

ENGINEERING INDUSTRY



S A R I O

Slovenská agentúra
pre rozvoj investícií a obchodu

Engineering industry – general overview

The engineering industry is the leading sector of all industry and manufacturing in Slovakia. The manufacture of transport vehicles is the strongest branch of the machine engineering, followed by the manufacture of computer, electronic and optical products and manufacture of fabricated metal products, except of machinery and equipment. Industrial production in Slovakia has surpassed the pre-crisis levels in 2011 and maintains strong growth in 2012.

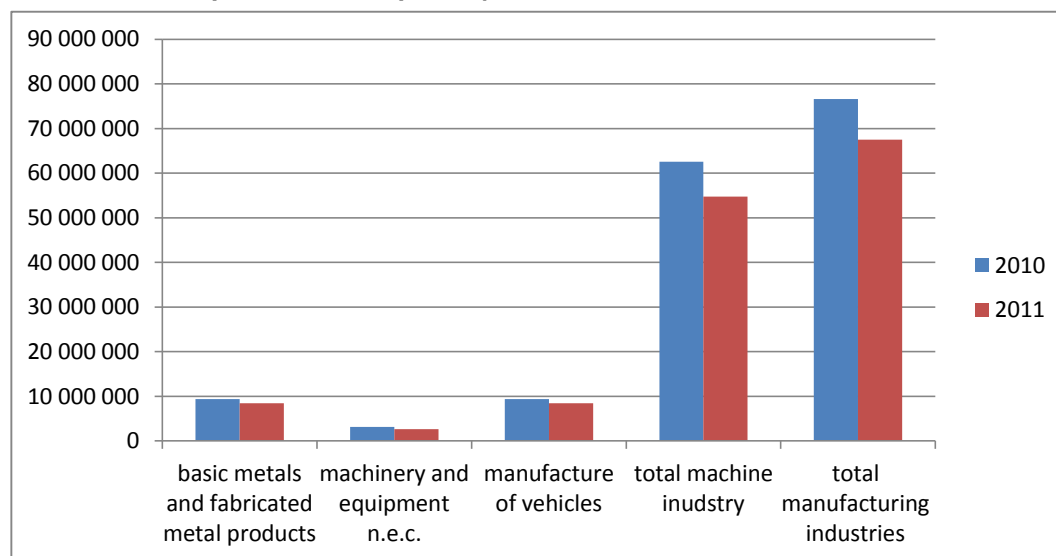
The revenues in industrial production in 2011 reached 29, 5 billion euros of which manufacture of basic metals and fabricated metal products was 9, 37 billion euro, manufacture of machinery and equipment was 3, 13 billion euro and manufacture of transport equipment was 17 billion euro.

Indicators of Industrial Production in Slovakia

Indicators	2010	2011
Share of manufacturing in the total industry	81,1%	81,7%
Share of engineering industry in the total industry	38,6 %	32,5%
Share of engineering industry in the manufacturing	47,1%	45,6%
Share of manufacture of basic metals and fabricated metal products, except machinery and equipment in the total industry	15,4%	15%
Share of manufacture of machinery and equipment in the total industry	5%	4,8%
Share of manufacture of transport equipment in the total industry	27,2%	25,4%

Source: Statistical Office of the Slovak Republic 2012

Production (thous. EUR) for years 2010-2011:



Source: Statistical Office of the Slovak Republic 2012

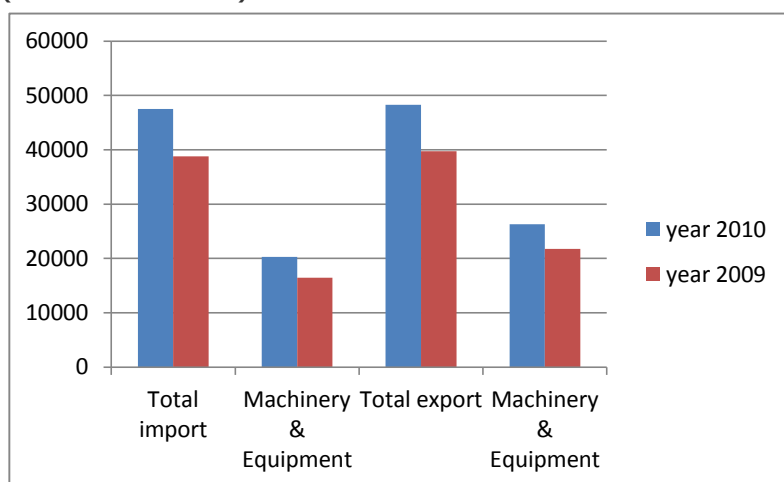
Exports and Imports

The biggest exporters and also importers in the engineering were companies VOLKSWAGEN SLOVAKIA a.s., PCA Slovakia s.r.o. and KIA Motors Slovakia s.r.o.

The share of exports of machinery and equipment in total exports in 2009 was 54.8% and in comparison to 2008, exports decreased by 18.4%.

The share of imported machinery and equipment in total imports in 2009 was 42.4% and in comparison to 2008, imports decline by 24%.

The exports and imports of machinery and equipment for the years 2009-2010 (in million EUR)



Source: Statistical Office of the Slovak Republic 2012

In the analysis of the engineering industry data are classified according to a new statistical classification of economy activities SK NACE Rev.2, which is valid in the countries of the European Union and which entered into force on 1.1.2008.

Engineering industry under a new statistical classification consists of:

NACE 25 - manufacture of metal products and fabricated metal products, except of machinery and equipment

NACE 28 - manufacture of machinery and equipment, n. e. c.

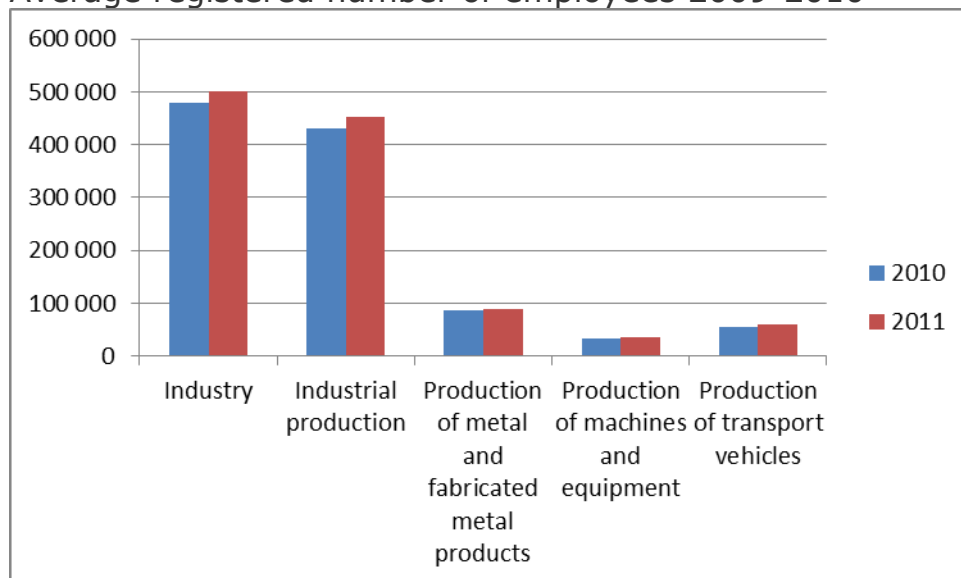
NACE 29 - manufacture of motor vehicles, trailers and semitrailers

NACE 30 - manufacture of other transport equipment

Employment

The increase of employment was eminent in every area of engineering industry in 2011. The Number of employees in industrial production grew by 5% to 499 760 persons, in production of metal and fabricated metal products grew by 4.9% to 89 925 persons, in production of machinery and equipment grew by 8.6% to 36 241 persons and in production of transport vehicles the amount of employees grew by 11% to 60 458 persons.

Average registered number of employees 2009-2010



Source: Statistical Office of the Slovak Republic 2012

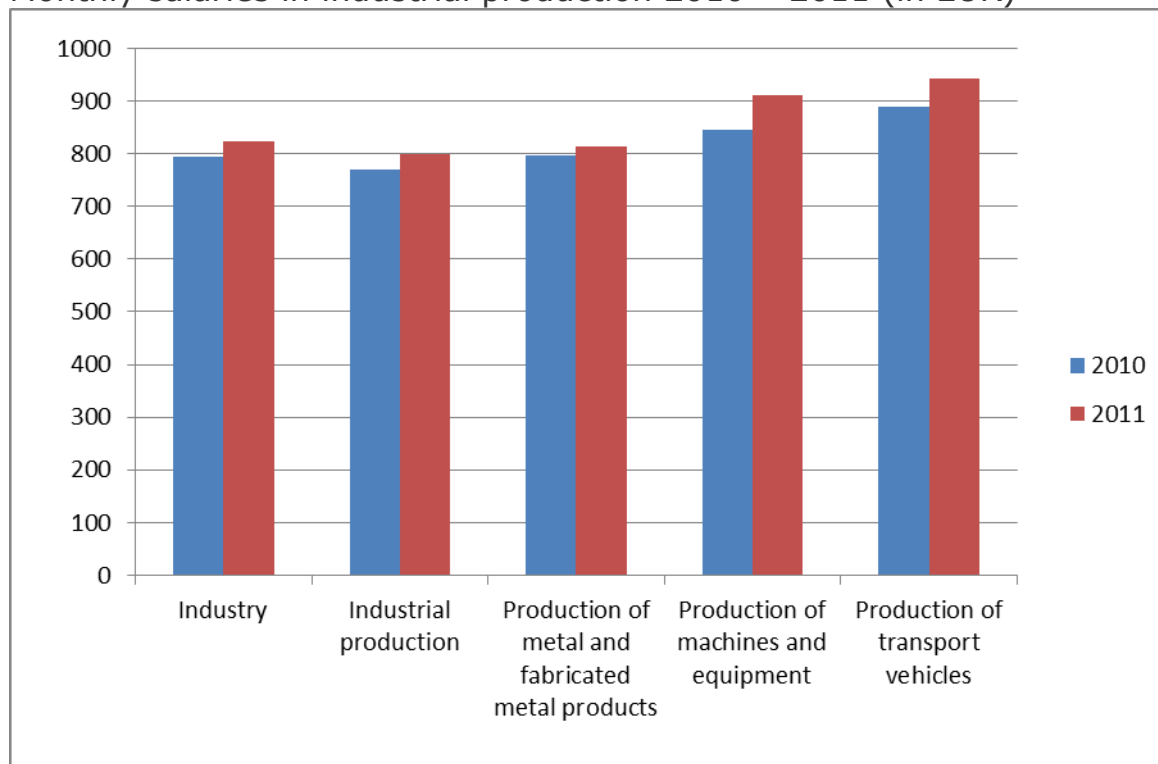
Labour costs

Total labour costs in 2011 in industrial production grew by 4.7% compared to 2010. The highest growth of labour costs was in production of machines and equipment and totalled 7.9%. The growth of salaries was mostly caused by increased demand after new employees in this sector.

Average monthly salary in Industrial production (in EUR)

NACE	2009	2010	2011
Industry overall	754	795	824
Industrial production	732	771	800
Manufacture of metal products and fabricated metal products	763	797	814
Manufacture of machinery and equipment	775	845	912
Manufacture of other transport equipment	845	889	942

Monthly salaries in industrial production 2010 – 2011 (in EUR)



Average monthly wages in Slovak regions for chosen job positions as of (3.Q.2011) (in EUR)

Occupation/region	BA	TT	TN	NR	ŽA	BB	PO	KE
2145 Designers and constructors of machinery, mechanical engineers	1277	1551	1194	1690	1181	1008	1108	1041
2149 Other architects, designers, constructors and technical engineers	1 425	1300	1039	983	1208	1168	1130	1347
3115 Mechanical engineering technicians	1389	1249	1199	1086	1049	1006	902	1073
3119 Other technical staff	1180	1041	996	968	995	913	782	929
7212 Welders, flame cutters and braziers	1124	891	916	722	713	810	729	787
7213 Manufacturers and repairers of products and parts from sheet metal	1244	829	583	649	771	681	0	682
7224 Toolmakers, metal-pattern makers, metalworkers, locksmiths	778	804	739	747	701	740	606	910
7226 Setters and machine tools operators	990	1007	832	797	972	754	708	814
7231 Mechanics and repairers of motor vehicles (except bodymen)	844	708	719	683	696	799	699	664
7235 Mechanics and repairs of machine tools, agricultural and industrial machinery	875	784	876	642	752	648	681	651
8171 Operation of automatic or semi-automatic assembly lines	722	633	543	580	697	490	572	0
8211 Operation of automatic machines, semi-automatic machine tools (except for adjusters)	733	901	812	691	947	667	707	703
9321 Laborers and unskilled workers, assembly workers (manual operations)	547	621	523	544	537	466	511	723

Source: TRIXIMA, 2011

Present and future development trends

The level of the Slovak industry in terms of innovation performance is defined in publication *European Innovation Scoreboard 2011 Comparative Analysis of Innovation Performance (EIS)*, which compares the innovative capacity and performance of the countries, especially EU countries. According to the publication EIS 2009, Slovakia is grouped along with the Czech Republic, Spain, Portugal, Greece, Italy, Norway, Lithuania, Malta, Hungary, Poland to the so-called "Moderate innovators" with innovation performance below the EU 27 average. Slovakia progressed from the group of the countries, which were included in the so-called "Catching up countries". Slovak Republic was placed at 22nd position out of 27 countries in the EU's innovation performance evaluation summary (SII – Summary Innovation Index 2010), Slovakia SII value is 0.331. EU27 average is SII = 0.478. Sweden is the best innovation country (SII=0.636).

The current (revised) definition of the technological sectors was created within the statistics on science, technology and innovation by Eurostat in collaboration with the OECD in 2008. Technological sectors in manufacturing are aggregated according to technological intensity (R&D expenditure/value added) and based on the Statistical classification of economic activities in the EU, NACE Rev.2. Manufacturing industries are classified into four technological sectors: high technology, medium-high technology, medium-low technology and low technology.

Production of engineering group was classified according to the technological intensity (R&D expenditure/value added) in the technology sector under the revised definition of the OECD/Eurostat in following way:

Technological sector	Manufacturing industries by NACE Rev. 2
High technology	30.3 – Manufacture of air and spacecraft and related machinery
Medium-high technology	25.4 – Manufacture of weapons and ammunition 28. – Manufacture of machinery and equipment n.e.c. 29 – Manufacture of motor vehicles, trailers and semitrailers 30 – Manufacture of other transport equipment excluding 30.1 Building of ships and boats and excluding 30.3 Manufacture of air and spacecraft and related machinery
Medium-low technology	25 – Manufacture of fabricated metal products, except machinery and equipment excluding 25.4 Manufacture of weapons and ammunition 30 – Manufacture of ships and boats 33 – Repair and installation of machinery and equipment
Low technology	-

Slovakia has the highest share of employees in the medium high-tech and high-tech production, thanks especially to the relatively small market on which businesses operate and the high concentration of the automobile industry.

In 2010 the private expenditure on R&D surpassed (50.4%) funding from State budget (49.6%). R&D expenditure in Slovakia reached 416 million Euros in 2010.

The share of expenditure on R&D of GDP in 2009 was 0.48%, while in 2010 it was 0.63%.

Gross domestic expenditures on R&D (in thous. EUR) by NACE Rev. 2

NACE Rev. 2	2007	2008	2009	2010
Manufacture of fabricated metal products, except machinery and equipment	5068	5 632	4 990	9 264
Manufacture of machinery and equipment, n.e.c.	7948	8 043	5 706	10 400
Manufacture of motor vehicles, trailers, semitrailers and other transport equipment	1626	2 461	19 616	32 986
Slovak Republic total	282 629	316 459	302 994	416 369

Source: Statistical Office of the Slovak Republic 2012

Strong growth of investment in engineering industry continued throughout 2010. After recovery from recession companies as well as government almost doubled investments into R&D in engineering industry. Particularly strong investments were seen in manufacture of motor vehicles and transportation equipment industry.

R&D personnel in head counts 2007-2010

NACE Rev. 2	2007	2008	2009	2010
Manufacture of fabricated metal products, except machinery and equipment	66	212	222	178
Manufacture of machinery and equipment, n.e.c.	286	408	347	485
Manufacture of motor vehicles, trailers, semitrailers and other transport equipment	70	41	89	125
Slovak Republic total	23437	23641	25388	28 128

Source: Statistical Office of the Slovak Republic 2012

The number of employees in research and development during 2010 had an overall upward trend. The only exception was manufacture of fabricated metal products where the number of employees decreased by 44 in 2010.

Companies HTS BB s.r.o. Vlkanová, Sauer - Danfoss a.s. Považská Bystrica a VIENA INTERNATIONAL s.r.o. Martin have their R&D department focused on engineering also in Slovakia.

In many engineering companies in Slovakia critical points exist in the production:

- surplus machine capacity, which is not fully utilized and adapted to a real production program in some companies
- a high degree of physical and time depreciation of machine capacity
- production technology rarely adapts to the new and more often just alters its production program
- predominating technologically outfitted workplaces, existing reserves with the use of cellular production structures
- lingering deficiencies in the field of automation, continuousness of material streams and in compatibility with information systems
- insufficient capability for innovation

In the case of investments coming to Slovakia, following trends emerge:

- product, technological and regional diversification, with positive impacts on employment and development in the areas of small and medium sized companies
- incoming investments to engineering activities, for research and development and more sophisticated services (including centres for shared services)
- a gradual transition from semi-automated production operations characterized by a high share of manual work to a system with a higher share of robotized workplaces, which is associated also with arising problems of diminishing work force availability in some branches
- continual pressure for increasing the quality, productivity and flexibility of suppliers, essential for preserving and strengthening of competitive advantage

Slovakia as an open economy has been strongly confronted with prevailing economic recession, which has significantly affected engineering industry as a whole and especially production of motor vehicles. This negative trend significantly influenced results of this sector in 2009.

In 2010 however the industrial production grew rapidly and surpassed the years before recession. Strong growth was maintained even throughout 2011 and therefore Slovakia secures its position within V4 countries as very attractive for foreign investors. Sustainable growth in engineering sector along with stable political situation, favorable tax legislation and labor code are solid base for foreign investment inflow. Qualification and discipline of Slovakian labour force is combined with high labor productivity and low costs.

The largest engineering companies in Slovakia by total sales (2010):

Company	Sales 2011 (Thous. Eur)	Sales 2010 (Thous. Eur)	Change 2011 / 2010 (%)	After tax profit 2011 (Thous. Eur)	After tax profit 2010 (Thous. Eur)	Change 2011 / 2010 (%)
Volkswagen Slovakia, a.s., Bratislava	5 192 936	4038 840	28,6	135 136	75 200	79,7
Kia Motors Slovakia, s.r.o., Žilina	3 328 383	2 888 748	15,2	68 631	42 920	59,9
PCA Slovakia, s.r.o., Trnava	1 642 432	1 654 389	-0,7	18 302	49 475	-63
Johnson Controls International, s.r.o., Bratislava	507 881	386 869	31,3	-2 391	96 848	n
SAS Automotive, s.r.o., Bratislava	419 192	293 486	42,8	n	3 227	n
INA Kysuce, a.s., Kysucké Nové Mesto	374 562	307 191	21,9	11 739	20 139	-41,7
Getrag Ford Transmissions Slovakia, s.r.o., Kechnec	360 473	227 779	58,3	11 225	2 294	389,3
INA Skalica, s.r.o., Skalica	341 425	265 567	28,6	9 252	11 577	-20,1
Vaillant Industrial Slovakia, s.r.o., Skalica	249 393	239 474	4,1	5 196	3 930	32,2
Continental Automotive Systems Slovakia, s.r.o., Zvolen	216 273	157 631	37,2	12 764	12 142	5,1

Source: TREND TOP 200, The largest non-financial Slovak companies by sector in 2012

Education and training

Rapid expansion of the automotive industry in Slovakia in the recent years has caused a shortage of skilled and qualified workforce. This in particular affects automobile sub-branches as well as other sub-branches in the engineering industry sector. The automobile sub-branch, however, can serve as an example of successful cooperation of the private sector and secondary schools and universities. In the framework of the automobile sub-branch and through the Automotive Industry Association of the Slovak Republic (ZAP SR), pilot centres were created which obtained accreditation for education in priority fields. At present nine pilot centres are in operation in selected secondary vocational schools in each region of Slovakia and there are four independent satellite pilot centres. Education process follows a curriculum adapted to the actual practical needs of the industry. This cooperation is evolving also in the framework of other machine industry sub-branches.

According to statistics from the Institute for Information and Education Prognosis in Slovakia, roughly 100 secondary technical, associated and vocational schools opened the 2011/2012 school year with a focus on the machine industry.

At present a total of 17,869 students are studying in secondary schools in machine industry fields. Last year 5 956 students successfully completed their study.

Source: UIPŠ 2011-2012

Number of students and graduates of secondary schools in the field of „23 – machinery and other metal processing production“ by regions:

Region	Number of students 2009/2010	Number of students 2010/2011	Number of graduates 2009/2010	Number of graduates 2010/2011
Bratislava	1121	1010	350	317
Trnava	2481	2350	689	714
Trenčín	3624	3335	936	957
Nitra	2799	2673	682	722
Žilina	3459	3272	818	847
<i>Banská Bystrica</i>	1830	1655	430	519
Prešov	2443	2474	572	593
Košice	2981	2729	674	794
total	20738	19498	5151	5463

Source: Institute of Information and Prognosis on Education 2011

Following universities cooperate with private entities in the machine industry:

- Slovak Technology University, Bratislava
- Technical University, Košice
- Žilinska University, Žilina
- Slovak Agricultural University, Nitra
- Technical University, Zvolen

In October 2010 universities registered a total of 10,669 students in different degrees of study in daily and external forms. Last year 3,314 students successfully completed university study in machine industry fields.

Number of students and graduates of Universities - „23 - Machinery and other metal processing production“

year	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011
Number of students - master degree	11453	10277	10533	10268	9999
Number of students - PhD	636	637	600	683	670
Number of graduates - master degree	2642	2600	2492	2891	3176
Number of graduates with PhD	38	56	83	34	138

Source: Institute of Information and Forecasting in Education 2006-2011

SWOT analysis

Strengths

- Long tradition of machine production
- Experience obtained through automobile producers
- Expansion of production capacity in automobiles, production of bearings and boilers
- Long-term process of establishing supplier networks
- Emerging activities in development and

Weaknesses

- Lingering high share of manual work in production, low level of automation
- Lack of qualified labour force in some professions
- Education curriculum remaining behind present trends and demands of the private sector
- Weak innovation ability
- Growing influence of the automobile industry, narrow specialization

- design
- Advantageous logistics, close to Western Europe
- Cooperation of public and private sectors
- Cost of labour, low tax burden

Opportunities

- Existence of new, favorable markets, potential for existing markets in surrounding countries
- A broader involvement of Slovak science and research
- International recognition of automotive supplier base
- Increase in technologically demanding production and an upswing in R&D
- The involvement of research capacity, including universities
- Development of human resources for more sophisticated activities

- Absence of regional innovation and development strategies in terms of machine industry potential
- Incomplete infrastructure in some regions

Threats

- Loss of competitiveness, shift of cost-oriented production to cheaper destinations
- Growth of world prices of steel, energy and wages in the economy
- Lack of qualified work force, high turnover
- Insufficient and delayed development of the educational system and schools, lagging behind the current needs in individual sectors

Sub-branches of the engineering industry – a summary of the largest employers

Production of fabricated metal products, except machinery and equipment- NACE 25

Sales in production of fabricated metal products grew by 26.6% in 2010 and reached 8.4 billion euro. The number of employees was decreased by 1704 employees as a direct result of consolidation measures within the companies. Sales in 2011 grew by 11.5% to 9.4 billion and number of employees increased by 4.8% to the total of 89 925.

Company	Location	Region
Vaillant Industrial Slovakia s.r.o.	Skalica	Trnava
Protherm Production s.r.o.	Skalica	Trnava
Bekaert Slovakia s.r.o.	Sládkovičovo	Trnava
Wertheim s.r.o.	Dunajská Streda	Nitra
SLOVENSKÉ ENERGETICKÉ STROJÁRNE a.s	Tlmače	Nitra
Arcelor Mittal Gonvarri SSC Slovakia, s.r.o.	Senica	Trnava
Silgan Metal Packaging Nove Mesto a. s.	Nové Mesto nad Váhom	Trenčín
Kollar & J & G spol. s r.o.	Čachtice	Trenčín
Bekaert Hlohovec, a.s.	Hlohovec	Trnava
Dong Jin Precision Slovakia, s.r.o.	Dolná Streda	Trnava

Source: Statistical Office of the Slovak Republic, 2009

Manufacture of engines and a turbines, except engines for aircrafts, cars and bicycles – NACE 28.11

Company	Location	Region
LOMBARDINI SLOVAKIA, s.r.o.	Martin	Žilina
AVC Čadca, a.s.	Čadca	Žilina
AVC Raková, a. s.	Raková	Žilina
DS Martin, a.s.	Martin	Žilina

Source: Statistical Office of the Slovak Republic, 2009

Manufacture of other pumps and compressors – NACE 28.13

Company	Location	Region
Embraco Slovakia s.r.o.	Spišská Nová Ves	Košice
Sauer - Danfoss a.s.	Považská Bystrica	Trenčín
Secop s.r.o.	Zlaté Moravce	Nitra
SLOVNAFT MONTÁŽE A OPRAVY a.s.	Bratislava	Bratislava
TEAM INDUSTRIES, s.r.o.	Turany	Žilina
EKOM spol. s r. o.	Piešťany	Trenčín
CCN Slovakia s.r.o.	Považská Bystrica	Žilina
Hydronika DEE a.s.	Bratislava	Bratislava
SB INMART, a.s.	Bardejov	Prešov
BROVEDANI SLOVAKIA, s.r.o.	Galanta	Trnava
HYDRAULIKA DS, s.r.o.	Dunajská Streda	Nitra

Source: Statistical Office of the Slovak Republic, 2009

Production of bearings, gears, gearings and driving elements – NACE 28.15

Company	Location	Region
INA Skalica spol. s r.o.	Skalica	Trnava
INA Kysuce a.s.	Kysucké Nové Mesto	Žilina
PSL a.s.	Považská Bystrica	Žilina
Kinex – KLF a.s.	Kysucké Nové Mesto	Žilina
Kinex a.s.	Bytča	Žilina
GeWiS - Slovakia s.r.o.	Handlová	Trenčín
Bonfiglioli Slovakia s.r.o.	Považská Bystrica	Žilina
GETRAG s.r.o.	Košice	Košice
Hriňovské Strojárne a.s.	Hriňová	Banská Bystrica
KLF - ZVL MTK spol. s r.o	Martin	Žilina

Source: Statistical Office of the Slovak Republic, 2009

Production of ventilation and cooling equipment, other than household – NACE 28.25

Company	Location	Region
ROEN EST, s.r.o.	Nové Mesto nad Váhom	Trenčín
KLIMAK s.r.o.	Nitra	Nitra
IMOS-Systemair, s.r.o.	Kalinkovo	Bratislava

PASTORKALT a.s.	Nové Zámky	Nitra
HALLA Climate Control Slovakia, s.r.o.	Ilava	Trenčín
Euros Slovakia s.r.o.	Žilina	Žilina
Camfil Farr s.r.o.	Levice	Nitra
Asek TZB spol. s r.o.	Hamuliakovo	Bratislava
Fuso Industries Ltd. - slovenská org. zložka	Považská Bystrica	Trenčín
EMMEGI HEAT-EXCHANGERS s.r.o.	Topoľčany	Nitra

Source: Statistical Office of the Slovak Republic, 2009

Production of Machines for agriculture and forestry – NACE 28.30

Company	Location	Region
GGP Slovakia, s.r.o.	Poprad - Matejovce	Prešov
PELLENC s. r. o.	Nové Mesto n. Váhom	Trenčín
NOVKREDIT spol. s r.o.	Nováky	Trenčín
PREMETAL MON s.r.o.	Prešov	Prešov
Globe Metal & Finance a.s.	Martin	Žilina
Movob s.r.o.	Prešov	Prešov
AGRIO - postrekovače, spol. s r.o.	Poniky	Banská Bystrica
T.S.A. spoločnosť s ručením obmedzeným	Kežmarok	Prešov
Opravovňa poľnohospodárskych strojov, spol. s r.o.	Vráble	Nitra

Source: Statistical Office of the Slovak Republic, 2009

Production of metal forming machinery and machine tools – NACE 28.4

Company	Location	Region
MicroStep, spol. s r.o.	Bratislava	Bratislava
TRENS, a.s.	Trenčín	Trenčín
IMC Slovakia s.r.o.	Považská Bystrica	Trenčín
LIPTOVSKÉ STROJÁRNE plus, a.s.	Liptovský Mikuláš	Žilina
LVD S2, a.s.	Tornaľa	Banská Bystrica
Remeslo strojal, s.r.o.	Žiar nad Hronom	Banská Bystrica
IQM, s.r.o.	Hriňová	Banská Bystrica
KABELSCHLEPP-SYSTEMTECHNIK, spol. s r.o.	Nové Zámky	Nitra
SLAVIA TOOLS a.s.	Detva	Banská Bystrica
UNICORN – ESK, s.r.o.	Tornaľa	Banská Bystrica

Source: Statistical Office of the Slovak Republic, 2009

Production of machinery for construction, mining, quarrying – NACE 28.92

Company	Location	Region
PPS Group	Detva	Banská Bystrica
STROJE a MECHANIZMY a.s.	Dunajská Streda	Trnava
Cestné a stavebné mechanizmy Tisovec, a.s.	Tisovec	Banská Bystrica
Glunz & Jensen, s.r.o.	Prešov	Prešov

WAY INDUSTRY, a.s.	Krupina	Banská Bystrica
GLOBE METAL & FINANCE, a.s.	Martin	Žilina
JMB, s.r.o.	Vrútky	Žilina
KOPAST, s.r.o.	Zvolen	Banská Bystrica
BMTI SK, s.r.o.	Bratislava	Bratislava
METALPORT s.r.o.	Košice	Košice
BMZ a.s.	Spišská Nová Ves	Košice
PPS Vývoj, s.r.o.	Zvolen	Banská Bystrica

Source: Statistical Office of the Slovak Republic, 2009

Production of machinery for food processing industry, beverages, tobacco – NACE 28.93

Company	Location	Region
ZTS Strojárne, s.r.o.	Námestovo	Žilina
Odenberg Engineering s.r.o.	Pezinok	Bratislava
PSS SVIDNÍK, a.s.	Svidník	Prešov
Rademaker Slovakia s.r.o.	Považská Bystrica	Žilina
MILKING, spol. s r.o.	Bratislava	Bratislava
Marel Slovakia s.r.o.	Nitra	Nitra
LEKOS, s.r.o. Trebišov	Trebišov	Košice
FARM PROFI s.r.o.	Modra	Bratislava
VOMZ - SLOVAKIA s.r.o.	Ľubica	Prešov

Source: Statistical Office of the Slovak Republic, 2009

Production of machinery for textile, apparel and leather industries – NACE 28.93

Company	Location	Region
STROJCHEM a.s.	Svit	Prešov
B.C.B. s.r.o.	Galanta	Trnava
NS ACM, spol. s r.o.	Nitra	Nitra
KOVO P+P, s.r.o.	Topoľčany	Nitra
VRAMON, spol. s r.o.	Sereď	Trnava
RENOZETA, spol. s r.o.	Trenčín	Trenčín

Source: Statistical Office of the Slovak Republic, 2009

Production of machinery for plastics and rubber – NACE 28.96

Company	Location	Region
Manz Slovakia s.r.o.	Nové Mesto n.Váhom	Trenčín
VOJUS a.s.	Považská Bystrica	Trenčín
FOPEX SLOVAKIA s.r.o.	Stakčín	Prešov
GOMS, spol. s r.o.	Púchov	Trenčín
BAAS s.r.o.	Beluša	Trenčín

Source: Statistical Office of the Slovak Republic, 2009

Production of other special purpose machinery – NACE 28.99

Company	Location	Region
Manz Slovakia s.r.o.	Nové Mesto nad Váhom	Trenčín
Matador industries, a. s.	Dubnica n.Váhom	Trenčín
Konštrukta-Industry akciová spoločnosť	Trenčín	Trenčín
STROJCHEM, a.s.	Svit	Prešov
PÖTTINGER STROJE, s.r.o.	Bánovce nad Bebravou	Trenčín
Gilbos Slovensko s.r.o.	Kechnec	Košice
Glunz & Jensen s.r.o.	Prešov	Prešov
IDO EET - Levické strojárne, s.r.o	Levice	Nitra
HÖRMANN Slovakia spol. s r.o.	Bratislava	Bratislava
VURAL,a.s.	Žilina	Žilina
JAMP SVORADA s. r. o.	Dubnica nad Váhom	Trenčín
VIPO a.s.	Partizánske	Trenčín
VUKOV EXTRA a.s.	Prešov	Prešov
Virtual Reality Media a.s.	Trenčín	Trenčín

Source: Statistical Office of the Slovak Republic, 2009

Manufacture of motor vehicles – NACE 29.1

Production of motor vehicles is the strongest part of Slovakian engineering industry. Passenger car production and components have after short drop in 2008 seen significant growth. In 2010 the sales in production of motor vehicles grew by 35% year on year and number of employees grew from 52 627 to 54 474 which is growth by 3.5%. Average salaries increased by 5.5% in 2010. Strong growth was maintained also throughout 2011 with growth of sales at 22.2% to reach 19 billion euros and number of employees growth at 11%. Average salary in 2011 grew by 5.9%.

Company	Location	Region
Volkswagen Slovakia a.s.	Bratislava	Bratislava
KIA Motors Slovakia s.r.o.	Žilina	Žilina
PCA Slovakia s.r.o.	Trnava	Trnava
PANAX F.C.S., spol. s r.o.	Tvrdošín	Žilina

Source: Statistical Office of the Slovak Republic, 2009

Manufacture of parts and accessories for motor vehicles – NACE 29.3

Company	Location	Region
Mobis Slovakia s.r.o.	Gbeľany	Žilina
JOHNSON CONTROLS INTERNATIONAL spol. s r.o.	Bratislava	Bratislava
Faurecia Slovakia s.r.o.	Bratislava	Bratislava
SAS Automotive s.r.o.	Bratislava	Bratislava
GETRAG FORD Transmissions s.r.o.	Kechnec	Košice
ZF Sachs Slovakia a.s.	Trnava	Trnava
HBPO Slovakia s.r.o.	Lozorno	Bratislava
MATADOR Automotive Vráble, a.s.	Vráble	Nitra
IAC Group (Slovakia) s.r.o.	Lozorno	Bratislava
Valeo Slovakia s.r.o.	Košice	Košice

Source: Statistical Office of the Slovak Republic, 2009

Ship building and ship repair – NACE 30.1

Company	Location	Region
Slovenské lodenice a.s.	Komárno	Nitra
BPT Trade a.s.	Bratislava	Bratislava
Slovenská plavba a prístavy - Lodenica, s.r.o.	Bratislava	Bratislava
KK Company s.r.o.	Vlkanová	Banská Bystrica

Source: Statistical Office of the Slovak Republic, 2009

Production of locomotives and rolling stock – NACE 30.20

Company	Location	Region
Tatravagónka a.s.	Poprad	Prešov
ŽOS Trnava a.s.	Trnava	Trnava
ZOS Zvolen s.r.o.	Zvolen	Banská Bystrica
ŽOS Vrútky a.s.	Vrútky	Žilina
ZASTROVA, a.s.	Spišská Nová Ves	Košice
LOKO TRANS Slovakia, s.r.o.	Šurany	Nitra
EVPU a.s.	Nová Dubnica	Trenčín
ZTS TESS VOS, akciová spoločnosť	Martin	Žilina
BEVEX - BANSKÝ VÝSKUM, spol. s r.o.	Martin	Žilina
ŽELOS, spol. s r.o.	Trnava	Trnava
COMPEL RAIL, a.s.	Martin	Žilina

Source: Statistical Office of the Slovak Republic, 2009

Installation of industrial machinery and equipment – NACE 33.20

Company	Location	Region
ABB, s.r.o.	Bratislava	Bratislava
Alcatel-Lucent Slovakia a.s.	Liptovský Hrádok	Žilina
PPA ENERGO s.r.o.	Bratislava	Bratislava
Glunz & Jensen, s.r.o.	Prešov	Prešov
KLIMAK, s.r.o.	Nitra	Nitra
PPA INŽINIERING, s.r.o.	Bratislava	Bratislava
PPA CONTROL a.s.	Bratislava	Bratislava
EVPU a.s.	Nová Dubnica	Trenčín
MENERT spol. s r.o.	Šaľa	Nitra
VSS, a.s.	Košice	Košice

Source: Statistical Office of the Slovak Republic, 2009

Useful contacts:

Companies operating in the engineering industry are associated in the Federation of the Mechanical Engineering Industry: www.zchfp.sk

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