP COMPANIES IN OTHERS PRODUCT GROUP

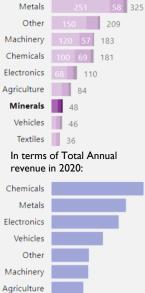
COMPANY_NAME	# OF EMPLOYEES	ANNUAL REVENUE 2020	NACE
NOVEM CAR INTERIOR DESIGN d.o.o.	702	86,878,956 €	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
ELAN, d.o.o.	623	57,476,000 €	Manufacture of sports goods
Paloma d.d.	483	75,223,841 €	Manufacture 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
CETIS d.d.	295	33,717,138 €	Other printing
FOTONA 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
BIOPROD 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 BLED, 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
RADEČE 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 €	

REPUBLIKA SLOVENIJA EVROPSKA UNIJA EVROPSKI SKLAD ZA REGIONALNI RAZVOJ 200

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FIRMOGRAPHICS IN MINERALS

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



885,175,006 €

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Minerals

Textiles

SLOVENAN 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.o
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.o
IMERYS 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 Škocjan, d.o.o.	53	9,319, <mark>2</mark> 42 €	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.o
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 Total Number Revenue 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 14450 Food processing € 2,281,265,285 Plastic products € 1,976,305,421 14034 Vehicles and automotive parts € 3,350,478,653 14012 Wood products € 1,819,402,835 11127 Basic metals € 2,364,167,461 8806 Chemicals € 1,504,495,910 6556 € 727,923,685 Textiles 6465 Optical, Technical, Medical Devices € 852.989.986 5621 Furniture € 371,870,941 3882 Other € 434,919,675 3623 Printing € 379,254,750 3219 164103 Total € 26,061,680,652





REPUBLIKA SLOVENIJA

Markets Analysis - Visegrad Group 38

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.

		-	_	_	-	-	•	-	
from]	Priority Sector (Supplier Site)	4 Electrical and electronic equipment	2 Food processing	6 Furniture	3 Machinery and equipment	5 Optical, Technical, Medical Devices	Vehicles and automotive parts	7 Wood products	Total
services	Machinery and equipment	100%	97%	100%	97%	100%	100%	100%	99 %
erv	Electrical and electronic equipment	100%	90%	100%	100%	100%	100%	100%	97 %
م م	Plastic products	100%	90%	100%	97%	100%	100%	100%	97 %
cts	Wood products	96%	93%	100%	93%	100%	100%	100%	97 %
buy products	Metal products	96%	90%	100%	93%	81%	100%	100%	94%
, a	Optical, Technical, Medical Devices	96%	87%	88%	93%	100%	100%	100%	94%
ĥ.	Chemicals	100%	100%	100%	83%	75%	87%	100%	92%
ers	Minerals	100%	84%	100%	97%	44%	100%	100%	90%
fng	Textiles	52%	92%	100%	97%	56%	100%	100%	88%
of Leads-potential buyers	Food processing	84%	97%	88%	59%		87%	71%	78%
oten	Basic metals	40%	8%	88%	93%	44%	100%		57%
pd-	Printing	12%	70%	25%	24%		69%	71%	49 %
eads	Furniture	8%	30%	100%	28%		20%		23%
۲ ل	Vehicles and automotive parts $^{m{st}}$				7%		61%		19%
∛ ♦	Other				17%				2%
م ا	Total	100%	100%	100%	100%	100%	100%	100%	100%

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]

* 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.**

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probability that potential buyers need products or

these industry/sector

services by

The most potential sectors in Slovenia by

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REPUBLIKA SLOVENIJA

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.

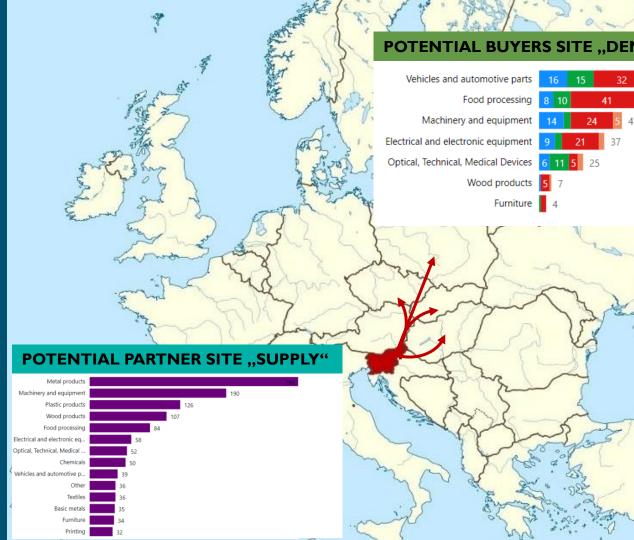
Tender Priority	Sector	Ranking by size (Annual Revenue)	Ranking by size (Number of Employees)	Ranking by probability of demand-supply fit	FINAL RANKING
Priority	Electrical and electronic equipment	1	3	2	6
Priority	Machinery and equipment	4	2	1	7
Priority	Vehicles and automotive parts	2	6	3	11
Priority	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



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:

I. 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 targeted potential buyers 257 (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].

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246 LEADS identified in V4 in a following Priority Sectors.. Vehicles and automotive parts 75 Food processing 10 41 Machinery and equipment 24 Electrical and electronic equipment Optical, Technical, Medical Devices 25 Wood products 5 Furniture 3 using CPA classification (# of them)... М Repair and instal Computer, e Fabricated metal Che Other Wood and of pr Motor veh

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...namely a following Products

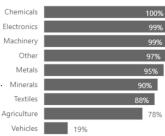
Electrical equipment		201
Rubber and plastic products		200
Paper and paper products		199
lachinery and equipment n.e.c.		198
llation services of machinery		197
electronic and optical products		195
al products, except machinery		195
emicals and chemical products		190
non-metallic mineral products		187
Textiles		182
Food products		152
Basic metals	117	
Printing and recording services	102	
roducts of wood and cork, ex	92	
Beverages	88	
Furniture	48	
hicles, trailers and semi-trailers	39	
Other manufactured goods	5	
REPUBLIKA SLOVENIJA	EVROPSKA UNIJA EVROPSKA UNIJA Referenter Razvoj	

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS

FROM LEADS TO POTENTIAL SUPPLIERS

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

PRODUCT GROUP / BUSINESS ACTIVITY [NACE L2] # of # of Annual Revenue Companies Employees Metals 348 29909 € 4,921,501,977 Manufacture of fabricated metal products, except machinery 312 € 2.578.422.460 and equipment Manufacture of basic metals 36 € 2.343.079.517 8647 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 12159 € 1,764,576,621 Manufacture of chemicals and chemical products 52 6308 € 1,468,453,060 Other 228 15933 € 2,503,151,165 Manufacture of wood and of products of wood and cork. 87 5269 € 798.047.609 except furniture; manufacture of articles of straw and plaiting materials Manufacture of paper and paper products 29 3529 € 805.487.479 Other manufacturing 39 € 392,024,666 Manufacture of furniture 37 2167 € 238,508,663 36 Printing and reproduction of recorded media 1844 € 269,082,748 Vehicles 48 13543 € 3,312,668,030 Manufacture of motor vehicles, trailers and semi-trailers 48 13543 € 3.312.668.030 Aariculture 90 11807 € 2.095.253.361 Manufacture of food products 83 10707 € 1,877,363,143 Manufacture of beverages 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 1939 € 287,310,998 Total 1300 137934 € 24,200,727,916



Electronics

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

2

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:

- I. Vehicles and automotive parts
- 2. Machinery and equipment
- 3. Electrical and electronical equipment

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

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

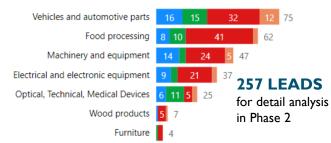
Priority Sector	Rank	Priority Sector
Vehicles and automotive parts	I.	Vehicles and automotive parts
Food processing	2	Machinery and equipment
Machinery and equipment	3	Electrical and electronic equipme
Electrical and electronic equipment	4	Food processing
Optical, Technical, Medical Devices	5	Optical,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

Priority Sector Rank Т 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

The Slovenian sectors by Size and

Demand-Supply Fit

[by complex ranking evaluation]



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Markets Analysis - Visegrad Group

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Rank

2

3

5

6



REPUBLIKA SLOVENIJA

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS I. VEHICLES AND AUTOMOTIVE PARTS



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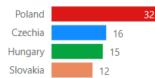
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REPUBLIKA SLOVENIJA

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Number of LEADS by Country



Number of LEADS by Ultimate Owner Country

2	GERMANY
13	USA
5	FRANCE
5	KOREA REP OF
4	JAPAN
3	CHINA
3	IRELAND
3	NETHERLANDS
3	POLAND
2	INDIA
2	SPAIN
1	AUSTRIA
1	CANADA
1	ENGLAND
1	HUNGARY
1	ITALY
1	LUXEMBOURG

SWEDEN

TOP30 Companies in V4

37

COMPANY_NAME	COUNTRY	ANNUAL REVENUE 2020
ŠKODA AUTO a.s.	Czechia	€ 17,240,862,74
VOLKSWAGEN SLOVAKIA, a.s.	Slovakia	€ 9,785,295,00
AUDI HUNGARIA Zártkörűen Működő Részvénytársaság	Hungary	€ 7,517,629,00
Hyundai Motor Manufacturing Czech s.r.o.	Czechia	€ 4,840,879,68
Kia Slovakia s. r. o.	Slovakia	€ 4,596,607,00
VOLKSWAGEN POZNAŃ SP Z O O	Poland	€ 3,484,067,44
PCA Slovakia, s.r.o.	Slovakia	€ 3,457,724,00
Mercedes-Benz Manufacturing Hungary Korlátolt Felelősségű Társaság	Hungary	€ 3,411,819,23
FCA POLAND S A	Poland	€ 2,227,736,34
Magyar Suzuki Zártkörűen Működő Részvénytársaság	Hungary	€ 1,656,668,32
VOLKSWAGEN MOTOR POLSKA SP Z O O	Poland	€ 1,304,073,52
Toyota Motor Manufacturing Czech Republic, s.r.o.	Czechia	€ 1,269,662,35
Mobis Slovakia s.r.o.	Slovakia	€ 1,227,521,00
Robert Bosch Energy and Body Systems Gépjárműelektromossági Alkatrész Gyártó és Forgalmazó Korlátolt Felelősségű Társaság	Hungary	€ 1,030,796,85
BOSCH DIESEL s.r.o.	Czechia	€ 860,217,17
Faurecia Automotive Slovakia s.r.o.	Slovakia	€ 839,173,00
ZF AUTOMOTIVE SYSTEMS POLAND SP Z O O	Poland	€ 796,877,44
TOYOTA MOTOR MANUFACTURING POLAND SP Z O O	Poland	€ 769,444,96
VOLVO POLSKA SP Z O O	Poland	€ 748,831,70
Robert Bosch, spol. s r.o.	Czechia	€ 743,014,98
SUNGWOO HITECH s.r.o.	Czechia	€ 731,125,13
SOLARIS BUS & COACH SP Z O O	Poland	€ 697,158,08
Schaeffler Savaria Korlátolt Felelősségű Társaság	Hungary	€ 658,865,30
PORSCHE INTER AUTO POLSKA SP Z O O	Poland	€ 642,429,88
Brose CZ spol. s r.o.	Czechia	€ 611,337,21
SMR Automotive Mirror Technology Hungary	Hungary	€ 609,634,97
OPEL MANUFACTURING POLAND SP Z O O	Poland	€ 588,870,63
Lear Corporation Hungary Autóipari Gyártó Korlátolt Felelősségű Társaság	Hungary	€ 561,683,59
Adient Czech Republic s.r.o.	Czechia	€ 561,569,64

MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS 2. MACHINERY & EQUIPMENT



Number of LEADS by Business Activity [NACE]

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Manufacture of railway locomotives and rolling stock Manufacture of non-domestic cooling and ventilation equipment Manufacture of bearings, gears, gearing and driving elements Manufacture of engines and turbines, except aircraft, vehicle and cycle engines Retail sale of clothing in specialised stores Wholesale of metals and metal ores Manufacture of agricultural and forestry machinery Manufacture of machinery and equipment n.e.c. Manufacture of other general-purpose machinery n.e.c. Manufacture of other special-purpose machinery n.e.c. Other retail sale in non-specialised stores Retail sale of automotive fuel in specialised stores Retail sale of cosmetic and toilet articles in specialised stores Retail trade, except of motor vehicles and motorcycles Manufacture of air and spacecraft and related machinery Manufacture of general-purpose machinery Manufacture of power-driven hand tools Retail sale of books in specialised stores Retail sale of footwear and leather goods in specialised stores Retail sale of sporting equipment in specialised stores Retail sale via mail order houses or via Internet Wholesale of agricultural machinery, equipment and supplies Wholesale of hardware, plumbing and heating equipment and supplies

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Number of LEADS by Country



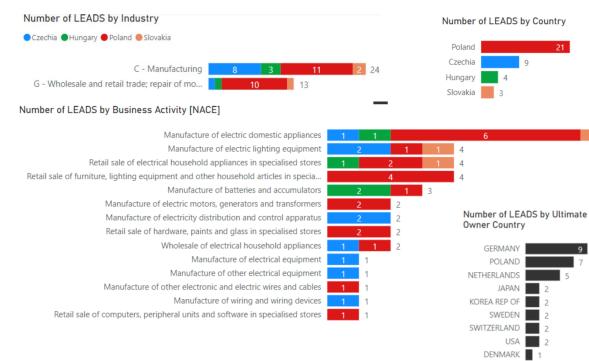
4 Number of LEADS by Ultimate **Owner Country** GERMANY POLAND ENGLAND USA CZECH REPUBLIC JAPAN CANADA FRANCE KOREA REP OF NETHERLANDS PORTUGAL AUSTRALIA CAYMAN ISLAN.. CYPRUS HONG KONG HUNGARY LIECHTENSTEIN LUXEMBOURG **SLOVAKIA**

SWITZERLAND

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

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MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS 3. ELECTRICAL AND ELECTRONICAL EQUIPMENT



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 WROCŁAW 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
Varroc 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

Markets Analysis - Visegrad Group 46

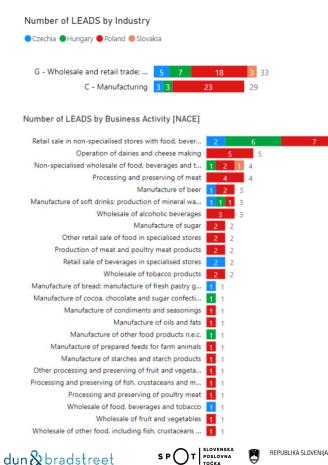
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FRANCE HUNGARY INDIA ITALY SLOVAKIA

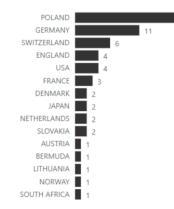
MOST POTENTIAL SECTORS TO SUPPORT & GENERATE NEW LEADS 4. FOOD PROCESSING



Number of LEADS by Country



Number of LEADS by Ultimate Owner Countries



TOP17 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 ŻYWIEC 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
Plzeňský 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



SLOVENSKA

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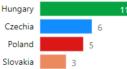
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REPUBLIKA SLOVENIJA

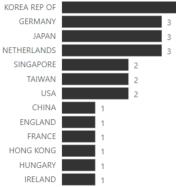
EVROPSKA UNIJA

EVROPSKI SKLAD ZA REGIONALNI RAZVOJ

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 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
Mondi Štětí a.s.	Czechia	€ 464,574,000	Manufacture of paper and paperboard
Mondi 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 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

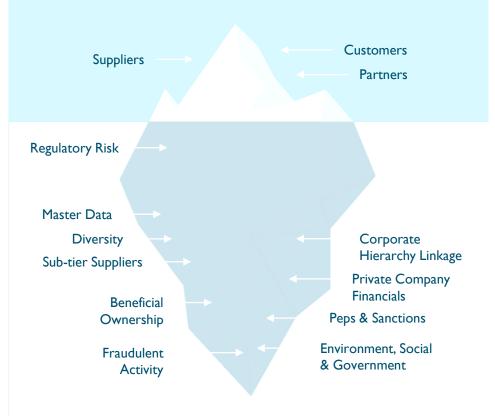




REPUBLIKA SLOVENIJA

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



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 I 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.
- I. 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.

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

TARGET SECTORS LEADS **HIGH** OUALITY CONTACTS REPUBLIKA SLOVENIJA POSLOVNA EVROPSKA UNITA EVROPSKI SKLAD ZA REGIONALNI RAZVOJ

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 & Bradtreet 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

Ru	le & Requirements	Phase I Target Sector > Lead	Phase 2 Lead > High Quality Contact
I	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

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.



REPUBLIKA SLOVENIJA

EVROPSKA UNIJA EVROPSKI SKLAD ZA REGIONALNI RAZVOJ

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 %

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



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TABLE 03 - TOTAL IMPORTS BY PRODUCTS (CPA)

Country	Year	ducts of iculture and nting	ducts of forestry d logging	ducts	ii and lignite de petroleum and	ural gas tal ores	er mining and	irrying products d products	erages	acco products	tiles	aring apparel ther and related	ducts od and products	ier and paper	ducts iting and ording products	te and refined	roleum products micals and	ic pharmaceutical ducts	ber and plastics	ier nonmetallic ieral products	ic metals	ricated metal ducts	mputer, electronic d optical products	trical equipment.	chinery and ipment	tor vehicles	ier transport ipment	niture	ier manufactured ods	:tricity, gas, steam I air conditioning	verage products	ste products	dishing products	tion pictures, eos and sound	hitectural ducts	er professional, intific and inical products	ative, arts and ertainment ducts	ducts for culture vices	sonal services ducts
		agr	an an	a a	<u>5</u>	Me. nat	ğ	En og	Be	1 ^d	Ě	Lea Ve	ŝŝ	Рар	Prir rec	ŝ	ਬ ਤੱਥੇ	Bas	tin s	a de la	Bas	Fab Pro	<u> </u>	Elec	equ	ĝ	e di th	ž	di di	Elec	Sev	Na	Put	Vid No.	Arc pro	te cie te cie	e te b te	Pro	Pen
	0040			03 B05					C11		C13 C1-		5 C16			C19	C20	C21	C22			C25	C26		C28	C29		C31	C32	D35	D37		J58	J59	L71	L74	R90	R91	S95
Czechia Czechia	2010 2011	1,639 1,819	137 124	20 22 33 34				60 <u>3,716</u> 77 4,161	375		1,456 1,4 1,611 1,5		61 58 71 58			1,63							16,769 14,804		7,426	9,172 10,422			1,822	827 1.340	0	352 531		10	6 1	1	2	1	0
Czechia	2012	1,819	124	36 25				73 4.640	417		1,611 1,5		91 62			2,14					8,395		15,115		9,169	10,422	956	1.059	1,838	1,340	0	605		9		1		11	
Czechia	2012	1,939	175	44 22					434		1,727 1,5			9 2,00		2,44					8.647		13,004		9,109	11.808	843		2,088	693	0	558		3	9 6	1	9	14	d
Czechia	2014	1,975	200	56 29					527		1.974 1.9			2 2,15		2,56					9,308		14.648			14,528	1.279		2,353	710	d	548		6	1 1	1	3	9	d
Czechia	2015	2,044	192	66 25	2 5,4	52 515	20	02 6,009	575	344	1,921 1,7	39 9		0 2,30		2,22		1 3,434	6,58	4 1,693	9,498	6,304	15,483	8,816	12,266	17,856	1,021	751	2,554	1,046	C	482	633	5	9 1	0	3	16	C
Czechia	2016	2,113	162	95 23	5 3,5	36 445	5 20	03 5,978	582	392	2,041 1,9	20 1,0	03 80	6 2,29	30 17	2,32	24 10,32	3 3,51	6,83	3 1,804	8,908	6,539	14,192	9,316	11,893	20,134	1,140	800	2,694	760	C	510	765	5	6 0	0	18	11	C
Czechia	2017	2,186	157	97 44				05 5,957	627		2,097 2,1			9 2,34			17 10,70				10,493			10,101		21,631		838	2,665	785	0	618		23		0	16	12	C
Czechia	2018	2,211	136	83 48				10 5,829	681		2,085 2,2			8 2,46			11,15					9 6,770		10,458		21,664		882	2,810	1,085	C	643		28		0	g	13	C
Czechia	2019	2,247	120	66 49				23 6,304	716		2,073 2,5			2 2,42			31 11,14					4 6,873	16,408			22,188		941	2,932	726	C	573		22		0	10	16	C
Czechia	2020 2010	2,285	99		5 2,9			09 6,387	639	490	2,301 2,5			2 2,29			17 10,72					5 6,374		11,169			1,282	969	2,931	466		424		22		0	7	30	
Slovakia	2010	839 1.067	34	5 49 6 65				87 2,210 93 2,540	257 272	91	570 8 640 1.0		73 38 45 34			1,23					2,885	5 2,035 2,338	8,884 8,916		3,454	6,320 7,384	297 336	506 609	600 673	314 569	0	403		4	5 0	0	1	⊢ †	- 4
Slovakia Slovakia	2012	1,067	33		0 5,1 3 4,8			93 2,540 83 2,755	214	106			43 34 00 41			1,4/						2,338	10,112		4,197	8,252		673	738	672		433		5	9 1 1 1	0	1		4
Slovakia	2012	926	69	6 40				88 2,775	244	100	685 1.0		76 41			1,37						2,310	10,112		4,401	8,496		666	756	464		433		3		0			
Slovakia	2010	860	44	11 36				75 2,684	308	115	714 1.1		97 38			1,40					3,451		10,998		4,738	8,917	375		781	496		277		3	1 0	0			
Slovakia	2015	874	28	10 37				88 2.737	307	126	724 1.1					96						4 2.916	12.097		5.552	10.545	520	979	875	540	0	229		4	4 1	0	0		d
Slovakia	2016	894	36	9 32				85 2,936	331	131	772 1,2					84					3,380		11,836			11,790		1,248	862	462	0	223		3	2 0	0	1	0	d
Slovakia	2017	972	50	12 53	4 3,0	55 483		95 2,988	346	155	810 1,2	72 1,1	20 45	8 85	57 6	1,16	4,21	9 1,682			4,079	9 3,364	12,514		6,001	12,269		1,302	897	613	C	306	169	2	9 12	0	C	0	C
Slovakia	2018	976	67	11 55	8,8 8	24 503	11	17 3,126	404	172	729 1,3	35 1,1	33 50	2 90	01 2	1,36	67 4,29	9 1,70 ⁻	3,16	4 1,068	4,489	3,569	12,074	4,940	6,324	15,274	479	1,591	958	563	C	321	166	3	4 O	0	1	1	C
Slovakia	2019	1,049	100		31 3,7			06 3,265	393		788 1,5					1,21						5 3,513	11,795					1,791	1,095	652	0	253		6	6 2	0	1	1	C
Slovakia	2020	1,044	90	8 29				88 3,264	391	185	803 1,2		45 50			75						3 3,157	10,730		5,969	14,760		1,393	1,082	606	C	283		6	з о	0	1	<u> </u>	C
Poland	2010	3,155	122	481 1,30				79 6,961	484		2,851 2,8					3,43					8,940		16,169			11,469		874	2,091	277		454		7	2 1	0	5	4	C
Poland	2011	3,916		446 1,55				16 8,085	512		3,094 3,1			3 3,87		4,33						2 5,837	14,705					964	2,203	324		626		10	8 1	0	ç	1	C
Poland	2012	3,986			9 15,1			23 8,762	575		2,985 3,0					3,59						9 5,692	14,905			11,836		958	2,279	458		780		8	92	0	5	1	C
Poland	2013	4,142			1 13,5			68 9,103 86 9,582	580 565		3.098 3.1 3.414 4.0					3,11	12 15,98				10,250		15,365 16,964		13,981	12,561			2,425	330 542		815 922		23		0	3	15	
Poland Poland	2014	4,344	148	731 81		91 838 25 802		86 9,582 90 10,050	673	198	3,414 4,0					2,70					11,056				15,341	13,634			2,817 3,248	542	0	922		<u>23</u> 54		0	12		
Poland	2016	4,228	122	985 61		23 767		89 10,855	735	696	3.884 5.4		73 1.29			3.07				2 2 2 2 3 0 5	11,254		19,002		16,196	18,719			3,661	528		982		53		0	7		
Poland	2017	4,220			3 7.9			14 12.097	820	692	3,991 6,2						20.90			3 2.651		3 8.277		11,908		21.000			4.086	503	0	1.152		69		0	, c		
Poland	2018	4,902		.068 1.88				05 12,656	917		4.097 7.3			7 5,66			06 21,94					8 8,905		13,474			5,287		4,387	577		1.321		76		0	14	12	d
Poland	2019	5,168	124 1	178 1,57	1 10,6			24 13,280	1,045	809	4,201 7,8	45 3,8		0 5,39			56 22,34		10,10	5 3,236	14,996	9,095		15,055		24,664			4,752	902	C	1,268	710	69	a a	0	13	14	C
Poland	2020	5,402	148 1	153 93	8 6,9	81 881	56	65 14,120	1,121	1,027	4,371 9,2	96 3,9	08 1,77	4 5.25	56 14	3,08	32 22,51	2 8,05	10,08	5 3,289	14,172	2 8,802	27,325	16,225	21,592	19,441	4,985	2,413	5,055	772	0	1,336	760	51	6 1	0	17	23	C
Hungary	2010	807	23	6 26	0 4,5	49 212	2 6	61 2,488	173	93	701 6	32 5	19 32	9 1,17	78 8	1,52	29 4,08	3 2,363	2,24	9 829	3,006	6 1,986	14,758	5,614	6,420	4,379	254	274	605	686	0	174	227	1	5 0	0	2	0	C
Hungary	2011	942	21	7 31				70 2,935	192	120		25 6		0 1,27		1,82					3,726		13,649		7,769	5,369	371	309	664	1,120	0	232	222	1	1 0	0	C	0	C
Hungary	2012	1,006	20		7 6,2			62 2,982	193	120				3 1,21		1,83					3,657		12,797		8,339	5,544		330	678	1,210	C	198			8 Q	0	1	<u> </u>	C
Hungary	2013	1,025	20	8 17				76 2,953	207	129			78 35			1,87						3 2,546	12,137		8,584	6,690	414	393	716	1,106	C C	167		1	1 0	0	0	1	d
Hungary	2014	1,053	24		6,0			72 3,123	218	137			83 39			1,86					3,729		10,787		9,689	8,545	526	500	793	1,143	0	169		1	3 0	0	1	<u> q</u>	C
Hungary	2015 2016	1,150	29		4 3,8		1 .	74 3,180	230	156	877 1,0		65 43			1,40					3,740		11,797		10,519	10,067	703	574	938	1,204	0	164		1	4 0	1	6	<u>⊢ q</u>	q
Hungary	2016	1,203	30	14 14	1 2,8			80 <u>3,376</u> 87 3,666	254 263		986 1,1 1,048 1,4			2 1,31		1,24					3,709	9 3,180 3,420	12,125			10,861	565 477	657	1,054	1,021	0	193 257		3	y g	0	1	<u>⊢</u> 1	q
Hungary Hungary	2017	1,295	28	12 23				87 <u>3,666</u> 27 <u>3,851</u>	263 301	101	1.048 1.4			3 1.43 3 1.53		1,70						3.420 3.638	13,600			11,625			1,065	1,386		257 253			4 9	0	1	t d	<u> </u>
Hungary	2018	1,245	25	13 25				2/ 3,851 31 4,167	301		1,006 1,6					2,02						4 3.766	16,406			12,768	634	873	1,159	1,327		253			7 7	0	11	10	
Hungary	2010	1,300	23	9 15				17 4,107	324		1,005 1,5			0 1.46		1.39						5 3,494	15,834			11,408	668	866	2.536	1,407		243			7 7				
i gundidi y	1010	1.412	41	ه ان	m 3.I	JA 113	4	10 4.103	324	24U	ذرا ويوعيا		00 00	u 1.40	21 0	1.08	201 7.003	a <u>0.99</u>	-+.22	4 (3//	0.9/0	J J.434	13,034	0.002	10.001	11,400	000	000	2,000	1.108	U	210	10/		u u	U		السب ا	L.

External trade indicator Imports in million of ECU/EURO Standard International

Trade Classification (CPA/SITC Rev. 4, 2006) Geopolitical entity (partner) All countries of the world **Unit of measure:** Million euro

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Source: National Statistical Offices of CZ, SK, HU, PL Data extracted on 19/11/2021 [ESTAT]





TABLE 04-SLOVENIAN EXPORTS BY PRODUCTS (CPA)

Import Country	Year	Architectural and services: technical testing and analysis services Basic metals	Basic pharmaceutical pharmaceutical pharmaceutical preparations Beverages	Chemicals and chemical products Coal and lignite	Coke and refined petroleum products	Computer, electronic and optical products	Ū	Crude petroleum and natural gas Electrical equipment	ELECTRICITY, GAS, STEAM AND AIR CONDITIONING	Fabricated metal products, except machinery and equipment	Fish and other fishing products, aquaculture products; support services to fishing	Food products Furniture	products Lihrary: archive	Machinery, archive, museum and other cultural services Machinery and	equipment n.e.c. Metal ores	Motion picture, video, sound recording and music publishing	Motor vehicles, trailers and semi- trailers	Other manufactured goods	Other mining and quarrying products Other non-metallic	mineral products Other personal services	Other professional, scientific and technical services	Other transport equipment Paper and paper	products Printing and recording services	Products of agriculture, forestry and fishing	Products of forestry, logging and related services Publishing services Rubber and plastic	products Sewerage services; sewage sludge Textiles	Tobacco products Waste collection, treatment and disposal services materials recovery services	Wearing apparel Wood and of products of wood and cork Total
		M71 C24		C20 B05	C19	C26		B06 C27	D35	C25		C10 C31		R91 C2		J59	C29			23 596		C30 C		A01		22 E37 C13		
Czechia	2010	0 62.8		42.5 0.0	0.3	5.8	0.0	0.0 44.6	7.4	16.4		4.1 16.5		0.0 19.		0.0	25.1			5.5 0.0		4.2 1		1.1		3.1 0.0 5.7		
Czechia	2011	0 79.1		46.9 0.0		8.4	0.0	0.0 44.7	18.8	19.1		3.4 23.0		0.0 24.		0.0	25.7			3.3 0.0		6.0 1		1.2		2.3 0.0 7.2		
Czechia	2012	0 71.8		48.8 0.0		7.3	0.0	0.0 47.3	29.9	16.6		4.2 19.6		0.0 34.		0.0	24.8			7.6 0.0		5.2 1		1.0		9.3 0.0 6.2		
Czechia Czechia	2013	0 75.1		44.8 0.0	50.6 11.4	10.2		0.0 56.6	14.7	20.2		7.2 15.1		0.0 39.		0.0	27.7			5.3 0.0 5.8 0.0		3.1 1		1.9		0.4 0.0 4.4		
Czechia	2014	0 73.9		52.1 0.0	0.9	12.6		0.0 68.6	19.3	34.4		7.1 18.7		0.0 33.		0.0	47.7			5.6 0.0		4.7 1		1.5		4.5 0.0 6.6		
Czechia	2015	0.000002 64.6		54.1 0.0		10.0	0.0	0.0 70.8	3.4	28.7		10.1 24.6		0.0 56.		0.0	55.0			5.9 0.0		4.9 1		1.5		2.1 0.0 7.9		
Czechia	2017	0 76.2		51.9 0.0		14.7	0.0	0.0 86.5	19.8	37.1		12.5 31.9		0.0 52.		0.0	76.9			5.3 0.0		4.7 1		1.6		5.8 0.0 8.0		
Czechia	2018	0 100.1		62.2 0.0	1.1	38.3		0.0 93.6	6.2	45.7		20.5 35.1		0.0 58.		0.1	77.6			3.3 0.0		3.1 1		1.9		2.3 0.0 8.0		
Czechia	2019	0 100.2		67.8 0.0	0.7	16.3		0.0 95.6	0.0	30.6		16.2 39.3		0.0 67.		0.1	85.7			3.7 0.0		3.4 1		4.9		3.7 0.0 7.6		
Czechia	2020	0.000647 76.2	105.3 0.6	60.7 0.0	1.1	20.7	0.0	0.0 84.0	0.0	30.3	0.2	14.9 31.8	5.3	0.0 62.	2 0.0	0.0	69.2	16.6	0.8	9.6 0.0	0.0	4.7 1	1.1 0.0	6.6	0.2 1.3 46	5.0 0.0 7.4	0.1 2.3	8.1 5.0 682.6
Hungary	2010	0 36.3		42.7 0.0		9.0	0.0	0.0 58.2	32.5	21.7		49.0 11.3		0.0 25.		0.0	85.0			5.0 0.0		0.8 2		4.4		7.8 0.0 3.9		
Hungary	2011	0 57.9		36.4 0.0		11.2		0.0 63.2	1.4	25.5		59.7 11.2		0.0 28.		0.0	103.1			5.4 0.0		1.9 2		11.9		5.1 0.0 7.7		
Hungary	2012	0 51.1		35.1 0.0		18.9		0.2 54.6	2.5	19.8		61.0 9.5		0.0 28.		0.0	94.5			5.7 0.0		1.4 2		8.2		7.8 0.0 5.2		
Hungary	2013	0 48.3		34.1 0.1	56.8	36.0		0.2 55.9	5.7	24.1		55.8 10.7		0.0 38.		0.0	104.2			5.5 0.0		2.6 2		6.3		0.7 0.0 3.9		
Hungary	2014	0 63.3		39.6 0.1 42.3 0.1	77.7	25.6		0.2 62.0	0.0	30.2		53.3 10.2		0.0 39.		0.0	122.5		0.8			5.4 2		4.4		2.5 0.0 4.6		
Hungary	2015	0 66.2		42.3 0.1	51.8 42.6	26.2		0.0 63.5	0.2	32.1		61.6 9.9 48.9 9.3		0.0 50.			112.0			5.6 0.0 3.1 0.0		4.1 2		5.1		5.1 0.0 7.3 9.6 0.0 10.4		
Hungary	2016	0 64.3		47.2 0.1 59.2 0.1	42.6	10.3		0.0 71.5	2.3	35.1		48.9 9.3		0.0 55.			112.3			3.1 0.0 3.9 0.0		6.6 2		10.4		1.3 0.0 8.1		
Hungary Hungary	2017	0 73.5		65.7 0.1	82.4	16.5		0.0 79.2	2.1			54.5 10.2		0.0 68.		0.0	108.7			0.0 0.0		8.6 3		4.1		3.6 0.0 11.1		
Hungary	2010	0 66.7		60.0 0.0		35.6		14.1 109.7	0.0	40.2		52.8 10.4		0.0 63.		0.0	86.5		0.9 9			8.5 3		10.6		5.9 0.0 18.4		
Hungary	2020	0 62.1		67.5 0.0		17.5		0.0 122.1	0.0	32.5		66.0 9.5		0.0 57.		0.0	54.5			1.0 0.0		6.7 2		13.8		3.9 0.0 10.1		
Poland	2010	0 49.4		66.2 0.0		12.4		0.0 86.7	0.0	24.3		3.7 8.8		0.0 30.		0.0	61.6			9.1 0.0		2.2 1		2.1		0.5 0.0 5.4		
Poland	2011	0 73.5	170.3 0.1	60.1 0.0	1.3	20.7	0.0	0.0 89.0	0.0	24.3	0.0	4.7 9.3	2.4	0.0 38.	9 0.0	0.0	46.7	2.4	3.2 10	0.7 0.0	0.0	5.9 1	3.3 0.0	2.4	0.0 0.4 56	5.4 0.0 7.0	0.0 1.2	1.4 2.8 648.3
Poland	2012	0 67.3		60.6 0.0		19.9	0.0	0.0 74.8	0.0	29.4		4.6 11.0		0.0 36.		0.0	37.0			2.8 0.0		5.2 1		0.4		9.5 0.0 7.9		
Poland	2013	0 56.6		59.2 0.0	8.0	22.6		0.0 73.0	0.0	19.1		5.0 11.8		0.0 40.		0.1	43.4			3.9 0.0		5.2 1		1.3		4.1 0.0 6.2		
Poland	2014	0 56.9		70.5 0.0		26.5		0.0 76.2	0.0	30.2		4.7 8.4		0.0 40.		0.0	76.2			5.7 0.0		4.8 1		2.3		1.3 0.0 9.2		
Poland	2015	0 81.1		68.4 0.0		26.7		0.0 76.1	0.0	26.5		8.0 10.9		0.0 49.		0.0	94.5			9.2 0.0		5.2 1		2.5		7.1 0.0 11.0		
Poland	2016	0 73.6		68.2 0.0		23.6		0.0 83.7	0.0	27.8		7.9 17.2		0.0 52.		0.0	95.1			7.5 0.0		3.6 1		2.8		1.2 0.0 11.8		
Poland Poland	2017 2018	0 88.8		75.6 0.0		39.1 38.3		0.0 83.6 3.4 92.4	0.0	27.8		7.7 13.0		0.0 66.		0.0	100.7			3.2 0.0 3.3 0.0		3.5 1 6.3 1		3.0		0.4 0.0 12.1 7.0 0.0 11.7		
Poland	2018	0 84.0		76.4 0.0	2.2	47.8		5.3 112.4	0.0	30.4		11.3 8.8		0.0 75.			113.9			9.3 0.0		6.0 2		5.6		7.8 0.0 13.9		
Poland	2019	0 79.5		71.8 0.0	0.4	55.6		0.0 122.0	0.0	35.0		10.3 7.4		0.0 73.		0.1	98.8			2.2 0.0		5.4 2		4.3		5.9 0.0 14.2		
Slovakia	2010	0 62.5		16.5 0.0	0.9	43		0.0 25.8	1.4			7.8 9.4		0.0 13.		0.1	14.2			3.0 0.0		2.5 1		1.1		4.8 0.0 2.5		
Slovakia	2011	0 29.3		20.2 0.0		21.3		0.0 27.5	3.1	29.5			2.3	0.0 17.		0.0	14.2			3.6 0.0		3.4 1		1.1		5.7 0.0 3.4		
Slovakia	2012	0 22.0		22.5 0.0		15.0		0.0 69.5	5.5	26.7		9.8 20.3		0.0 40.		0.3	16.2			3.0 0.0		5.0		1.8		5.8 0.0 2.9		
Slovakia	2013	0 15.2	37.4 0.6	22.9 0.0	36.7	21.2	0.0	0.0 59.9	1.3	33.5	0.0	20.3 29.6	2.4	0.0 43.	.1 0.0	0.3	17.6	0.2	0.1	3.6 0.0	0.0	3.8	9.3 0.0	2.0	0.0 0.8 10	5.0 0.0 2.6	0.0 6.7	0.6 5.1 392.9
Slovakia	2014	0 16.6	38.8 0.2	22.4 0.0	18.4	35.6	0.0	0.0 46.9	0.0	51.3	0.0	19.6 27.0	2.3	0.0 39.	0.0 0.0	0.0	20.9	0.5	0.1 4	4.1 0.0		5.3 1		2.2	0.1 0.6 1	7.5 0.0 3.5	0.0 3.3	0.4 5.4 394.6
Slovakia	2015	0 59.7		25.1 0.0	6.9	26.4		0.0 74.5	0.0	51.9		29.2 31.6		0.0 29.		0.3	32.0			1.0 0.0		3.7 1		1.1		3.5 0.0 3.7		
Slovakia	2016	0 52.1		21.8 0.0	8.3	22.6		0.0 49.3	0.2	61.3			2.8	0.0 36.		0.0	54.2			1.6 0.0			7.0 0.0	4.0		3.7 0.0 4.4		
Slovakia	2017	0 61.5		23.0 0.0		24.1		0.0 59.0	1.7	66.1		16.4 32.2		0.0 45.		0.2	46.0			5.2 0.0		2.5		4.1		0.2 0.0 4.2		
Slovakia	2018	0 97.4		22.0 0.0	5.1	34.0		0.0 26.2	0.2	45.6		25.1 18.3		0.0 56.		0.1	39.0			5.1 0.0		2.7		2.3		2.7 0.0 5.4		
Slovakia	2019 2020	0 109.3		23.9 0.0	9.9	58.5 57.0	0.0	9.4 23.6 0.0 22.9	0.0	34.5		15.0 18.4 22.9 15.1	2.1	0.0 58.		0.1	38.3			4.9 0.0 5.2 0.0		4.7		2.9		2.4 0.0 4.3 4.4 0.0 4.5		
Slovakia	2020	U 80.0	70.3 3.4	25.7 0.0	19.3	57.0	0.0	0.0 22.9	0.0	20.4	0.1	22.9 15.1	1.0	0.0 55.	.o U.U c.	0.1	40.9	5.5	U.I 6	J.Z U.U	0.0	5.5	0.0 0.0	3.7	0.3 0.4 34	+.++ U.U 4.5	U.I 3./	2.0 0.2 525.5





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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 POTENTIAL

Another "angle" on market potentials brings International Trade Center calculating potential indicatiors based on international trade data.

EXPORT POTENTIAL INDICATOR

Potential export value of product k supplied by country i to market *i*, in dollars, is calculated as supply × demand (corrected for market access) × bilateral ease of trade. Supply and demand are projected into the future based on GDP and population forecasts, demand elasticities and forwardlooking 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.

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SLOVENSKA

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REPUBLIKA SLOVENIJA

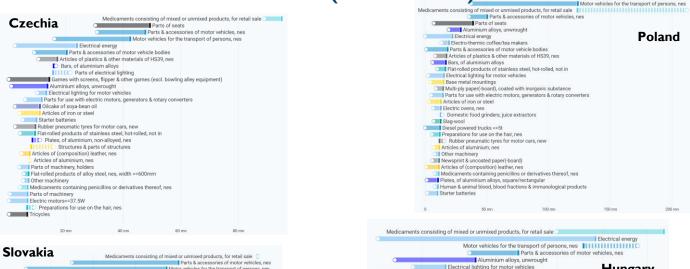
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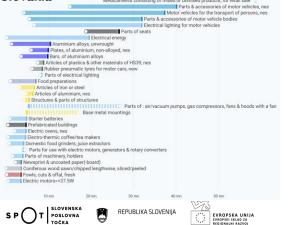
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https://exportpotential.intracen.org/

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





TOČKA

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Markets Analysis - Visegrad Group 61

120 mn

Hungary

100 mn

Electro-thermic coffee/tea makers

Articles of plastics & other materials of HS39, nes

Diesel powered trucks <=5t

Parts of electrical ignition or starting equipment

O Parts of seats

Bananas fresh or dried

O Prefabricated buildings

Sausages & similar products

20 mn

Omega Parts of trailers, nes

Preparations for use on the hair, nes

Bars, of aluminium alloys

Parts for spark-ignition internal engine

Rubber pneumatic tyres for motor cars, new

Newsprint & uncoated paper(-board)

Articles of aluminium, nes Articles of iron or steel

Articles of (composition) leather, nes

Electric conductors <=1.000V, fitted with connectors

Coniferous wood sawn/chipped lengthwise, sliced/peeled

40 mn

Parts & accessories of motor vehicle bodies

HITTIN Human & animal blood, blood fractions & immunological products

Parts of : air/vacuum pumps, gas compressors, fans & hoods with a fan

Oilcake of sova-bean oil

60 mn 80 mn

ID Parts for use with electric motors, generators & rotary converters