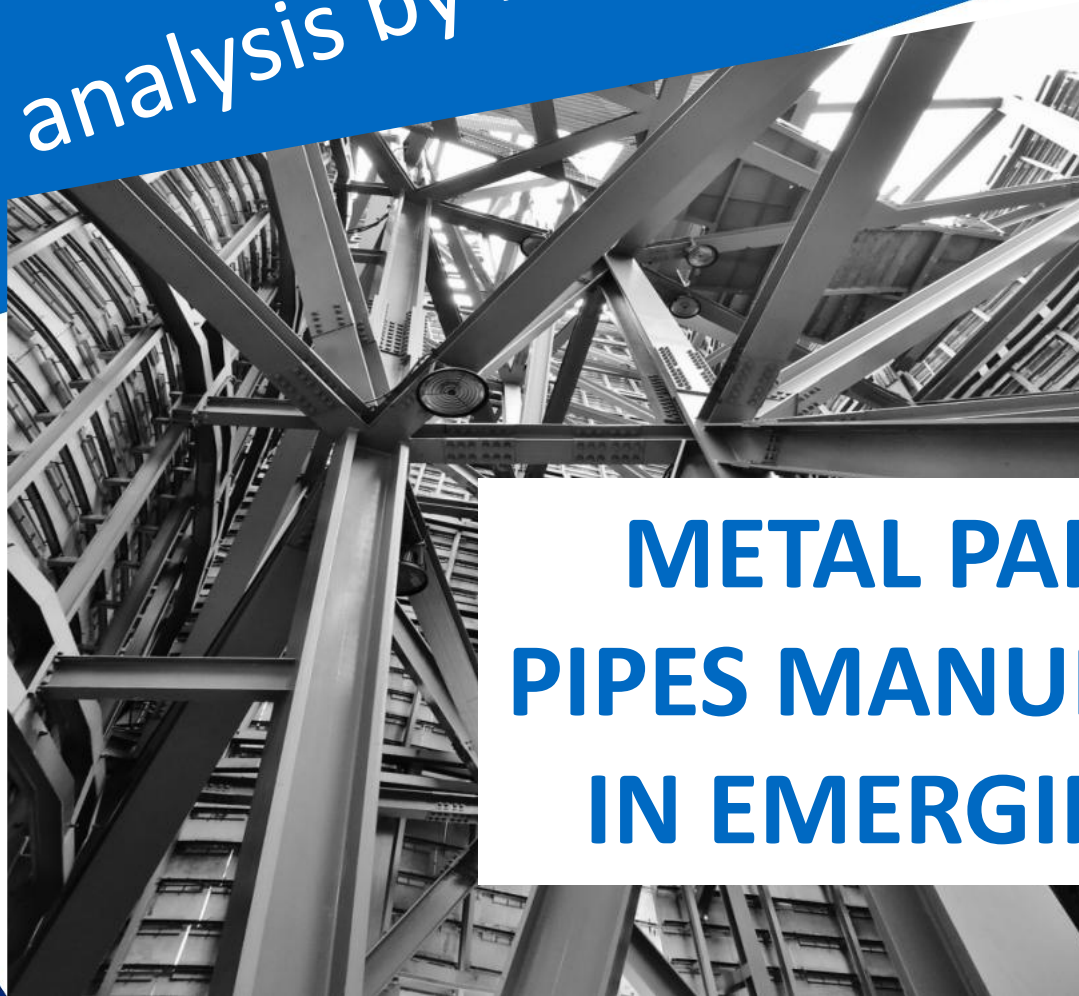


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A DEMO analysis by FRD Center



**METAL PARTS, TUBES,
PIPES MANUFACTURING
IN EMERGING EUROPE**

INTRODUCTION

This DEMO report is produced by FRD Center – www.frdcenter.ro - one of the pioneer privately owned independent market entry consulting firms in Emerging Europe as a promotional document.

Since 2000, FRD Center offers upon demand opportunity assessment, new business partners identification and selection services, market research and intelligence, new leads generation, B2B matchmaking, target origination and M&A consulting services to foreign companies and organisations interested to enter Romania and the emerging markets in Europe as exporters, consultants, investors or joint-ventures, to relocate their operations, to find new vendors or to source in CE, SE and Eastern Europe.

Disclaimer:

Whilst every care is taken in compiling this report, no responsibility is taken for errors or omissions. FRD Center guarantees that this information, collected and generated, has been operated in a professional manner and best efforts were applied with a view to offering accurate and complete results. However, FRD Center will not be held liable for any damage or loss resulting from the use of the information contained herein.

Sources for graphs and statistics: Eurostat, FRD Center, INS



**As part of the CSR activity, FRD Center endorses the
Sibiu International Theatre Festival FITS (SibFest)**

www.sibfest.ro

With a tradition of 28 editions so far, the Sibiu International Theatre Festival is the most complex festival in Romania. Internationally, it is recognised as one of the most important performing arts festivals in Europe, alongside Edinburgh International Festival (Great Britain) and Avignon Festival (France).



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One of the pioneer privately
owned independent market
entry consulting firms in
Emerging Europe

For over 20 years, provides assistance to:

- Foreign companies, SMEs, corporations**
- Foreign export promotion agencies, international trade organisations, global consulting groups, chambers of commerce, commercial sections of embassies**

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Since 2000

- **Multi-country market research, sector studies, business analysis**
- **Local business partners search and selection, target origination for M&A**
- **Players identification and detailed profiles**
- **Comparative analysis, background and reputation checks**
- **Data collection, interviews with KOLs, Decision Makers**
- **B2B matchmaking, Trade missions - physical, virtual**

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**New supplier
search and
selection**

For over 20 years, FRD Center has been assisting foreign manufacturing companies identify, select and approach at Decision Maker level local relevant firms, according to their selection criteria and requirements, in view of appointing them as new suppliers and subcontractors for manufacturing and assembly in metalworks, furniture, plastic, textiles and garments etc. Full details in the presentation at the link:

<https://www.frdcenter.ro/wp-content/uploads/2021/10/FRD-Center-New-Suppliers-Search-and-Selection-services-Presentation.pdf>

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Target origination for M&A

To foreign Buyers looking to expand to Europe through an acquisition in Romania / Eastern Europe, FRD Center provides services leading to Target Origination for Mergers & Acquisitions (M&A) according to the Client's selection criteria and requirements and facilitates direct contact at Top Level / Owner with the interested local parties.

Full details in the presentation at the link:

<https://www.frdcenter.ro/market-entry-consulting-services/ma-advisory-services-in-romania/>

Are you looking to expand on the Romanian market with new suppliers or an acquisition?



04

FRD Center is monitoring the market opportunities in Romania and other markets in CE Europe, Eastern Europe and SE Europe.

01

Upon demand, FRD Center identifies and selects the local players according to the Client's criteria, provides New Suppliers Search & Selection, In-Depth Analysis and Target Origination services.

02

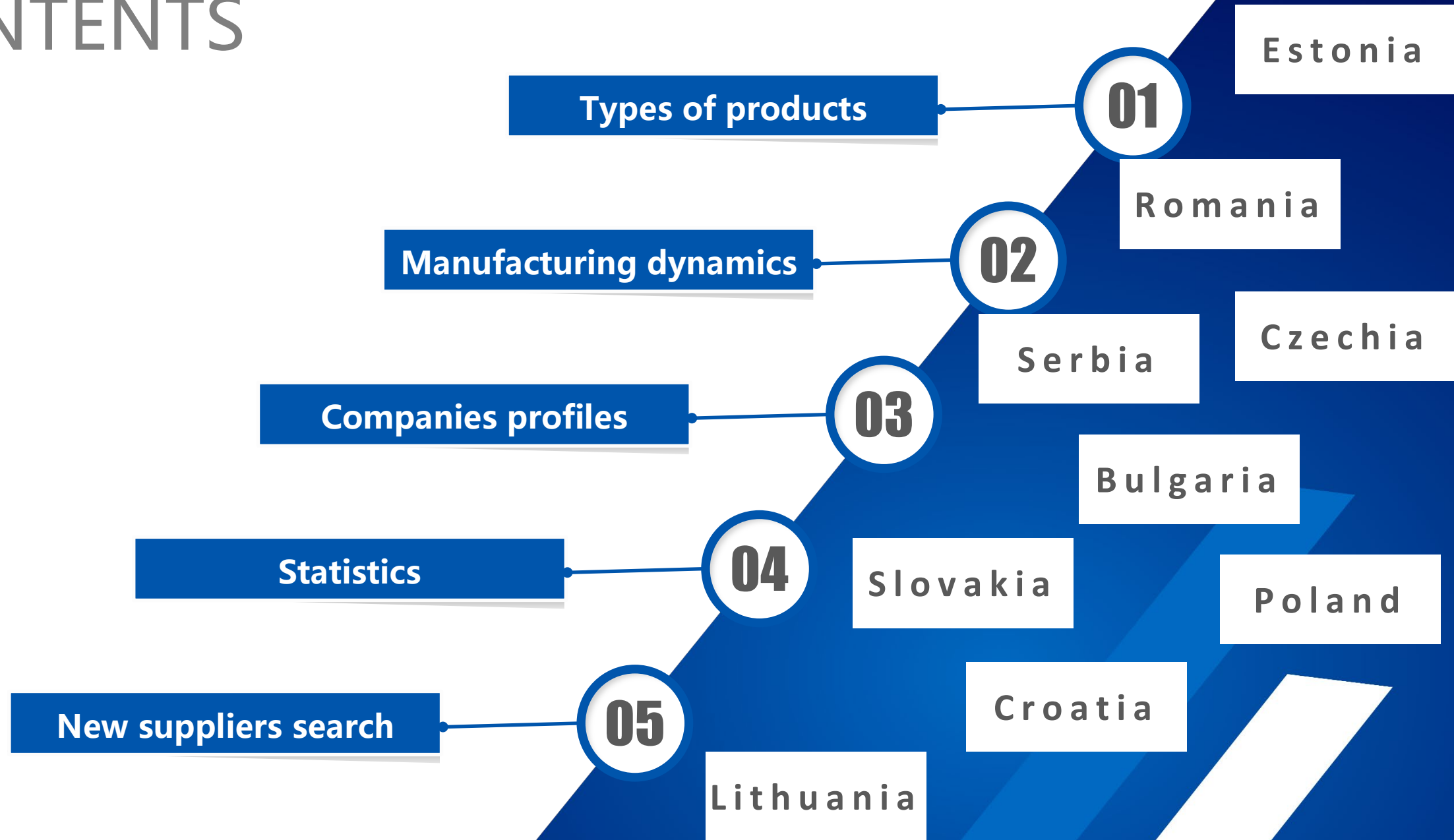
For over 20 years, FRD Center facilitates commercial relations between foreign manufacturers, investors, exporters with local key decision makers and provides B2B matchmaking at Decision Maker level, Market Research etc.

03

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with your specific demand for local support

CONTENTS





Type of products

1



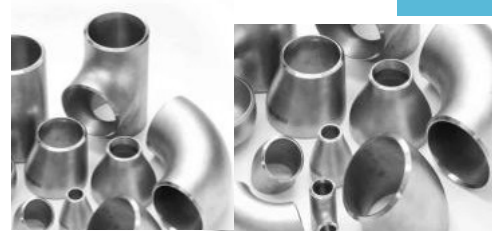
Tubes and pipes, of circular cross-section, welded, of an external diameter $\leq 406,4$ mm, of stainless steel, excluding line pipe of a kind used for oil or gas pipelines, and casing and tubing used for oil or gas drilling

2



Cold-formed sections, obtained from flat products, of non-alloy steel, coated with zinc

3



Copper and copper alloy tube/pipe fittings including couplings, elbows, sleeves, tees and joints excluding bolts and nuts used for assembling/fixing pipes/tubes, fittings with taps, cocks, valves

4



Tubes and pipes, open seam, riveted or similarly closed, of steel, excluding line pipe for oil and gas pipelines, casing and tubing used for oil or gas drilling and other welded tubes and pipes

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5



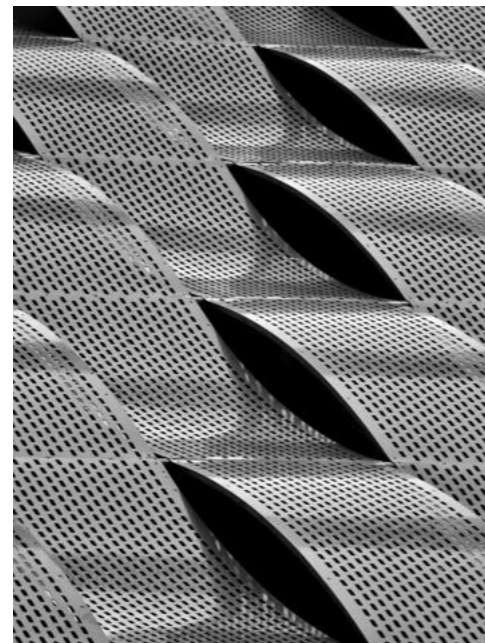
Elbows, bends, couplings, sleeves and other threaded tube or pipe fittings, of steel, excluding cast fittings

6



Cold-formed sections, obtained from flat products, of non-alloy steel, not coated

7



Cold-profiled (ribbed) sheets, of non-alloy steel

8



Iron or non-alloy steel wire containing $< 0,25 \%$ of carbon including crimping wire excluding stranded wire, barbed wire used for fencing - duplex wire - saw-tooth wire, insulated electric wire

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9



Copper tubes and pipes

10



Ductile iron castings for machinery and mechanical appliances excluding for engines

11



Flanges of steel, excluding cast fittings

12



Angles, shapes and sections, of iron or non-alloy steel, cold-formed or cold-finished and further worked, or hot-forged, or hot-formed by other means and further worked, n.e.s., excl. from flat-rolled products

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Manufacturing dynamics

Romania

Serbia

Poland

Estonia

Slovakia

Czechia

Lithuania

Bulgaria

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market research in
Romania and Eastern
Europe?



Individual
business agendas
and Trade
Missions



Market studies

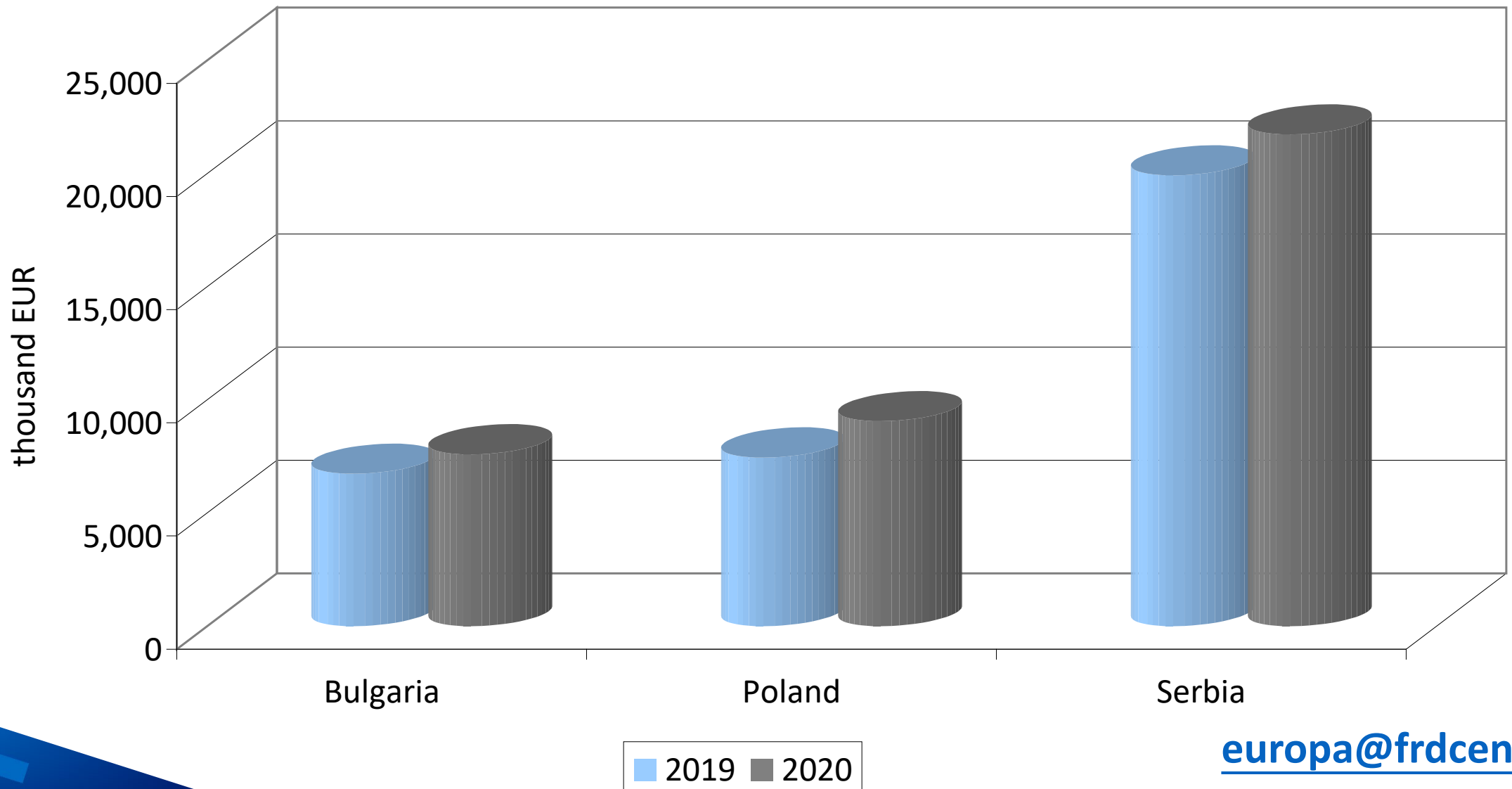
Players analysis

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**Manufacturing of tubes and pipes, of circular cross-section,
welded, of an external diameter $\leq 406,4$ mm, of stainless steel**

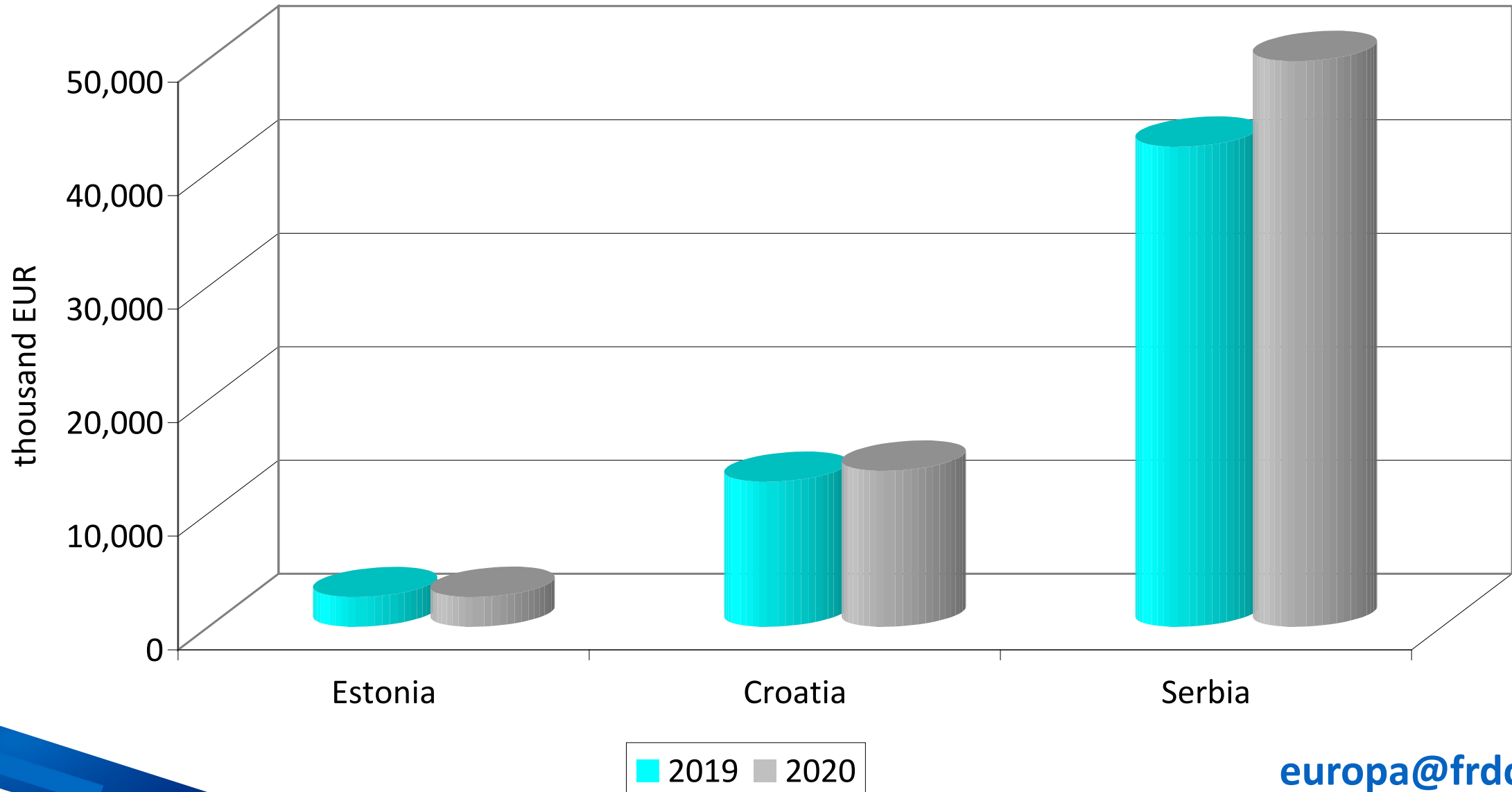


Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Tubes and pipes, of circular cross-section, welded, of an external diameter $\leq 406,4$ mm, of stainless steel, excluding line pipe of a kind used for oil or gas pipelines, and casing and tubing used for oil or gas drilling</i>			
Bulgaria	6,743	7,596	12.7
Poland	7,457	9,066	21.6
Serbia	19,930	21,738	9.1

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Manufacturing of cold-formed sections, obtained from flat products, of non-alloy steel, coated with zinc

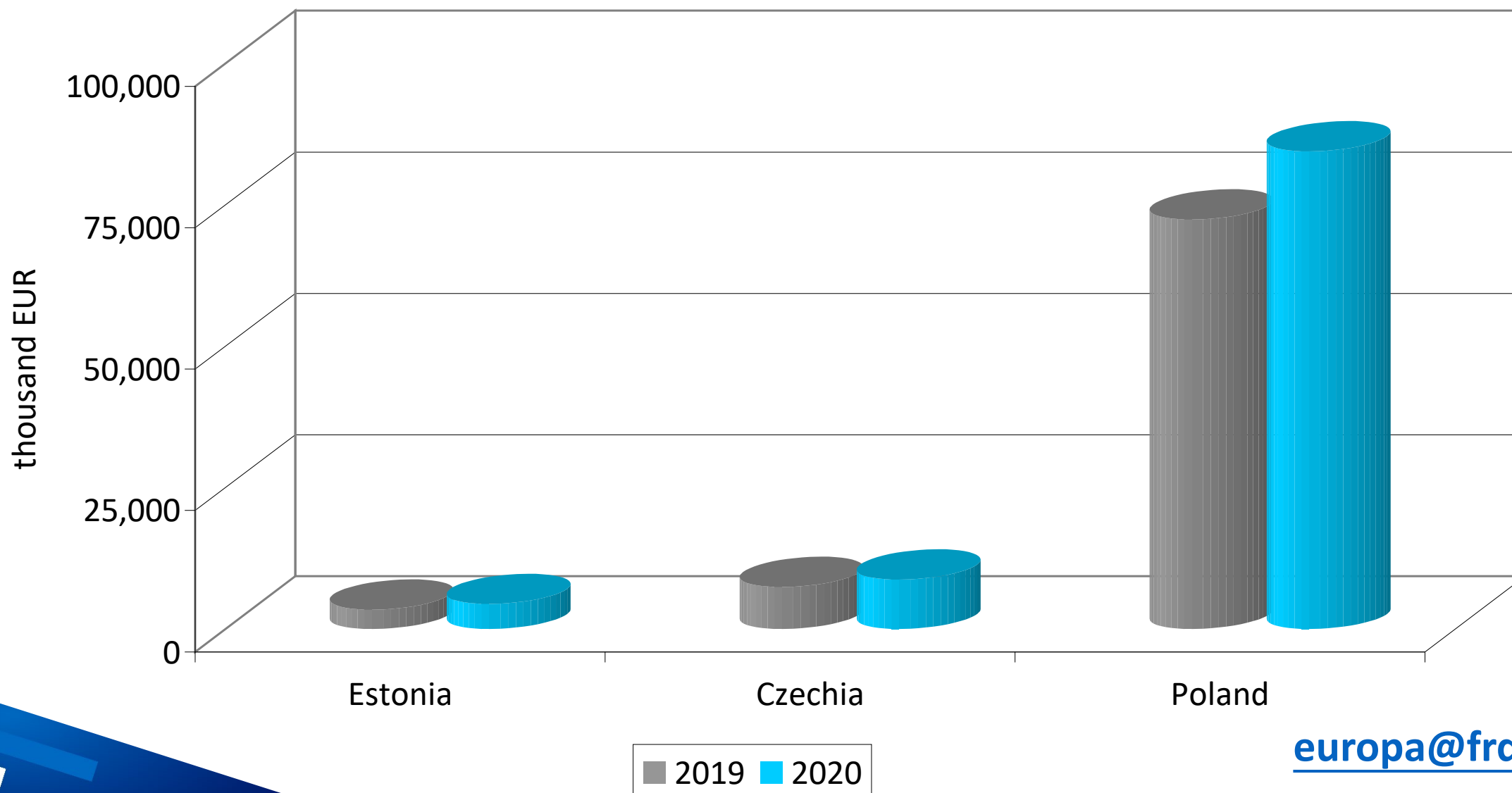


Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Cold-formed sections, obtained from flat products, of non-alloy steel, coated with zinc</i>			
Estonia	2,623	2,629	0.2
Croatia	12,783	13,758	7.6
Serbia	42,303	49,846	17.8

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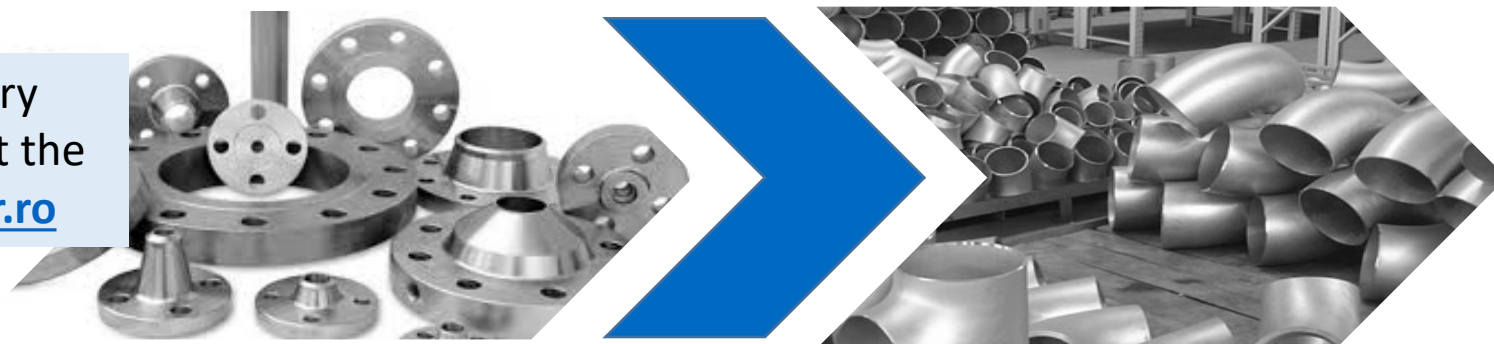


Manufacturing of copper and copper alloy tube/pipe fittings including couplings, elbows, sleeves, tees and joints

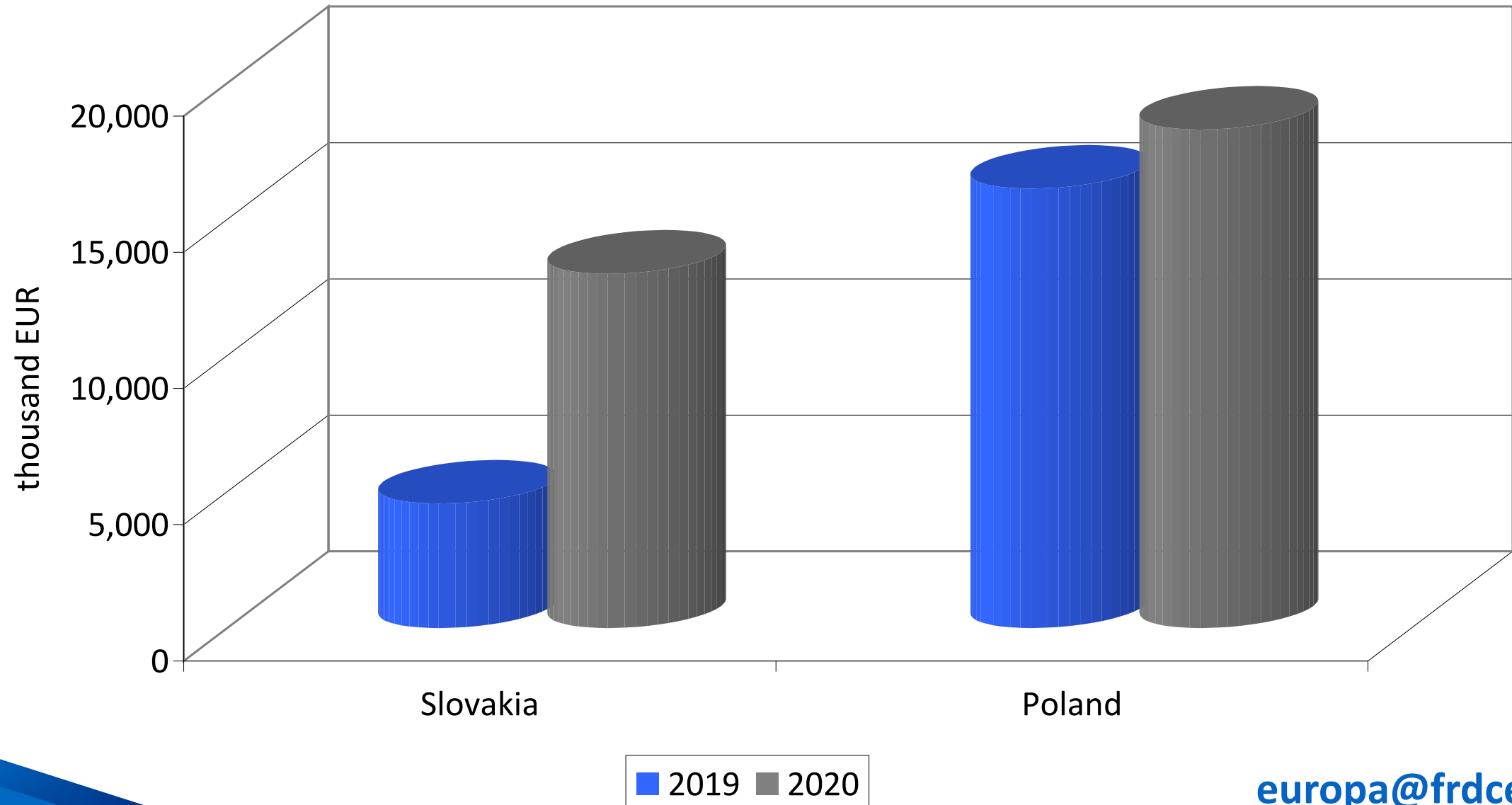


Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Copper and copper alloy tube/pipe fittings including couplings, elbows, sleeves, tees and joints excluding bolts and nuts used for assembling/fixing pipes/tubes, fittings with taps, cocks, valves</i>			
Estonia	3,448	4,450	29.1
Czechia	7,460	8,752	17.3
Poland	72,444	84,509	16.7

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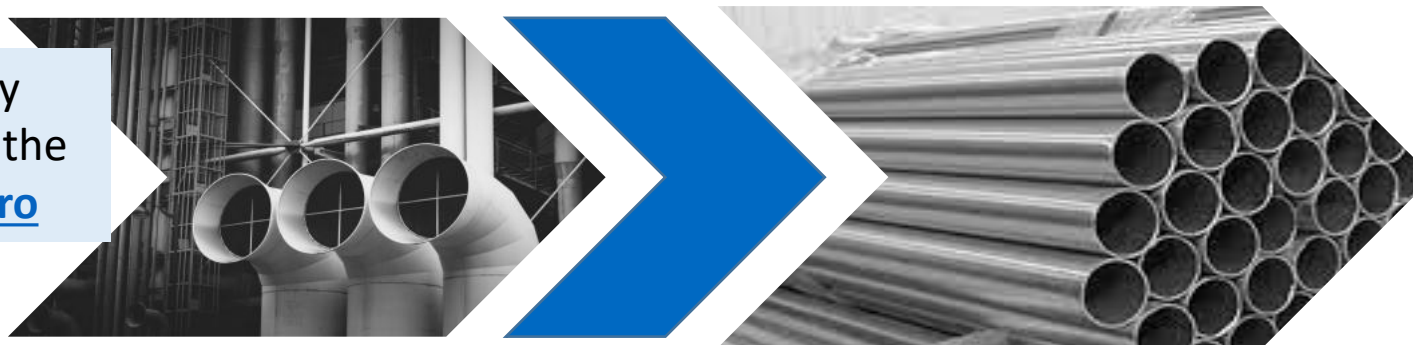


Manufacturing of tubes and pipes, open seam, riveted or similarly closed, of steel

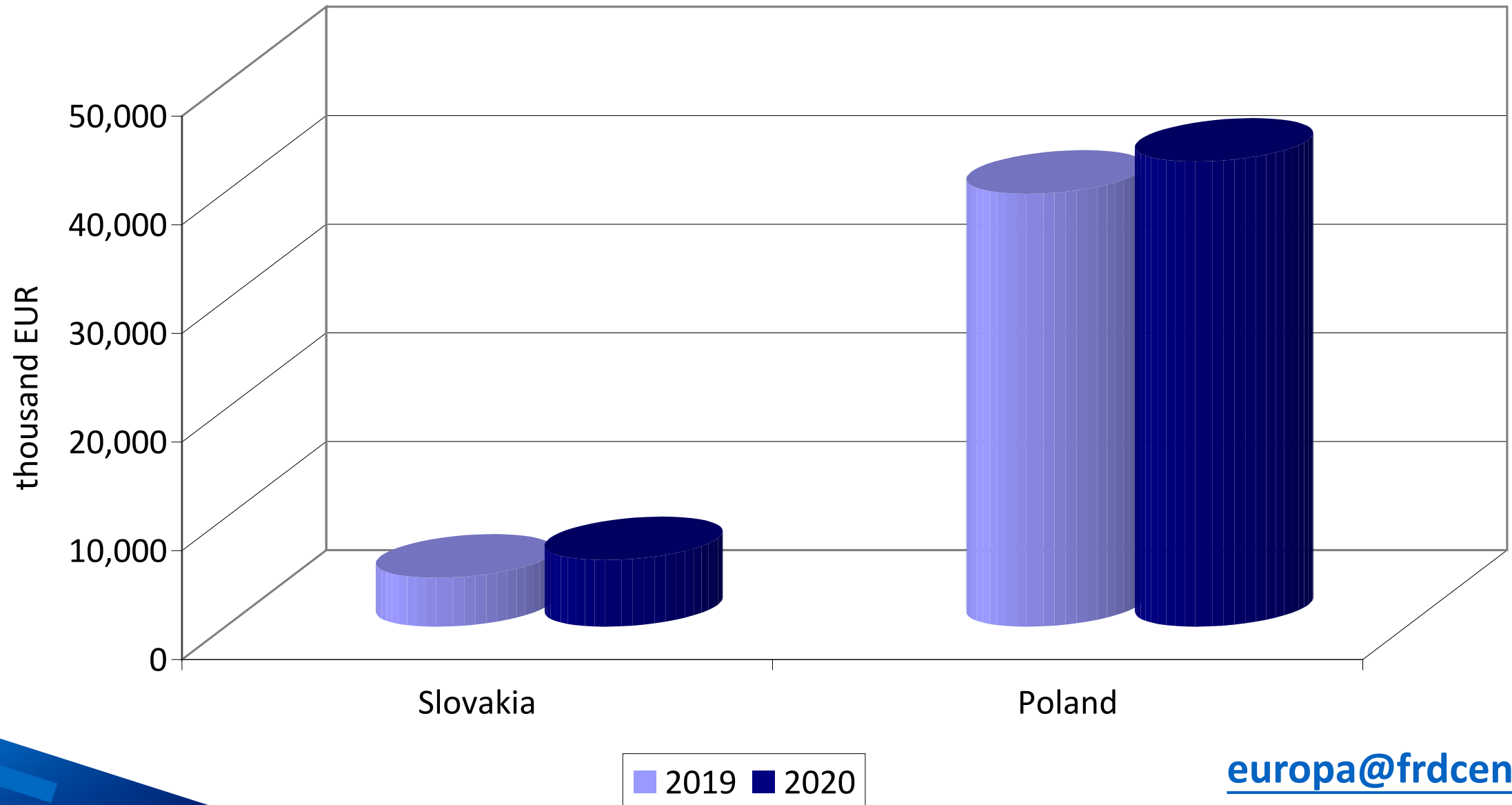


Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Tubes and pipes, open seam, riveted or similarly closed, of steel, excluding line pipe for oil and gas pipelines, casing and tubing used for oil or gas drilling and other welded tubes and pipes</i>			
Lithuania	374	460	22.8
Slovakia	4,565	13,002	184.8
Poland	16,125	18,292	13.4

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Manufacturing of elbows, bends, couplings, sleeves and other threaded tube or pipe fittings, of steel

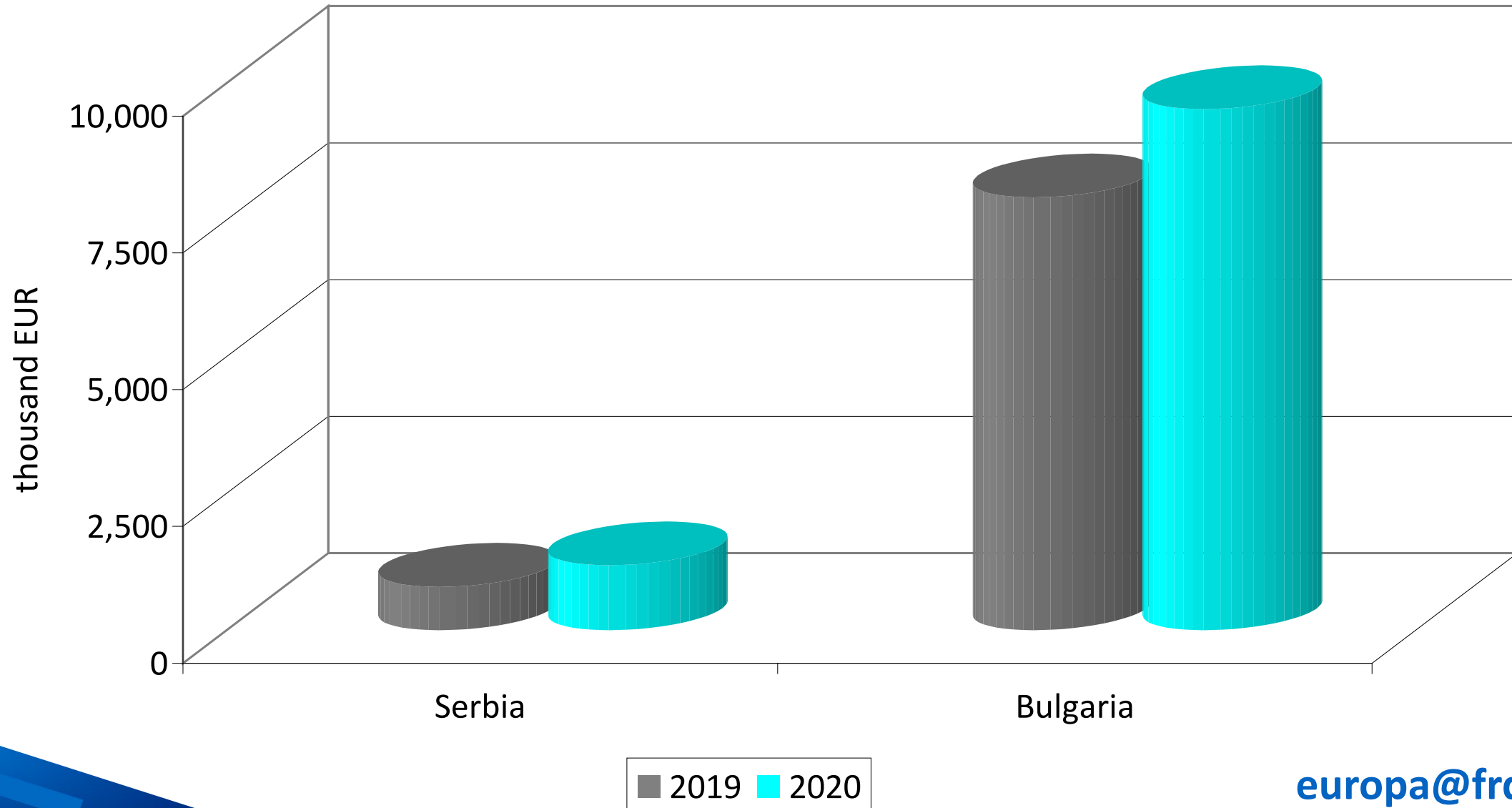


Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Elbows, bends, couplings, sleeves and other threaded tube or pipe fittings, of steel, excluding cast fittings</i>			
Lithuania	101	102	0.3
Slovakia	4,501	6,124	36.1
Poland	39,835	42,789	7.4

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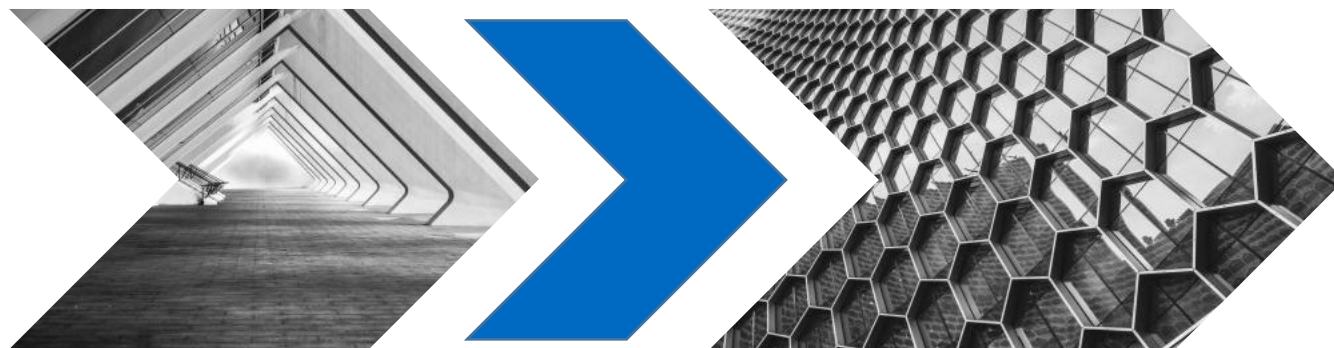


Manufacturing of cold-formed sections, obtained from flat products, of non-alloy steel, not coated

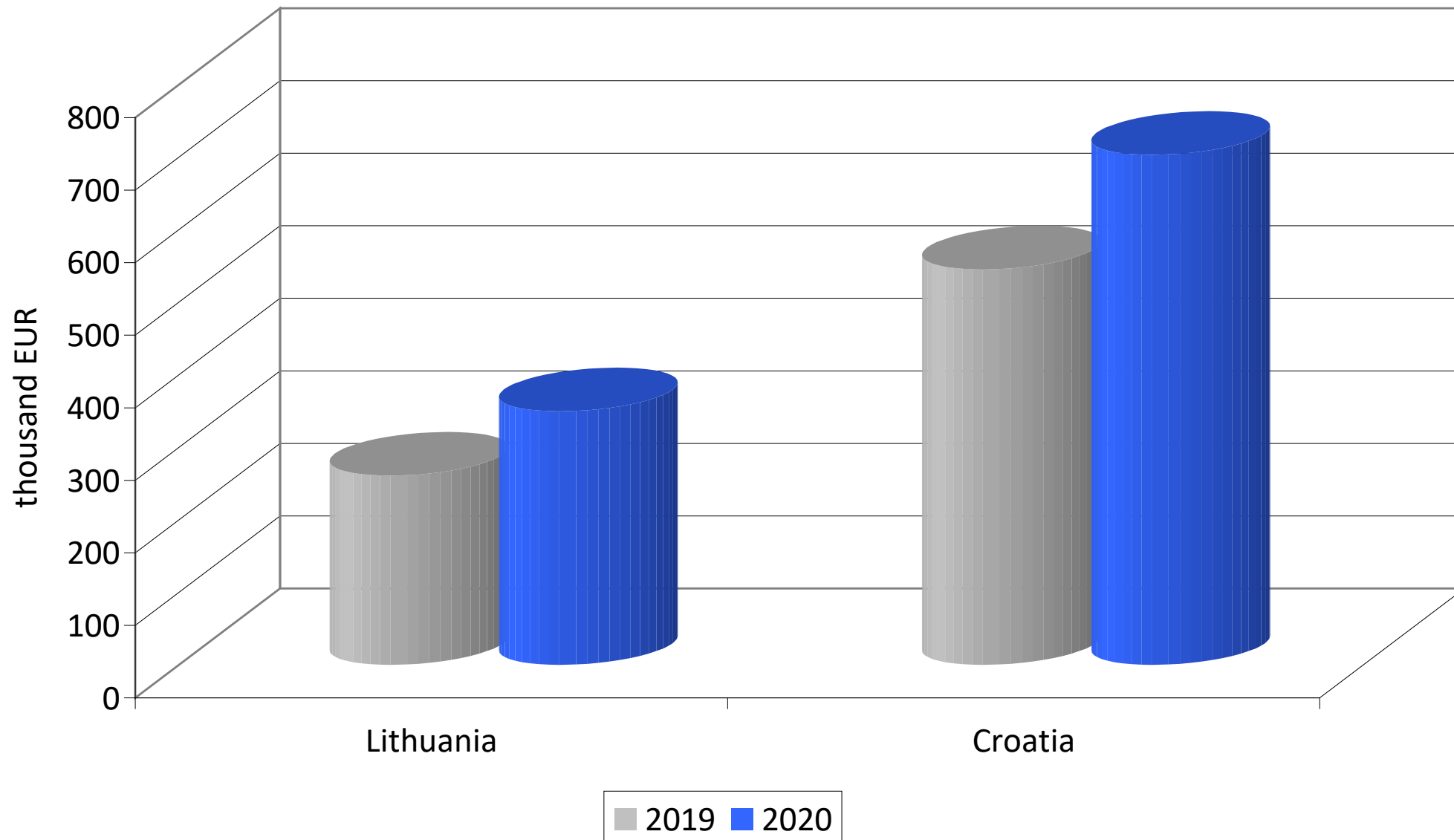


Manufacturing	2019 thou.EUR	2020 thou. EUR	2020 vs 2019 %
<i>Cold-formed sections, obtained from flat products, of non-alloy steel, not coated</i>			
Serbia	793	1,184	49.4
Bulgaria	7,909	9,522	20.4

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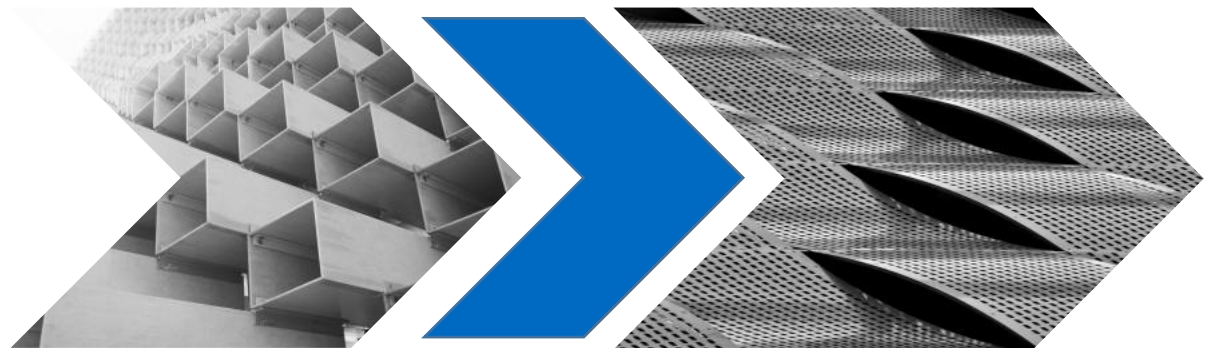


Manufacturing of cold-profiled sheets, of non-alloy steel

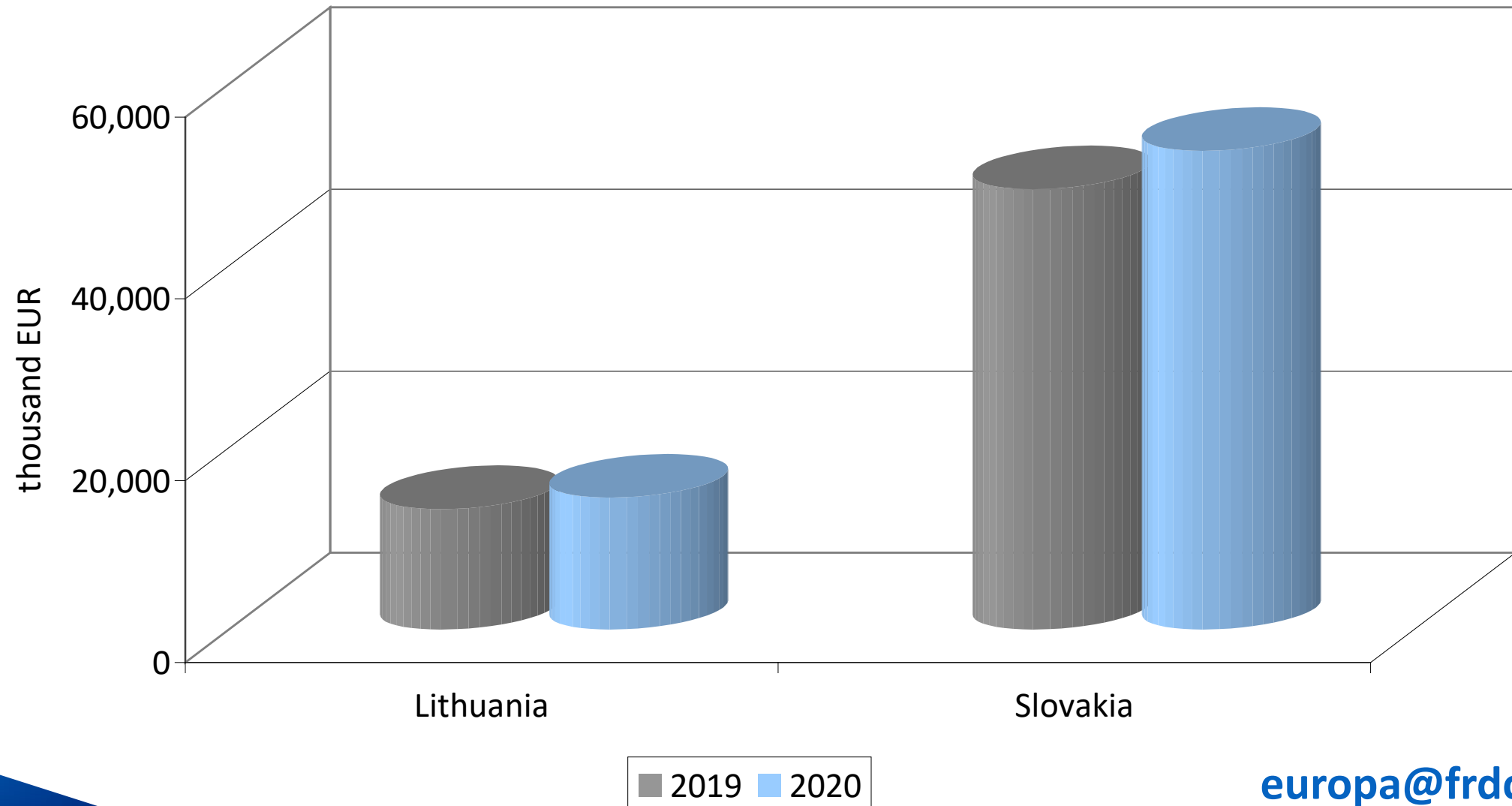


Manufacturing	2019 thou. EUR	2020 thou.EUR	2020 vs 2019 %
<i>Cold-profiled (ribbed) sheets, of non-alloy steel</i>			
Lithuania	261	350	34.0
Croatia	545	704	29.0

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Manufacturing of iron or non-alloy steel wire containing < 0,25 % of carbon

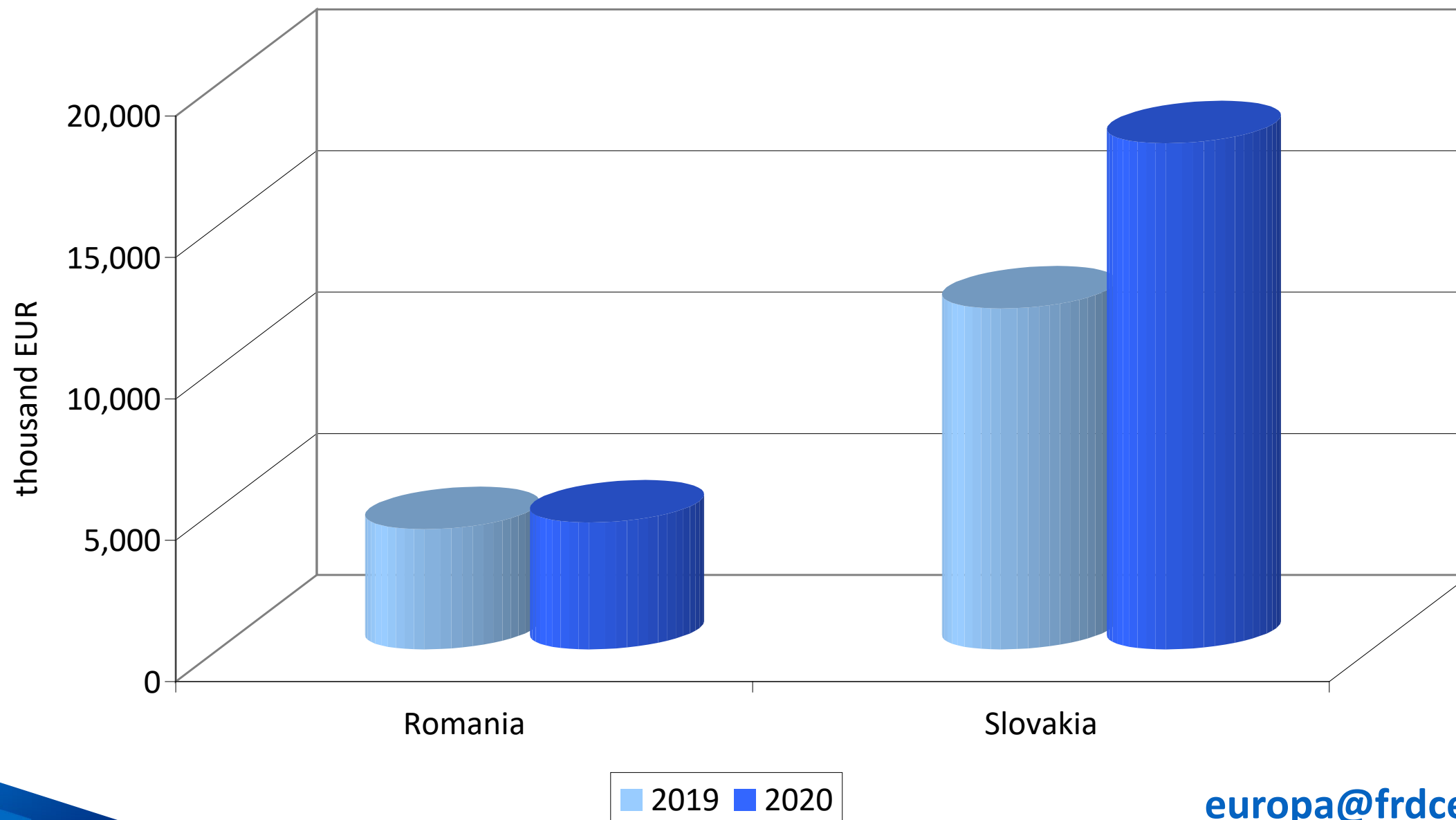


Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Iron or non-alloy steel wire containing < 0,25 % of carbon including crimping wire excluding stranded wire, barbed wire used for fencing - duplex wire - saw-tooth wire, insulated electric wire</i>			
Lithuania	13,239	14,499	9.5
Slovakia	48,431	52,660	8.7

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Manufacturing of copper tubes and pipes

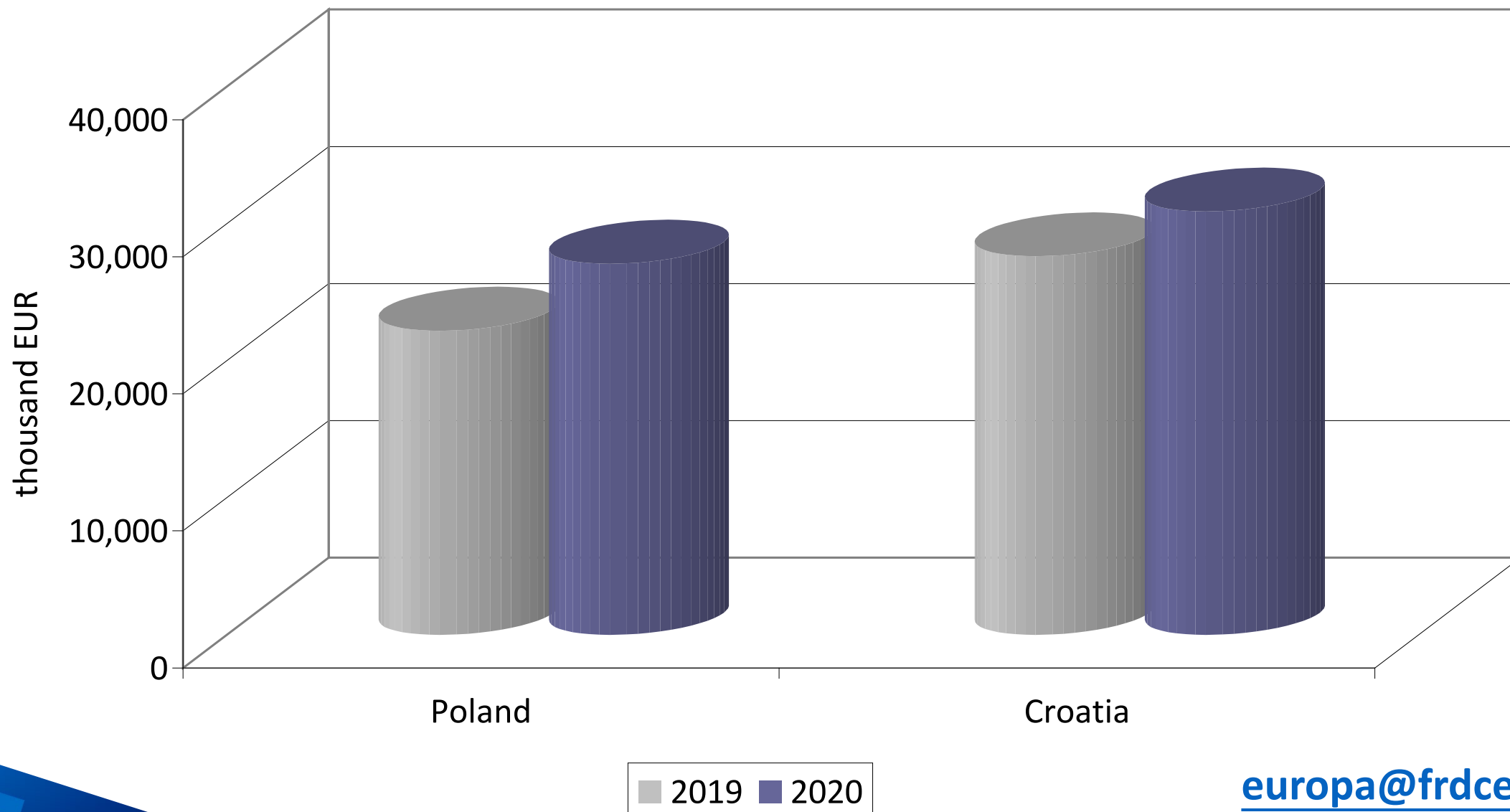


Manufacturing	2019 thousand EUR	2020 thousand EUR	2020 vs 2019 %
<i>Copper tubes and pipes</i>			
Romania	4,257	4,491	5.5
Slovakia	12,064	17,907	48.4

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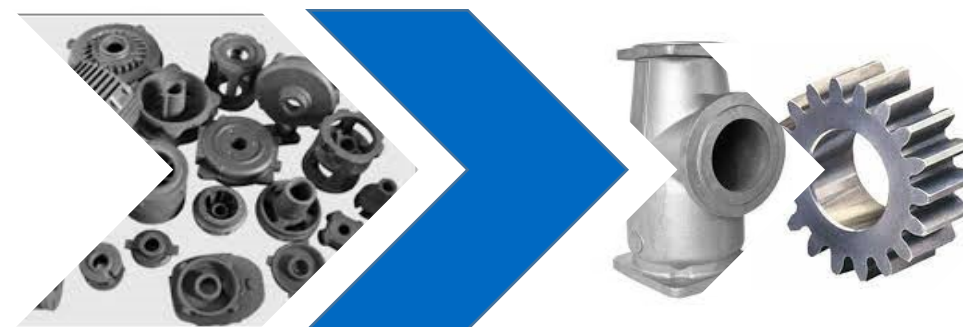


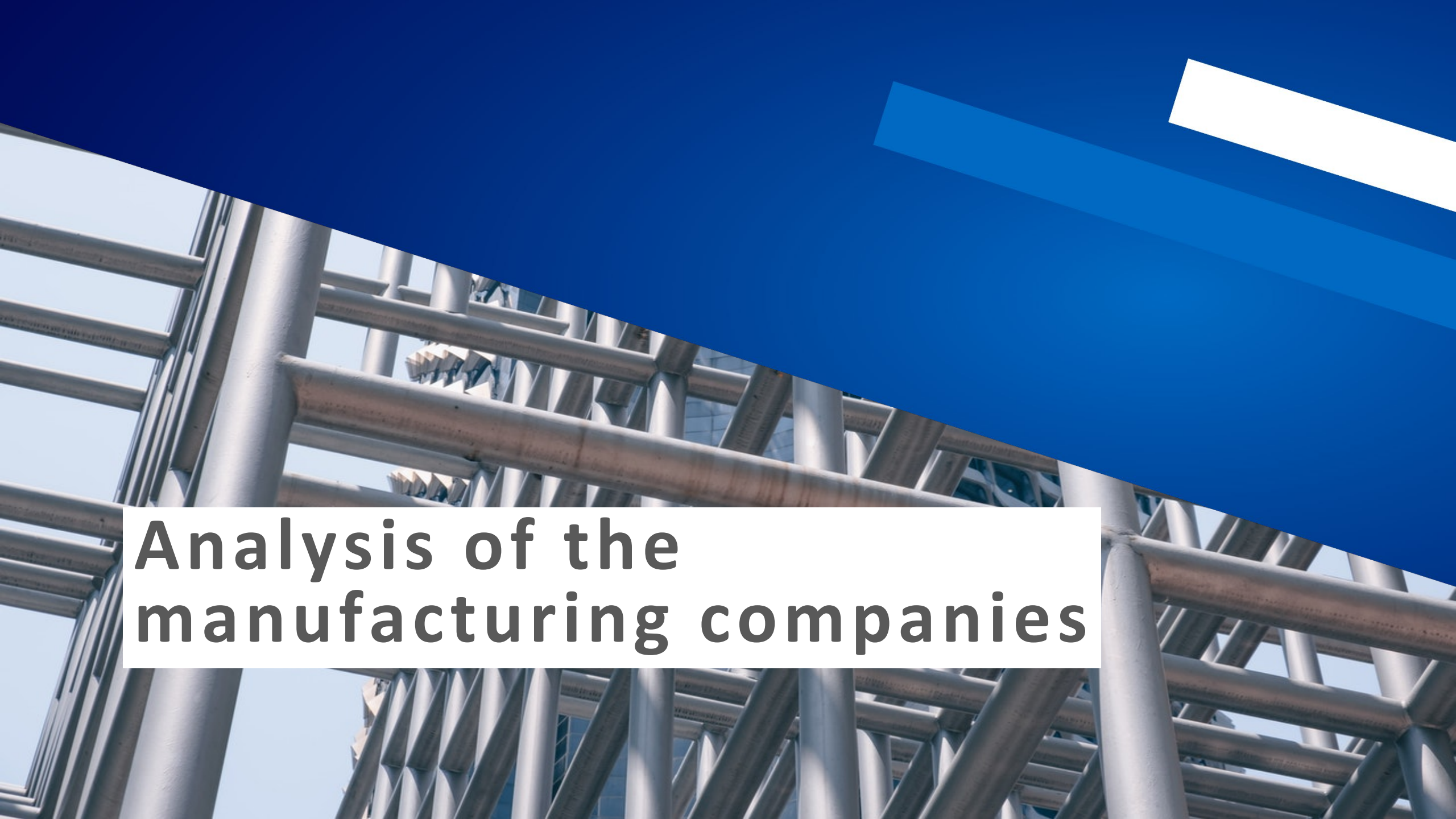
Manufacturing of ductile iron castings for machinery and mechanical appliances



Manufacturing	2019 thou. EUR	2020 thou. EUR	2020 vs 2019 %
<i>Ductile iron castings for machinery and mechanical appliances excluding for engines</i>			
Poland	22,191	27,076	22.0
Croatia	27,625	30,886	11.8

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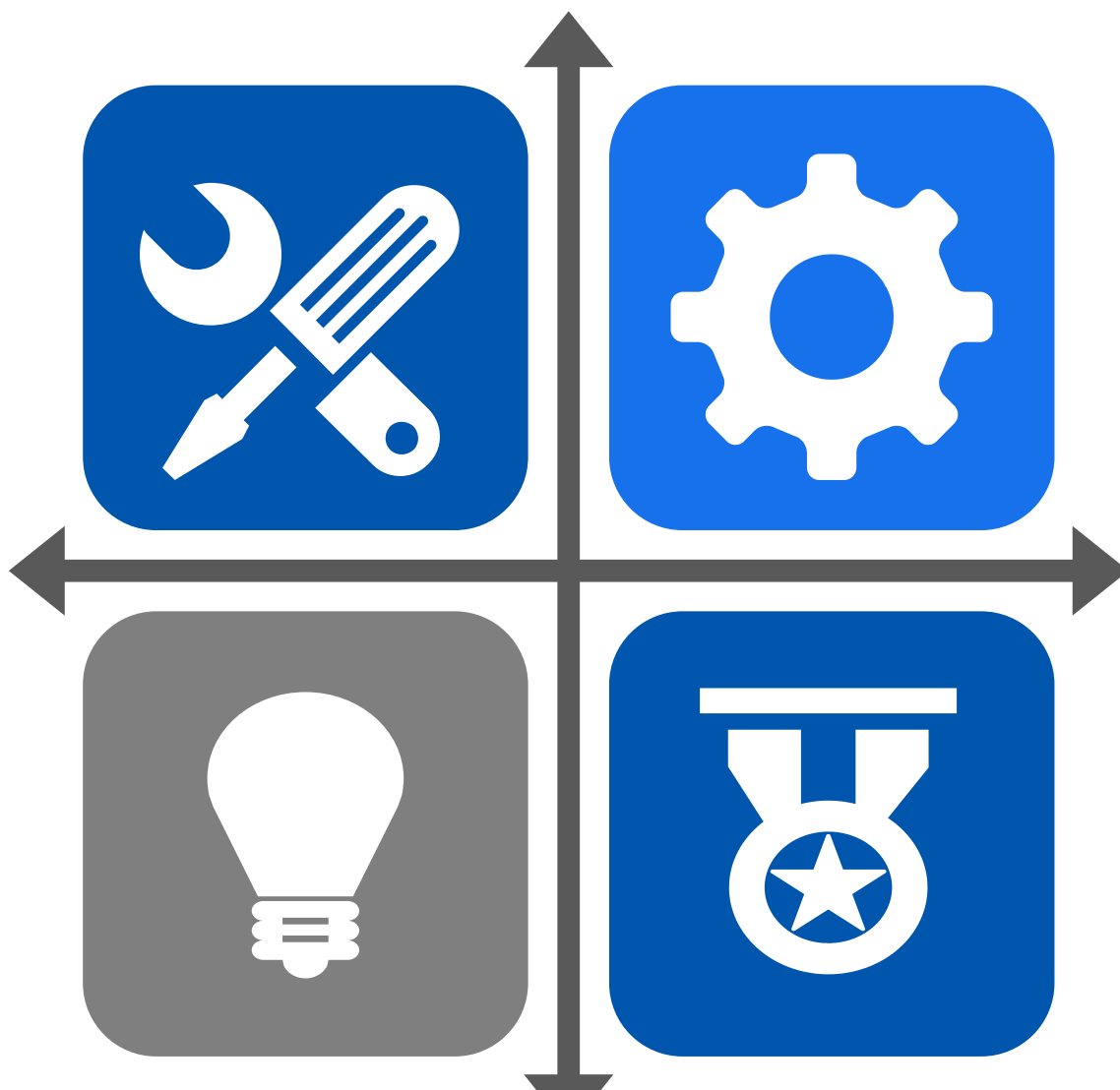
Analysis of the manufacturing companies

**Are you looking for new suppliers
in Romania and Eastern Europe?**



**Are you looking for targets to be
acquired in Romania and Eastern
Europe?**

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Omega - Bulgaria

Established in 1995, the Bulgarian company Omega is specialised in the manufacturing of welded steel tubes and profiles, steel strips, guardrails and other steel profiles. It has one production line for cutting cold and hot rolled steel strips and six production lines for electro-welded steel tubes and profiles. The company is ISO 9001:2015 and ISO 14001: 2004 certified.



Lego-Lim - Croatia

Lego-Lim is a Croatian manufacturer of metal sheets, sheet metal pipes and gutters, sandwich panels, hall constructions etc. It was founded in 1992. The company provides installation, maintenance and repair services..

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Laromet - Romania

Controlled by Trip Materials Switzerland, Laromet is a major Romanian manufacturer of copper, brass and bronze products.

Its portfolio includes: copper tubes, bars and rods, brass tubes and bars, bronze tubes and bars, copper wire etc.

The technologies used are: continuous casting, extrusion, drawing and forging.

82% of the raw materials are from recyclable sources.

The company is ISO 9001, ISO 14001 and OHSAS 18001 certified.

Laromet recorded a turnover of 11.8 mEUR in 2020. It has around 150 employees.

Odlewnie Polskie - Poland

Odlewnie Polskie is a dynamic Polish manufacturer of ductile iron castings.

The company's products are exported to 15 countries.

Its clients are from the automotive, machinery, energy, sewerage, heavy rail, appliance sectors.

Odlewnie Polskie has a R&D centre that implemented projects such as: automation and robotization of the grinding process of castings, CNC machining of castings etc.

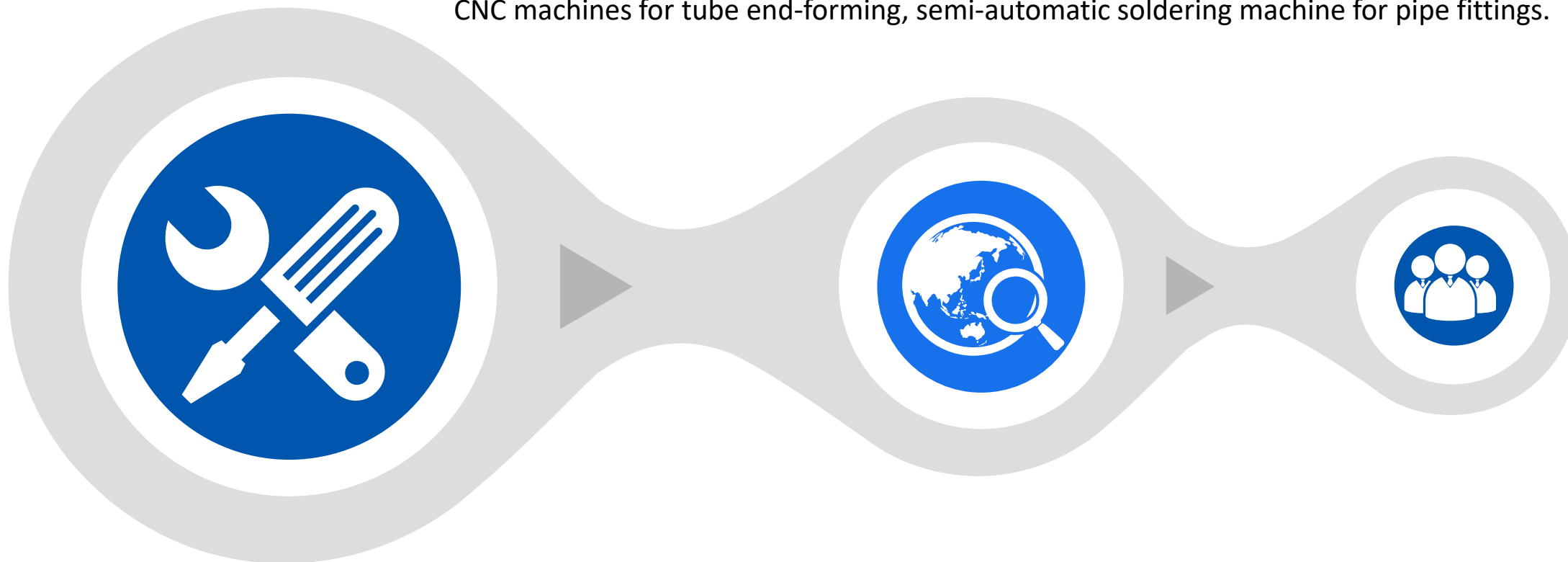
The firm is ISO 9001:2015 and ISO 14001:2015 certified.



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Established in 1992, **Knomi is a Czech manufacturer** of fittings and couplings. Its portfolio includes copper sealings rings. Knomi exports its products to France, Germany, Poland, Latvia, Ukraine etc. The company uses cutting-edge technology: single-spindle machines, six spindle CNC lathes, 5-axis milling machine, CNC tube bending machine, CNC machines for tube end-forming, semi-automatic soldering machine for pipe fittings.



Set up in 1996, **Edikol is a dynamic Polish manufacturer** of steel tubes and pipes. Its portfolio includes square, rectangular, flat-oval and elliptical profiles. The company manufactures its products using cold-rolled steel supplied by Polish steel mills.

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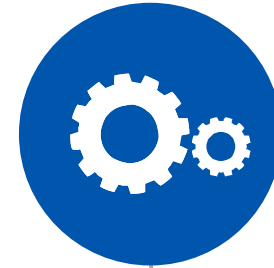
Orion - Romania

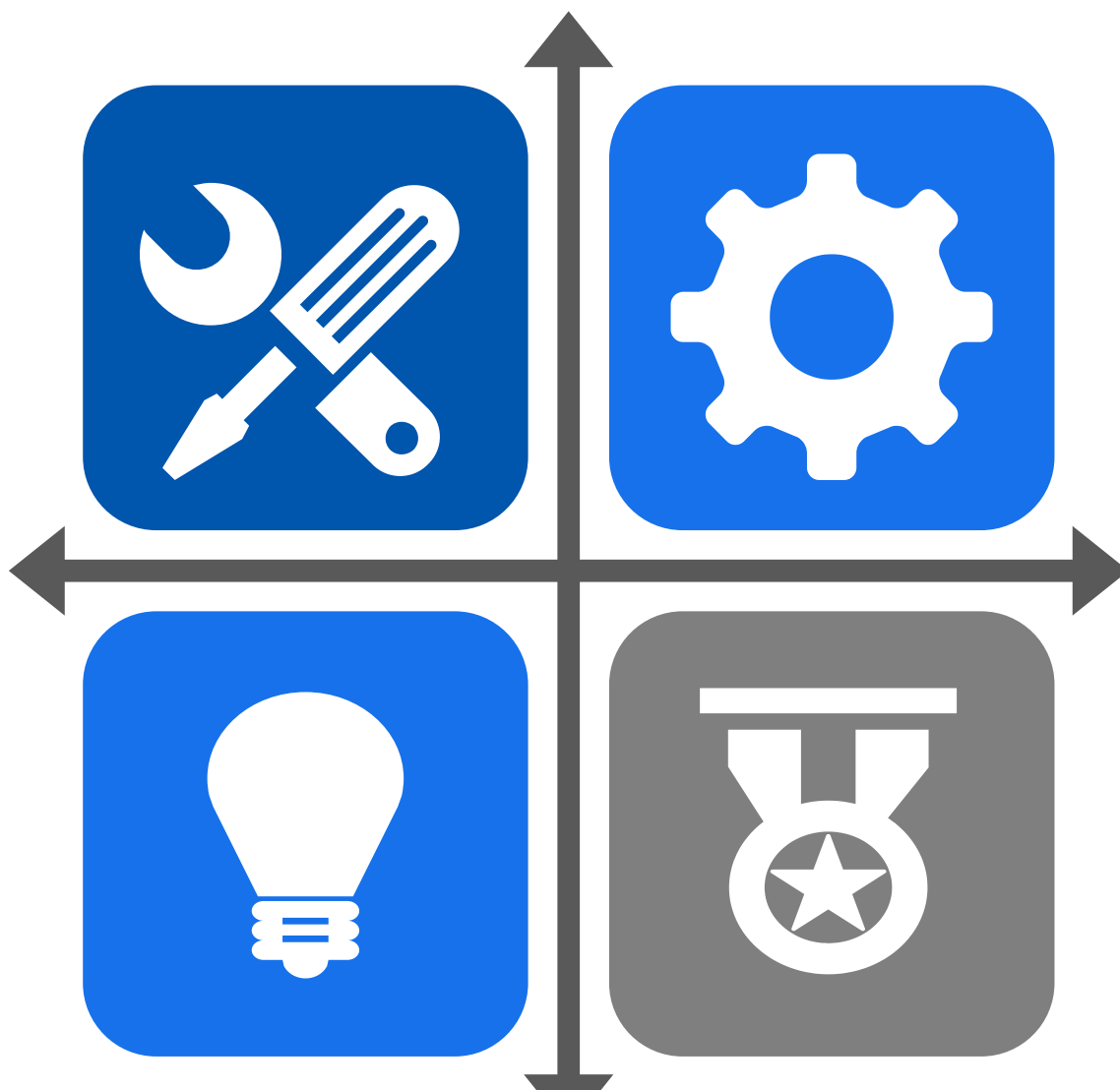
Orion is a Romanian manufacturer founded in 1991. Its range of products includes: copper tubes, brass industrial fittings, bronze flanges etc. Being ISO 9001:2000 certified, the company has clients in the oil, machine building, chemical, food, railways or naval industries. Orion registered a turnover of 0.7 mEUR in 2020.



Steelimpex - Bulgaria

Steelimpex is a dynamic Bulgarian manufacturer of welded steel tubes and pipes, cold rolled, hot rolled and pickled coils and sheets. It uses the following technologies: laser processing, bending, cutting, deburring, slitting, rolling etc. The company has own laboratory for mechanical testing and a steel service center.





Westa Steel - Lithuania

Established in 2014 in Lithuania, Westa Steel manufactures steel pipes, tanks, containers, structures. The company uses the following technologies: CNC plasma, laser cutting, welding, CNC milling, turning, casting, coating, 3D design. It has the capacity to manufacture up to 200 tonnes of steel products per month.



Lim-Mont - Croatia

Set up in 1975, Lim-Mont is a Croatian manufacturer of metal sheets, insulated sheet metal panels, stainless steel sheet flue pipes etc. The company has 180 employees. Its manufacturing and warehousing spaces cover 135,000 sqm.

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Trubostal Subotica - Serbia

Trubostal Subotica is a Serbian manufacturer of steel tubes and pipes. The products have the diameter of 15 - 60 mm. Their maximum annual production is of 30000 tons of pipes according to all European and world standards. Their manufacturing process guarantees the quality and durability of these pipes

Being a a leading manufacturer in the Balkans, the company exports its products in various countries in Europe.

It has production collaboration agreements with companies in Italy or China. Its website is <http://trubostal.eu/>

RS Metali - Croatia

RS Metali has a tradition of over 80 years in the metal casting. It manufactures ductile iron castings, gray iron castings as well as castings made from non-ferrous metals such as aluminium, bronze and brass.

The company has three manufacturing plants in Croatia with the total capacity of approximately 12,000 tonnes of castings per year. Around 85% of the production is exported.

RS Metali is ISO 9001:2002, ISO 14001 and OHSAS 18001 certified and has own laboratory for testing chemical and mechanical properties.

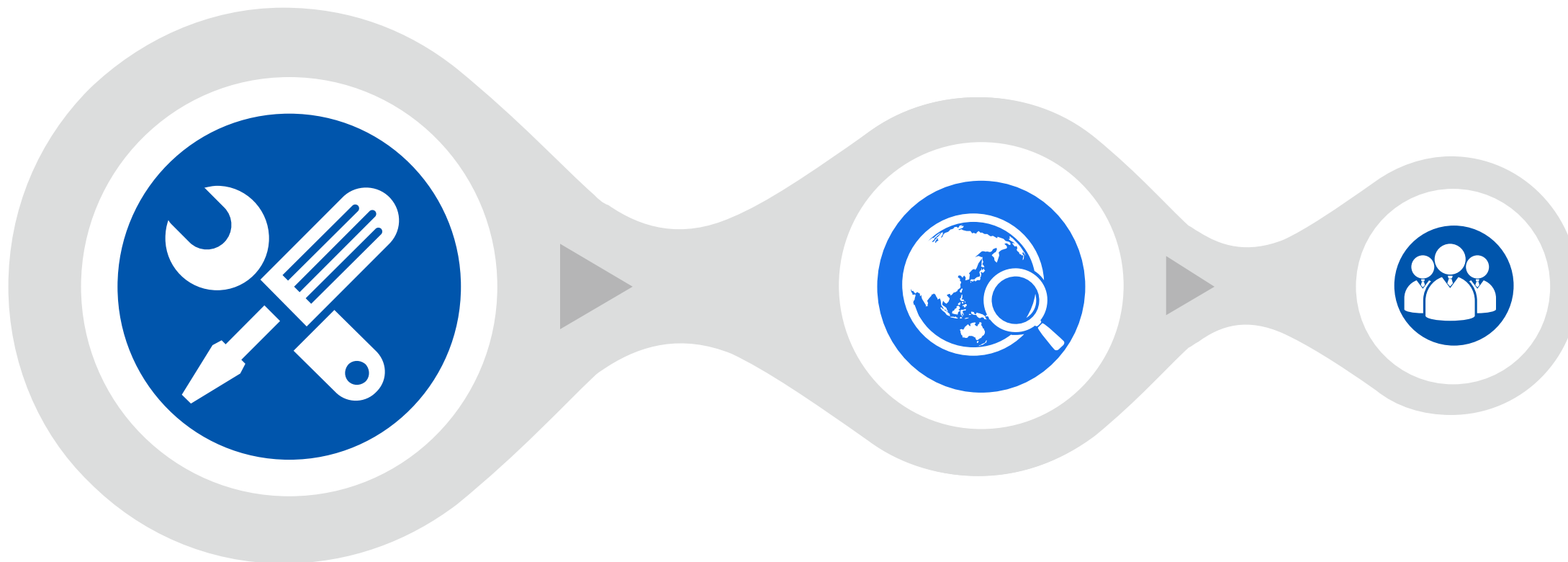


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Based in **Slovakia**, **Zeleziarne Podbrezova** is a major manufacturer of steel tubes and steel tube fittings.

It has an annual production of 160,000 tonnes of seamless steel tubes. The company has R&D centre and its products are exported in 50 countries.

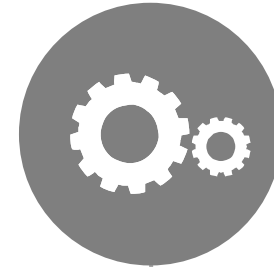


The **Romanian company Laronef** manufactures a wide range of copper products: pipes, bars, plates, boards, bearings etc.

Other examples of products in its portfolio are: bronze tubes, bronze plates, brass tubes, brass wire etc.

The foundry is located in the Sibiu area, Centre Romania.

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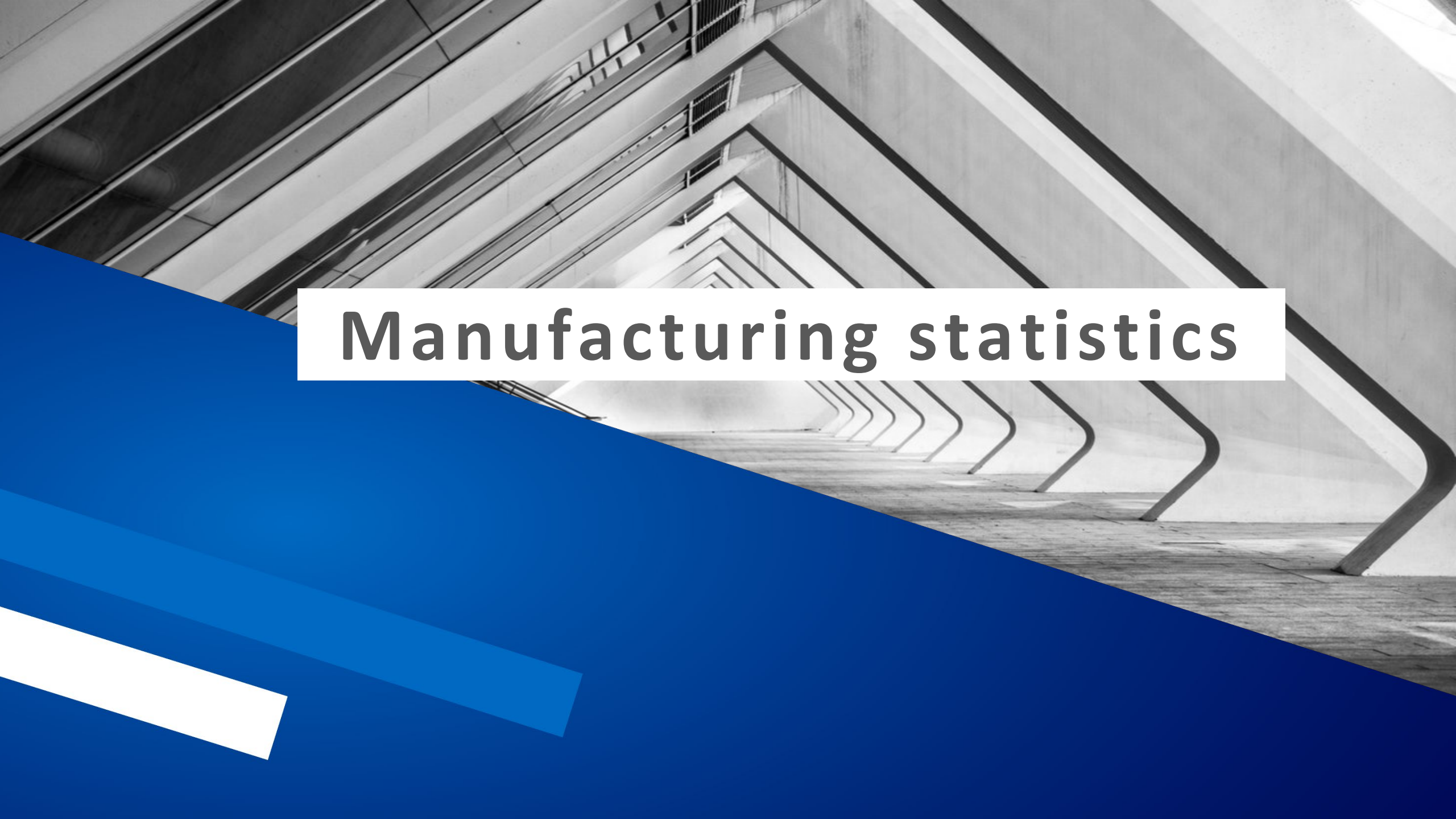


Gebo Technika - Poland

Based in Poland, Gebo Technika manufactures steel pipe fittings. It is part of the German Group Gebo. Gebo Technika has around 45 employees. The company is ISO 9001: 2015 certified.

Plamen - Croatia

Founded in 1922, the Croatian company Plamen manufactures ductile iron castings, gray iron castings, household heating appliances. Its foundry of iron castings has the capacity of up to 20,000 tonnes per year. More than 90% of its output is exported on the EU market.



Manufacturing statistics

Romania	10 months of 2021 vs. 10 months of 2020 - gross series	October 2021 vs. October 2020 - gross series
industrial production	+8.3%	-8.6%
manufacturing	+8.3%	-12.1%



Bulgaria	October 2021 vs. October 2020 - calendar adjusted
industrial production	+9.7%

01

02

03

04

Estonia	October 2021 vs. October 2020
production of industrial enterprises	+2.8%
manufacturing	+3.5%



Poland	10 months of 2021 vs. 10 months of 2020 - in constant prices	October 2021 vs. October 2020 - in constant prices
gross production of industry	+14.9%	+7.8%
gross production of manufacturing	+14.5%	+5.5%

Slovakia	10 months of 2021 vs. 10 months of 2020	October 2021 vs. October 2020
industrial production	+11.3%	-0.6%



Czechia	October 2021 vs. October 2020 - in real terms
industrial production	-4.9%

05

06

07

08



Lithuania	10 months of 2021 vs. 10 months of 2020 - calendar adjusted	October 2021 vs. October 2020 - calendar adjusted
industrial production	+18.1%	+22.6%
manufacturing	+18.8%	+22.7%

Serbia	10 months of 2021 vs. 10 months of 2020	October 2021 vs. October 2020
industrial production	+6.5%	+0.9%
manufacturing	+5.7%	-0.2%



Are you looking to research the Romanian market and study the local players?

Upon demand from Clients, FRD Center is generating data collection, primary research, market and sector studies, players analyses in Romania and other markets in CE Europe, Eastern Europe and SE Europe.

FRD Center identifies and selects the local players according to the Client's criteria, provides In-Depth Analysis and Target Origination services.

For over 20 years, FRD Center facilitates commercial relations between foreign manufacturers, investors, exporters with local key decision makers and provides B2B matchmaking at Decision Maker level, Market Research etc.

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with your specific demand for local support

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Jackie BOJOR, Director



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