



A German perspective on the Romanian automotive market - Potential for Republic of Moldova -

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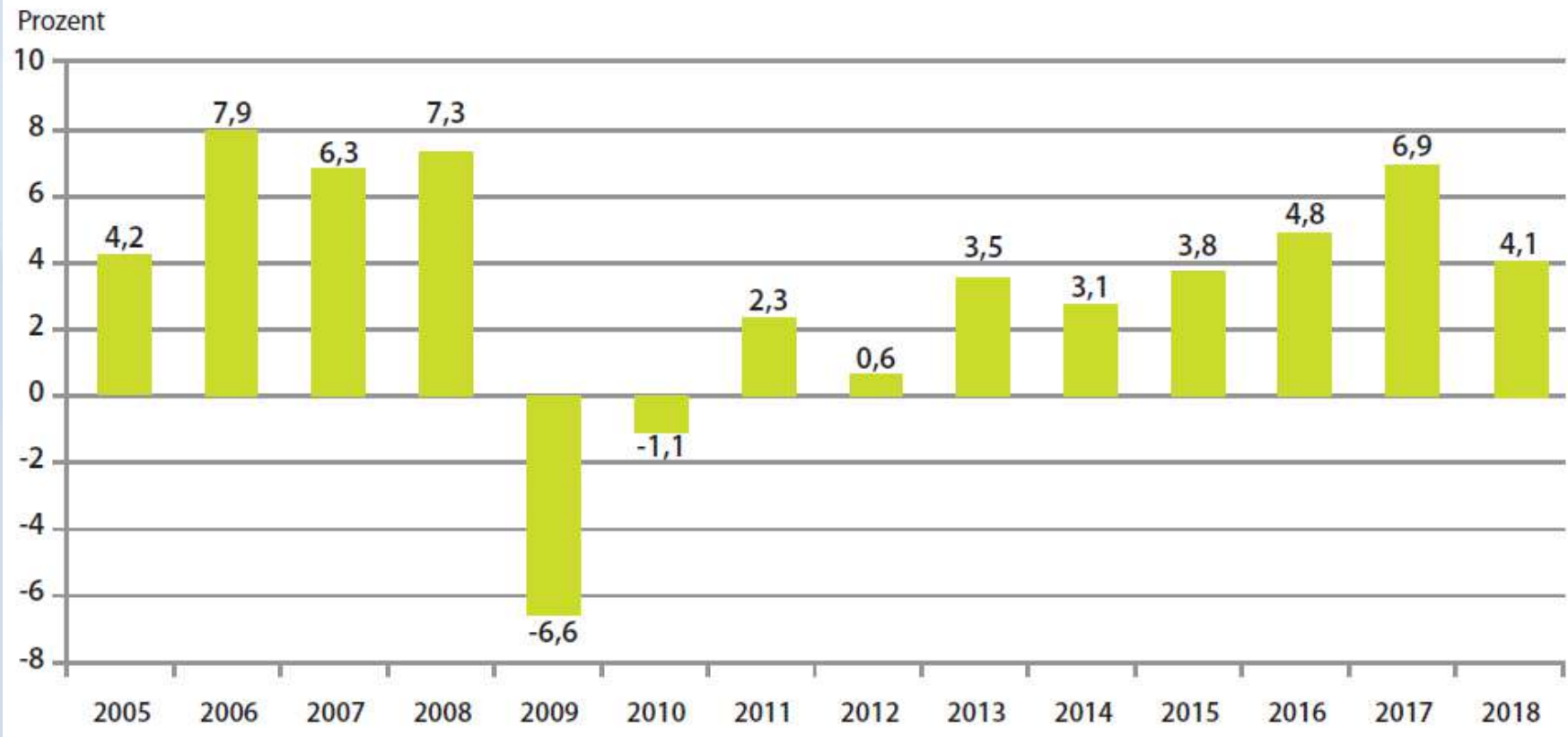
○ AHK Romania



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Romania's GDP growth (annual %)



Source: AHK publication "Economic Overview Romania 2019", published on www.ahkrumaenien.ro

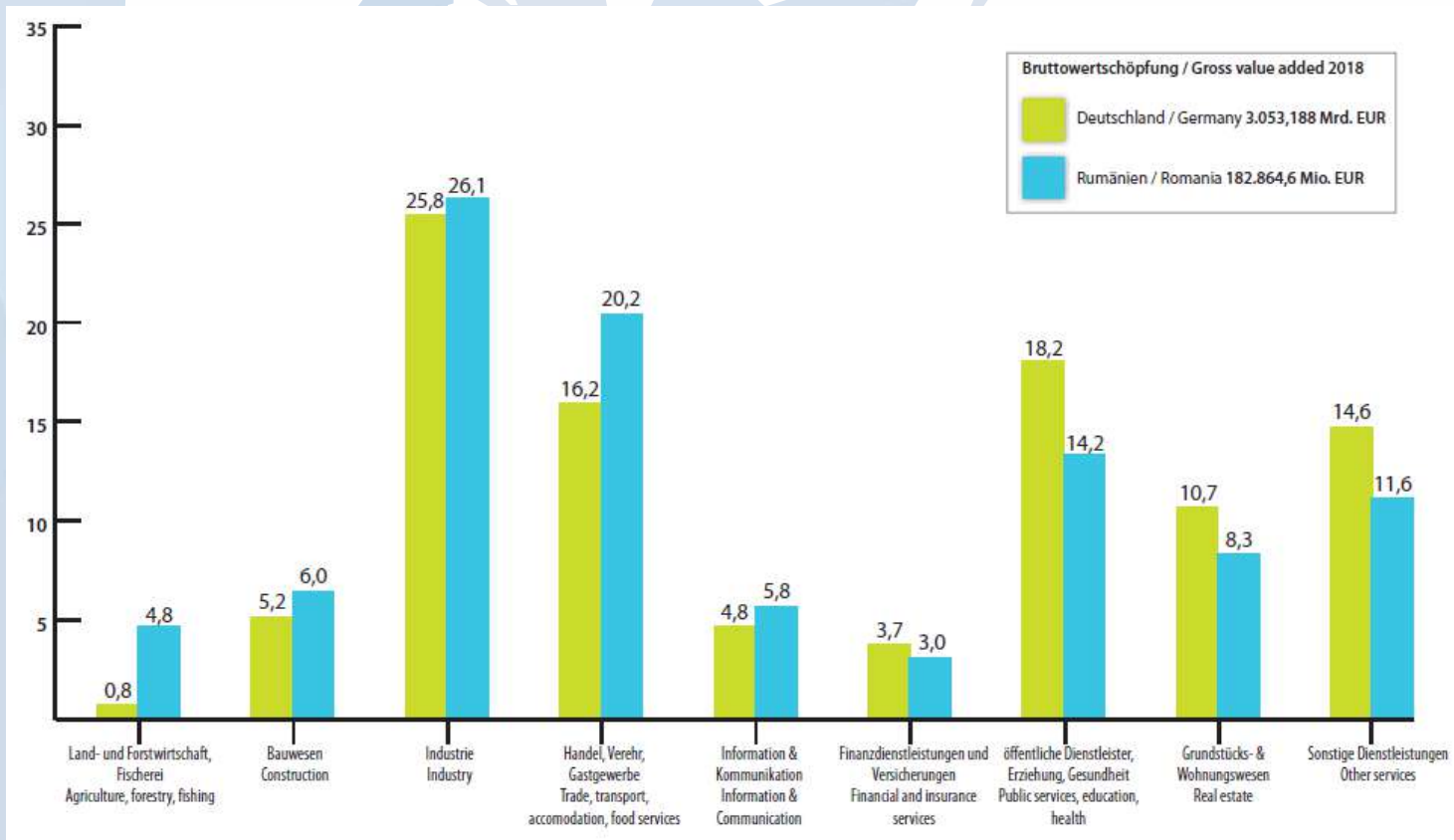


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MARKET OVERVIEW ROMANIA

Gross value added by industries (%)



Source: AHK publication "Economic Overview Romania 2019", published on www.ahkrumaenien.ro



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Imports & Exports between Romania & Germany (mil. EUR)

Category	Imports 2018	% as against 2017	Exports 2018	% as against 2017
Machinery and mechanical appliances	6.422,7	+12,81%	6.515,3	+7%
Vehicles and associated transport equipment	2.733,0	+20,78%	3.933,3	+7,57%
Base metals and articles of base metals	1.511,8	+12,86%	971,1	+11,81%
Plastics & rubber	1.474,6	+4,58%	806,8	13,36%
Total	12.141,9	+13,41%	12.226,5	+7,96%

→ Total GER-RO Trade: ca. 32,6 bil. EUR (Imports from GER: 17 bil. EUR / Export to GER: 15.6 bil. EUR)

Source: AHK publication "Economic Overview Romania 2019", published on www.ahkrumaenien.ro

German investments in Romania (capital stock)



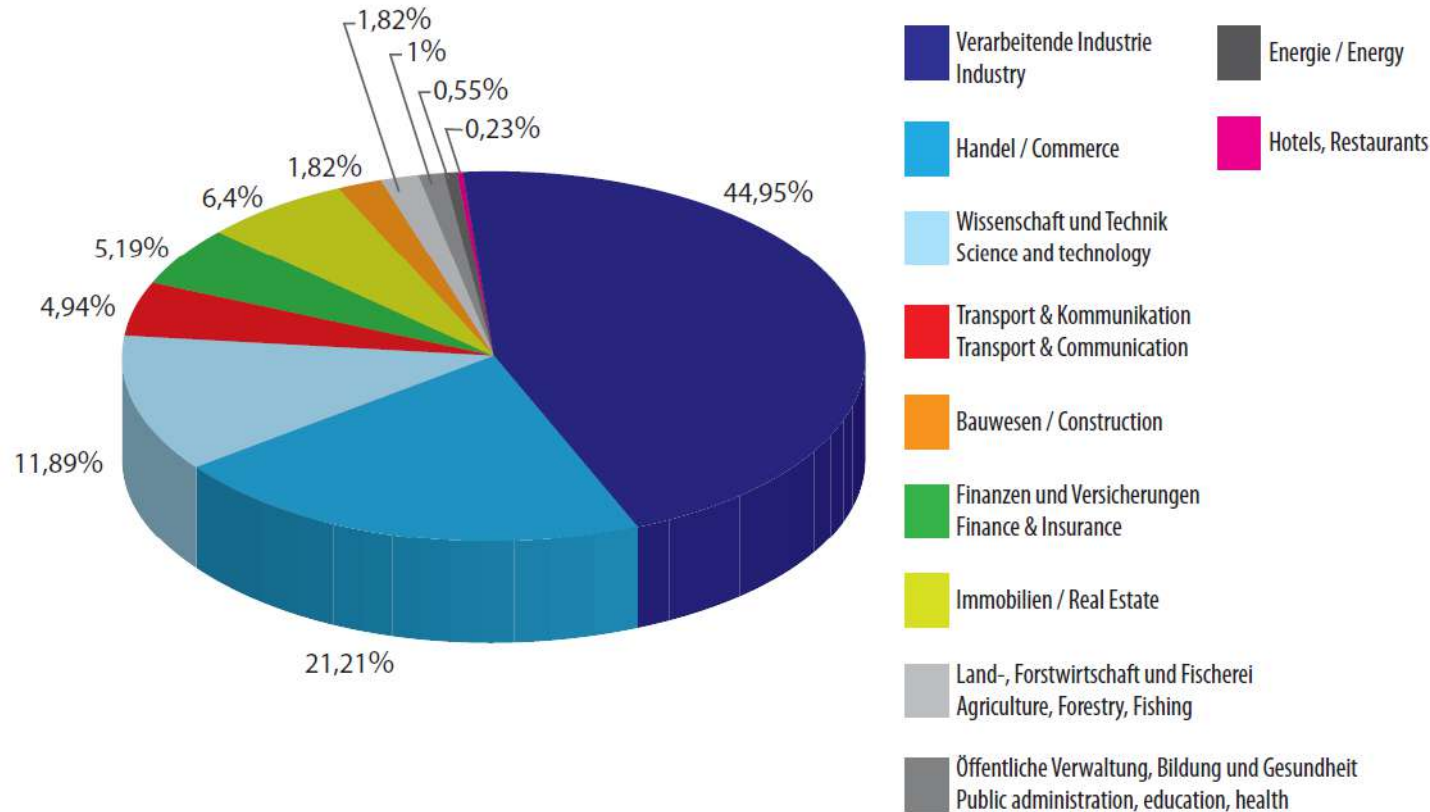
Source: AHK publication "Economic Overview Romania 2019", published on www.ahkrumaenien.ro



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GER investment in share capital: Dec. 1990 – 2018



Source: AHK publication "Economic Overview Romania 2019", published on www.ahkrumaenien.ro

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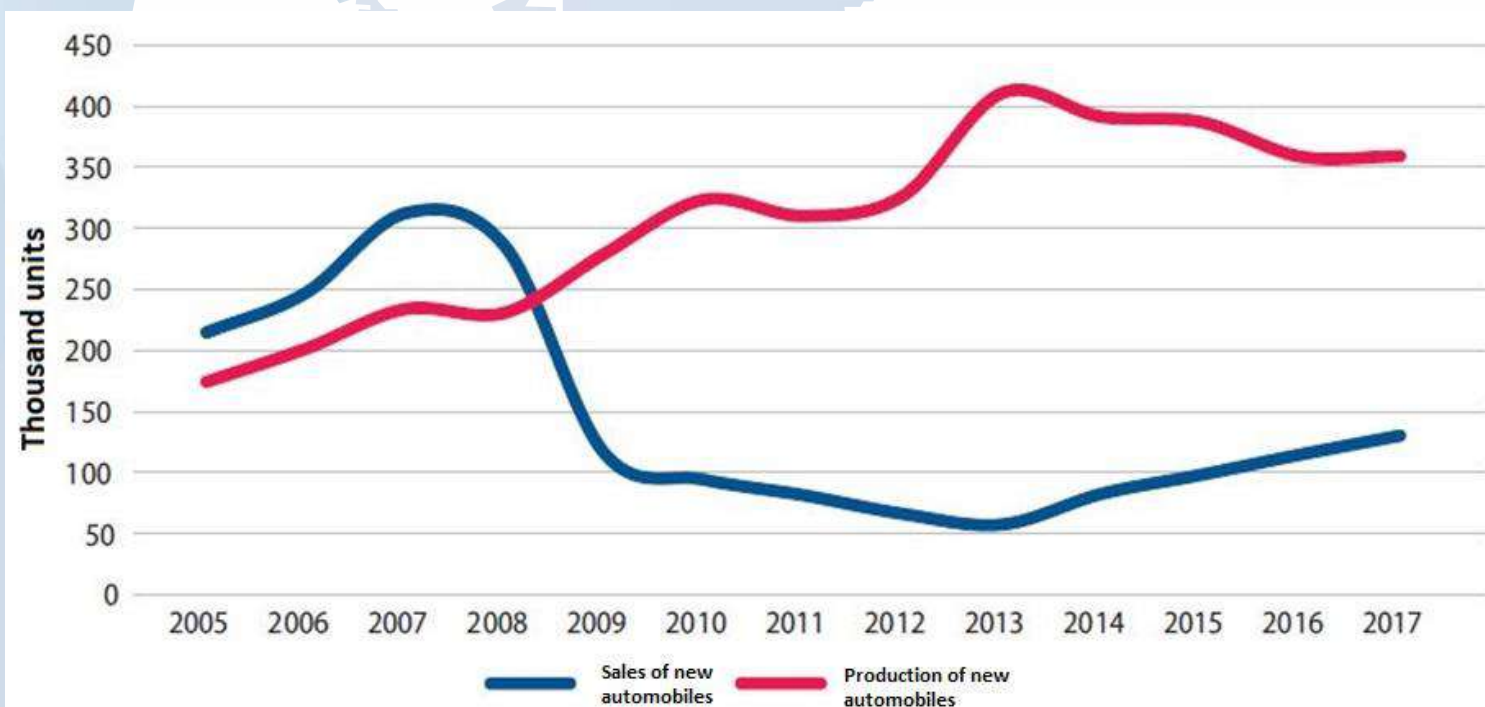
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ROMANIAN AUTOMOTIVE INDUSTRY

Automobile sector overview

- Sales of new automobiles 2017: 130.000 automobiles
- Production of new automobiles 2017: 359.000 automobiles



Source: Syndex, 2018



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ROMANIAN AUTOMOTIVE INDUSTRY

Automotive components sector

Tires	Valeo	Sumitomo	Dräxmaier	DELPHI	LEAR CORPORATION	YAZAKI
Cables and conductors	MAGNA	Valeo	preh	faurecia		
Plastics	KIRCHHOFF AUTOMOTIVE	BAMESA	GIC GRUPUL INDUSTRIAL COMPONENTE			
Aluminum and metal components	CONTITECH®	SNR®	RONERA RUBBER	Putere prin elasticitate		
Rubber technical components	SCHAEFFLER	NTN®	SNR®			
Bearings and transmission components		BOSCH	Continental			
Electronics/ Mechatronic equipment	MARQUARDT	KUHNKE	DELPHI			
Optical devices	Valeo	HELLA	ELBA			
Batteries/ Accumulators		ROMBAT	CARANDA®			
Recycling		ROMBAT	rc® ROMCARBON S.A.			

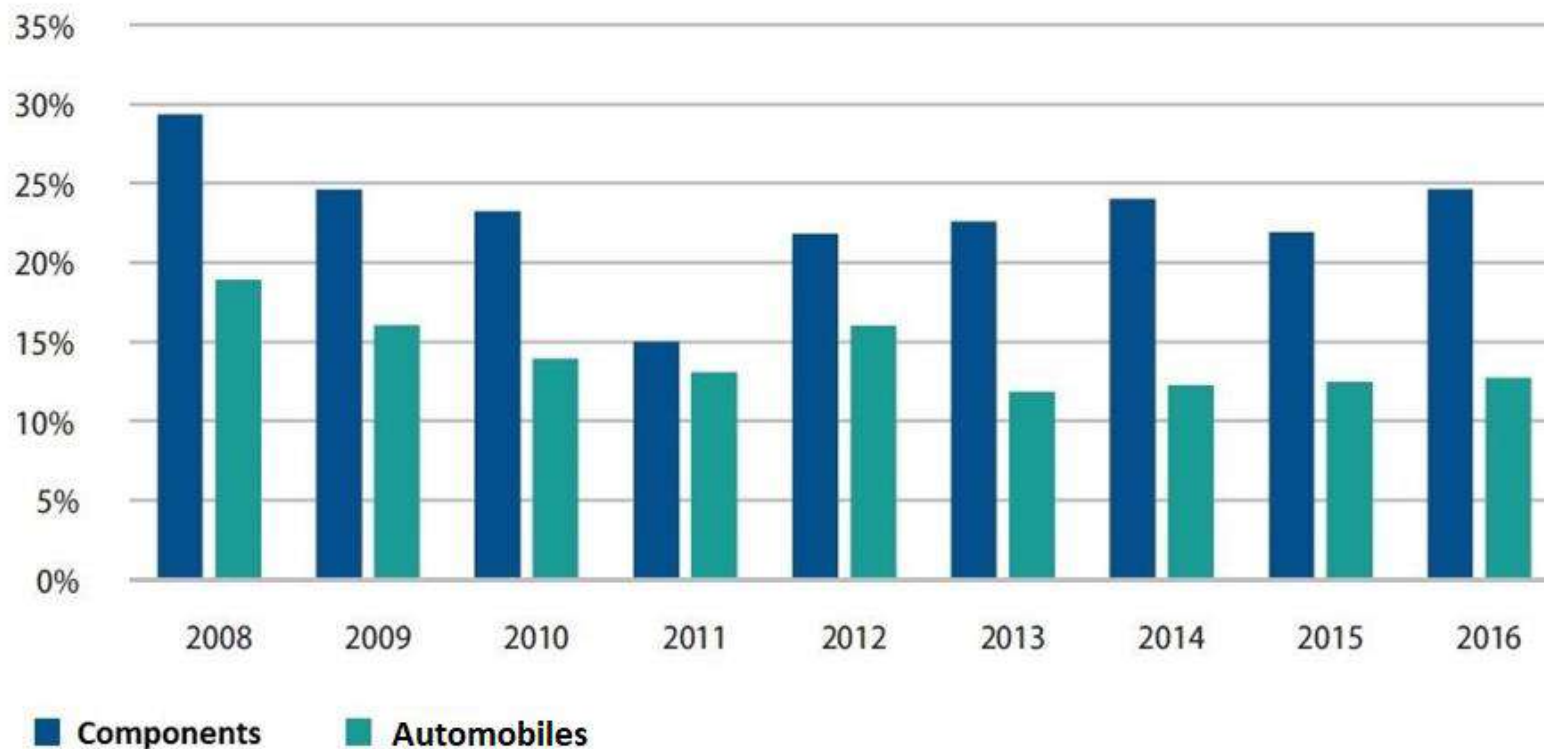


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ROMANIAN AUTOMOTIVE INDUSTRY

Added value in the automotive industry (% of turnover of each sector)



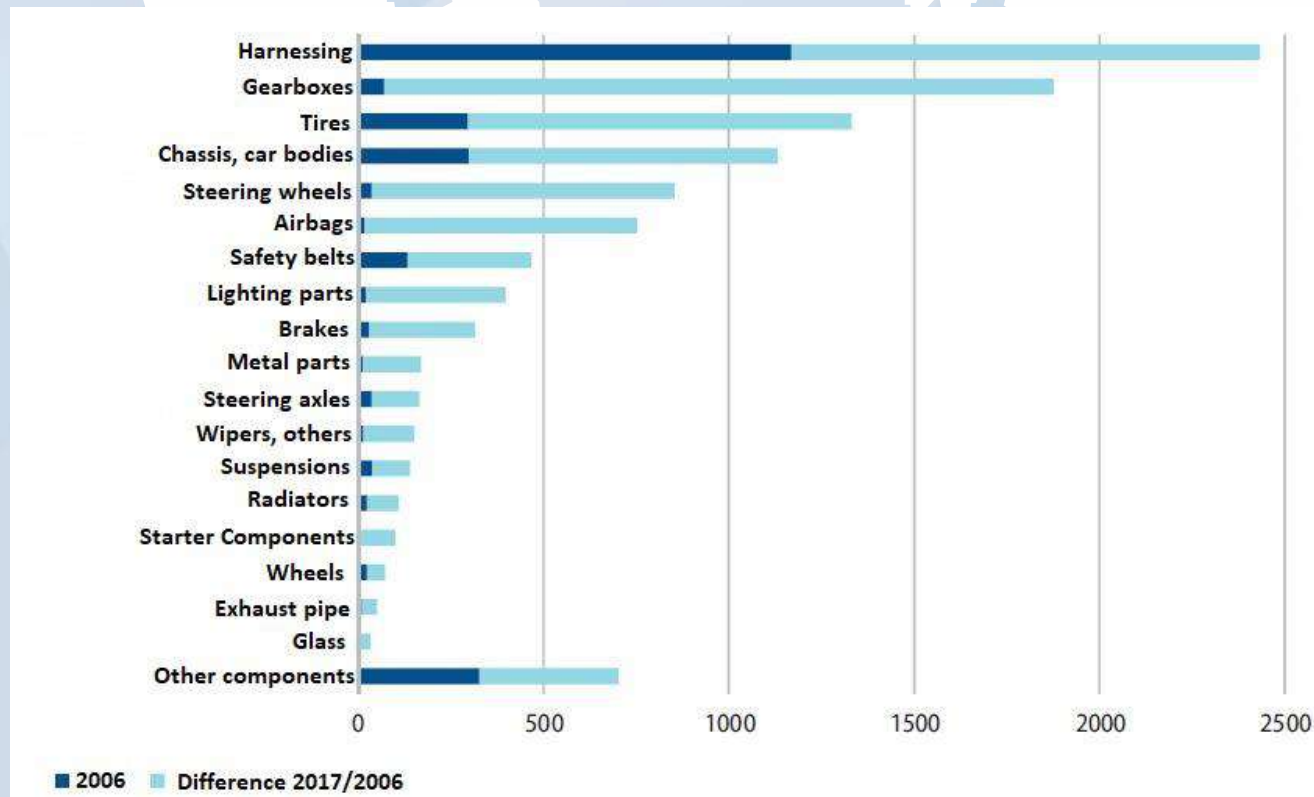
Source: Syndex, 2018



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Exports of auto. components by product types (hundreds of millions of euros turnover)



Source: Syndex, 2018

Sold production of wiring harness in Europe

	Total value of production in 2017 (billion euros)	Growth compared to 2007	Average price per unit produced in 2017
RO	2,56	+89,5%	12,5 €
PL	0,85	+37,0%	11,2 €
SK	0,80	+69,7%	24,1 €
CZ	0,76	-8,7%	19,4 €
DE	0,71	-36,5%	17,2 €
ES	0,49	-2,3%	18,1 €
AT	0,43	-10,1%	7,5 €
FR	0,29	-57,5%	81,2 €
HU	0,20	-54,9%	12,6 €
IT	0,17	-16,3%	12,3 €
PT	0,15	-52,5%	4,9 €
UK	0,11	-52,3%	52,6 €
FI	0,02	-84,1%	43,5 €

Source: Syndex, 2018



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Employees in the auto industry by counties, 2016 (% of total employees by county)



Source: Syndex, 2018



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Potential for Moldova – Perspective AHK Romania

German active companies

6th place among the companies with foreign capital: ~ 400 (3,5% of the total); Investition: ~ 36,4 mil. EUR

Example automotive sector: Dräxlmaier Automotive, LEONI, SEBN Sumitomo Electric Bordnetze, Steinel Electronic, *Coroplast Fritz Mueller*

GER-MOLD Trade in Jan-Aug 2019: ca. 174 mil. EUR

- *Imports from GER: 28,9 mil. EUR = 8,4 % of the total imports*
- *Exports to GER: 145 mil. EUR = 9 % of the total exports*

Romanian active companies

1st place among the companies with foreign capital: 1.746 (15,4% of the total); Investition: ~ 36,3 mil. EUR

RO-MOLD Trade in Jan-Aug 2019 : ca. 956,3 mil. EUR

- *Imports from RO: 496,3 mil. EUR = 14,5 % of the total imports*
- *Exports to RO: 460 mil. EUR = 28,4 % of the total exports*



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Potential for Moldova – Perspective AHK Romania

- Increase investments of German companies in Rep. Moldova by using the specific advantages of Republic of Moldova, namely availability of skilled workforce and university eco-system in the proximity of the EU
- Tighten the cooperation between Romania and Republic of Moldova in the field of the manufacturing industry focusing on GER companies in RO and original RO companies
- Promoting the attractiveness of Republic of Moldova as a sales as well as a supplying market for companies in Germany



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ih business portal für den rumänischen markt



the GreenTech-Initiative of AHK Romania

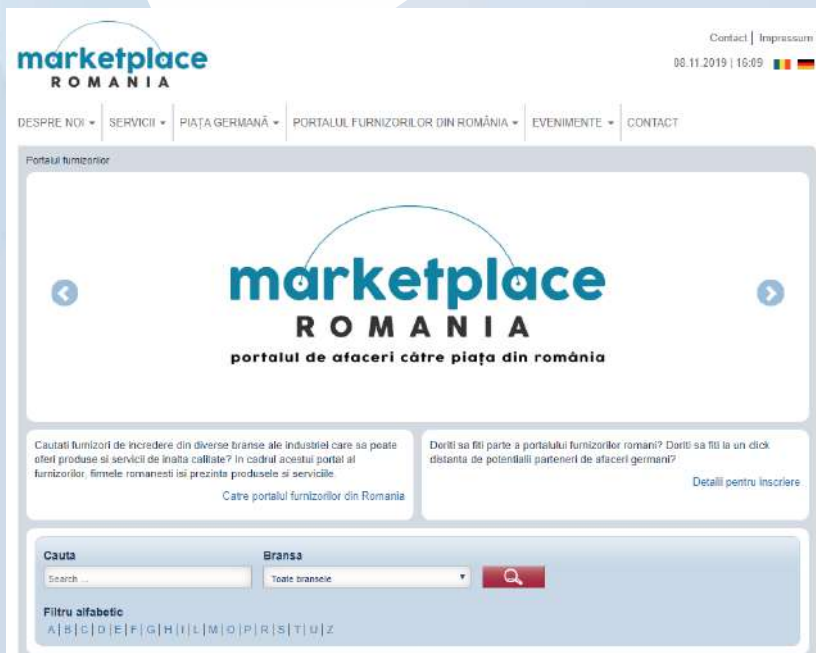


Ständiges Schiedsgericht bei der AHK Rumänien



AHK-Tool for Romanian producers (www.marketplaceroomania.ro)

- possibility to enter the German supply chain
- visibility on the German market
- a simple way for the German companies to identify the right potential suppliers



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AHK Services

The AHKs offer various services for business development on foreign markets.



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AHK Initiatives

marketplace romania - Portal of Suppliers in Romania

www.marketplaceroomania.ro/ro/portalul-furnizorilor/

econet romania - GreenTech platform

www.econet-romania.com/de/

EduPro – professional training center

www.eduprosummit.ro/

Court of Arbitration

www.ahkrumaenien.ro/ro/initiativele-ahk/curtea-de-arbitraj/



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Thank you for your attention!



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