






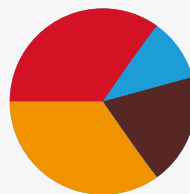


# Automotive

	DIRECT JOBS	13,000 (4.5 %)
	SUPPLIERS	+120
	REGIONAL GDP	6 %
	BUSINESS VOLUME	6,500bn 25 %
	CARS PRODUCED	221,000 uds

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 30 % of the Navarra's total GDP

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



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

**AUTHI**

Authi  
1965



Seat  
1975



Volkswagen  
1984



VW Landaben is one of the most productive plants in the group, with 4,600 employees.



**Los Arcos Circuit**

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

**R&D+i centre specialised in automotive applications**



Cemitec provides specialised services for the automotive sector.

- ELECTRONICS
- MECHANICAL
- MATERIALS
- APPLICATION OF MATERIALS



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

**Navarra has 3 OEMs, what they manufacture car (VW) and motor buses atmospheric (Sunsundegui and Integralia)**

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, which currently produces three of its most famous models there: Polo, T-Cross and Taigo. The automotive industry's contribution to Navarra's GDP is 6%.

Nowadays the sector includes **120 companies**, with a turnover of around **6,500 billion euros**. It directly employs around **13,000 people**, 4.3 % of the region's workforce. In 2021, export from the sector stood at **4,650 millions euros**, ie. 46% of goods export 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. Undoubtedly, and in view of the data, they also play a key role in creating employment, lead by the Landaben

factory, which currently employs 4,621 workers (2021).

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 is committed to sustainable and connected mobility. The automotive industry is currently in the middle of a process of transformation, moving towards the electrification for the decarbonisation of the industry.

The Naveac project stands out, whose activities are structured into 4 large areas: Sustainable Mobility, Recharging Infrastructures, Industrial Vehicle Opportunities, and Pioneer Territory.

**The chain of value includes in Navarrs to OEM, TIER 1 and 2, services, aftermarket and R+D+i.**



**Naitec's** mission is to be a center of excellence in sustainable mobility and mechatronics of international reference to contribute to the promotion technology of both sectors and the improvement of the of the competitiveness of companies.



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.



Acan, Navarra's automotive cluster, brings together more than 50 companies and works to consolidate Navarra as a region of excellence in the automotive industry. The cluster represents more than 90% of employment in the sector.

**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.



**NUADI Group** is the leader global in innovation products and manufacturing system components of brakes. Nuadi belongs to the venture capital firm Artá Capital, which acquired in 2019 the Navarra plant to the Canadian NUCAP



**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.



**APTIV** is a manufacturer of vehicle components that at its plant in Pamplona is specialized in injection plastic parts small size. APTIV is a technological multinational american that develops sustainable, safe and connected based on the new mobility.



**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.