

# FRD Center

Market research, Strategic business introductions  
at Decision Maker level, pre-M&A assistance,  
New Leads generation, Trade Missions,  
New Suppliers Search & Selection



a FRD Center publication

# INDUSTRIAL MANUFACTURING IN EMERGING EUROPE 2022



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### FRD Center

Market entry services to Romania, the CEE and SEE.  
Market research, B2B matchmaking, sector studies, trade missions,  
investment opportunity research, M&A support,  
new supplier identification and selection.



FRD CENTER

market entry consulting

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

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

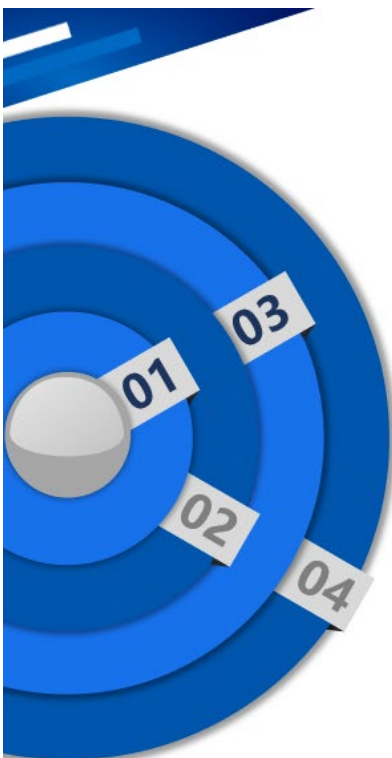
Upon demand from Clients, FRD Center is generating data collection, primary research, market and sector studies, players analysis in Romania and other markets in CE Europe, Eastern Europe and SE Europe.

FRD Center identifies and selects the local players according to the Client's criteria, provides InDepth 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



**As part of the CSR activity, FRD Center endorses the  
Sibiu International Theatre Festival FITS  
[www.sibfest.ro](http://www.sibfest.ro)**

with a tradition of 29 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).

We are looking forward to welcoming you to the 30th edition in 2023!



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Since 2000, [FRD Center](http://www.frdcenter.ro) 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.

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## SUMMARY

**1 – ROMANIA:** general presentation, industrial manufacturing, furniture, plastic, metal, chemicals and pharmaceuticals, electric / electronic goods, textiles and garments, automotive

**2– POLAND:** general presentation, industrial manufacturing, furniture, plastic, metal, chemicals and pharmaceuticals, electric / electronic goods, textiles and garments, heavy machinery and tools, autovehicles

**3 – HUNGARY:** general presentation, industrial manufacturing, electric / electronic goods, textiles and garments, automotive

**4 – CZECHIA:** general presentation, industrial manufacturing, furniture, electric / electronic goods, chemicals and pharmaceuticals, textiles and garments, automotive

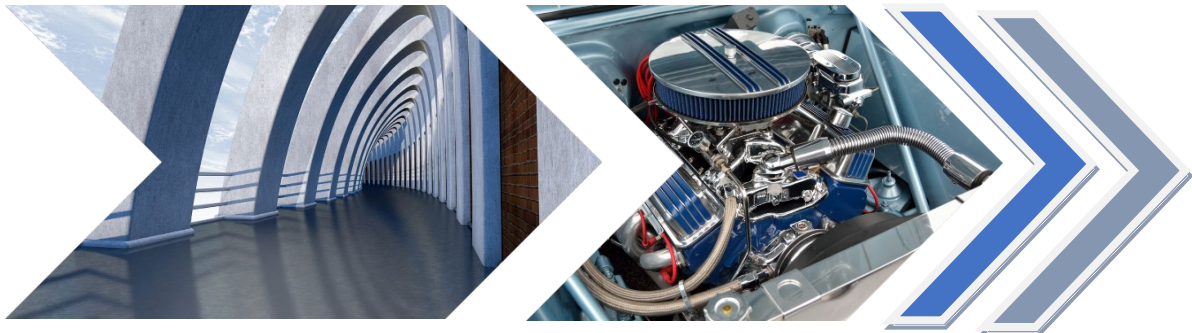
**5 – SLOVAKIA:** general presentation, industrial manufacturing, furniture, electric / electronic goods, textiles and garments, automotive

**6 – SERBIA:** general presentation, industrial manufacturing, metal, chemicals and pharmaceuticals, electric / electronic goods, textiles and garments, automotive

**7 - CROATIA:** general presentation, industrial manufacturing, furniture, plastic, metal, chemicals and pharmaceuticals, electric / electronic goods, textiles and garments, automotive

**8 - BULGARIA:** general presentation, industrial manufacturing, metal, chemicals and pharmaceuticals, electric / electronic goods, textiles and garments, automotive

**9 - TURKEY:** general presentation, industrial manufacturing, plastic, chemicals and pharmaceuticals, electric / electronic goods, textiles and garments, automotive





## ROMANIA

According to the National Institute of Statistics, the GDP in Romania increased by 5% as gross series in the first nine months of 2022 compared to the same period of 2021.

The annual inflation rate in Romania in October 2022 compared to October 2021 is 15.3%, based on data from the National Institute of Statistics. Furthermore, the average rate of change in consumer prices during November 2021 - October 2022 as compared to November 2020 - October 2021 is 12.4%.

Through the **National Recovery and Resilience Plan (NRRP)**, Romania will benefit of 29.2 bn EUR of European funding. The plan includes 15 components:

- Water management
- Forests and biodiversity protection
- Waste management
- Sustainable transport
- Renovation wave
- Energy
- Digital transformation
- Tax and pension reform
- Support for the private sector, research, development and innovation
- Local fund
- Tourism and culture
- Health
- Social reforms
- Good governance
- Education

One of the sectors to receive funding through the NRRP is the Romanian **microelectronics** sector. It receives 500 mEUR to develop a strategic program of research and production of microchips and semiconductors in the country. Furthermore, Romania receives 1.2 bn EUR through the NRRP for waste management projects and must implement the planned projects by 2026. One priority is the digitization of the waste management sector.

According to the National Institute of Statistics, in September 2022 compared to September 2021, the industrial production price index for electricity, gas, steam and air conditioning supply in Romania surged by 163.21%, which pushed up the manufacturing prices by 20.53%.

Since the war in Ukraine, international players have been relocating their manufacturing sites to Romania. One recent example is the Finnish company **Nokian Tyres** - <https://www.nokiantyres.com/> - which will invest 650 mEUR to construct a vehicle tire factory in Romania with the annual manufacturing capacity of 6 million tires.

## INDUSTRIAL MANUFACTURING

According to the National Institute of Statistics, the manufacturing industry in Romania increased by 0.2% as gross series in H1 2022 compared to H1 2021.

Examples of growths are:

- manufacture of food products	+5.9%
- manufacture of beverages	+4.0%
- manufacture of paper and paper products	+5.6%
- manufacture of other non-metallic mineral products	+4.1%
- manufacture of machinery and equipment n.e.c.	+3.8%

In the first eight months of 2022 compared to the same period of the previous year, the turnover in the manufacturing industry in Romania increased by 23.6% in nominal terms, while the new orders in this sector rose by 18.9%.

## FURNITURE

According to the Romanian Furniture Manufacturers Association, the furniture industry is an important contributor to the GDP in Romania. Its contribution to balancing the trade balance is of 1.5 bn EUR per year, on average.

Controlled by an Austrian entrepreneur, **Sortilemn** - <https://sortilemn.ro/> - is a dynamic furniture manufacturer in Romania. It is a major IKEA supplier. The company estimates a turnover of 43 mEUR in 2022, up 14.5% compared to 2021.

**Theta Furniture & More** - <https://theta.com.ro/ro/> - opened in 2022 a new custom-made furniture production factory, in Paulesti, Southern Romania, following an investment of around 4 mEUR. The company targets to reach revenues of 25 mEUR by 2025.

## PLASTIC

According to the National Institute of Statistics, the manufacture of rubber and plastic products in Romania increased by 1.6% as gross series in H1 2022 compared to H1 2021.

The Romanian company **Promateris** - <https://www.promateris.com/> - is the main producer of biodegradable and compostable packaging in Central and Eastern Europe. It recorded a turnover of almost 18 mEUR in H1 2022, up 3.5% compared to H1 2021. The company is listed on the Bucharest Stock Exchange.

The producer of plastic packaging **Electric** - <https://electricsrl.ro/> - is Romanian family-owned business. The company invested 2.5 mEUR in 2021 to double its production capacity. Currently, it has the capacity to process 1,200 tonnes of plastic packaging per month. Electric forecasts a turnover of 12 mEUR in 2022, approximately 33% higher than in 2021.

## METAL

According to the National Institute of Statistics, the manufacture of fabricated metal products, except machinery and equipment increased by 3% as gross series in the first eight months of 2022 compared to the same period of 2021.

The Romanian company **Laronef** - <http://www.metal-nef.ro/> - manufactures a wide range of metal products: copper pipes, copper bars, copper bearings, bronze tubes, bronze plates, brass tubes, brass wire etc. Its foundry is located in the Sibiu area, Centre Romania.

## CHEMICALS and PHARMACEUTICALS

The manufacture of basic pharmaceutical products and pharmaceutical preparations increased by 5.3% as gross series in Romania in the first eight months of 2022 compared to the similar period of 2021, based on official data from the National Institute of Statistics.

In 2022, **Stada** - <https://stada.ro/> - announced an investment of 48.3 mEUR in a new pharmaceuticals production facility in Turda, NW Romania. The plant will initially include nine state-of-the-art technology lines for capsules and tablets, with a capacity of 100 million packages per year. The deadline for the completion of the project is planned for October 2024.

The pharmaceuticals manufacturer **Zentiva** - <https://www.zentiva.ro/> - invested approximately 44 mEUR in the last two years in its plants in Romania. Around 46% of its turnover in H1 2022 is represented by exports. The company is listed on the Bucharest Stock Exchange.

## ELECTRIC / ELECTRONIC GOODS

Based on official data from the National Institute of Statistics, the Romanian manufacture of computer, electronic and optical products increased as gross series by 1.7% in H1 2022 compared to H1 2021.

The German company **Diehl Controls** - <https://www.diehl.com/> - will construct a manufacturing unit of electronic control components, mainly for home appliances in Brasov, Centre Romania, with investments of 50 - 60 mEUR. Brasov was selected following an evaluation of 20 European cities. The production is scheduled to start in 2024.

Within the programme targeting to develop the microelectronics sector, part of the National Recovery and Resilience Plan, **NXP Semiconductors Romania** - <https://www.nxp.com/> - submitted a project entitled "Senthicom" in partnership with various local companies and universities. NXP requested 86 mEUR for the research and development. The NXP engineers in Romania focus on software IP (automotive, microcontroller and connectivity devices) and board solutions.

### TEXTILES AND GARMENTS

According to the National Institute of Statistics, the Romanian manufacture of textile products increased by 2.2% in gross series in the first eight months of 2022 compared to the same period of 2021. Furthermore, the manufacture of wearing apparel recorded a y-o-y growth of 2.3% as gross series in Romania in H1 2022.

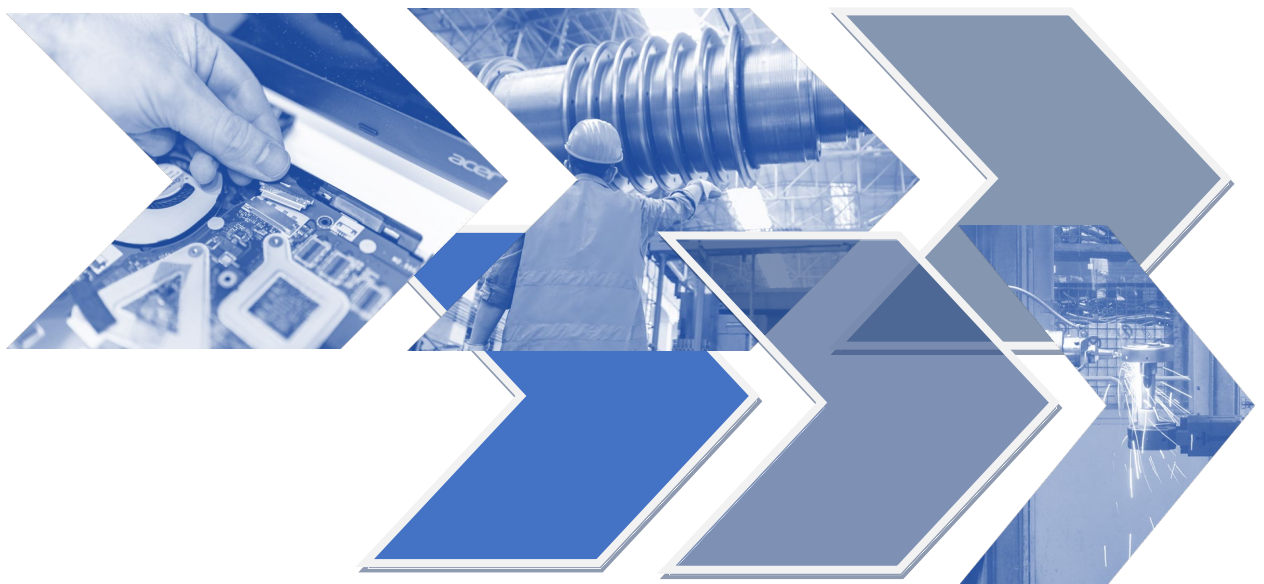
Set up in 1999 by two French entrepreneurs, **Formens** - <https://www.formensfactorystore.ro/> - is based in Botosani, NE Romania. It is a major menswear manufacturer on the ready-to-wear and made-to-measure segments. It has own chain of Formens stores.

### AUTOVEHICLES

According to ACEA - the European Automobile Manufacturers Association, Romania produced 376,047 passenger cars in the first three quarters of 2022, 19.3% more compared to the first three quarters of 2021. Romania ranked as the sixth largest producer of passenger cars in the EU in the first three quarters of 2022.

According to the National Institute of Statistics, the manufacture of motor vehicles, trailers and semi-trailers in Romania increased as gross series by 12.7% in August 2022 compared to August 2021.

The **Ford** plant in Craiova, SW Romania - <https://www.ford.ro/> - will start the production of the new generation Courier model, both the freight (Transit) and passenger (Tourneo) variants in 2023, with an all-electric version from 2024. To support the launch of the Courier model, Ford announced investments of 490 mEUR during the next three years at its Craiova plant. Furthermore, the Ford Puma passenger car will benefit from a fully electric version to be produced at the plant in Romania in 2024.







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Are you looking to expand to the Romanian Industry 4.0 market? To contact at Decision Maker level the players operating in the Romanian manufacturing industry? Perhaps we could be of assistance to you.

Are you looking for **leads generation** in the Romanian industry market? Are you interested in approaching the **Decision Makers** in the Romanian industrial manufacturing sector to present your automation solutions?

Perhaps the FRD Center team can be of assistance to you. Contact us by email at [europa@frdcenter.ro](mailto:europa@frdcenter.ro)

For over 20 years, FRD Center has been assisting international companies with their market expansion to Romania, providing **target origination**, market opportunity assessment, **strategic business contacts** at decision maker level.

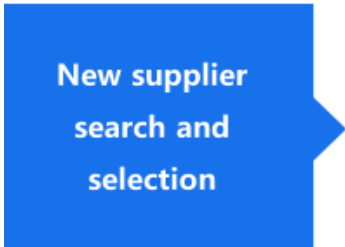
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market entry consulting



**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>

## POLAND

Based on the preliminary estimates of Statistics Poland, the seasonally unadjusted GDP in the second quarter of 2022 in Poland was higher by 5.5% y-o-y.

The consumer prices in Poland increased by 16.1% in August 2022 compared with the corresponding month of the previous year, according to Statistics Poland.

The EU support for implementing the National Recovery and Resilience Plan (NRRP) in Poland amounts to 35.36 bn EUR and includes 23.85 bn EUR in grants and 11.51 bn EUR in loans. The plan includes 50 reforms and 54 investments, grouped under six key development areas:

- Resilience and competitiveness of the economy
- Green energy and energy intensity reduction
- Digital transformation
- Efficiency, accessibility and quality of the health system
- Green, smart mobility
- Improving the quality of institutions and the conditions for the implementation of the NRRP

According to Statistics Poland preliminary data, the prices of sold production in manufacturing in the first ten months of 2022 increased by 19.5% in Poland compared to the corresponding period of 2021, while the prices in electricity, gas, steam and air conditioning supply rose by 50.8%.

The Ukraine war forces major relocations across Central and Eastern Europe. According to a member of the management board at the Polish Investment and Trade Agency, several automotive suppliers enquired with the Agency about relocating their production to Poland from Ukraine, Belarus and Russia.

The Ireland-based automotive technology manufacturer **Aptiv** - <https://www.aptiv.com/> - moved the production from Ukraine to existing facilities sites in Poland, Romania and Serbia.

## INDUSTRIAL MANUFACTURING

According to Statistics Poland, the sold production in manufacturing in constant prices in the first nine months of 2022 in Poland was 11.7% higher than in the corresponding period of 2021.

In September 2022 compared to September 2021, the non-seasonally adjusted sold production in manufacturing in Poland increased by 11%, according to Statistics Poland. Examples of growths are:

- manufacture of food products	+8.3%
- manufacture of beverages	+9.9%
- manufacture of paper and paper products	+4.5%
- manufacture of other non-metallic mineral products	+3.2%

- manufacture of machinery and equipment n.e.c. +26.1%

## PLASTIC

In September 2022 compared to the corresponding month of 2021, the non-seasonally adjusted sold production in the manufacture of rubber and plastic products in Poland was 8.5% higher, based on Statistics Poland data.

The Group **Alpla** - <https://www.alpla.com/> - opened its first plant in Poland in 1991. Currently, the company has four modern plants in Poland producing plastic packaging and one PET recycling plant. Its portfolio includes a wide range of bottles, jars and containers made of PET, HDPE and PP.

Set up in Poland in 2001, **Amhil Europa** - <https://amhil.eu/> - is a dynamic producer of disposable plastic cups, lids and other plastic packaging used in the food and beverage industries. The company has plastic dry offset printing, embossing and laser engraving capacities. It operates in accordance with the BRC and FDA quality systems.

## METAL

As it results from the Statistics Poland data, the non-seasonally adjusted sold production in the manufacture of basic metals in Poland increased by 3% in September 2022 compared to September 2021, while the manufacture of metal products was 13.1% higher.

**Marcegaglia Poland** - <https://marcegaglia.pl/> - manufactures carbon steel welded precision tubes, strips and sheets for a wide range of applications. The plant features six tube mills operating from hot rolled and cold rolled steel and three coil slitting lines. Inaugurated in 2010, the facility covers an overall area of 450,000 sqm.

## CHEMICALS

According to Statistics Poland, the non-seasonally adjusted sold production in the manufacture of pharmaceutical products in Poland increased by 2.3% in September 2022 compared to the same month of 2021.

In the first nine months of 2022 compared to the same period of 2021, the sold production of sodium hydroxide in aqueous solution in Poland increased by 32.3% while the sold production of synthetic calcium sulphate was 28.3% higher, according to Statistics Poland.

**Polpharma** - <https://polpharma.pl/en/> - is a major Polish pharmaceutical manufacturer. The company has five manufacturing plants, three R&D centres and over 4,300 employees. It manufactures prescription drugs, OTC drugs, hospital drugs, dietary supplements and medical devices. Its areas of drug production are cardiology, gastroenterology, pulmonary, neurology, ophthalmology and anti-infective.

## TEXTILES AND GARMENTS

Based on Statistics Poland data, the non-seasonally adjusted sold production in the manufacture of textiles increased y-o-y by 6% in Poland in September 2022.

The manufactured production of women's or girls' suits and ensembles increased by 114.8% in Poland in the first nine months of 2022 compared to the corresponding period of 2021, while the sold production of men's or boys' overcoats and similar articles was 77% higher, according to Statistics Poland.

Established in Poland in 1990, **Kamus** - <http://www.kamusfirma.pl/en/> is specialised in the production of textiles and apparel for women, men and children. Its product range includes coats, shirts, gowns, suits, trousers, dresses, bedclothes, towels, sheer curtains etc. The company has clients from the European markets.

**M-Corp** - <http://m-corp.pl/> is a Polish company specialised in custom garment manufacturing. The company manufactures a wide range of garments for women, men and children, such as: dresses, blouses, shirts, shorts, skirts, sweaters, pants, hoodies etc. It owns two clothing brands: Martin Sparrow and Bluzedu.

## HEAVY MACHINERY AND TOOLS

In the first nine months of 2022 compared to the same period of 2021, the Polish manufactured production of machinery for construction, road and drainage work was 29.1% higher while the manufactured production of machining centres, unit construction machines and multi-station transfer machines for working metal increased by 13.8%, according to Statistics Poland.

**Grutech** - <https://grutech.pl/en/> - is a Polish manufacturer of agricultural, forestry, construction and municipal machinery. The company has been a machinery producer since 2012. The products are manufactured under the Grutech brand. Its range of construction machines includes concrete mixers, sweepers, digging arms etc.

## AUTOVEHICLES

According to official data from Statistics Poland, the non-seasonally adjusted sold production in the manufacture of motor vehicles, trailers and semi-trailers increased by 46.5% in September 2022 compared to the same month of 2021 in Poland.

Based in Poland, **Volkswagen Poznan** - <https://www.volkswagen-poznan.pl/en/> - manufactures commercial vehicles and components. It has four modern manufacturing plants and over 11,000 employees. For over 15 years, the company has manufactured VW Caddy and VW Transporter models and distributed them across the world. The daily production of the plant is 750 vehicles.



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**europa@frdcenter.ro**

**Target origination**

New suppliers search & selection at Decision Maker level

Are you looking for strategic partners in Romania and Eastern Europe?

Are you looking for targets to be acquired in Romania?

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

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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/>



## HUNGARY

Based on official data of the Hungarian Central Statistical Office - HCSO, the Hungary's GDP increased by 4.1% according to seasonally, calendar adjusted and reconciled data in the third quarter of 2022 compared to the corresponding period of the previous year.

The y-o-y increase of consumer prices in the first seven months of 2022 was 10% in Hungary, according to HCSO.

The sum allocated to Hungary in the European Recovery and Resilience Mechanism includes grants of 5.8 bn EUR.

According to HCSO, in September 2022 compared to September 2021, the industrial domestic output prices in Hungary rose by 39.5% in manufacturing and by 137% in the energy industry (electricity, gas, steam and air conditioning supply).

Furthermore, the industrial non-domestic output prices in Hungary increased by 26.3% in manufacturing in September 2022 compared to September 2021 and by 168% in the energy industry, owing to a drastic increase in the world market prices. In addition to the steep rise in the energy prices, the rise in the base material prices and the weakening of the local currency (forint) also had a price-raising effect.

## INDUSTRIAL MANUFACTURING

According to HCSO, in the first nine months of 2022 compared to the corresponding period of 2021, the manufacturing in Hungary grew by 6.5%. Examples of growths are:

- |  |        |
|--|--------|
| - manufacture of food products, beverages and tobacco products | +10.5% |
| - manufacture of wood and paper products                       | +2.0%  |
| - manufacture of machinery and equipment n.e.c.                | +10.0% |

## ELECTRIC / ELECTRONIC GOODS

The manufacture of computer, electronic and optical products in Hungary rose by 10.6% in the first nine months of 2022 compared to the same period of the previous year, while the manufacture of electrical equipment increased by 27.9%, according to HCSO.

Furthermore, in September 2022 compared to September 2021, the manufacture of electronic components and boards went up by 29% while the manufacture of consumer electronics rose by 9.9% in Hungary.

Founded in 1996 in Hungary, **Secutron** - <https://www.secutron.hu/> - is specialised in the electronics manufacturing. The company is able to produce boards with 1 - 16 layers and offers electrical testing for the manufactured PCBs. For the design and development, Secutron uses state of the art CAD systems.

The German manufacturer **Infineon** - <https://www.infineon.com/> - opened in October 2022 a new semiconductor module factory in Hungary, following

investments of around 100 mEUR. The factory assembles and tests high-power semiconductor modules for the electrification of vehicles.

**Lenovo** - <https://www.lenovo.com/> - opened in June 2022 its first in-house manufacturing facility in Europe. Based in Hungary, the factory focuses on building server infrastructure, storage systems and high-end PC workstations. The production line can produce over 1,000 servers and 4,000 workstations a day.

### TEXTILE AND GARMENTS

As it results from the HCSO data, the manufacture of textiles, apparel, leather and related products increased by 6.9% in Hungary in the first nine months of 2022 y-o-y.

Established in 1992 in Hungary, **Suel** - <https://suelknitwear.com/> - is a family owned business. It designs and manufactures clothing for women. The company has four stores in Hungary and sells also online.

### AUTOVEHICLES

According to ACEA - the European Automobile Manufacturers Association, Hungary produced 326,757 passenger cars in the first nine months of 2022, 2% higher compared to the similar period of 2021. Hungary ranked as the eighth largest manufacturer of passenger cars in the EU in the first nine months of 2022.

Based on HCSO official data, the volume of the motor vehicles manufacturing in Hungary rose by 36% in September 2022 compared to September 2021.

**Audi Hungaria** - <https://audi.hu/en/> - is one of the largest and most successful Hungarian companies. It produced 171,015 cars and 1,620,767 engines in 2021. The plant has own technical development centre. The company generated sales of 7.717 bn EUR and invested 162.6 mEUR in 2021.

**Magyar Suzuki** - <https://www.suzuki.hu/> - is one of Hungary's leading industrial companies. It produces the Vitara and SX4 S-CROSS models. The company produced 107,974 vehicles in 2021 in its plant in Esztergom. Magyar Suzuki recorded total net sales revenues of 1,754.2 mEUR in 2021.

**BMW Group** - <https://www.bmwgroup.com/en.html> - started in 2022 the construction works for its new electric car plant in Debrecen, Hungary, with investments of over 1 bn EUR. The series production for the all-electric New Class vehicle is expected to start in 2025. The production capacity will be approximately 150,000 units per year.

**Mercedes Benz** - <https://group.mercedes-benz.com/en/> - announced in 2022 investments of more than 1 bn EUR in its Kecskemet plant in Hungary to develop two new electric vehicle platforms. The series production of models of the new Mercedes Modular Architecture platform will start in 2024, while an electric model of the Mercedes-Benz Electric Architecture platform will start in 2025.



**ABOUT FRD CENTER**

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**International validation**

**Small, efficient and experienced team**

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- Switzerland Global Enterprise Expert Directory
- Sweden on the Go
- Business Finland International Consultants
- Enterprise Ireland local consultant in Romania since 2000

<https://www.frdcenter.ro/frdcenter-core-team/>

**CONTACT**

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## CZECHIA

Based on official data from the Czech Statistical Office - CZSO, the y-o-y increase of GDP in Czechia in the third quarter of 2022 was of 1.6%.

The y-o-y growth of consumer prices in Czechia amounted to 15.1% in October 2022, according to CZSO. Furthermore, the increase in the average consumer price index in the twelve months to October 2022 compared to the previous twelve months amounted to 13.5%.

The Recovery and Resilience Plan in Czechia consists of 91 investment measures and 33 reforms, supported by 7 bn EUR in European grants. 42% of the plan supports climate objectives and 22% fosters the digital transition. The plan is built on six pillars:

- Digital transformation
- Green transformation and physical infrastructure
- Education and labour market
- Research, development and innovation
- Public administration
- Health

According to CZSO, the prices in Czechia increased in electricity, gas, steam and air conditioning by 56.8% in October 2022 y-o-y.

The conflict in Ukraine generated a mass exodus of businesses and foreign investment flows across Central and Eastern Europe.

**Amcor** - <https://www.amcor.com/> - completed in August 2022 the acquisition of a flexible packaging facility in Czechia. The acquisition came a few days after Amcor revealed plans to sell three of its factories in Russia, in response to the invasion of Ukraine. Amcor acquired the plant in Czechia from the Russian manufacturer

**Danaflex** - <https://danaflex-group.com/en>.

## INDUSTRIAL MANUFACTURING

The CZSO data show that the manufacturing in Czechia increased by 2% in the first nine months of 2022 compared to the same period of 2021. Examples of growths are:

- manufacture of beverages	+8.4%
- manufacture of paper and paper products	+4.8%
- manufacture of other non-metallic mineral products	+1.4%
- manufacture of machinery and equipment n.e.c.	+4.2%

## FURNITURE

According to the CZSO data, the manufacture of furniture in Czechia was 4.1% higher during the first nine months of 2022 compared to the same period of the previous year.

Founded in 1991, **Novatronic** - <https://www.novatronic.cz/> - is a Czech furniture manufacturer. Currently, the company operates two manufacturing facilities and have over 55 employees. The product range includes office, school, laboratory and custom-made furniture. The products are delivered to the domestic market and abroad, mainly to France, Germany, Belgium, the Netherlands and Slovakia.

Based in Czechia, **Mminterier** - <https://www.mminterier.cz/> - is a family-owned company specialised in the production of upholstered furniture for contract and private home interiors. Its products gained various awards and are included in the annual Hall of Fame published by Red Dot Design in Essen. Furthermore, the company's oval furniture collection was nominated for the German Design Award 2023.

### CHEMICALS

The CZSO data indicate that, during the first nine months of 2022 compared to the corresponding period of 2021, the manufacture of basic pharmaceutical products and pharmaceutical preparations rose by 11.9% in Czechia.

**Pro.Med.Cs** - <https://www.promed.cz/en/> - is an independent Czech pharmaceutical manufacturer. Its product range includes prescription drugs, non-prescription drugs and dietary supplements. The company exports its products to over 25 countries, mainly from Europe and Asia.

### ELECTRIC / ELECTRONIC GOODS

The manufacture of computer, electronic and optical products in Czechia rose by 0.7% in the first nine months of 2022 compared to the similar period of 2021 while the manufacture of electrical equipment increased by 5%, based on the CZSO data.

**Nvision** - <https://www.nvisioncz.com/> - is a Czech provider of electronic production and digital solutions & services. Its capabilities are: product engineering, manufacturing, data analysis, global sourcing, after sales services etc. The plant delivers turn key manufacturing services, from PCBA to full box builds and complete systems integration.

### TEXTILE AND GARMENTS

According to CZSO data, the manufacture of textiles increased by 2.9% in Czechia in the first nine months of 2022 compared to the same period of 2021, while the manufacture of wearing apparel was 11.8% higher.

**Modeva** - <https://clothingproduction.eu/> - is a clothing company with a long tradition since 1931. It manufactures classic, leisure and professional clothing for women and men. The Czech company has long-term cooperation with major foreign brands in Germany, Austria or Belgium.



## AUTOVEHICLES

According to ACEA - the European Automobile Manufacturers Association, Czechia manufactured 901,030 passenger cars in the first three quarters of 2022, up 9.1% compared to the same period of 2021. Czechia was the third largest producer of passenger cars in the EU in the first three quarters of 2022.

As it results from the CZSO data, the manufacture of motor vehicles, trailers and semi-trailers in Czechia increased by 7.5% in the first nine months of 2022 y-o-y.

### **Toyota Motor Manufacturing Czech Republic (TMMCZ) -**

<https://newsroom.toyota.eu/> - has a plant in Kolin. The new Aygo X, the third generation of Toyota's A-segment model, started production at TMMCZ in March 2022, along with the Toyota Yaris model. Toyota invested over 180 mEUR in the expansion of the Kolin plant for vehicle production on the Toyota New Global Architecture (TNGA) B-platform.

### **Established in 2006, Hyundai Motor Manufacturing Czech (HMMC) -**

<https://hyundai-motor.cz/en/> - is based in the Nosovice industrial zone. It manufactures the Tucson, i30 and Kona Electric models. The cars are exported to more than 70 countries worldwide. The company has around 3,300 employees and the manufacturing capacity of 350,000 cars per year.



## SLOVAKIA

According to the Statistical Office of the Slovak Republic - SO SR, the GDP in Slovakia in chain-linking volumes increased in the third quarter of 2022 by 1.2% compared to the third quarter of 2021. In the current prices in the third quarter of 2022, the GDP amounted to 28.31 bn EUR, representing a y-o-y increase by 8.8%.

The SO SR data indicate that, in the first ten months of 2022, the consumer prices increased by 12.2% y-o-y in Slovakia.

The EU support for the implementation of the **National Recovery and Resilience Plan** in Slovakia amounts to 6.3 billion EUR in grants. The plan is strongly focused on the green transition and digital transformation, with 43.2% and 21% respectively. The plan includes 58 reforms and 58 investments and the measures are organised around five strategic priorities:

- Green economy
- Education
- Science, research, innovation
- Health
- Efficient public administration and digitalisation.

During the past months, the producer prices in manufacturing in Slovakia were driven up mainly by the energy sector. For example, in September 2022 compared to September 2021, the producer price indices in the electricity, gas, steam and air conditioning supply in Slovakia recorded a significant growth of 136.3%.

Slovakia is an attractive M&A destination in the industrial manufacturing sector. A recent example is represented by **Timken** - <https://www.timken.com/> - a US player specialised in engineered bearings and power transmission products, which acquired in May 2022 the Slovakia-based company **Spinea** - <https://www.spinea.com/> - a manufacturer of highly engineered cycloidal reduction gears and actuators.

## INDUSTRIAL MANUFACTURING

Based of the SO SR adjusted data, the manufacturing in Slovakia increased by 0.3% in the first nine months of 2022 compared to the same period of 2021.

## CHEMICALS

According to SO SR data, the manufacture of pharmaceuticals, medicinal chemical and botanical products in Slovakia rose by 19% in the first nine months of 2022 y-o-y.

**Imuna Pharm** - <https://www.imuna.sk/en/> - is a Slovak pharmaceutical manufacturer. It offers contract manufacturing services in production of single and multi-chamber bags of 100 - 5,000 ml. In the last years, the company modernised and renovated its production capacities with EU funds.

## ELECTRIC / ELECTRONIC GOODS

The SO SR data indicate that, in the first nine months of 2022 compared to the same period of 2021, the manufacture of electrical equipment was 9.3% higher in Slovakia.

Founded in 1993, **Elmax Zilina** - <http://www.elmaxzilina.sk/en/> - is a Slovak producer of electrical equipment. It manufactures low voltage switchboards. Furthermore, the company is specialised in industrial automation, for the design and full implementation of electrical control projects for technological plant and material handling equipment. Elmax Zilina has around 110 employees.

Based in Slovakia, **Eltec** - <http://www.eltec.sk/en/> - is specialised in the manufacturing of electrical switchgear for industrial and residential use and electrical control panels for industry. Its manufacturing facility covers 1,900 sqm. The company exports its products to Austria, France, Germany, UK or Czechia.

The Canada-based automotive technology company **Magna International** - <https://www.magna.com/> - announced in April 2022 plans to open a new 22,000 sqm manufacturing facility in Slovakia. The plant will produce advanced driver-assistance systems and electric vehicle technologies for European and global clients.

## TEXTILE AND GARMENTS

As it results from the SO SR data, the Slovak manufacture of textiles, apparel, leather and related products rose by 11.5% in the first nine months of 2022 compared to the corresponding period of 2021.

With over 65 years of experience, **Vzor** - <http://www.vzor.sk/> - is a medium-sized Slovak company specialised in the manufacturing of clothing and cardboard. Its product range includes work clothing, professional clothing for the HoReCa sector, sports and casual clothing. Almost 90% of its total production of work clothing is exported to EU countries.

## AUTOVEHICLES

According to ACEA - the European Automobile Manufacturers Association, Slovakia ranked as the fourth biggest producer of passenger cars in the EU in the first nine months of 2022, with 724,297 units.

The **Volvo Group** - <https://www.volvogroup.com/en/> - announced in July 2022 that Slovakia was chosen as the site of a new 1.2 bn EUR plant for the production of electric vehicles. The plant in the Valaliky industrial park will have the production capacity of 250,000 vehicles per year and will employ around 3,300 people.



## SERBIA

Based on official data from the Statistical Office of the Republic of Serbia, the real GDP growth in Serbia in the second quarter of 2022, compared to the corresponding period of the previous year, amounted 3.9%.

The consumer prices in October 2022 in Serbia increased by 15% in relation to October 2021, according to the Statistical Office. Furthermore, the consumer prices in October 2022 in relation to December 2021 increased by 13.5%, on average.

In the first ten months of 2022 compared to the same period of 2021, based on data from the Statistical Office, the producer prices increased by 17.6% in Serbia, while the prices in electricity, gas, steam and air conditioning supply rose by 1.1%.

## INDUSTRIAL MANUFACTURING

According to the Statistical Office, the manufacturing in Serbia was 2.7% higher in the first nine months of 2022 compared to the same period of 2021. Examples of growths are:

- manufacture of beverages	+4.1%
- manufacture of leather and related products	+3.3%
- manufacture of paper and paper products	+9.8%
- manufacture of coke and refined petroleum products	+16.6%
- manufacture of machinery and equipment n.e.c.	+8.6%
- manufacture of other transport equipment	+47.4%

## METAL

As it results from the official data of the Statistical Office, in the first nine months of 2022 compared to the corresponding period of 2021, the manufacture of fabricated metal products, except machinery and equipment increased by 3.3% in Serbia.

The Serbian company **Elit Inox** - <http://www.elitinox.co.rs/> - has been manufacturing stainless steel tubes since 2009. It has modern high-tech production equipment. The firm is ISO 9001:2015 and ISO 14001:2015 certified.

## CHEMICALS

The data of the Statistical Office indicate that, the Serbian manufacture of basic pharmaceutical products and pharmaceutical preparations increased y-o-y by 6.4% in the first nine months of 2022. Furthermore, the manufacture of chemicals and chemical products in Serbia rose by 13.5% in September 2022 compared to September 2021.

Based in Serbia and part of NC Group, **Galenika** - <https://galenika.rs/> - is a pharmaceutical company. Its solid dosage forms plant producing tablets, film-coated tablets, coated tablets and capsules has the annual capacity of 75,000,000 packs. Furthermore, its pharmaceuticals plant specialised in syrups, inhalation nebulizer

solutions, ointments, creams, gels, suppositories, hormone tablets, film-coated tablets and dietary supplements has the annual capacity of 25,000,000 packs.

The vertically integrated Serbian Group **Elixir** - <https://www.elixirgroup.rs/en/> - is one of the regional leaders in the chemical industry. It produces phosphoric acid, complex mineral fertilizers and NPK fertilizers. Around 70% of its annual revenues come from exports.

### **ELECTRIC / ELECTRONIC GOODS**

The manufacture of computer, electronic and optical products increased by 25.5% in Serbia in the first nine months of 2022 compared to the same period of the previous year, according to the Statistical Office.

Based in Serbia, **Smart Line Technology** - <https://slt.rs/> - offers services of development, testing, SMD production and PCB assembly. The facility offers production capabilities for complex and high-volume products. The firm covers the sectors of communications, networking, computing, industrial, automotive, consumer etc.

### **TEXTILE AND GARMENTS**

According to the Statistical Office, the manufacture of textiles in Serbia rose by 11% in September 2022 compared to the same month of 2021.

**Nenateks** - <https://nenateks.com/> - is a Serbian producer of household textiles. The products are exclusively made of 100% cotton materials. The company is ISO 9001:2008 certified. Its main clients are Interex, Merkur, Mercator, BricoS and Super Vero.

### **AUTOVEHICLES**

The manufacture of motor vehicles, trailers and semi-trailers was 7.7% higher in Serbia in September 2022 compared to the corresponding month of 2021, based on the Statistical Office data.

**Fiat Serbia** - <https://www.fiat.rs/> - produces the Fiat 500 L model in its plant in Kragujevac. The plant has the capacity to produce up to 200,000 cars per year.

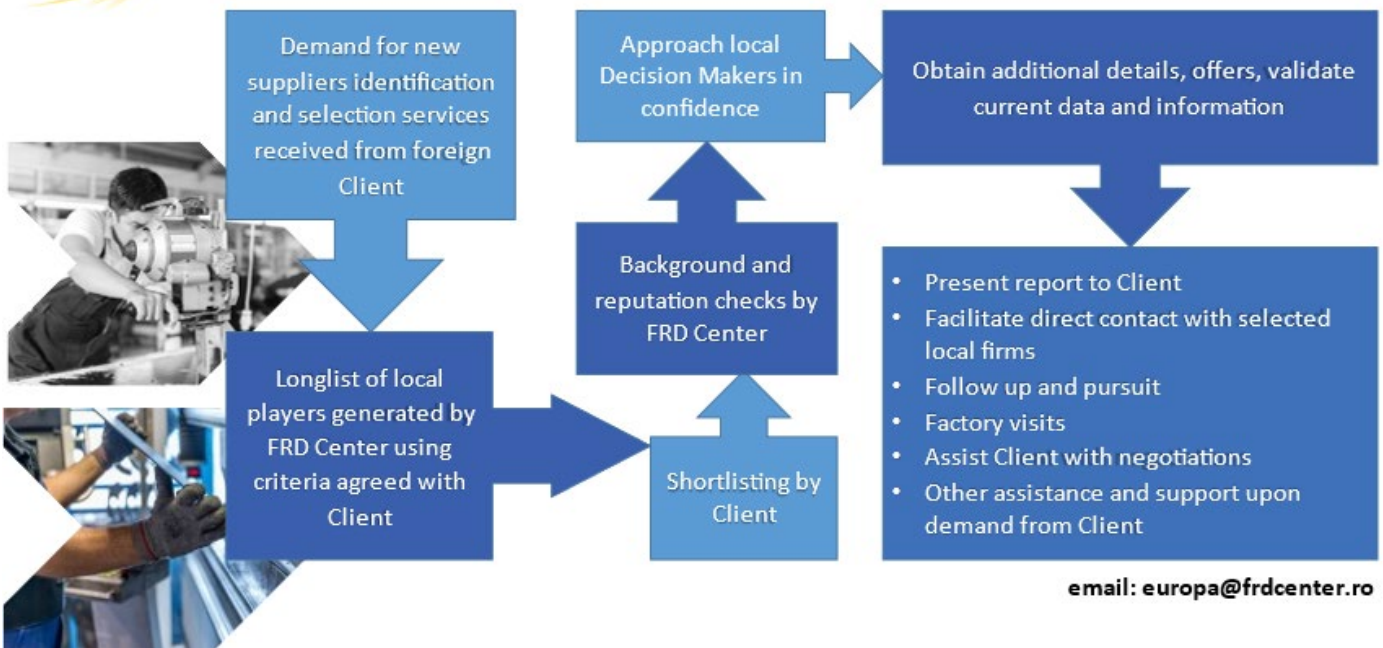






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## CROATIA

According to the Croatia Bureau of Statistics, the GDP in real terms increased by 7.7% in Croatia in the second quarter of 2022 compared to the same quarter of 2021.

The consumer price indices increased by 13.2% in October 2022 y-o-y, according to the Croatia Bureau of Statistics.

The National Recovery and Resilience Plan in Croatia consists of 146 investments and 76 reforms, supported by 6.3 bn EUR in European grants. 40.3% of the plan supports the climate objectives while 20.4% targets the digital transition. The plan comprises five components and one initiative:

- Economy
- Public administration, justice and state assets
- Education, science and research
- Labour market and social protection
- Healthcare
- Initiative: Renovation of buildings

In October 2022 compared to October 2021 in Croatia, based on data from the Croatia Bureau of Statistics, the total producer price in manufacturing increased by 12,4% while the price in electricity, gas, steam and air conditioning supply rose by 63.9%.

## INDUSTRIAL MANUFACTURING

According to official data from the Croatian Bureau of Statistics, the manufacturing in Croatia increased by 2.1% on basis of gross volume indices in the first nine months of 2022 compared to the same period of 2021. Examples of growths are:

- manufacture of food products	+1.3%
- manufacture of beverages	+12.3%
- manufacture of paper and paper products	+3.0%
- manufacture of machinery and equipment n.e.c.	+10.0%

## PLASTIC

The official data from the Croatian Bureau of Statistics indicate that the manufacture of rubber and plastic products rose by 4.6% in gross volume in the first nine months of 2022 compared to the corresponding period of 2021 in Croatia.

Established in 1992, **Alpro-ATT** - <http://www.alpro-att.hr/> - is a Croatian manufacturer of plastic pipes and tubes. The products are exported to various European countries. The company is ISO 9001:2000 certified.

Based in Croatia, **Drnisplast** - <http://www.drnisplast.hr/> - manufactures polyethylene pipes. The company is ISO 9001:2015 and ISO 14001:2015 certified. The pipes are

supplied in straight lengths or as coils. In 1999, the firm became the member of the German Gas and Water Pipes Producers Association - DVGW.

## METAL

Based on the Croatian Bureau of Statistics data, the manufacture of fabricated metal products, except machinery and equipment in Croatia was 2.8% higher in gross volume in the first nine months of 2022 compared to the same period of 2021.

**König Metall Croatia** - <https://www.km-croatia.com/en/> - is a major metal processing player. Its manufacturing processes include punching, riveting, bending, machining, 3D measuring or heat treatment. The company is part of the German Group König Metall.

## ELECTRIC / ELECTRONIC GOODS

As it results from the data of the Croatian Bureau of Statistics, in the first nine months of 2022 compared to the similar period of 2021, the manufacture of electrical equipment in Croatia increased by 8.1% in gross volume.

**Koncar Switchgear** - <https://www.koncar-ap.hr/> - is a major manufacturer of electrical equipment in Croatia. Its product range includes electric power transmission products, primary and secondary distribution units of electrical energy, low voltage switchgears, low voltage apparatus etc. The company has around 240 employees.

## TEXTILE AND GARMENTS

In the first nine months of 2022, the manufacture of textiles in gross volume in Croatia increased by 7.8% y-o-y, according to the Croatian Bureau of Statistics.

**Varteks** - <https://www.varteks.com/> - is a dynamic Croatian manufacturer of clothing for women and men. It has a nationwide chain of stores. The company manufactures clothing for famous brands, such as Hugo Boss, Zadig & Voltaire and J.Lindeberg.

## AUTOVEHICLES

The gross volume data from the Croatian Bureau of Statistics indicate that the manufacture of motor vehicles, trailers and semi-trailers in Croatia was 18.6% higher in the first nine months of 2022 y-o-y.

Founded in 2009, **Rimac Automobili** - <https://www.rimac-automobili.com/> - is a Croatian manufacturer of electric hyper-cars and EV components for the automotive industry. It manufactures the Nevera brand of hyper-cars. The company has around 1,300 employees. Its latest facility expansion in 2021 spreads over 37,000 sqm.

## BULGARIA

According to the seasonally adjusted data of the National Statistical Institute, the GDP in Bulgaria increased by 3.2% in the third quarter of 2022 compared to the third quarter of the previous year.

The annual inflation rate in October 2022 compared to October 2021 was 17.6% in Bulgaria, based on the National Statistical Institute data.

Through the National Recovery and Resilience Plan, Bulgaria will receive a total of 5.69 bn EUR in European grants. 58.9% of funds support climate objectives while 25.8% support digital objectives. The plan consists of 12 components grouped in four policy pillars:

- Innovative Bulgaria pillar, divided into three components: Education and skills; Research and innovation; Smart industry
- Green Bulgaria pillar, divided into three components: Low-carbon economy; Biodiversity; Sustainable agriculture
- Connected Bulgaria pillar, divided into three components: Digital connectivity; Sustainable transport; Local development
- Fair Bulgaria pillar, divided into three components: Business environment; Social inclusion; Healthcare

According to the National Statistical Institute, in September 2022 compared to the same month of 2021, the total producer price in manufacturing in Bulgaria went up by 22.7% and the price in electricity, gas, steam and air conditioning supply recorded a significant increase of 148.3%.

## INDUSTRIAL MANUFACTURING

According to calendar adjusted data from the National Statistical Institute, the Bulgarian manufacturing index rose by 13.8% in September 2022 compared to September 2021. Examples of growths are:

- manufacture of food products	+3.7%
- manufacture of beverages	+43.3%
- manufacture of other non-metallic mineral products	+8.7%
- manufacture of machinery and equipment n.e.c.	+12.1%

## METAL

In September 2022 compared to September 2021, the calendar adjusted data indicate that the manufacture of basic metal in Bulgaria increased by 25.7% while the manufacture of fabricated metal products, except machinery and equipment was 30.7% higher, according to the National Statistical Institute.

Established in 1990 and based in Bulgaria, **HUS** - <https://www.husltd.com/en/> - is specialised in the manufacturing of steel products. The company has more than

120,000 tonnes of available metal stock. HUS is ISO 9001:2015, ISO 14001:2015, ISO 45001:2018 and ISO 50001:2011 certified.

**BMT** - <http://bmt-bg.com/> - is a Bulgarian manufacturer of steel tubes. The company has two production lines and it is ISO 9001:2015 certified. Its product range includes round, square and rectangular steel profiles, with length from 4,000 to 12,000 mm and thickness from 0.90 to 5 mm.

## CHEMICALS

According to the National Statistical Institute calendar adjusted data, the manufacture of basic pharmaceutical products and pharmaceutical preparations in Bulgaria increased by 4.7% in September 2022 y-o-y.

Founded in 1994, **Adipharm** - <https://www.adipharm.com/en> - is a Bulgarian pharmaceutical company specialised in the development and manufacture of medicines and food supplements. Its portfolio includes tablets, hard capsules, sachets of powder and liquid for oral use, injections, ointments, gels, unguents, syrups and oral drops.

Based in Bulgaria, **Chemax Pharma** - <https://chemaxpharma.com/> - has over 30 years of experience in the development and manufacture of pharmaceuticals and dietary supplements. It has more than 150 employees and over 300 registered products in the form of tablets, capsules, syrups, tinctures, sachets for oral use etc. Some of its brands are Dialgin, Iburapid, Acessal Protect etc.

## ELECTRIC / ELECTRONIC GOODS

In September 2022 compared to September 2021, the calendar adjusted data of the National Statistical Institute show that the manufacture of computer, electronic and optical products in Bulgaria increased by 45.9% while the manufacture of electrical equipment rose by 9.3%.

Established in 1990, **BIMCO** - <http://bimco.net/en/> - is a Bulgarian manufacturer of electronic scales. Its product range includes scales for trucks, platforms, railways, retail, storage etc. BIMCO offers services of metrological testing, calibration, warranty and after-warranty. The company is ISO 9001:2008 certified.

**Eberspaecher** - <https://www.eberspaecher.com/> - announced in June 2022 plans to construct a new production plant for electrical heaters and electronics in Ruse, Bulgaria by the end of 2023. The products will be used in e-vehicles and plug-in hybrid models for the European market. When production starts, the team in Ruse will have approximately 150 employees.

The Belgium-based high-tech communications systems manufacturer **Televic Group** - <https://www.televic.com/en> - invests around 5.1 mEUR in 2022 in a new production facility in Bulgaria. The new plant will cover an area of more than 5,500 sqm.



### TEXTILE AND GARMENTS

According to the calendar adjusted data from the National Statistical Institute, in September 2022 compared to the corresponding month of 2021, the manufacture of wearing apparel in Bulgaria was 15.3% higher.

Founded in 1991 in Bulgaria, **Modak** - <http://modak.eu/en/> - is a manufacturer of sports and leisure clothing for women and men. Its product range includes polo-shirts, t-shirts, sportswear, pajamas, body wear, blouses etc. It has the daily production capacity of 2,000 - 4,000 garments, depending on the pattern of the model. The company has around 140 employees. Some of its main clients are: s.Oliver, Marks&Spencer, Diesel etc.

### AUTOVEHICLES

The manufacture of motor vehicles, trailers and semi-trailers in Bulgaria increased by 39.3% in September 2022 y-o-y, based on the calendar adjusted data from the National Statistical Institute.

**SIN Cars** - <https://sincars.co.uk/> - is a Bulgarian supercar manufacturer. In October 2022, SIN Cars and Romanian representatives signed an agreement for the next stage of the procedure to construct a new production facility in Giurgiu, Southern Romania



## TURKEY

According to the Turkish Statistical Institute - TURKSTAT, the GDP in Turkey in the second quarter of 2022 increased by 7.6% compared with the same quarter of the previous year.

Based on TURKSTAT data, the consumer price index in Turkey in October 2022 increased by 57.8% compared to December of the previous year, by 85.51% compared to the same month of the previous year and by 65.26% on the twelve months moving averages basis.

In October 2022, the domestic producer price index in Turkey increased annually by 122.97% for manufacturing and by 554.56% for electricity, gas, steam and air conditioning, according to TURKSTAT.

## INDUSTRIAL MANUFACTURING

According to TURKSTAT, the manufacturing index in Turkey increased by 1.7% annually in September 2022. Some examples of growths are:

- manufacture of food products	+3.1%
- manufacture of leather and related products	+40.4%
- manufacture of paper and paper products	+1.8%
- manufacture of machinery and equipment n.e.c.	+16.0%

## PLASTIC

Based on the TURKSTAT official data, the manufacturing index of rubber and plastic products in Turkey increased by 2.7% in September 2022 compared with the same month of 2021.

Founded in 2013, **Senkap Plastik** - <https://www.senkap.com/> - is a Turkish manufacturer of plastic products for indoor and outdoor gardens. Its range of products includes planting pots, garden trays, flanges, irrigation hoses etc. The products are exported in various countries, mainly in Europe.

**Isik Plastik** - <https://www.isikplastik.com/> - is a Turkish manufacturer of plastic sheets, packaging, compound and masterbatch. Its portfolio includes plastic drinking cups, plates, pots or lids. Established in 1988, the company has a factory with a total area of around 23,000 sqm and over 250 employees.

## CHEMICALS

As it results from the TURKSTAT data, in September 2022 compared to the same month of 2021, the Turkish manufacture index of basic pharmaceutical products and pharmaceutical preparations rose by 0.7%.

Established in 1958, **Deva** - <https://www.deva.com.tr/> - is a major pharmaceutical manufacturer in Turkey. The company has three manufacturing sites, covering a total area of over 216,000 sqm. Its portfolio includes approximately 600 products

covering 14 therapeutic areas, from oncology to cardiology, ophthalmology, respiratory system etc.

Founded in 1912, **Abdi Ibrahim** - <https://www.abdiibrahim.com.tr/> - is dynamic Turkish pharmaceutical manufacturer. It has an accredited R&D center and a strong product portfolio in Turkey, exceeding 200 brands and more than 450 products. The products cover various treatment areas, such as: cardiovascular, gastrointestinal, endocrinology, infectious, neurological, skin diseases etc. The products are exported to over 60 countries.

### **ELECTRIC / ELECTRONIC GOODS**

According to the TURKSTAT data, in September 2022 compared to September 2021, the manufacture index of computer, electronic and optical products in Turkey was 6.2% higher.

Operating in its industrial facilities in Istanbul, Turkey, **Panasonic Electric Works** - <https://ewtr.panasonic.com/en/> - delivers innovative products and solutions. It carries out R&D, innovation and design studies and exports its products to more than 60 countries. Its product range includes smart home and building automation systems, LED lighting products, solar energy panels, fire detection systems, electrical switches and sockets, low voltage switchgear products, MCB boxes etc. The company is ISO 9001, ISO 14001, OHSAS 18001 and ISO 27001 certified.

### **TEXTILE AND GARMENTS**

Based on TURKSTAT data, the manufacture index of wearing apparel in Turkey increased by 19.9% in September 2022 compared to September 2021.

**Berke Global** - <https://www.berkeglobal.com/> - is a Turkish player with a manufacturing experience of more than 20 years. It has two facilities for private label and own clothing production of women knitted clothes. Its product range includes t-shirts, shirts, sweatshirts, blouses, skirts, pants and jackets. The company is a certificated supplier of Oek Tex 100.

Based in Turkey, **Fleksib** - <https://fleksib.com/> - is an apparel sourcing company for women fashion brands. The product range includes woven, jersey wear and knitwear for women. Its services are: R&D, prototypes and sampling, design, production and supply chain management.

### **AUTOVEHICLES**

The manufacture index of motor vehicles, trailers and semi-trailers in Turkey increased by 22.9% in September 2022 y-o-y, according to the TURKSTAT data.

**Toyota Motor Manufacturing Turkey** - <https://www.toyota-europe.com/> - is one of Toyota's biggest overseas manufacturing operations. It has an annual production capacity of approximately 280,000 units. Toyota Turkey manufactures the Toyota C-HR and Corolla models. The majority of the production is exported to around 150 countries.

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