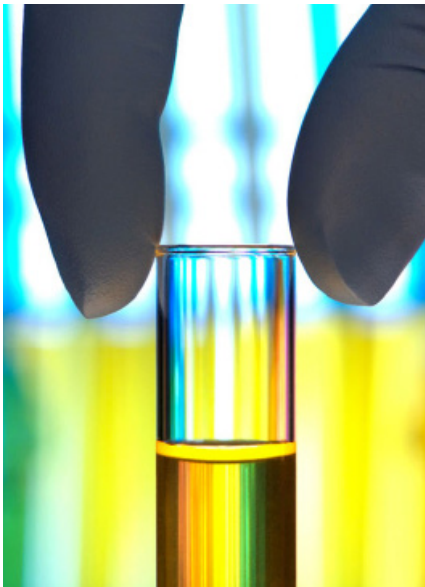


Chemical & Plastics Industry in SLOVAKIA



Chemical & Plastics Industry in Slovakia

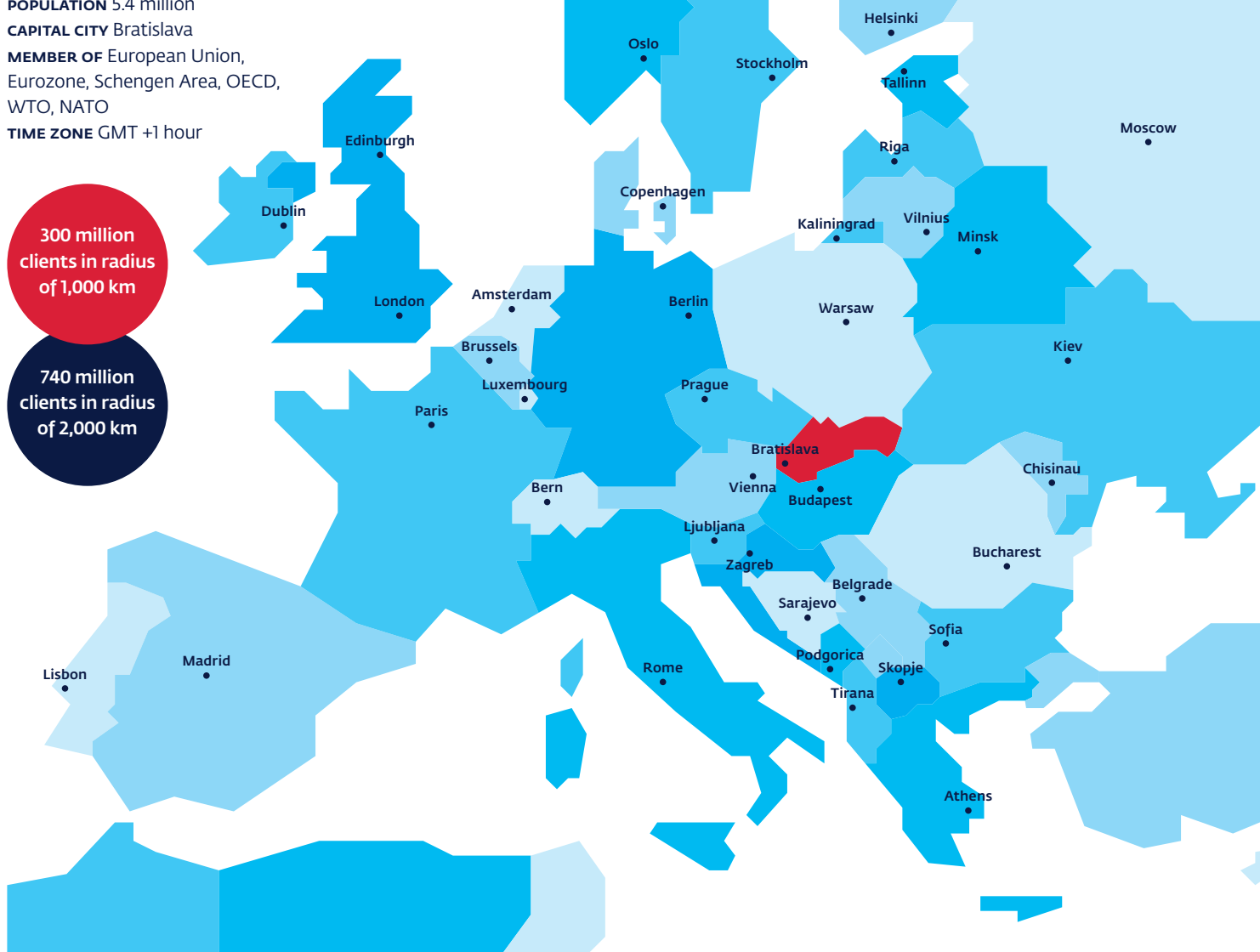
The purpose of this publication is to present the opportunities for potential investors from the chemical industry in Slovakia. Two of the strongest economic sectors – automotive and electronics industry – build a lot of opportunities also for the suppliers of plastic components. The publication includes facts and figures for both of these sectors and serves as an introduction to the chemical & plastics industry in Slovakia.



TOTAL AREA 49,035 km²
POPULATION 5.4 million
CAPITAL CITY Bratislava
MEMBER OF European Union,
Eurozone, Schengen Area, OECD,
WTO, NATO
TIME ZONE GMT +1 hour

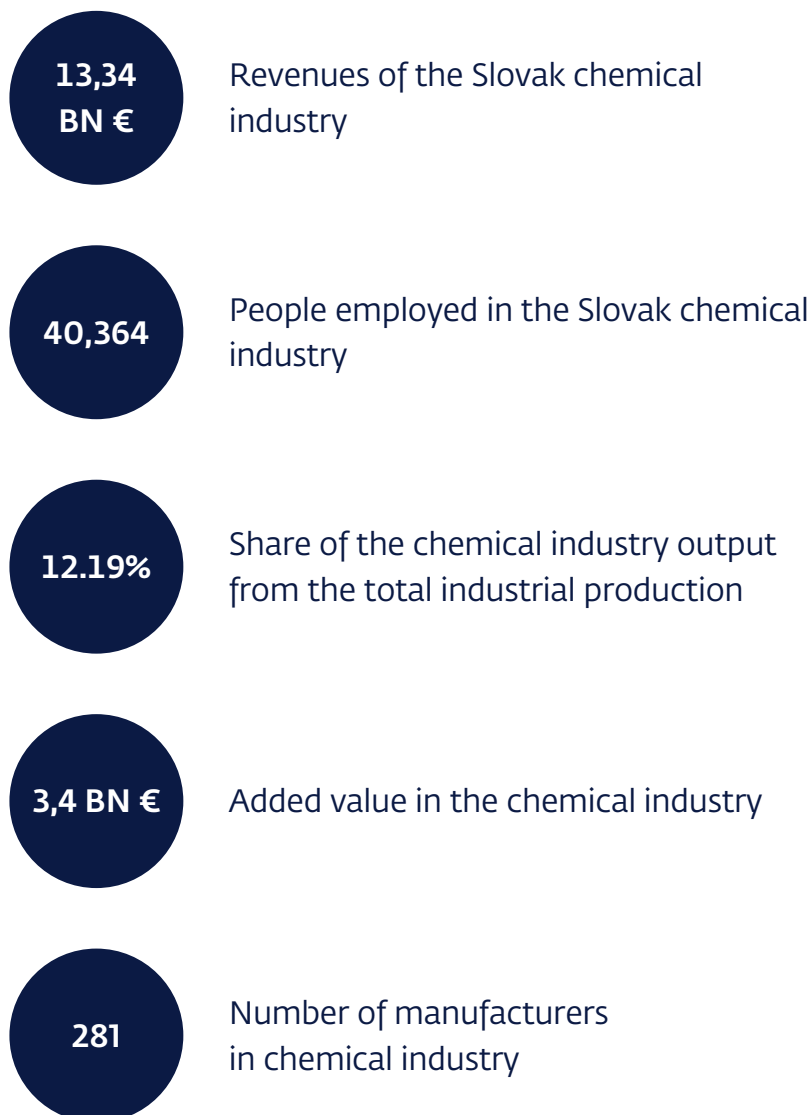
300 million
clients in radius
of 1,000 km

740 million
clients in radius
of 2,000 km



Chemical & Plastics Industry in Slovakia — Key Facts

Slovakia has a strong tradition in all major segments of the chemical industry, including petroleum refining, production of chemicals, fertilizers, rubber and plastics production. The portfolio of products is also influenced by Slovakia's strong automotive and electronics sectors, which serve as constant, high-capacity clients for different companies from the chemical & plastics industry.



*Only companies with more than 20 employees included.
Source: Statistical office of the Slovak republic, Yearbook of Industry of the SR 2023



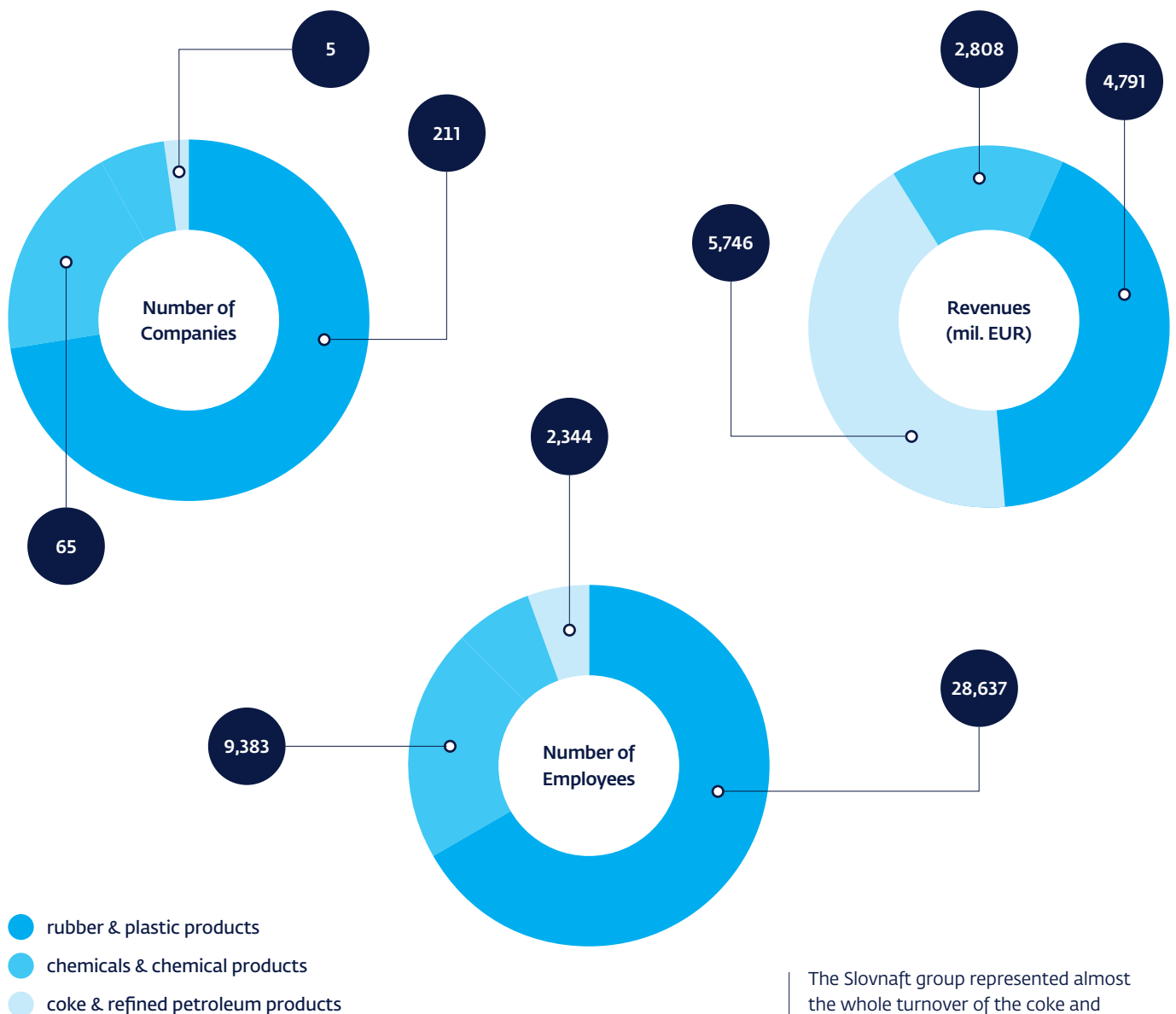
Top 10 Reasons Why to Invest in Slovakia

- 1 Highest labour productivity in CEE region
- 2 Cost-effective & skilled labour force
- 3 Political & economic stability
- 4 Strategic location in Europe with great export potential
- 5 Attractive investment incentives for industry
- 6 Euro currency as one of the few in CEE
- 7 Fastest growing Eurozone member within the last 10 years
- 8 Large selection of industrial land
- 9 Well-developed infrastructure
- 10 Strong local production capacities in need of plastic components

Chemical & Plastics Industry in Slovakia – Summary

Unlike in some other countries, the output of the Slovak chemical industry does not consist of one product or a group of few products, but includes a diversified portfolio of hundreds of different products, ranging from petrochemicals, agrochemicals, and primary organic/ inorganic chemicals, to rubber and plastic products.

Chemical industry has traditionally been one of the largest sectors of Slovak economy. In 2022, revenues generated by all companies in this sector amounted to EUR 13,34 billion. At the same time Slovak chemical industry equaled output of 12.19% (EUR 13,66 billion) from the total industrial production (EUR 112 billion). The sector employs over 40,000 people in approximately 280 companies.



The Slovnaft group represented almost the whole turnover of the coke and petroleum production in Slovakia, which is the biggest revenue generating sub-sector of the chemical industry.

Source: Statistical office of the Slovak republic, Yearbook of Industry of the SR 2023

Skilled & Cost-Effective Labour Force



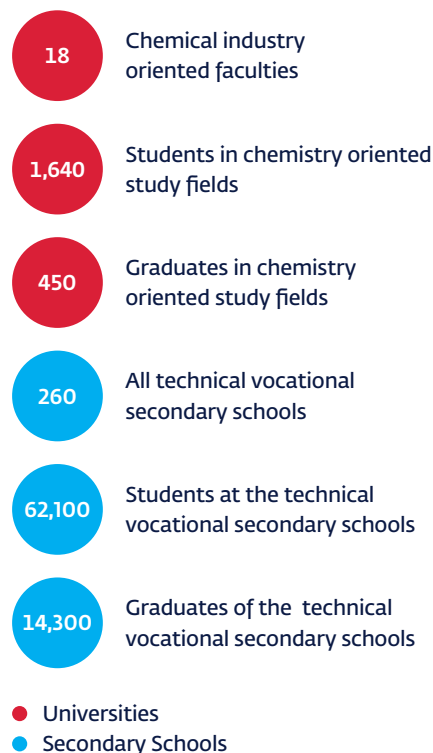
Slovakia is praised as one of the most productive countries in Europe. Combined with cost-effectiveness and high education level, Slovak labour force excels in the three areas that often concern investors – productivity, qualification and labour costs.

More than 1,900 companies and 9,000 students joined the dual education in academic year 2023/2024

DUAL EDUCATION

The Slovak Government has fully implemented a new dual education framework facilitating combination of theoretical education in schools and practical training in companies. The companies joining the new scheme have the advantage of not only benefiting from a prepared and qualified labor force, but also from the possibility to utilize a related tax relief and other financial benefits.

Chemical & Plastics Related Education in Slovakia



AVERAGE GROSS MONTHLY SALARY (IN EUR)

POSITION		BRATISLAVA	TRNAVA	NITRA	TRENČÍN	ŽILINA	BANSKÁ BYSTRICA	KOŠICE	PREŠOV
Production Operative	Min.	1,000	950	1,000	1,100	1,100	1,100	950	850
	Max.	1,400	1,350	1,400	1,400	1,400	1,350	1,200	1,150
Injection Molding Setter	Min.	1,800	1,800	1,800	1,600	1,600	1,800	1,100	1,000
	Max.	2,100	2,200	2,100	2,100	2,100	2,000	1,500	1,300
Quality Technician	Min.	1,500	1,400	1,500	1,400	1,400	1,400	1,350	1,250
	Max.	1,900	1,800	1,900	1,600	1,600	1,600	1,600	1,500
Production Supervisor	Min.	1,600	1,600	1,600	1,500	1,500	1,500	1,400	1,300
	Max.	2,000	2,000	2,000	1,800	1,800	1,800	1,800	1,500
Chemical Engineer	Min.	1,800	1,800	1,800	N/A	N/A	N/A	N/A	N/A
	Max.	2,500	2,500	2,500	N/A	N/A	N/A	N/A	N/A

Source: Institute of Education Information & Prognosis of Slovakia for the Academic Year 2023/2024; Faculty of chemical and food technology STU 2020; Grafton Slovakia, 2024

Examples of Companies from the Slovak Chemical Industry



Slovnaft

3rd biggest company by turnover and the only oil refinery in Slovakia. It also houses an R&D center employing more than 100 engineers.
Revenue: 5,887 mil. EUR
Employees: 2,172

Duslo

Fertilizer producer with European significance and global rubber chemical supplier. The company also produces polyvinyl acetate and poly acrylic glues, dispersions and various other special products.
Revenue: 538 mil. EUR
Employees: 1,942



Continental

Building up on Matador's tyre production history, Continental operates a truck and personal vehicle tyre production facilities in Puchov, with a 150 FTE R&D center.
Revenue: 1,375 mil. EUR
Employees: 3,263

Haleon Levice

The company, as a part of GlaxoSmithKline, has set up a high capacity production of consumer cosmetic products in Levice.
Revenue: 226 mil. EUR
Employees: 565



Chemosvit Folie

The company with a very broad portfolio of chemical products. One of the biggest employers in Eastern Slovakia.
Revenue: 97 mil. EUR
Employees: 682

Source: SARIO, Finstat 2024 (data for 2023)

Chemical Industry Supporting Platform



THE ASSOCIATION OF CHEMICAL & PHARMACEUTICAL INDUSTRY OF THE SLOVAK REPUBLIC (ZCHFP SR)

- headquarters in Bratislava
- established 1991
- merges 65 companies in the fields of chemical and pharmaceutical industry
- members employ 16,000+ people

ZCHFP activities include:

- supporting research projects in Slovakia by networking companies with technical universities and help to enhance a mutual cooperation between the members
- defending of business and entrepreneurial interests of the chemical and pharmaceutical industries, in dialogue with the Parliament and the Government, with trade unions
- influencing of the legislative process

Slovak Academy of Science



INSTITUTE OF CHEMISTRY

Research activities are focused on:

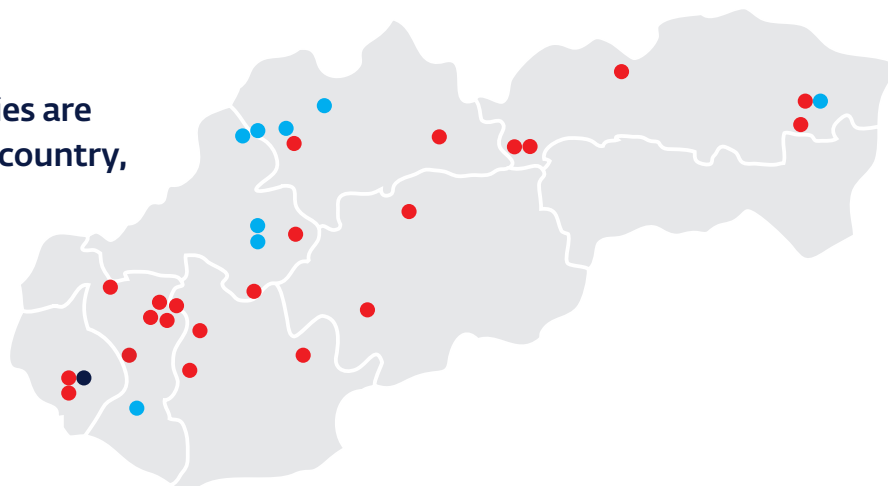
- Structure and functional properties of polysaccharides, their derivatives, and conjugates with other polymers
- Establishment of a Pan-European network on the sustainable valorisation of lignin (LignoCOST)
- Analysis of glycan markers by innovative methods based on biochips & biosensors using nano technologies and many more

The Biggest Players of the Slovak Chemical Industry

(based on revenues)

The biggest chemical companies are present in every region of our country, with a higher concentration in the Western Slovakia.

- Coke & refined petroleum
- Rubber & plastic products
- Chemicals & chemical products



COMPANY	LOCATION	SEGMENT	PRODUCT	REVENUE 2023 (THS. EUR)	AVERAGE NUMBER OF EMPLOYEES
Slovnaft	Bratislava	coke & refined petroleum	motor fuels, fuel oils, petrochemical products	5,887,427	2,172
Continental Tires Slovakia	Púchov	rubber & plastic	passenger car and truck tires	1,374,915	3,263
Duslo	Šaľa	chemicals & chemical products	fertilizers	538,163	1,942
Haleon Levice	Levice	perfumery & toilet preparations	personal care products	225,976	565
ENVIRAL	Leopoldov	chemicals & chemical products	bioethanol	192,618	240
Fortischem	Nováky	chemicals & chemical products	electrolysis products, PVC products	158,259	699
Meroco	Leopoldov	chemicals & chemical products	bioethanol	151,101	53
BASF Slovensko	Bratislava	chemicals & chemical products	chemicals production	140,679	94
ContiTech Vibration Control Slovakia	Dolné Vestenice	rubber & plastic	vibration reduction components	127,029	670
APIS Plastic Slovakia	Dubnica nad Váhom	chemicals & chemical products	plastic products	103,038	450
Chemosvit Folie	Svit	chemicals & chemical products	packaging films	97,398	682
Partizánske Building Components-SK	Partizánske	rubber & plastic	builders ware of plastic, roof windows	95,173	420
Saneca Pharmaceuticals	Hlohovec	chemicals & chemical products	pharmaceutical substances, forms for medicines, manufacturing of medicines	85,943	852
Slovaktual	Pravenec	rubber & plastic	builders ware of plastic, doors, windows	84,512	612
JP-Auto	Matúškovo	chemicals & chemical products	Manufacture of other plastic products	80,114	238
Audia Plastics	Voderady	chemicals & chemical products	synthetic resins	76,210	112
Jasplastik-SK	Matúškovo	rubber & plastic	plastic components	69,896	476
Messer Tatragas	Bratislava	chemicals & chemical products	industrial gases	69,129	140
SaarGummi Slovakia	Dolné Vestenice	rubber & plastic	car window and trunk seals	63,453	855
Terichem Tervakoski	Svit	chemicals & chemical products	plastic plates, sheets, tubes and profiles	62,696	252
Franke Slovakia	Strečno	rubber & plastic	builders ware of plastic, kitchen sinks	56,788	288
Dongil Rubber Belt Slovakia	Považská Bystrica	rubber & plastic	car window and trunk seals	54,566	558
Bang Joo Electronics Slovakia	Šurany	rubber & plastic	plastic products	53,975	117
Evonik Fermas	Slovenská Ľupča	chemicals & chemical products	aminoacids & other chemical products	53,806	243
Nexis Fibers	Humenné	chemicals & chemical products	industrial fibres	53,059	414
D.P. Ekoplast	Snina	chemicals & chemical products	plastic plates, sheets, tubes and profiles	52,597	50
Reutter SK	Mýjava	rubber & plastic	fuel, oil coolant and AdBlue plastic caps	49,720	439
H S F	Malacky	rubber & plastic	builders ware of plastic, doors, windows	49,697	248
Albéa Slovakia	Bratislava	chemicals & chemical products	laminare tubes	47,437	215

The present list of manufacturers of different chemical products is subject to change and it does not represent an exhaustive overview.
Source: Finstat 2024 (data for 2023); webpages of respective companies

Examples of Plastic Components Suppliers

A separate part of the chemical industry handout is attributed to suppliers of the plastic components. Strong base of these companies is important for automotive & electronics industries, which are two of the strongest pillars of the Slovak economy. Additionally, this subcategory of the industry is represented by the highest amount of companies within the Slovak chemical industry.



Seoyon E-Hwa Automotive

Korean Tier1 producer of various automotive plastic and trimmed parts.

Revenue: 288,817,921 EUR

Employees: 555



Magna Slovteca

Canadian interior and exterior automotive plastic parts producer.

Revenue: 196,031,135 EUR

Employees: 711



Jasplastik

Three facilities for production of automotive & television plastic components.

Revenue: 69,896,867 EUR

Employees: 476



Thermoplastik

Slovak Tier 1 supplier, injection moulding plastic component manufacturer for automotive exteriors as well as interiors.

Revenue: 42,400,605 EUR

Employees: 261



Služba Nitra

Vehicle plastic components for electronics, fuse boxes as well as interior and exterior lighting equipment.

Revenue: 23,769,649 EUR

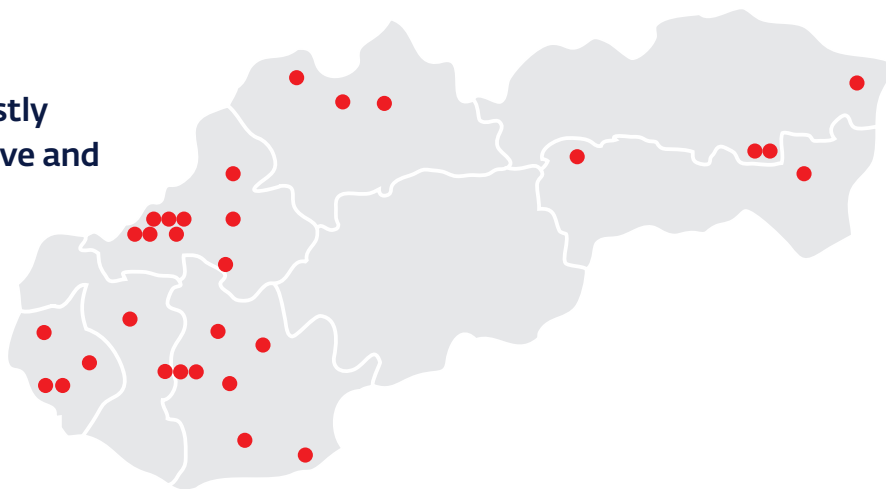
Employees: 186

Source: SARIO, Finstat 2024 (data for 2023)

The Biggest Plastic Component Producers in Slovakia

(based on revenues)

Plastic parts production is mostly connected to Slovak automotive and electronics industries. These suppliers are located all around Slovakia, but with the higher concentration in the Western part of the country.



COMPANY	LOCATION	REVENUE 2022 (THS. EUR)	AVERAGE NUMBER OF EMPLOYEES
Plastic Omnium Auto Exteriors	Lozorno	340,737	1,095
Seoyon E-HWA Automotive Slovakia	Považská Bystrica	288,817	555
Magna Slovteca	Nové Mesto nad Váhom	196,031	711
Plastic Omnium Auto Inergy Slovakia	Lozorno	148,944	265
BASF Slovensko	Bratislava	140,679	94
APIS Plastic Slovakia	Dubnica nad Váhom	103,038	450
CHEMOSVIT FOLIE	Svit	97,398	636
Partizánske Building Components-SK	Partizánske	95,173	420
SLOVAKTUAL	Pravenec	84,512	612
JP-AUTO	Matúškovo	80,114	542
Audia Plastics	Voderady	76,210	110
JASPLASTIK-SK	Matúškovo	69,896	252
Terichem Tervakoski	Svitšurany	62,696	288
Franke Slovakia	Strečno	56,788	288
Bang Joo Electronics Slovakia	Šurany	53,975	117
D.P. EKOPLAST	Snina	52,597	50
Reutter SK	Myjava	49,720170	439
H S F	Malacky	49,697	248
Albéa Slovakia	Bratislava	47,437	215
Nobel Automotive Slovakia	Dolný Kubín	44,432	103
Nanogate Slovakia	Vráble	42,253	280
Bourbon Automotive Plastics Dolný Kubín	Dolný Kubín	38,727	440
PRIMA POPRAD	Poprad	38,242	19272
SMRC Automotive Solutions Slovakia	Nitra	37,923	300
Berry Slovakia	Veľký Meder	37,180	342
DIAKOL STRÁŽSKE	Strážske	35,140	34
Polycasa Slovakia	Žilina	33,690	101
AAH PLASTICS	Nitra	32,894	80
Monarflex	Štúrovo	31,271	141
FENESTRA SK	Zlaté Moravce	29,107	173
eliastech	Krásno nad Kysucou	28,876	224
EUROPACK	Dunajská Streda	28,358	132

The present list of manufacturers of different chemical products is subject to change and it does not represent an exhaustive overview. Source: Finstat 2024 (data for 2023); webpages of the respective companies

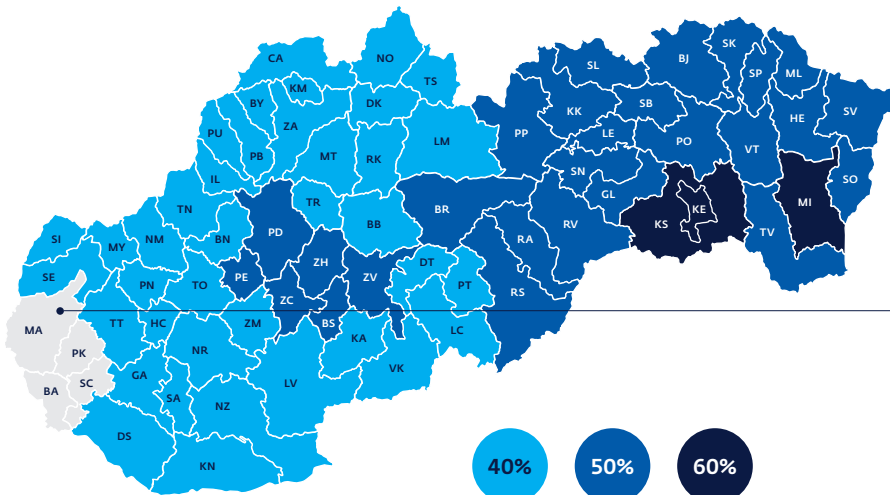
Investment Incentives

The primary goal of the investment incentives is to motivate investors to place their new projects in regions with higher unemployment and to attract projects with higher added value.



Districts in Bratislava region are excluded from the investment aid scheme

MAXIMUM REGIONAL INVESTMENT AID INTENSITY



ELIGIBLE PROJECTS

The Act on Investment Incentives divides the projects, which may be supported, into four categories:

- industrial production
- technology centers
- combined projects of industrial production and technology center
- shared services centers

ELIGIBLE COSTS

- Costs of land acquisition
- Costs of buildings acquisition & construction
- Costs of new technological equipment and machinery acquisition
- Intangible long-term assets — licences, patents, etc.
- Rent of new land/building
- or
- Total wage costs of all new employees calculated over a period of 2 years

+10% additional incentives for medium-sized enterprises

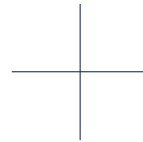
+20% additional incentives for small and micro-sized enterprises

+10% additional incentives for projects related to critical technologies

FORMS OF INVESTMENT INCENTIVES

- Corporate income tax relief
- Cash grant
- Contributions for the newly created jobs
- Rent/Sale of real estate for a discounted price

Please contact us at invest@sario.sk for more information (including minimum conditions and critical technologies definition).



Positive regional contribution of a new investment projects shall be concluded based on these categories — investment location, number of jobs created, average gross monthly salary of new employees, expected added value and possible qualification of a project respecting definition of a priority area



AIM INVESTMENT AWARDS UAE 2022

CEE & TURKEY REGION
Best Investment Promotion Agency in 2022



SARIO Profile

Slovak Investment and Trade Development Agency (SARIO) is a governmental investment and trade promotion agency of the Slovak Republic. The agency was established in 2001 and it operates under the Ministry of Economy of the Slovak Republic.

01 INVESTMENT SERVICES

FOR POTENTIAL INVESTORS

- investment environment overview
- organization of the investor´s visits of Slovakia
- starting a business consultancy
- sector and regional analyses
- investment incentives consultancy
- site location & suitable real estate consultancy

FOR ESTABLISHED INVESTORS

- identification of local suppliers, service providers
- assistance with expansion preparation and execution
- assistance with Industry 4.0 solutions and R&D implementation

02 FOREIGN TRADE SERVICES

IF YOU ARE LOOKING FOR

- Slovak supplier or sub-contractor
- information about Slovak export/trade environment
- sourcing opportunities
- forming a joint venture, production cooperation or other forms of partnership with a Slovak partner

SERVICES FOR EXPORTERS

- information on foreign territories
- customized search for foreign partners
- online database of business opportunities
- export Training Centre
- subcontracting assistance

03 SLOVAK SPACE OFFICE

FOR SLOVAK ENTITIES

- tailor-made sector entry consultancy
- startup creation through hackathons and incubation programs
- cooperation opportunities through matchmaking events
- internationalization of the Slovak space companies and research institutions

FOR FOREIGN PARTNERS

- customized search for local partners
- assistance with establishing branch in Slovakia
- cooperation on space industry events

**SARIO IS YOUR ONE STOP SHOP FOR INVESTMENT & TRADE IN SLOVAKIA.
TALK TO US TODAY!**

SARIO | Slovak Investment and Trade Development Agency

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