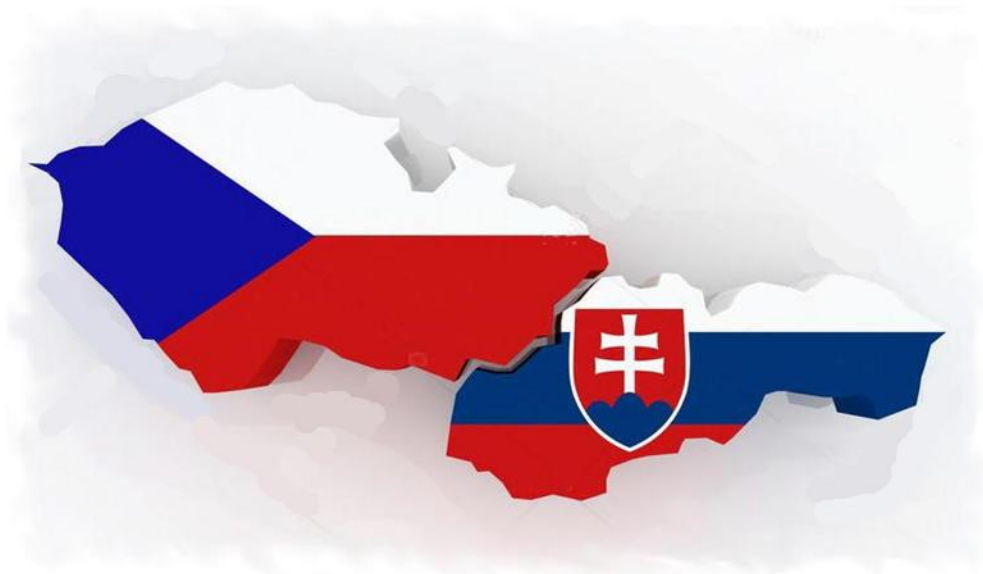


56th General Meeting of the IA "Intercable"












03 - 07 December 2018, Salzburg, Austria

The cable industry of Czech and Slovak Republic



Anton Slobodin
General Director
Kabelovna Kabex a.s.
Czech Republic

The cable factories

Czech Republic		Slovak Republic	
KABLO VRCHLABI, Vrchlabi		VUKI a.s., Bratislava	
NKT s.r.o., Velke Mezirici		Elkond – HHK a.s., Trstena	
NKT s.r.o., Kladno		ICS Industrial Cables Slovakia, s.r.o., Nitra	
Prakab Prazska Kabelovna, Prague		ZTS-Kabel s.r.o., Dubnica nad Vachom	
Kabelovna Kabex a.s., Holysov		Draka Comteq Slovakia, s.r.o., Presov	
Kabelovna Decin Podmokly, Decin		LEONI Slovakia, Trencin, Stara Tura	
Draka Kabely, Velke Mezirici			
Reichle&De-Massari Czech Republic a.s., Decin			

WILMS group factories (Germany)

Kablo Vrchlabi s.r.o., Vrchlabi, Czech Republic

The factory was established in 1923. Since 2017 is a member of the Wilms group

Main product range: automotive wires and flexible cables. There is a radiation crosslinking equipment at the plant.

Annual revenue for the year 2017 represents the amount about 100 mio EUR.

The share of the turnover in foreign market is about 70 %.

Number of employees: 370



WILMS group factories (Germany)

Kabelovna Decin Podmokly, Decin, Czech Republic

The factory was established in 1910. Since 2007 is a member of the group Wilms.

Main product range : optical cables up to 144 fibers, communication cables and auto-bundles.

Annual revenue for the year 2017 represents the amount of 30 mio EUR.

The share of the turnover in foreign market is about 60%

Number of employees: 200



NKT group factories (Denmark)

NKT s.r.o., Velke Mezirzhichi, Czech Republic

The factory was established in 1946. Since 2007 is a member of the group NKT.

Main product range: power cables with insulation of cross-linked polyethylene for voltages up to 60 kV, Al core up to 1600 mm², Cu core up to 800 mm².

Annual revenue: for the year 2017 represents the amount of 70 mio EUR.

The share of the turnover in foreign market is about 90 %

Number of employees: 210



SKB group factories (Austria)

PRAKAB Prazska Kabelovna s.r.o., Prague. The factory belongs to the Austrian group Schwechater Kabelwerke. The plant was established in 1921. In 1946 it was nationalized. In 1992 bought by the third generation of the founder's family.

Main product range: installation and construction cables, power cables 0,6/1 kV, cables for railway and communication cables, fire-resistant cables and cables for electronics.

Annual revenue for the year 2017 represents the amount of 150 mio EUR.

The share of the turnover in foreign market is 2/3 of total production.

Number of employees: 350



SKB group factories (Austria)

ICS Industrial Cables Slovakia s.r.o , Nitra, Slovak Republic

The company was registered into the commercial register in December 2005, the construction of the factory begun in 2006, production started in 2007.

The factory is focused on production of special flexible industrial wires.

Company net turnover for the year 2017 represents the amount of 16,7 mio EUR, sales for 2018 are about 22,7 mio EUR.

Sales in the Czech Republic and Slovak Republic - 7%, export - 93%.

Number of employees: 86



LEONI AG group factories (Germany)

1. LEONI Slovakia, s.r.o. – branch in Trenčín , Slovak Republic

Profile: cables and harnesses for cars

2. LEONI Slovakia, s.r.o. – branch in Trechinska Tepla, Slovak Republic

Profile: special coaxial and data cables for cars

3. LEONI Slovakia, s.r.o. – branch in Stara Tura, Slovak Republic

Profile: cables and cable harnesses for medical equipment and robots

Company net turnover for the year 2017 represents the amount of 189,5 mio EUR

Most of the companies export activities (100 %) are oriented to Germany, Holland, Switzerland.

The staff of all factories is 2500 employees.

LEONI

Prysmian Group factories

Draka Kabely s.r.o., Velke Mezirici, Czech Republic

The factory was built on greenfield in 1994 in the city Velke Mezirici, where the privatized plant KABLO Velke Mezirici was already in operation at that time (since 2007 the factory is a member of NKT)

The factory manufactures assembly cables, automotive cables and wires, lift cables and harnesses, cable joints for medium and high voltage.

Company net turnover for the year 2017 represents the amount of 150 mio EUR.

Number of employees: 380



Prysmian Group factories

Draka Comteq Slovakia s.r.o., Presov, Slovak Republic

The factory was established in 2006.

Main product range - optical and control cables.

Annual revenue for the year 2017 represents the amount of 40 mio EUR.

The share of the turnover in foreign market is about 90%

Number of employees: 190



The private cable companies



Kabelovna Kabex a.s., Holyšov, Czech Republic

The company was established in 1994. The product range gradually expanded in accordance with the requirements of local customers - energetics, including nuclear, metro, petrochemicals.

The company manufactures control cables, power cables for voltage of 0.6 - 12 kV, mainly in flameproof halogen-free version, cable glands, as well as hermetic cable penetrations. There is a whole range of products for nuclear power plants.

An annual turnover is about 15 mio EUR.

The share of the turnover in foreign market is about 30%

Number of employees: 100

The private cable companies

Elkond – HHK a.s., Trstena, Slovak Republic

The factory was established in 1992.

The factory manufacturer fire-resistant building cables, communication cables, control cables, cables for solar power plants, low-voltage power cables with a cross section of up to 40 mm².

Company net turnover for the year 2017 represents the amount of 14,3 mio EUR.

The share of the turnover in the markets of Czech and Slovak Republic is 66%, export - 33%.

Number of employees: 110



The private cable companies



VUKI a.s., Bratislava, Slovak Republic

The company was established in 1950 as scientific research institute of cables and insulators, since 1990 became a commercial manufacturing company.

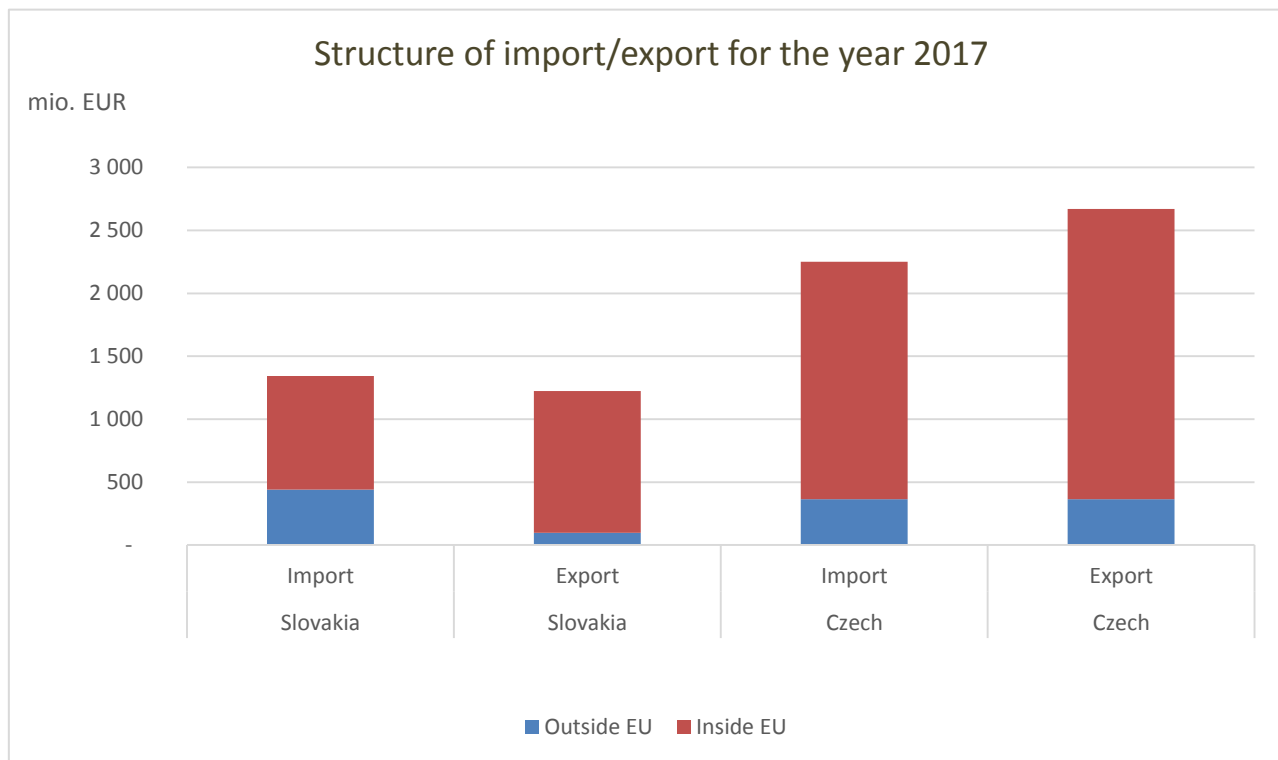
The company manufactures flame-resistant halogen-free cables, communication cables, heat shrink cable joints, cables for special operating conditions, including cables for nuclear power plants. There is a chemical production - impregnants.

Company net turnover for the year 2017 represents the amount of 9 mio EUR. The export of cable products is 10%, the export of chemical products - 80 %.

Number of employees: 70



Market Statistics

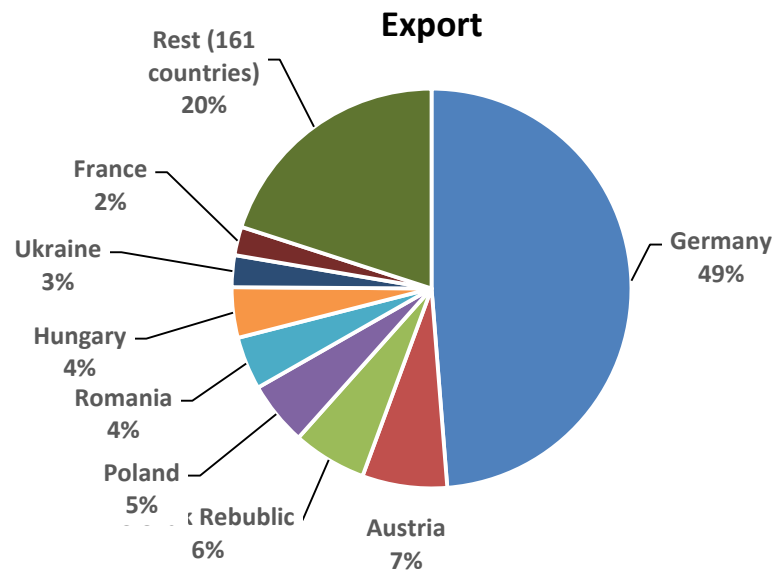
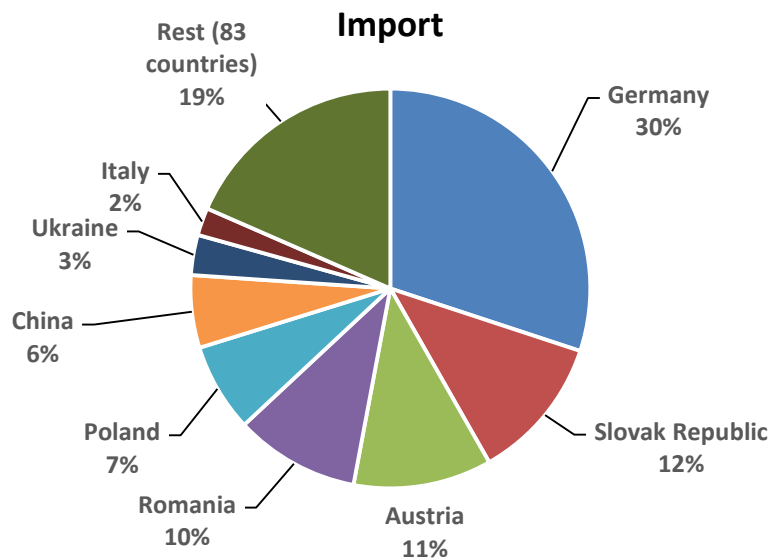


Code 8544: Insulated wires..., cables (including coaxial cables) and other insulated electrical conductors with or without connecting devices; optical fiber cables ...

Source: database of EU statistic agency

The structure of import/export of cable products

Czech Republic - 2017



Code 8544: Insulated wires..., cables (including coaxial cables) and other insulated electrical conductors with or without connecting devices; optical fiber cables ...

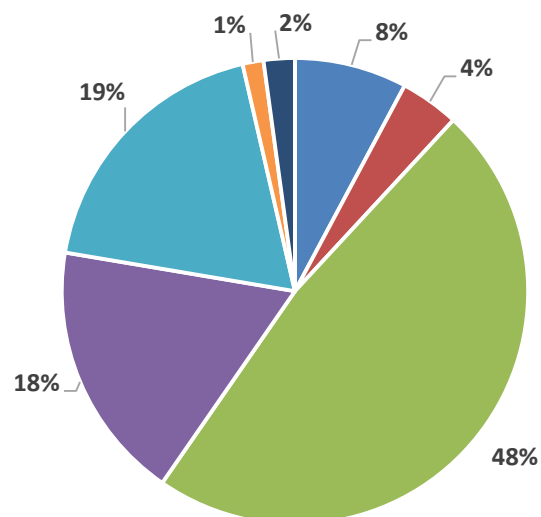
Source: database of EU statistic agency

The structure of import/export of cable production by product type

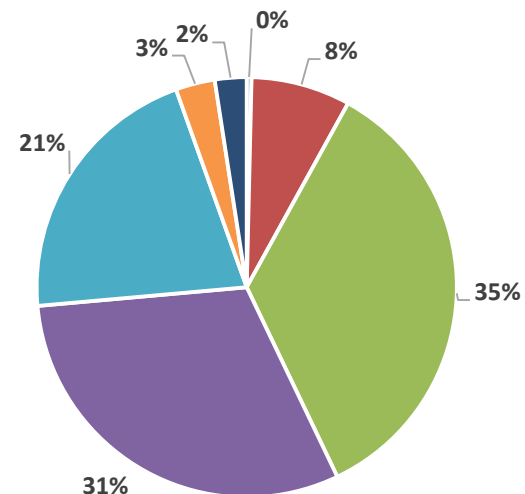
Czech Republic - 2017

Import

- 85441X - Winding wires
- 854420 - Coaxial cables
- 854430 - Wire sets
- 854442 - ... equipped with a connecting device
- 854449 - ... for voltage ≤1000 B
- 854460 - ... for voltage >1000 B
- 854470 - Fiber optic cables



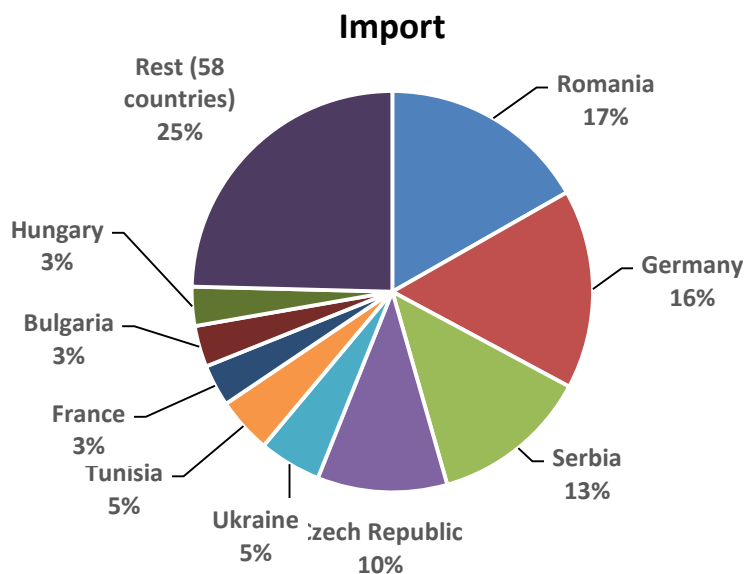
Export



Source: database of EU statistic agency

The structure of import/export of cable products

Slovak Republic - 2017

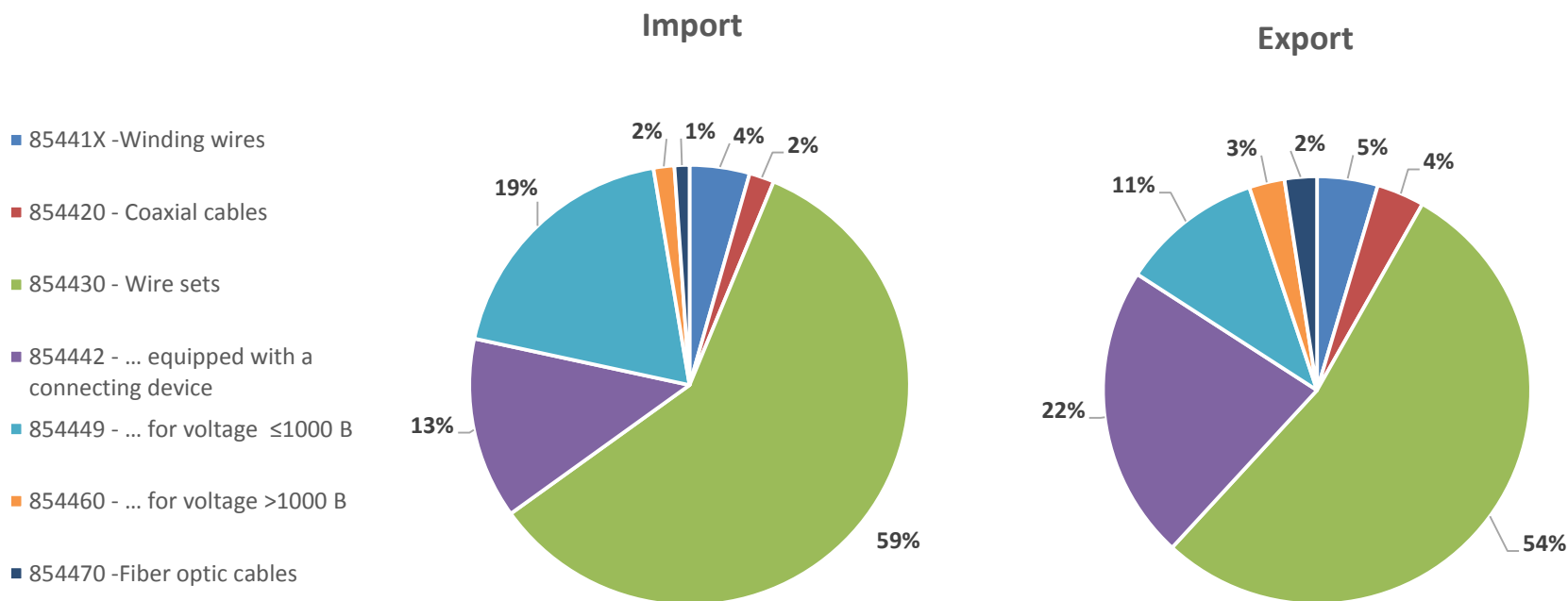


Code 8544: Insulated wires..., cables (including coaxial cables) and other insulated electrical conductors with or without connecting devices; optical fiber cables ...

Source: database of EU statistic agency

The structure of import/export of cable production with the break-down by product type

Slovak Republic - 2017



Source: database of EU statistic agency

Cable Manufacturers Association of the Czech and Slovak Republics (AVK)

Association was founded in 1995

The Association was officially registered in Czech Republic in accordance of local legislation in 2003

There are eight members of Association

It unites only cable producers

Mutual cooperation with Europacable since 2006

Current activities of AVK are concentrated mainly on the following topics:

- Work in accordance with the norms and requirements at the local level and EU level and their harmonization
- Control over quality and increase of quality level at the local market and standoff against non-compliance
- Improving the image of the Association
- Expansion of the membership base

The chairman Miroslav Troyan

Website www.vyrobcikabelu.cz



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Market characteristics and trends

- Globalization – acquisition of local companies by cable holdings.
- Tightening of norms for cables (CPR-standards from 01.07.2017).
- Export orientation.
- Sales of serial cables at local markets are made mostly by cable wholesalers.
- Serial cables within the high range of price competition are manufactured for a wholesale market below required standards – «optimization».
- Limited data exchange about production and another information between manufacturers inside cable associations due to legislation requirements and corporate standards.

Thank you for your attention!

**Anton Slobodin
General Director
Kabelovna Kabex a.s.
Czech Republic**

