Contents

Introduction..............................................................................................................13

Chapter 1
Changing Landscape...............................................................................................17

Chapter 2
Central and Eastern Europe Survey 2007............................................................22

Chapter 3
Shifts in Automotive production by EU & Country.............................................36

Chapter 4
The Shift in European Automotive Production....................................................71

Chapter 5
Business Practices.................................................................................................86

Chapter 6
Country by Country Market Reviews...................................................................98

Bulgaria..................................................................................................................98
Croatia.................................................................................................................104
Czech Republic....................................................................................................109
Hungary...............................................................................................................120
Poland................................................................................................................131
Romania..............................................................................................................147
Russia.................................................................................................................157
Slovakia..............................................................................................................167
Slovenia..............................................................................................................182
Turkey................................................................................................................189
Ukraine..............................................................................................................199

Appendix
Directory Lists:
Ukraine, Croatia, Slovakia, Slovenia and Romania.............................................210
Russian Database..............................................................................................343
List of figures

Figure i: Investment Vehicle Production 1990-2006 .................................................. 14
Figure ii: Progress of the European Union ............................................................... 16

Figure 1.1: Vehicle Production Capacity in Central and Eastern Europe ................. 17
Figure 1.2: Central Europe steps up its component exports .................................... 21

Figure 2.1: Expected growth of component industry in Central and Eastern Europe .... 22
Figure 2.2: Supplier sales growth in Central and Eastern Europe ............................. 23
Figure 2.3: Two-year projection of sales in Central and Eastern Europe ................. 23
Figure 2.4: Attractive business areas in Central and Eastern Europe ...................... 24
Figure 2.5: Key strengths and weaknesses of Central and Eastern European .......... 25
Figure 2.6: Regional competition over the next five years .................................. 26
Figure 2.7: Major competitors for Central and Eastern European ....................... 27
Figure 2.8: Most competitive global manufacturing location today ..................... 28
Figure 2.9: Just-in-sequence supply to Western Europe ........................................ 29
Figure 2.10: Attraction for automotive Supplier investments ................................... 30
Figure 2.11: Automotive supplier investments in five years’ time ......................... 31
Figure 2.12: Locations of Company Headquarters .................................................. 33
Figure 2.13: Size of company in automotive sales ............................................... 33
Figure 2.14: Significant business partnerships ...................................................... 34
Figure 2.15: Significant operations across Central and Eastern Europe .................. 35

Figure 3.1: EU Membership .................................................................................... 36
Figure 3.2: Bulgaria and EU27 - Imports and exports of motor vehicles ............... 41
Figure 3.3: Bulgarian trade with EU15 Extra, Bumpers in Euros ......................... 42
Figure 3.4: Bulgarian trade with EU15 Extra, Bumpers in Tonnes ....................... 42
Figure 3.5: Bulgarian trade with EU15 Intra, Bumpers in Euros ......................... 42
Figure 3.6: Bulgarian trade with EU15 Intra, Bumpers in Tonnes ....................... 42
Figure 3.7: Bulgarian trade with EU15 Intra, Brake Parts in Euros ..................... 42
Figure 3.8: Bulgarian trade with EU15 Extra, Brake Parts in Tonnes .................. 42
Figure 3.9: Bulgarian trade with EU15 Intra, Brake Parts in Euros ..................... 42
Figure 3.10: Bulgarian Trade with EU15 Intra, Brake Parts in Tonnes .................. 42
Figure 3.11: Bulgarian Trade with EU15 Extra, Gearboxes in Euros ..................... 43
Figure 3.12: Bulgarian Trade with EU15 Extra, Gearboxes in Tonnes .................. 43
Figure 3.13: Bulgarian Trade with EU15 Intra, Gearboxes in Euros ..................... 43
Figure 3.14: Bulgarian Trade with EU15 Intra, Gearboxes in Tonnes .................. 43
Figure 3.15: Bulgarian trade with EU15 Extra, Drive Axles in Euros ................... 43
Figure 3.16: Bulgarian trade with EU15 Extra, Drive Axles in Tonnes .................. 43
Figure 3.17: Bulgarian trade with EU15 Intra, Drive Axles in Euros ................... 43
Figure 3.18: Bulgarian trade with EU15 Intra, Drive in Tonnes ............................ 44
Figure 3.19: Bulgarian trade with EU15 Extra, Body parts in Euros ..................... 44
Figure 3.20: Bulgarian trade with EU15 Extra, Body parts in Tonnes ................... 44
Figure 3.21  Bulgarian trade with EU15 Intra, Body parts in Euros ..........................44
Figure 3.22  Bulgarian trade with EU15 Intra, Body parts in Tonnes ..........................44
Figure 3.23  Czech Rep. trade with EU15 Extra, Bumpers in Euros ..........................45
Figure 3.24  Czech Rep. trade with EU15 Extra, Bumpers in Tonnes ..........................45
Figure 3.25  Czech Rep. trade with EU15 Intra, Bumpers in Euros ..........................45
Figure 3.26  Czech Rep. trade with EU15 Intra, Bumpers in Tonnes ..........................45
Figure 3.27  Czech Rep. trade with EU15 Extra, Brake parts in Euros ..........................45
Figure 3.28  Czech Rep. trade with EU15 Extra, Brake parts in Tonnes ..........................45
Figure 3.29  Czech Rep. trade with EU15 Intra, Brake parts in Euros ..........................45
Figure 3.30  Czech Rep. trade with EU15 Intra, Brake parts in Tonnes ..........................45
Figure 3.31  Czech Rep. trade with EU15 Extra, Chassis in Euros ..........................46
Figure 3.32  Czech Rep. trade with EU15 Extra, Chassis in Tonnes ..........................46
Figure 3.33  Czech Rep. trade with EU15 Intra, Chassis in Euros ..........................46
Figure 3.34  Czech Rep. trade with EU15 Intra, Chassis in Tonnes ..........................46
Figure 3.35  Czech Rep. trade with EU15 Extra, Drive Axles in Euros ..........................46
Figure 3.36  Czech Rep. trade with EU15 Extra, Drive Axles in Tonnes ..........................46
Figure 3.37  Czech Rep. trade with EU15 Intra, Drive Axles in Euros ..........................46
Figure 3.38  Czech Rep. trade with EU15 Intra, Drive Axles in Tonnes ..........................47
Figure 3.39  Czech Rep. trade with EU15 Extra, Body parts in Euros ..........................47
Figure 3.40  Czech Rep. trade with EU15 Extra, Body parts in Tonnes ..........................47
Figure 3.41  Czech Rep. trade with EU15 Intra, Body parts in Euros ..........................47
Figure 3.42  Czech Rep. trade with EU15 Intra, Body parts in Tonnes ..........................48
Figure 3.43  Czech Rep. body parts & accessories EU15 Extra in Tonnes ..........................48
Figure 3.44  Czech Rep. trade with EU15 Extra, Gearboxes in Euros ..........................48
Figure 3.45  Czech Rep. trade with EU15 Extra, Gearboxes in Tonnes ..........................48
Figure 3.46  Czech Rep. trade with EU15 Intra, Gearboxes in Euros ..........................48
Figure 3.47  Czech Rep. trade with EU15 Intra, Gearboxes in Tonnes ..........................48
Figure 3.48  Hungary imports and exports with the EU27 ..........................................49
Figure 3.49  Hungarian trade with EU15 Extra, Chassis in Euros ..........................49
Figure 3.50  Hungarian trade with EU15 Extra, Chassis in Tonnes ..........................49
Figure 3.51  Hungarian trade with EU15 Intra, Chassis, in Euros ..........................49
Figure 3.52  Hungarian trade with EU15 Intra, Chassis, in Tonnes ..........................50
Figure 3.53  Hungarian trade with EU15 Extra, Bumpers, in Euros ..........................50
Figure 3.54  Hungarian trade with EU15 Extra, Bumpers, in Tonnes ..........................50
Figure 3.55  Hungarian trade with EU15 Intra, Bumpers, in Euros ..........................50
Figure 3.56  Hungarian trade with EU15 Intra, Bumpers, in Tonnes ..........................50
Figure 3.57  Hungarian trade with EU15 Extra, Brake parts, in Euros ..........................51
Figure 3.58  Hungarian trade with EU15 Extra, Brake parts, in Tonnes ..........................51
Figure 3.59  Hungarian trade with EU15 Intra, Brake parts, in Euros ..........................51
Figure 3.60  Hungarian trade with EU15 Intra, Brake parts, in Tonnes ..........................51
Figure 3.61  Hungarian trade with EU15 Extra, Gearboxes, in Euros ..........................51
Figure 3.62  Hungarian trade with EU15 Extra, Gearboxes, in Tonnes ..........................51
Figure 3.63  Hungarian trade with EU15 Intra, Gearboxes, in Euros ..........................51
Figure 3.64  Hungarian trade with EU15 Intra, Gearboxes, in Tonnes ..........................51
Figure 3.65  Hungarian trade with EU15 Extra, Drive Axles in Euros ..........................52
Figure 3.66  Hungarian trade with EU15 Extra, Drive Axles in Tonnes ..........................52
Figure 3.67 Hungarian trade with EU15 Extra, Drive Axles in Euros......................52
Figure 3.68 Hungarian trade with EU15 Extra, Drive Axles in Tonnes.....................52
Figure 3.69 Poland - Imports and Exports between EU15 in Euros...........................53
Figure 3.70 Polish trade with EU15 Extra, Bumpers, in Euros...............................53
Figure 3.71 Polish trade with EU15 Extra, Bumpers, in Tonnes..............................53
Figure 3.72 Polish trade with EU15 Intra, Bumpers, in Euros...............................53
Figure 3.73 Polish trade with EU15 Intra, Bumpers, in Tonnes..............................54
Figure 3.74 Polish trade with EU15 Extra, Brake Parts, in Euros...........................54
Figure 3.75 Polish trade with EU15 Extra, Brake Parts, in Tonnes..........................54
Figure 3.76 Polish trade with EU15 Intra, Brake Parts, in Euros...........................54
Figure 3.77 Polish trade with EU15 Intra, Brake Parts, in Tonnes..........................54
Figure 3.78 Polish trade with EU15 Extra, Gearboxes, in Euros............................55
Figure 3.79 Polish trade with EU15 Extra, Gearboxes, in Tonnes...........................55
Figure 3.80 Polish trade with EU15 Intra, Gearboxes, in Euros.............................55
Figure 3.81 Polish trade with EU15 Intra, Gearboxes, in Tonnes............................55
Figure 3.82 Polish trade with EU15 Extra, Drive Axles in Euros............................55
Figure 3.83 Polish trade with EU15 Extra, Drive Axles in Tonnes...........................55
Figure 3.84 Polish trade with EU15 Extra, Drive Axles in Euros............................55
Figure 3.85 Polish trade with EU15 Extra, Drive Axles in Tonnes...........................55
Figure 3.86 Polish trade with EU15 Extra, Chassis, in Euros...............................56
Figure 3.87 Polish trade with EU15 Extra, Chassis, in Tonnes...............................56
Figure 3.88 Polish trade with EU15 Intra, Chassis, in Euros.................................56
Figure 3.89 Polish trade with EU15 Intra, Chassis, in Tonnes...............................56
Figure 3.90 Polish trade with EU15 Extra, Other body parts, in Euros.....................56
Figure 3.91 Polish trade with EU15 Extra, Other body parts, in Tonnes....................56
Figure 3.92 Polish trade with EU15 Intra, Other body parts, in Euros.....................57
Figure 3.93 Polish trade with EU15 Intra, Other body parts, in Tonnes....................57
Figure 3.94 Value of trade; all parts between Romania and the EU..........................57
Figure 3.95 Romanian trade with EU15 Extra, Bumpers, in Euros..........................58
Figure 3.96 Romanian trade with EU15 Extra, Bumpers, in Tonnes..........................58
Figure 3.97 Romanian trade with EU15 Intra, Bumpers, in Euros...........................58
Figure 3.98 Romanian trade with EU15 Intra, Bumpers, in Tonnes..........................58
Figure 3.99 Romanian trade with EU15 Extra, Brake Parts, in Euros.....................58
Figure 3.100 Romanian trade with EU15 Extra, Brake Parts, in Tonnes.....................58
Figure 3.101 Romanian trade with EU15 Intra, Brake Parts, in Euros.....................58
Figure 3.102 Romanian trade with EU15 Intra, Brake Parts, in Tonnes.....................58
Figure 3.103 Romanian trade with EU15 Extra, Gearboxes, in Euros.......................59
Figure 3.104 Romanian trade with EU15 Extra, Gearboxes, in Tonnes.....................59
Figure 3.105 Romanian trade with EU15 Intra, Gearboxes, in Euros........................59
Figure 3.106 Romanian trade with EU15 Intra, Gearboxes, in Tonnes.....................59
Figure 3.107 Romanian trade with EU15 Extra, Drive Axles, in Euros.....................59
Figure 3.108 Romanian trade with EU15 Extra, Drive Axles, in Tonnes.....................59
Figure 3.109 Romanian trade with EU15 Intra, Drive Axles, in Euros.....................59
Figure 3.110 Romanian trade with EU15 Intra, Drive Axles, in Tonnes.....................59
Figure 3.111 Romanian trade with EU15 Extra, Chassis, in Euros..........................60
Figure 3.112 Romanian trade with EU15 Extra, Chassis, in Tonnes..........................60
Figure 3.113 Romanian trade with EU15 Intra, Chassis, in Euros……………………….60
Figure 3.114 Romanian trade with EU15 Intra, Chassis, in Tonnes……………………60
Figure 3.115 Romanian trade with EU15 Extra, Other body parts, in Euros…………..60
Figure 3.116 Romanian trade with EU15 Extra, Other body parts, in Tonnes………..60
Figure 3.117 Romanian trade with EU15 Intra, Other body parts, in Euros…………..60
Figure 3.118 Romanian trade with EU15 Intra, Other body parts, in Tonnes…………60
Figure 3.119 Russian car parts trade with major European nations………………….61
Figure 3.120 Imports to Russia from Europe of Bumpers in US$……………………..62
Figure 3.121 Exports from Russia to Europe of Bumpers in US$……………………62
Figure 3.122: Imports to Russia from Europe of Brake parts in US$…………………62
Figure 3.123 Imports to Russia from Europe of Gearboxes in US$………………….63
Figure 3.124 Imports to Russia from Europe of Drive axles in US$………………….63
Figure 3.125 Imports to Russia from Europe of Chassis in US$……………………64
Figure 3.126 Exports to Russia from Europe of Body parts in US$………………….64
Figure 3.127 Value of imports and exports of all parts and accessories………………65
Figure 3.128 Slovakian trade with EU15 Extra, Bumpers, in Euros………………….65
Figure 3.129 Slovakian trade with EU15 Extra, Bumpers, in Tonnes……………….65
Figure 3.130 Slovakian trade with EU15 Extra, Bumpers, in Tonnes……………….65
Figure 3.131 Slovakian trade with EU15 Intra, Bumpers, in Euros………………….66
Figure 3.132 Slovakian trade with EU15 Intra, Bumpers, in Tonnes………………..66
Figure 3.133 Slovakian trade with EU15 Extra, Brake Parts, in Euros…………….66
Figure 3.134 Slovakian trade with EU15 Extra, Brake Parts, in Tonnes……………..66
Figure 3.135 Slovakian trade with EU15 Intra, Brake Parts, in Euros………………66
Figure 3.136 Slovakian trade with EU15 Intra, Brake Parts, in Tonnes…………….66
Figure 3.137 Slovakian trade with EU15 Extra, Gearboxes, in Euros………………..67
Figure 3.138 Slovakian trade with EU15 Extra, Gearboxes, in Tonnes………………67
Figure 3.139 Slovakian trade with EU15 Intra, Gearboxes, in Euros………………..67
Figure 3.140 Slovakian trade with EU15 Intra, Gearboxes, in Tonnes………………67
Figure 3.141 Slovakian trade with EU15 Extra, Drive Axles in Euros…………………67
Figure 3.142 Slovakian trade with EU15 Extra, Drive Axles in Tonnes………………67
Figure 3.143 Slovakian trade with EU15 Intra, Drive Axles in Euros…………………..67
Figure 3.144 Slovakian trade with EU15 Intra, Drive Axles in Tonnes………………67
Figure 3.145 Slovakian trade with EU15 Extra, Gearboxes in Euros………………….68
Figure 3.146 Slovakian trade with EU15 Extra, Gearboxes in Tonnes………………..68
Figure 3.147 Slovakian trade with EU15 Intra, Gearboxes in Euros………………….68
Figure 3.148 Slovakian trade with EU15 Intra, Gearboxes in Tonnes………………..68
Figure 3.149 Slovakian trade with EU15 Extra, Other parts in Euros………………….68
Figure 3.150 Slovakian trade with EU15 Extra, Other parts in Tonnes………………68
Figure 3.151 Slovakian trade with EU15 Intra, Other parts in Euros………………….68
Figure 3.152 Slovakian trade with EU15 Intra, Other parts in Tonnes………………68
Figure 3.153 Value of imports and exports of all parts and accessories………………69
Figure 3.154 Slovenian trade with EU15 Extra, Bumpers, in Euros………………….69
Figure 3.155 Slovenian trade with EU15 Extra, Bumpers, in Tonnes……………….69
Figure 3.156 Slovenian trade with EU15 Intra, Bumpers, in Euros…………………..70
Figure 3.157 Slovenian trade with EU15 Intra, Bumpers, in Tonnes…………………70
Figure 3.158 Slovenian trade with EU15 Extra, Brake Parts, in Euros………………..70
Figure 3.159  Slovenian trade with EU15 Extra, Brake Parts, in Tonnes.........................70
Figure 3.160  Slovenian trade with EU15 Intra, Brake Parts, in Euros............................70
Figure 3.161  Slovenian trade with EU15 Intra, Brake Parts, in Tonnes..........................70
Figure 3.162  Slovenian trade with EU15 Extra, Gearboxes, in Euros..........................71
Figure 3.163  Slovenian trade with EU15 Extra, Gearboxes, in Tonnes..........................71
Figure 3.164  Slovenian trade with EU15 Intra, Gearboxes, in Euros............................71
Figure 3.165  Slovenian trade with EU15 Intra, Gearboxes, in Tonnes..........................71
Figure 3.166  Slovenian trade with EU15 Extra, Drive Axles in Euros..........................71
Figure 3.167  Slovenian trade with EU15 Extra, Drive Axles in Tonnes..........................71
Figure 3.168  Slovenian trade with EU15 Intra, Drive Axles in Euros............................71
Figure 3.169  Slovenian trade with EU15 Intra, Drive Axles in Tonnes..........................71
Figure 3.170  Slovenian trade with EU15 Extra, Chassis, in Euros...............................72
Figure 3.171  Slovenian trade with EU15 Extra, Chassis, in Tonnes...............................72
Figure 3.172  Slovenian trade with EU15 Intra, Chassis, in Euros...............................72
Figure 3.173  Slovenian trade with EU15 Intra, Chassis, in Tonnes...............................72
Figure 3.174  Slovenian trade with EU15 Extra, Other parts in Euros............................72
Figure 3.175  Slovenian trade with EU15 Extra, Other parts in Tonnes..........................72
Figure 3.176  Slovenian trade with EU15 Intra, Other parts in Euros............................72
Figure 3.177  Slovenian trade with EU15 Intra, Other parts in Tonnes..........................72
Figure 3.178  Turkish imports from Europe of Bumpers in US$..................................73
Figure 3.179  Turkish imports from Europe of Bumpers by Quantity............................73
Figure 3.180  Turkish exports to Europe of Bumpers in US$........................................73
Figure 3.181  Turkish exports to Europe of Bumpers in Quantities...............................74
Figure 3.182  Imports to Turkey from Europe, Brake parts in US$.................................74
Figure 3.183  Imports to Turkey from Europe, Brake parts by Quantity...........................74
Figure 3.184  Exports from Turkey to Europe, Brake parts in US$.................................74
Figure 3.185  Exports from Turkey to Europe, Brake parts by Quantity...........................75
Figure 3.186  Imports to Turkey from Europe of Gearboxes in US$...............................75
Figure 3.187  Imports to Turkey from Europe of Gearboxes by Quantity........................75
Figure 3.188  Exports from Turkey to Europe of Gearboxes in US$...............................76
Figure 3.189  Exports from Turkey to Europe of Gearboxes by Quantity........................76
Figure 3.190  Imports to Russia from Europe of Drive axles in US$...............................76
Figure 3.191  Exports from Russia to Europe of Drive axles in US$...............................76
Figure 3.192  Imports to Turkey from Europe of Chassis in US$.................................77
Figure 3.193  Imports to Turkey from Europe of Chassis by Quantity............................77
Figure 3.194  Exports from Turkey to Europe of Chassis in US$.................................77
Figure 3.195  Exports from Turkey to Europe of Chassis by Quantity............................77
Figure 3.196  Imports to Turkey from Europe of Body parts in US$...............................78
Figure 3.197  Exports from Turkey to Europe of Body parts in US$...............................78

Figure 4.1  Importance of European Automotive Manufacture..................................80
Figure 4.2  Employment, Turnover and Investment Selected Countries...........................81
Figure 4.3  Volume Output of Top 10 OEMs 2001 – 2006..............................................82

Figure 5.1  2006 Corruption Perceptions Index.........................................................87
Figure 5.2  Bribery and automotive industry practice..................................................89
Figure 5.3 Poor ethical practices at automakers/suppliers.................................................90
Figure 5.4 Major car manufacturers and "whistle-blowing" routes..................................................90
Figure 5.5 Suppliers and adequate ethical policies.................................................................91
Figure 5.6 Accepted industry practices.....................................................................................92
Figure 5.7 Car manufacturers and ethical policy and culture......................................................92
Figure 5.8 Ethical policies in automotive industry by region......................................................93

Figure 6.1 Bulgaria Survey Results.........................................................................................103
Figure 6.2 Car sales in Croatia.................................................................................................104
Figure 6.3 Top 23 companies based on revenues.......................................................................106
Figure 6.4 Development of Investment and Business Climate in Croatia.....................................107
Figure 6.5 Croatia Survey Results.............................................................................................109
Figure 6.6 Projected Car Production (2006 – 2012)..................................................................110
Figure 6.7 Car Parc Market Share by Vehicle Age.......................................................................111
Figure 6.8 OEMs in Czech Republic..........................................................................................112
Figure 6.9 OEM Car Sales in Czech Republic.............................................................................113
Figure 6.10 Bestselling Cars in the Czech Republic...................................................................114
Figure 6.11 Market Share by Segment........................................................................................115
Figure 6.12 Czech Republic Survey Results...............................................................................119
Figure 6.13 Hungary – Car Sales...............................................................................................121
Figure 6.14 Hungarian Ownership structure.............................................................................122
Figure 6.15 OEMs in Hungary....................................................................................................126
Figure 6.16 OEM Car Sales in Hungary.....................................................................................127
Figure 6.17 Hungary – Car Production Volume..........................................................................128
Figure 6.18 Hungary Survey Results..........................................................................................130
Figure 6.19 Monthly Sales of new passenger cars 2003-2007....................................................132
Figure 6.20 Vehicles Registered (in thousand units)...................................................................132
Figure 6.21 Number of passenger cars per thousand inhabitants..............................................133
Figure 6.22 Sales of new passenger cars in 2006-2007.............................................................134
Figure 6.23 Top selling cars January-June 2007.........................................................................134
Figure 6.24 Top selling cars June 2007........................................................................................134
Figure 6.25 Profile of the passenger car market in 2005, by segment..........................................135
Figure 6.26 POLAND- Sales of major manufacturers 2004-2017.............................................135
Figure 6.27 Sales by group..........................................................................................................136
Figure 6.28 Key Locations for the automotive industry in Poland.............................................138
Figure 6.29 Table of companies operating in Dolnoslaskie.......................................................139
Figure 6.30 A list of selected companies operating in the region..............................................140
Figure 6.31 Tenneco Poland sales dynamics [kPLN].................................................................143
Figure 6.32 Tenneco Poland Supplier Base.................................................................................143
Figure 6.33 OE/Aftermarket Split in 2006.................................................................................145
Figure 6.34 Tenneco Company Description..............................................................................145
Figure 6.35 Poland Survey Results.............................................................................................146
Figure 6.36 Romania Car Sector Summary..................................................................................147
Figure 6.37 Passenger car sales 2007........................................................................................148
Figure 6.38 Vehicles Export Evolution 2000-2006 (units).........................................................151
Figure 6.39 Product produced by ACAROM members.............................................................155
<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 6.44</td>
<td>Romanian automotive industry turnover (€ million)</td>
</tr>
<tr>
<td>Figure 6.45</td>
<td>Romania Survey Results</td>
</tr>
<tr>
<td>Figure 6.46</td>
<td>Light vehicle sales and production, 2006 - 2014</td>
</tr>
<tr>
<td>Figure 6.47</td>
<td>Russian Passenger Car Market Development</td>
</tr>
<tr>
<td>Figure 6.48</td>
<td>Production locations of top twenty suppliers in East Europe</td>
</tr>
<tr>
<td>Figure 6.49</td>
<td>OES market from local production in Russia</td>
</tr>
<tr>
<td>Figure 6.50</td>
<td>Active/Passive Safety Equipment in Russia compared to EU</td>
</tr>
<tr>
<td>Figure 6.51</td>
<td>Russian Survey Results</td>
</tr>
<tr>
<td>Figure 6.52</td>
<td>Production of Passenger Cars per 1000 inhabitants in 2008</td>
</tr>
<tr>
<td>Figure 6.53</td>
<td>Production of passenger cars from 1992-2006</td>
</tr>
<tr>
<td>Figure 6.54</td>
<td>Forecasted production of cars in CEEC’s 2004-2010</td>
</tr>
<tr>
<td>Figure 6.55</td>
<td>Employment Index in automotive industry CEEC’s and EU25</td>
</tr>
<tr>
<td>Figure 6.56</td>
<td>GDP growth in Slovakia</td>
</tr>
<tr>
<td>Figure 6.57</td>
<td>Projected employment in the Slovak automotive industry</td>
</tr>
<tr>
<td>Figure 6.58</td>
<td>Labour Costs in CEECs in 2004</td>
</tr>
<tr>
<td>Figure 6.59</td>
<td>Strikes and Lockouts in CEE</td>
</tr>
<tr>
<td>Figure 6.60</td>
<td>New Passenger Cars: Segmentation from 2004-2008</td>
</tr>
<tr>
<td>Figure 6.61</td>
<td>Sales of new passenger cars in Slovakia from 2005-2007</td>
</tr>
<tr>
<td>Figure 6.62</td>
<td>Top 10 Bestselling Models in the B Segment in 2006</td>
</tr>
<tr>
<td>Figure 6.63</td>
<td>Top 10 Bestselling Models in the C Segment</td>
</tr>
<tr>
<td>Figure 6.64</td>
<td>New Passenger Cars: SUV Segment Evolution</td>
</tr>
<tr>
<td>Figure 6.65</td>
<td>Top 10 Passenger Car Brands in Slovakia</td>
</tr>
<tr>
<td>Figure 6.66</td>
<td>Production index for the auto parts sector (NACE 343)</td>
</tr>
<tr>
<td>Figure 6.67</td>
<td>Turnover in the auto parts sector in Slovakia</td>
</tr>
<tr>
<td>Figure 6.68</td>
<td>Slovakian Fuel Production</td>
</tr>
<tr>
<td>Figure 6.70</td>
<td>Slovakian Survey Results</td>
</tr>
<tr>
<td>Figure 6.71</td>
<td>Vehicle Price in Tolar</td>
</tr>
<tr>
<td>Figure 6.72</td>
<td>Slovenian Survey Results</td>
</tr>
<tr>
<td>Figure 6.73</td>
<td>Exports destined for more than 170 countries</td>
</tr>
<tr>
<td>Figure 6.74</td>
<td>Turkish Economy</td>
</tr>
<tr>
<td>Figure 6.75</td>
<td>Economy and Job Growth</td>
</tr>
<tr>
<td>Figure 6.76</td>
<td>Turkey Survey Results</td>
</tr>
<tr>
<td>Figure 6.77</td>
<td>Car Segment Share in Ukraine 2006</td>
</tr>
<tr>
<td>Figure 6.78</td>
<td>Excise Tax Rules</td>
</tr>
<tr>
<td>Figure 6.79</td>
<td>Car Output in Ukraine</td>
</tr>
<tr>
<td>Figure 6.80</td>
<td>OEMs operating in Ukraine</td>
</tr>
<tr>
<td>Figure 6.81</td>
<td>Car Sales in Ukraine</td>
</tr>
<tr>
<td>Figure 6.82</td>
<td>Ukraine Survey Results</td>
</tr>
</tbody>
</table>
## List of Illustrations

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.9</td>
<td>Defective Brake Disc</td>
<td>94</td>
</tr>
<tr>
<td>6.12</td>
<td>Location of suppliers in the Czech Republic</td>
<td>117</td>
</tr>
<tr>
<td>6.15</td>
<td>Unemployment rate in Hungary 2005</td>
<td>122</td>
</tr>
<tr>
<td>6.20</td>
<td>Trans European transport network centres in Hungary</td>
<td>129</td>
</tr>
<tr>
<td>6.42</td>
<td>Geographical areas for foreign suppliers in Romania</td>
<td>153</td>
</tr>
<tr>
<td>6.68</td>
<td>Location of suppliers in Slovakia</td>
<td>180</td>
</tr>
</tbody>
</table>