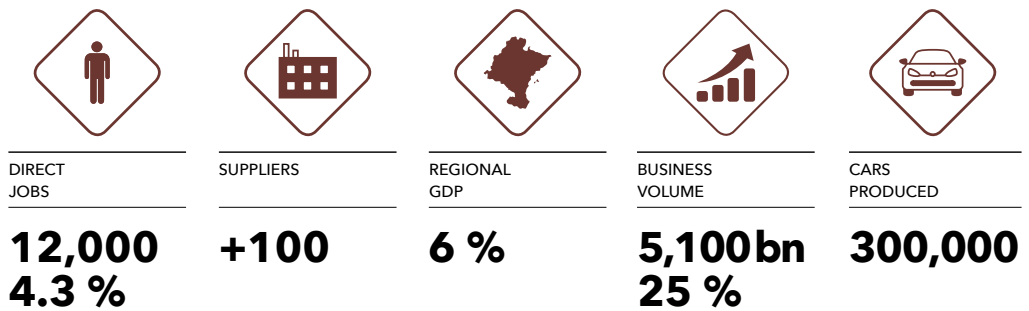




**THE STRENGTH OF A KINGDOM**

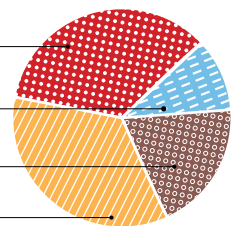
INVEST IN NAVARRA



Navarra has a long-standing tradition in the automotive sector. It represents around 25 % of the region's industrial GDP, which in turn accounts for 29 % of the Navarra's total GDP.

65 % of the industrial activity of the automotive sector in Navarra

- ♦ TRANSMISSIONS 31 %
- ♦ POWER TRAIN 17 %
- ♦ INTERIOR PARTS 21 %
- ♦ OTHER COMPONENTS 31 %

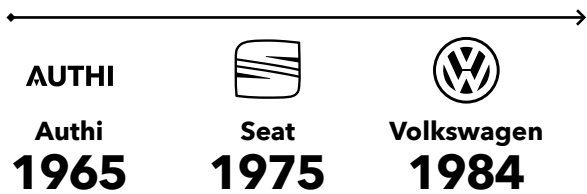
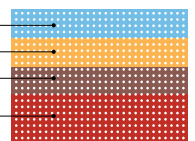


VW Landaben is one of the most productive plants in the group, with 4,800 employees.



R&D+i centre specialised in automotive applications.

- ♦ ELECTRONICS
- ♦ MECHANICAL
- ♦ MATERIALS
- ♦ APPLICATION OF MATERIALS



**Los Arcos Circuit**

Navarra has the only motor racing circuit in the north-west quadrant of Spain, less than an hour away from Pamplona.

Naitec provides specialised services for the automotive sector.



Business association dedicated to improving the sector's competitiveness through cooperation.

**The automotive sector in Navarra represents around 25 % of the region's GDP, which in turn accounts for 29 % of the Navarra's total GDP.**



Car manufacture started in 1965 with the creation of the Anglo-Spanish company Authi. After a few years it became SEAT and in 1994, Volkswagen.

Nowadays the sector includes **105 companies**, with a turnover of around **5,100 million euros**. It directly employs around **12,000 people**, 4.3 % of the region's workforce. In 2016, exports from the sector stood at **3,750 million euros**, i.e. 45 % of goods exports from Navarra.

As for its business fabric, Navarra has a solid base of Tier 1 and Tier 2 suppliers offering high-quality products, and it has gradually grown thanks to the main driver: Volkswagen Navarra. These companies compete at international level and are characterised by their flexibility and adaptability to demand from constructors. Component companies

play an increasingly important role in the value chain, the result of the high - and growing - level of outsourcing of production commonly found in vehicle manufacturers. In the light of the figures, they also play a key role in job creation headed by the Volkswagen factory in Landaben, which will start to produce a second model in 2018 with the creation of **200 new jobs**.

Companies based in Navarra also manufacture products for transmission systems, interior parts and power train, mainly. These three areas represent **more than 65 %** of the industrial activity of the automotive sector. Companies located in the region have a strong presence in the braking, chassis, transmission and interior design subsectors.

**Navarra has a strong R&D+i centre that specialises in the automotive sector:**



**Naitec** is the Multidisciplinary Technology Centre for Industry in Navarra. It has four fields of specialisation: electronics, mechanics, materials and the application of materials.

Its **mission** is to help to increase the competitiveness of companies through the development of R&D+i technology services and other activities that promote innovation. Among others, Cemitec offers the following services related to the automotive sector:

1. Development of electronic products: software, hardware and control. Engine control units to monitor and manage automotive components.
2. Technological assistance in materials.
3. Structural mechanics: component and systems testing.

**ACAN ACAN Automotive Cluster**

A business association to improve the competitiveness of the automotive sector and consolidate Navarra as a region of excellence in this sector.



**Los Arcos Circuit**

Navarra has the only motor racing circuit in the north-west quadrant of Spain. Located at Los Arcos, **62.3 kilometres** from Pamplona, it is a large recreational and sports area dedicated to the world of motoring. It also has facilities to create and house a wide range of corporate and leisure events. Presentations of new models by Audi and Jaguar, filming TV adverts (Mercedes) and a stage finish of the Tour of Spain cycle race.

**Main companies in the sector**



**Volkswagen Navarra** is one of the Volkswagen Group's 120 manufacturing facilities and the lead factor for the new Polo. The plant, located in Pamplona, produces almost 300,000 cars a year.



**The German-owned TRW** mainly produces steering systems for cars, and also for buses and trucks.



**NUCAP Industries** is the world leader in product innovation and the manufacture of components for braking systems. The company's product range includes high-quality bearings for brake pads, wedge brakes, hardware and springs.



**TI Automotive** makes products that help to burn fuel efficiently and reduce emissions. TI Automotive employs 190 people in Navarra.



**Fagor Ederlan** is a reference automotive company, specialising in the manufacture of engine blocks. Its plant in Tafalla (Navarra) employs over 700 people.



**Dana Holding Corporation** is a US company that supplies axles, cardan shafts, gearboxes, thermal management and sealing products, and spare parts.



**SAS Automotive Systems** specialises in the assembly, logistics and development of cockpit systems. Its plant in Navarra supplies VW and employs 270 people.



**Tecnoconfort** manufactures upholstered seats and supplies the new VW Polo model. Its plant in Navarra employs 340 people.



**Faurecia** specialises in engineering and the production of solutions for the automotive sector. Its main activity is the production of vehicle seats, emission control technologies, and interior and exterior systems.



**Delphi** is a worldwide supplier of electronics and technology for car manufacturers, commercial vehicles and other market segments. Its plant in Navarra employs 250 people.



**SKF** is the world leader in the design and manufacture of roller bearings. It also produces other bearings and frames. It is located in the south of Navarra and has a workforce of 300 people.



**Grupo ISFINGHAUSEN.** AESL supplies complete seat systems. It offers centralised interior solutions, passenger seats, ISRI suspension seats for the driver and decorative textile accessories.



**KYB** is one of the biggest producers in the world of shock absorbers for vehicle manufacturers. The group has two plants in Navarra, one in Ororbia and the other in Los Arcos.



**Gestamp** is an international group that designs, develops and manufactures metallic components and structural systems for the automotive industry.



**Kayser Automotive Systems** develops and manufactures products for fuel tanks, engines and the passenger compartment.



**Grupo Antolin** provides multi-technology solutions for interior modular parts. The company works in four main areas: ceilings, doors, seats and lighting.