



# **AUTOMOTIVE MANUFACTURING IN ROMANIA - H1 2015**

**a DEMO sector brief by  
FRD Center**

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*Sources consulted for this report: business mass media, the companies, official sources*

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## 1. AUTOMOTIVE COMPONENTS

### 1.1. Local production - general considerations

The manufacturing of automotive components is a dynamic sector in Romania, benefitting from ongoing foreign investments, an educated and productive labour force and a long tradition of industrial manufacturing, metal working and casting.

Romania is an attractive market for the foreign manufacturers of auto components. The domestic market of auto components is dominated by big foreign companies that have manufacturing facilities in Romania, such as: Continental, Michelin, Autoliv, Takata, Schaeffler, Johnson Controls, Pirelli, Delphi, TRW Automotive, Leoni, Draxlmaier, Yazaki, Daimler etc.

Key foreign manufacturers of automotive components have been attracted in Romania by the investments made by the domestic manufacturers of auto vehicles - Automobile Dacia (part of Renault Group) and Ford Romania.

### 1.2. Examples of automotive components produced in Romania and their producers

According to the FRD Center research and the Romanian Association of Automotive Components Producers some of the automotive components manufactured in Romania and the respective producers are listed below.

Products	Producers
Chassis	Continental Uzina Mecanica si Sasiuri Dacia Trelleborg Automotive Stelco Romania
Gearboxes	Uzina Mecanica si Sasiuri Daci Star Transmission Subansamble Auto Schaeffler
Gaskets	Fermit Ronera Rubber
Exhaust pipes and silencers	Twomar New Megaconstruct Tess Conex Stelco Romania
Shock absorbers and springs	Compa Imperial Motor
Steering box components	Compa Sidem
Steering wheels	Autoliv

	Takata TRW Automotive Key Safety Systems
Suspension equipment (arms, axles, semi-axles, ball joints)	Componente Auto
Brake systems and components	Mogul Motorparts Compa Autonova
Ignition distributors and cable kits	Sinterom
Batteries	Rombat Caranda Baterii
Bodies and parts	Tess Conex SILDVB Com
Window glasses	Gerom Glasscorp
Window frames and body gaskets	Ronera Rubber VM Comp 4K Services
Fittings, locks and manual window lifts	AKA Automotiv
Seats	Johnson Controls GIC Group Martur Lear
Dashboards and internal trims	Draxlmaier Chimica Euro Auto Plastic Systems GIC Group ELJ Automotive Metaplast Delta Invest
Bumpers	Chimica GIC Group Magna
Seatbelts	Autoliv Takata Key Safety Systems
Airbags	Autoliv Takata GST Automotive Safety Ro TRW Automotive

	Key Safety Systems
Trailer coupling devices, sun visors, fuel tank caps and assembled cable systems	Chimica GIC Group
Headlamps and light signalling devices	Elba Tesva Hella
Windscreen washers and wipers	Compa
Cables	Kromberg & Schubert Leoni Draxlmaier Fujikura Automotive Complete Systems Romcab Delta Rom Technologies Yazaki Delphi Packard Hirschmann SEWS
Radiators	RAAL Romradiatoare Conrad Termic
Filters	Romcarbon
Tyres	Continental Michelin Pirelli

Source: FRD Center, ACAROM

### 1.3. Examples of production values / type of automotive component

According to Eurostat, the value of some of the automotive components manufactured in Romania is:

Products	Production value in 2013 (EUR)
Insulated ignition wiring sets and other wiring sets	1,939,388,440
Distributors and ignition coils	2,583,657
Safety seat belts	647,038,265
Parts and accessories of bodies (including cabs)	672,968,121
Brakes and servo-brakes and their parts (excluding un-mounted linings or pads)	69,753,410

Drive-axles with differential, non-driving axles and their parts	14,124,000
Road wheels and parts and accessories thereof	56,370,574
Suspension systems and parts thereof (including shock absorbers)	24,613,224
Silencers, exhaust pipes and parts thereof	38,963,553
Clutches and parts thereof	48,625
Steering wheels, steering columns, steering boxes and parts thereof	202,561,864

Source: Eurostat

#### 1.4. Examples of recent production dynamics / type of product

According to the FRD Center analysis based on official statistic data, some of the recent dynamics in automotive components manufacturing are:

Products	Production value in 2012 (EUR)	Production value in 2013 (EUR)	Dynamics 2013 vs 2012
Insulated ignition wiring sets and other wiring sets	1,800,442,797	1,939,388,440	+7.7%
Distributors and ignition coils	2,161,629	2,583,657	+19.5%
Safety seat belts	569,639,010	647,038,265	+13.6%
Parts and accessories of bodies (including cabs)	510,258,213	672,968,121	+31.9%
Drive-axles with differential, non-driving axles and their parts	12,501,578	14,124,000	+13.0%
Road wheels and parts and accessories thereof	56,025,948	56,370,574	+0.6%
Steering wheels, steering columns, steering boxes and parts thereof	156,600,388	202,561,864	+29.3%

Source: FRD Center, Eurostat

## 2. AUTOMOTIVE PRODUCTION

### 2.1. Statistics

The production and assembly of auto vehicles in Romania has recorded 391,434 units in 2014, out of which 391,422 passenger cars and 12 commercial vehicles, this representing a decrease by 4.8% compared to 2013.

Production and assembly	2013 (units)	2014 (units)	Dynamics 2014 vs 2013
Passenger cars	410,959	391,422	-4.8%
Commercial vehicles	38	12	-68.4%
Buses	0	0	-
<b>TOTAL</b>	<b>410,997</b>	<b>391,434</b>	<b>-4.8%</b>

Source: Automotive Manufacturers and Importers Association - APIA

In the first five months of 2015, the production and assembly of auto vehicles has recorded 177,643 units in Romania, this representing an increase of 0.9% compared to the same period of 2014.

Production and assembly	Jan - May 2014 (units)	Jan - May 2015 (units)	Jan - May 2015 vs Jan - May 2014
Passenger cars	176,120	177,643	+0.9%
Commercial vehicles	4	0	-
Buses	0	0	-
<b>TOTAL</b>	<b>176,124</b>	<b>177,643</b>	<b>+0.9%</b>

Source: Automotive Manufacturers and Importers Association - APIA

## 2.2. Manufacturers of automotive

### 2.2.1. OEMs

Company name	Automobile Dacia SA
Website	www.daciagroup.com
Owner	Renault Group (99.43%)
Year of set up	1966; Renault Group has acquired the plant in 1999
No. of manufacturing facilities in Romania	One
No. employees	14,063 (in 2014)
Net turnover	4.2 billion EUR (in 2014)
Products	Logan, Logan MCV, Sandero, Duster, Lodgy, Dokker, Dokker VAN

Company name	Ford Romania SA
Website	www.ford.ro
Owner	Ford Group
Year of set up	1976 (under the name "Oltcit" and subsequently "Automobile Craiova"); Ford Group has acquired the plant in 2008

No. of manufacturing facilities in Romania	One
No. employees	3,448 (in 2013)
Net turnover	1.1 billion EUR (in 2013)
Products	B-Max

### 2.2.2. Tier 1 automotive companies operating in Romania - examples

Company name	Continental Automotive Products SRL
Website	www.continental-corporation.com
Owner	Continental AG Germany
Year of set up	1998
No. of manufacturing facilities in Romania	Seven (total number of manufacturing units of Continental Group in Romania)
No. employees	2,239 (in 2014)
Net turnover	601 million EUR (in 2014)
Products	Tyres
Main clients	Automobile Dacia, Ford, Nissan, Fiat, Toyota, GM
Additional info	Other manufacturers of automotive components in Romania, part of Continental Group, are: Continental Automotive Systems SRL, Continental Automotive Romania SRL, Contitech Romania SRL, Continental Powertrain Romania SRL, ContiTech Fluid Automotive Romania SRL and ContiTech Thermopol Romania SRL. Continental Group has in Romania manufacturing plants in the following sectors: tyres, fluid technology & power transmission, chassis & safety, interior and powertrain.

Company name	Michelin Romania SA
Website	www.michelin.ro
Owner	Michelin France
Year of set up	2001
No. of manufacturing facilities in Romania	Three (two tyre facilities and one steel cord facility)
No. employees	2,698 (in 2014)



Net turnover	471 million EUR (in 2014)
Products	Tyres
Main clients	Automobile Dacia

<b>Company name</b>	<b>Autoliv Romania SRL</b>
Website	www.autoliv.com
Owner	Autoliv Inc. Sweden
Year of set up	1997
No. of manufacturing facilities in Romania	Five
No. employees	6,893 (in 2014)
Net turnover	549 million EUR (in 2014)
Products	Seatbelts and seatbelt components (webbings, retractors), airbags, steering wheels
Main clients	BMW, Volkswagen, Renault, Ford, Daimler

<b>Company name</b>	<b>Takata Romania SRL</b>
Website	www.takata.com
Owner	Takata Japan
Year of set up	1996
No. of manufacturing facilities in Romania	One
No. employees	4,103 (in 2014)
Net turnover	445 million EUR (in 2014)
Products	Seatbelts, steering wheels
Main clients	Mercedes, Honda
Additional info	Takata Group owns in Romania also the company Takata Sibiu SRL that manufactures airbag cushions.

<b>Company name</b>	<b>Schaeffler Romania SRL</b>
Website	www.schaeffler.ro
Owner	Schaeffler AG Germany
Year of set up	2002
No. of manufacturing facilities in Romania	One
No. employees	3,868 (in 2014)
Net turnover	391 million EUR (in 2014)
Products	Automotive components, machine tools components, components for wind industry

Main clients	n/a
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<b>Company name</b>	<b>Pirelli Tyres Romania SRL</b>
Website	www.pirelli.com
Owner	Pirelli & C S.p.A Italy
Year of set up	2004
No. of manufacturing facilities in Romania	One
No. employees	2,282 (in 2014)
Net turnover	376 million EUR (in 2014)
Products	Tyres
Main clients	n/a
Additional info	Pirelli Group owns in Romania also the company Pirelli & C. Eco Technology Ro SRL that manufactures auto filters.

<b>Company name</b>	<b>Johnson Controls Romania SRL</b>
Website	www.johnsoncontrols.ro
Owner	Johnson Controls Inc. USA
Year of set up	2002
No. of manufacturing facilities in Romania	Seven (total number of automotive manufacturing units of Johnson Controls Group in Romania)
No. employees	4,163 (in 2014)
Net turnover	329 million EUR (in 2014)
Products	Auto seats
Main clients	Automobile Dacia
Additional info	Other manufacturers of automotive components in Romania, part of Johnson Controls Group, are: Johnson Controls Jimbolia SRL and Johnson Controls Fabrics Romania SRL.

<b>Company name</b>	<b>Delphi Packard Romania SRL</b>
Website	www.delphi.com
Owner	Delphi Automotive UK
Year of set up	1996
No. of manufacturing facilities in Romania	Three
No. employees	7,598 (in 2014)
Net turnover	293 million EUR (in 2014)
Products	Electrical and electronic distribution

	systems (wiring harnesses for automotive bodies, interiors and doors and small harnesses)
Main clients	Renault
Additional info	Delphi Group owns also the company Delphi Diesel Systems Romania SRL. It has one manufacturing facility of diesel engine management systems (including common rail diesel pumps and injectors).

<b>Company name</b>	<b>TRW Automotive Safety Systems SRL</b>
Website	www.trw.com
Owner	ZF TRW Automotive Holdings Corp USA
Year of set up	2004
No. of manufacturing facilities in Romania	Six
No. employees	2,931 (in 2014)
Net turnover	288 million EUR (in 2014)
Products	Steering wheels, airbags
Main clients	Mercedes-Benz, BMW, Volkswagen, Porsche, Fiat, Renault
Additional info	ZF TRW Automotive Group owns in Romania also the company TRW Airbag Systems SRL that has one airbag manufacturing facility.

<b>Company name</b>	<b>Leoni Wiring Systems Ro SRL</b>
Website	www.leoni.ro
Owner	Leoni AG Germany
Year of set up	2001
No. of manufacturing facilities in Romania	One
No. employees	4,348 (in 2014)
Net turnover	206 million EUR (in 2014)
Products	Auto cables
Main clients	Mercedes, BMW, Rolls Royce
Additional info	Other manufacturers of automotive components in Romania, part of Leoni Group, are: Leoni Wiring Systems Arad SRL and Leoni Wiring Systems Pitesti SRL. They have three cable manufacturing facilities.

2.2.3. Tier 2 automotive companies operating in Romania - examples

Company name	Compa SA
Website	www.compa.ro
Owners	Employees (54.6%), others (45.4%)
Year of set up	1969 (under the name “Intreprinderea de Piese Auto Sibiu”)
No. of manufacturing facilities in Romania	One
No. employees	1,660 (in 2014)
Net turnover	94.7 million EUR (in 2014)
Products	Injector subassemblies and components, turbocharger subassemblies and components, windscreen wiper subassemblies and components, subassemblies and components for steering gears and columns, hot and cold coiled springs, chamber brake cylinders, brake equipment, air-conditioning tubes, stamped parts, industrial equipment, moulds and tools, metallic welded structures
Main clients	Delphi, Takata, Faurecia, Schaeffler, Bosch, Honeywell, Dacia-Renault

Company name	GIC Nosag Metal SRL
Website	www.gic.ro
Owners	GIC Group - Grup Industrial Componente (Romanian family business) and Defta Group France
Year of set up	2004
No. of manufacturing facilities in Romania	One
No. employees	435 (in 2014)
Net turnover	57.1 million EUR (in 2014)
Products	Inserts for back seat frames, stamping parts, door rods, hood holders, trunk hinges, harnesses supports, headrest inserts, armrest brackets, glove box strikers etc
Main clients	Johnson Controls, Faurecia, Valeo, Treves, Trelleborg, Heyform, Dacia, Renault

Company name	Delta Invest SRL
Website	www.deltainvest.ro
Owner	Mr. Nicolae Movileanu
Year of set up	1994
No. of manufacturing facilities in Romania	One
No. employees	348 (in 2014)
Net turnover	26.3 million EUR (in 2014)
Products	Automotive plastic components, interior and exterior plastic parts, exterior trim parts, protection parts, plastics for electronics industry etc
Main clients	Faurecia, Delphi, Yazaki, Euro Auto Plastic Systems, Valeo, Emerson, Makita, Calsonic Kansei, Honeywell, Dacia, Renault

Company name	Altur SA
Website	www.altursa.ro
Owners	Mecanica Rotes SA (28.2%), Celule Electrice SA (14.8%), Romanian Investment Fund (13.1%), others (43.9%)
Year of set up	1991
No. of manufacturing facilities in Romania	One
No. employees	609 (in 2014)
Net turnover	19.7 million EUR (in 2014)
Products	Brake systems components, gravity castings, pressure castings
Main clients	TRW Automotive, Continental

Company name	Comefin SA
Website	www.gic.ro
Owner	GIC Group - Grup Industrial Componente (Romanian family business)
Year of set up	1991
No. of manufacturing facilities in Romania	One
No. employees	318 (in 2014)
Net turnover	14.4 million EUR (in 2014)
Products	Brackets, threaded bushings, rear train mounting brackets, fixation rods, stamping

	parts, coatings for brackets, tubes, metallic wires etc
Main clients	Continental, Johnson Controls, MMM Autoparts, Dacia-Renault

<b>Company name</b>	<b>Automotive Complete Systems SRL</b>
Website	www.acs-automotive.ro
Owner	GIC Group - Grup Industrial Componente (Romanian family business)
Year of set up	2000
No. of manufacturing facilities in Romania	One
No. employees	555 (in 2014)
Net turnover	3.8 million EUR (in 2014)
Products	Wire-harnesses for automotive control systems, retractable luggage covers, security nets, floor stiffener assemblies, spare parts
Main clients	Yazaki, Treves, FCI

<b>Company name</b>	<b>Faconnage Mecanique de la Bresle Plastics SRL</b>
Website	www.fmb-plastics.ro
Owner	FMB Group France
Year of set up	2006
No. of manufacturing facilities in Romania	One
No. employees	54 (in 2014)
Net turnover	3.4 million EUR (in 2014)
Products	Automotive plastic components
Main clients	Valeo, Mahle, Salomon, Videoton, CDP Access Groupe Piroux etc

<b>Company name</b>	<b>TDM Transformation Decoupage de Metaux SRL</b>
Website	www.groupe-emi.fr
Owner	Groupe EMI France
Year of set up	2009
No. of manufacturing facilities in Romania	One
No. employees	12 (in 2014)
Net turnover	1.7 million EUR (in 2014)
Products	Stamped parts and assembled parts for automotive

Main clients	Continental, Faurecia, Valeo, Calsonic Kansei
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Company name	Euro Sandow Filiala Bucuresti SRL
Website	www.eurosandow.ro
Owner	Euro Sandow SAS France
Year of set up	2003
No. of manufacturing facilities in Romania	One
No. employees	53 (in 2014)
Net turnover	1.1 million EUR (in 2014)
Products	Elastic and rigid nets, elastic and rigid straps, elastic cables for automotive and industry sectors
Main clients	Euro Auto Plastic Systems, Faurecia, Treves, Dacia, Renault

Company name	Chimica SA
Website	www.chimica.ro
Owners	Mr. Alexandru Farcas (64.1%), others (35.9%)
Year of set up	1937 (under the name “Statia de Incercare Astra”)
No. of manufacturing facilities in Romania	One
No. employees	8 (in 2014)
Net turnover	0.9 million EUR (in 2014)
Products	Automotive plastic components, plastic consumer goods, plastic packages etc.
Main clients	Faurecia, TRW Automotive, Euro Auto Plastic Systems, Dura Automotive Systems, Automotive Lighting, Dacia-Renault etc

### 3. SECTOR NEWS

The US company **Federal Mogul Motorparts** has opened a new manufacturing facility in Ploiesti (Southern Romania) in April 2015. The facility produces parts and components of windshield wipers for auto vehicle manufacturers in Europe. The new production unit operates together with the brake systems plant owned by Federal Mogul Motorparts in Ploiesti.



The German group **Draxlmaier** has launched in April 2015 a new production unit in Brasov (Central Romania), following investments of 50 million EUR. The new facility manufactures dashboards, consoles and doors for large automakers such as BMW. Through this investment, Draxlmaier has created 500 new jobs.

**Automobile Dacia** - the biggest producer of auto vehicles in Romania - has sold 511,465 auto vehicles in 2014, up by 19% compared to 2013. Dacia has a market share of over 31% on the Romanian market. The company exported in 2014 auto vehicles mainly to France, Germany, Spain and Italy.

**Preh Romania**, part of the German Group Preh, has invested approximately five million EUR in 2014 in its plant located in Brasov county (Central Romania). Preh Romania manufactures driver control and climate control components for Daimler, Porsche, BMW, Audi, Volkswagen, Seat or Skoda.

The Swedish group **Autoliv** has invested approximately 20 million EUR in 2014 to develop its manufacturing facilities in Romania. Autoliv has finalised in 2014 the relocation process of a seatbelts plant from Germany to Romania.

**Glasscorp**, part of the Turkish Group Sisecam, has opened in November 2014 an automotive glass facility in Buzau (SE Romania), with investments of 65 million EUR. The facility has the production capacity of 800,000 sets of automotive glass per year. Glasscorp manufactures windscreens for Dacia, Renault, Volkswagen, Suzuki, Skoda, Mercedes, Ford, Opel or Fiat.

**TRW Automotive** has launched in April 2014 a new airbag manufacturing facility in Romania, following investments of 13.6 million EUR. The manufacturing unit is located in Roman (NE Romania). The unit is forecasted to have almost 1,200 employees by 2016.

**Star Transmission**, owned by the German Group Daimler, has started in April 2014 the construction works at a new assembly plant in Sebes (Central Romania). Starting with 2016, the new plant will assemble Mercedes-Benz 9G-TRONIC nine-speed automatic transmissions. The new facility is forecasted to create approximately 500 new jobs.

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