

CLUSTER LOMBARDO PER LA MOBILITA' LOMBARDY MOBILITY CLUSTER

STREPARAVA GROUP in BRASIL
From single components to system supplier



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LOMBARDY MOBILITY CLUSTER

ITALIAN AUTOMOTIVE INDUSTRY

Number 2 in Europe

Employees:

- Piemonte (25%),
- Lombardia (15%),
- Campania (10%),
- Emilia Romagna (9%),
- Toscana (7%)

LOMBARDY AUTOMOTIVE

Evaluation of automotive cluster strength Employment

<i>Regional Cluster</i>	<i>Employment</i>
Stuttgart, DE	136.353
Piemonte (Turin), IT	85.915
Oberbayern (Munchen), DE	82.339
Braunschweig, DE	79.997
Cataluna (Barcelona), ES	74.086
Ile de France (Paris), FR	61.351
Lombardia, IT	51.631
Vlaams Gewest (Antwerp), BE	46.084
Dogu Marmara (Bursa), TR	44.901
Vastverige (Gothenburg), SE	42.832
Karlsruhe, DE	40.694
Niederbayern (Landshut), DE	37.960
West Midlands (Birmingham), UK	37.913



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LOMBARDY MOBILITY CLUSTER

- Established 2009
- Pre-existing clusters: Brescia, Bergamo, Milan/Lecco/ Monza Brianza
- > 50.000 employees
- > 20 billions budget
- > 1.000 companies
- 7th automotive cluster in Europe (2nd in Italy)
- 120 PARTICIPANTS
 - 6 CONSORTIA
 - 90 COMPANIES
 - 5 UNIVERSITIES/RESEARCH CENTRES
 - 12 TRADE ASSOCIATIONS
 - 7 PUBLIC ADMINISTRATIONS (4 'PROVINCE': MI, BS, CR, MN)



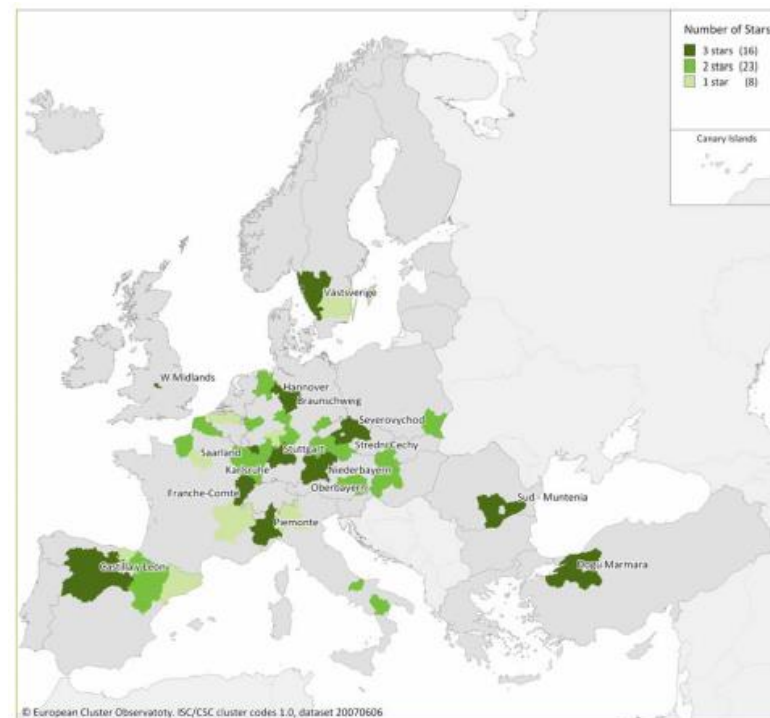
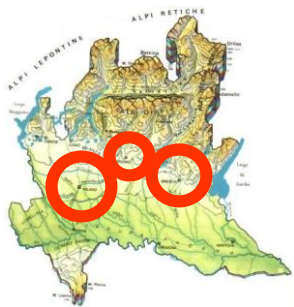
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LOMBARDY MOBILITY CLUSTER

- Tight connection with Italian & European Clusters
- Main Provinces (Brescia – Bergamo – Milan)
- Clusters Inter-Connections



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	Automotive	Railway	Waterborne	Infrastructure & logistics
Customer satisfaction and business development				
LIGHTWEIGHT	X	X	X	
CO2 REDUCTION Alternative transmissions, fuels, energy harvesting etc	X		X	
CONNECTED VEHICLES Control Systems & Mechatronics	X	X	X	X
SAFETY AND UNMANNED VEHICLES	X			
ADVANCED MATERIALS	X		X	



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EXCELLENT COMPANIES OF THE LOMBARDY MOBILITY CLUSTER

Automotive

- Tyres, wheels (e.g. Cromodora, Pirelli, Magnetto Wheels)
- Brakes (Brembo)
- Fasteners (e.g. Agrati, Fontana)
- Electronics and Electric (e.g. STM, Magneti Marelli)
- Farm tractors (SameDeutzFahr)
- Trucks (CNHI Eurocargo, CNHI Magirus)
- IC Engine (Streparava)
- Tier 1 and Tier2 (OMR, CF Gomma)
- Axles & Suspensions (Streparava)



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STREPARAVA GROUP

YOUR AUTOMOTIVE PARTNER

STREPARAVA GROUP in BRASIL

From single components to system supplier



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A leading group for driveline and powertrain components since 1951



Your reliable partner for powertrain and chassis components, from two wheeler up to passenger cars, commercial vehicle truck and bus



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Streparava Group *at a glance*

Founded in 1951

5 plants
3 in Europe
1 in Brazil
1 in India

700 employees



SAP ERP since 1999

Testing center

More than 3.000.000
independent front
suspension system
produced from 1978

More than 2.000.000 rocker
arm assy produced since
1998

More than 2000 engines per
day, produced worldwide
with our components

Streparava Group a Global Partner for Automotive Industries

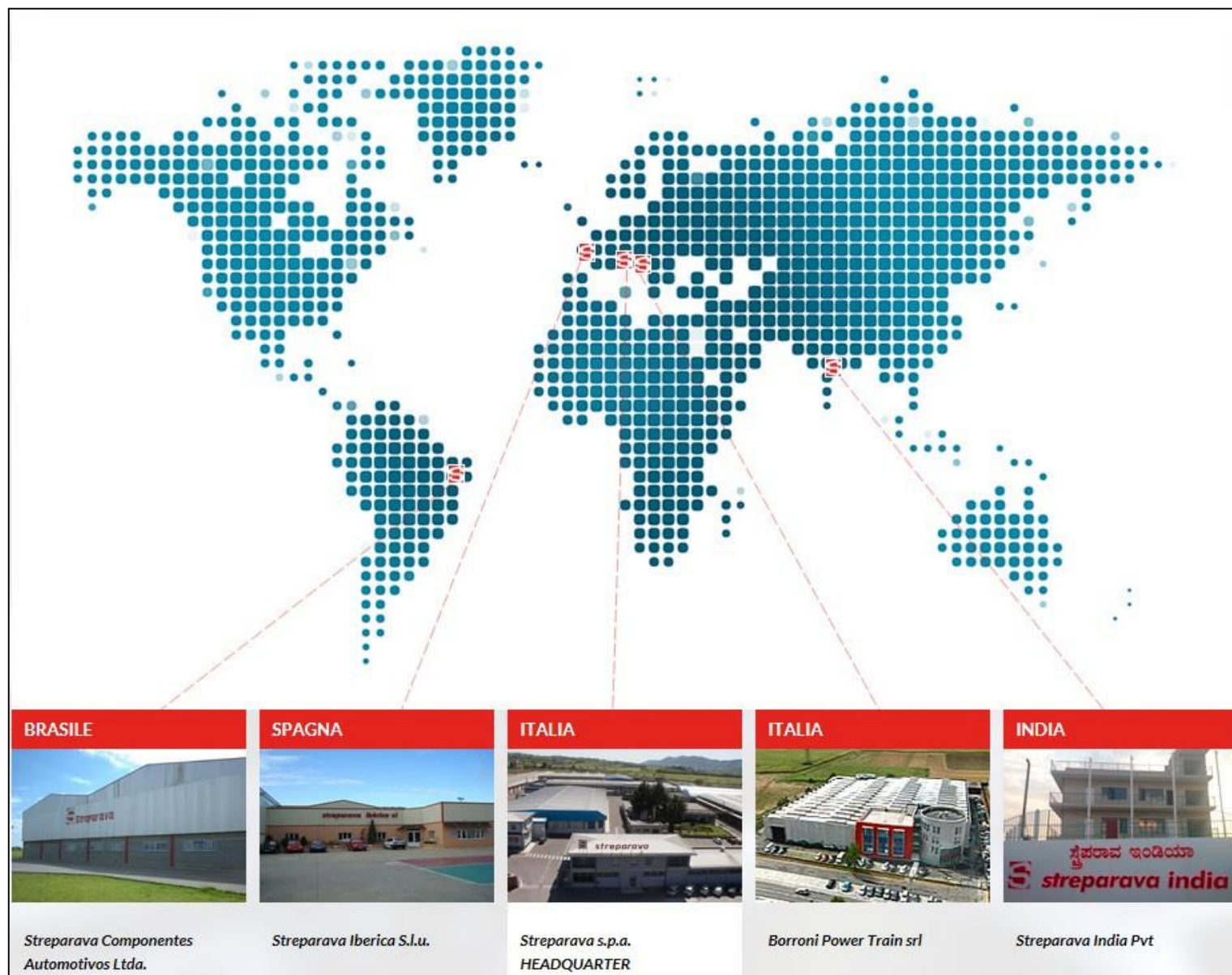


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Streparava Footprint



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Streparava Products Footprint



Axles Assemblies- Chassis components



Axles



Powertrain Components



Axles Chassis components
Powertraincomp. Testing centre



Powertrain components- Casting and Forging machining



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Current SCAL production plant



5.000 sqm

Established in 1999 – SETE LAGOAS – MinasGerais state

ISO/TS 16949 certified

ISO 14001 certified

Products: Axles, Brake discs

Annual Capacity (1 shift): 14.500 Axles

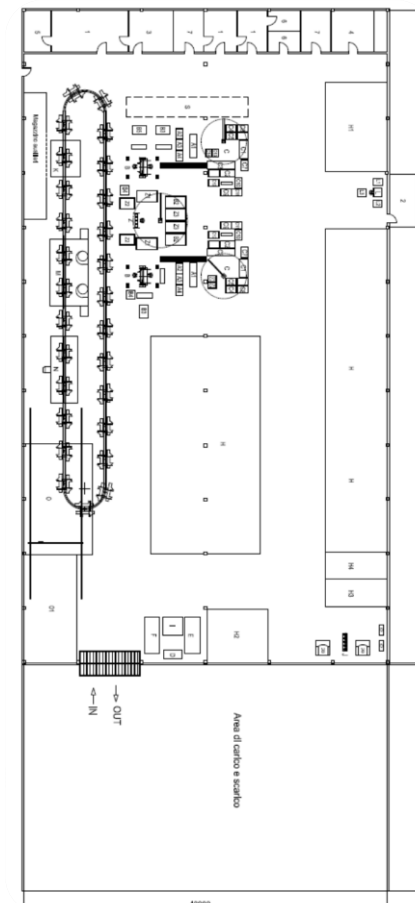
Processes: assembly \ painting \ machining

Product - IFS: 14.500/year

Customer: CNHi (Iveco)

Product - Brake discs: 1.050.000/year

Customer: FCA



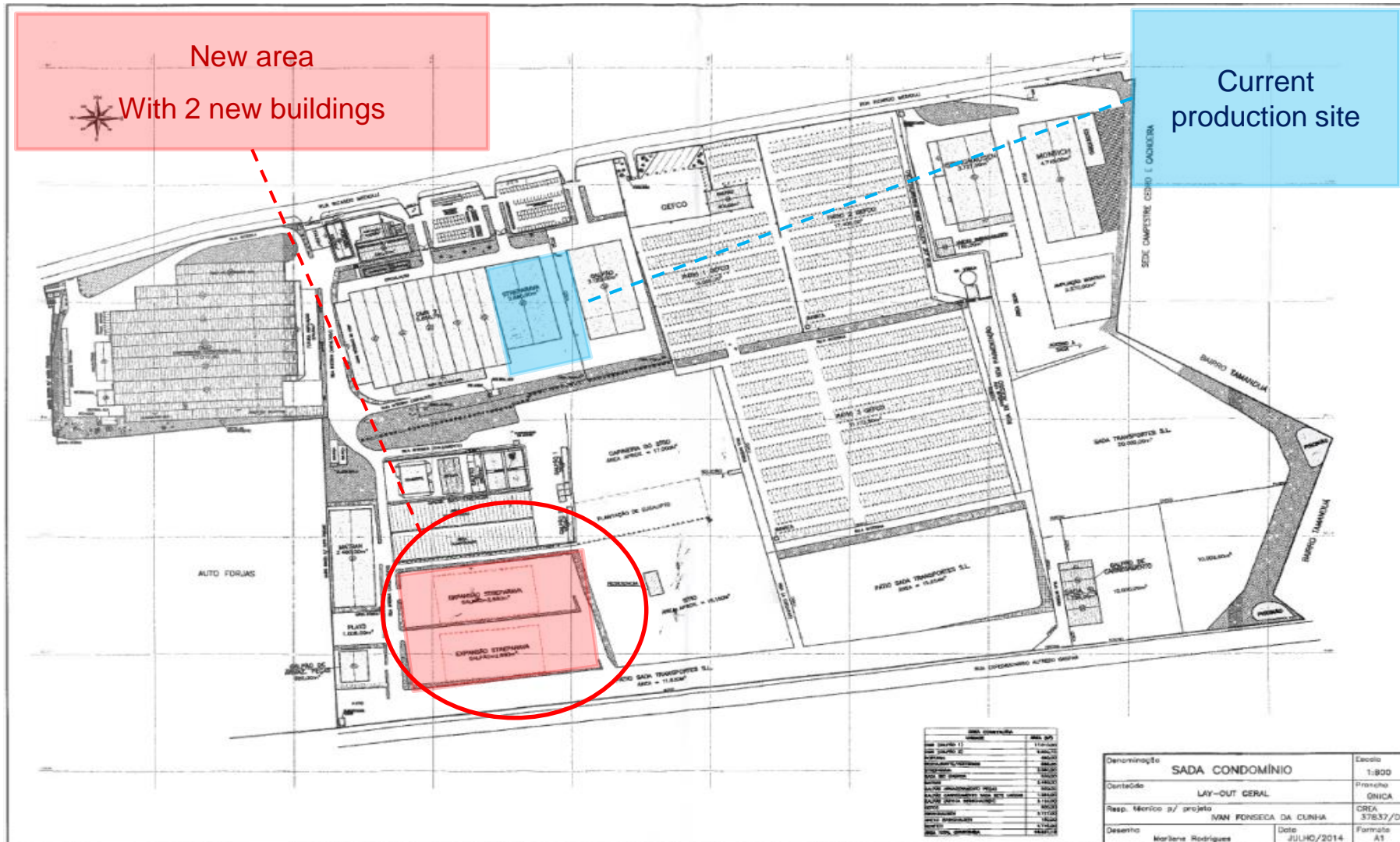
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New area

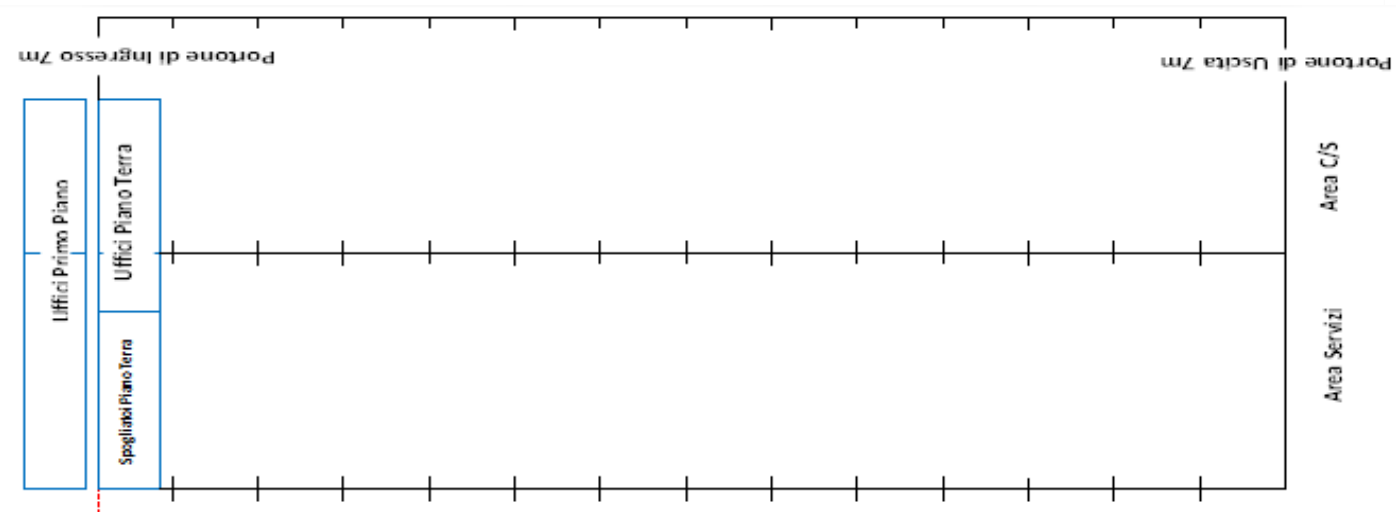
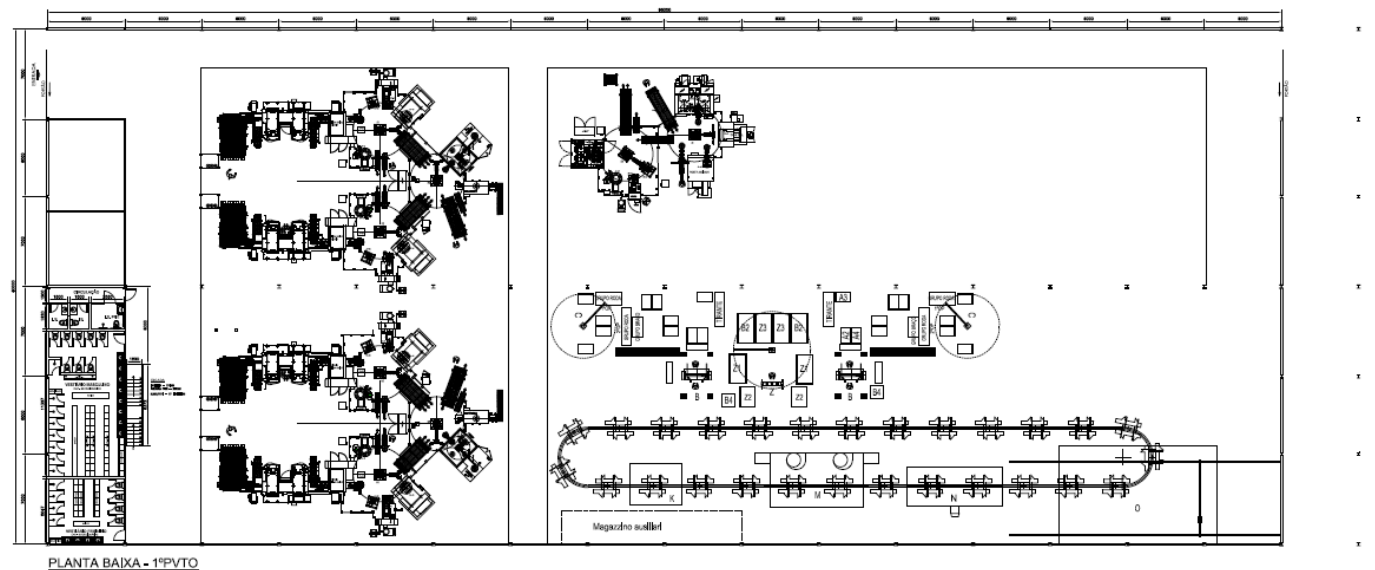
With 2 new buildings

Current
production site



New area : lay-out details

New Building 1 : machining operations on brake discs and drums business



New Building 2 : available space for new business



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New project 2015 – Brake disc for Jeep – Brazilian plant



FCA
FIAT CHRYSLER AUTOMOBILES



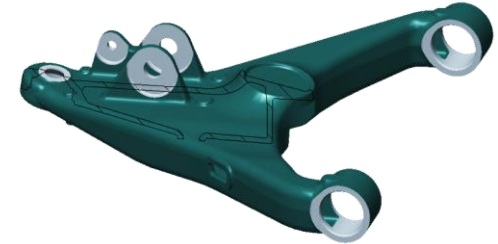
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AUTOMOTIVE MARKET in BRASIL

OPPORTUNITIES

- Good level of quality and competitive prices for casted parts
- High dedicated competences and qualified personnel for the automotive industry
- Major OEM are present on the Brazilian market.



DIFFICULTIES

- Bureaucracy and high taxes for imported machines tools
- High fluctuation of the Brazil on currency exchange rate against \$ and €
- Forged iron suppliers: very few and with high costs
- High costs of the investments for sheet-metal parts (no competitive prices) compared with ITALY



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Thank You for Your Attention!



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