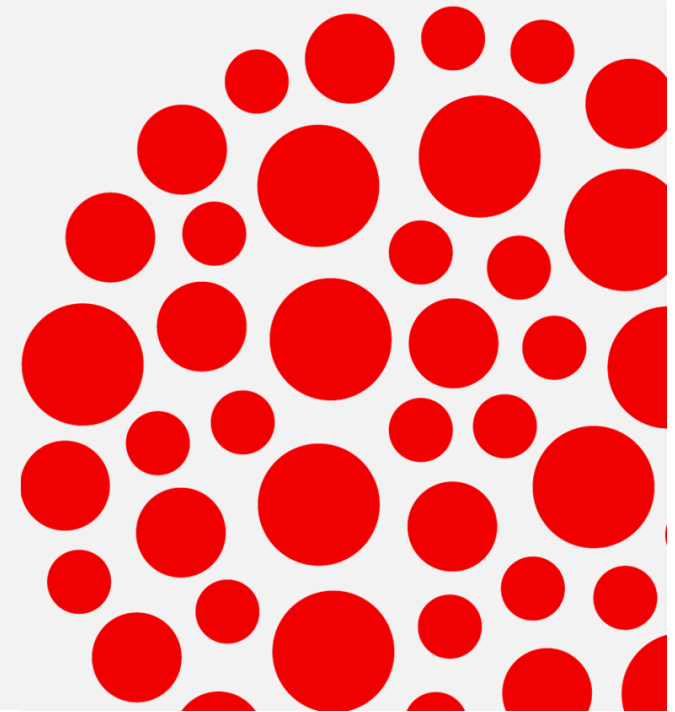


AUTOMOTIVE SECTOR IN PORTUGAL 2016

AUTO INDUSTRY IN PORTUGAL



OEM IN THE PORTUGUESE MARKET



Toyota / Salvador Caetano
Products: LC70
Production 2015: 1.629 units



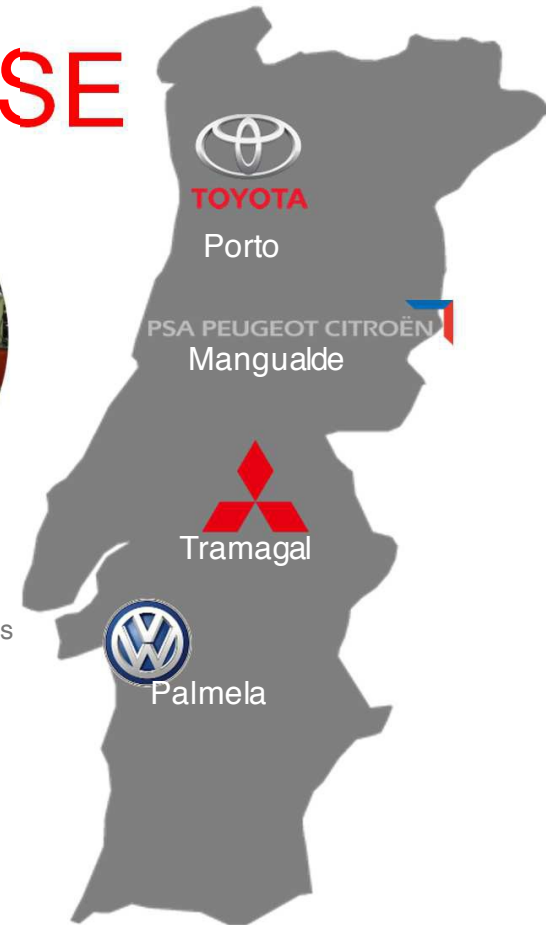
PSA Peugeot Citroën
Products: Berlingo and Partner
Production 2015: 46.602 units



Mitsubishi FUSO Trucks
Products: Canter
Production 2015: 6.237 units



Volkswagen AutoEuropa
Products: VW Sharan; Seat Alhambra; Scirocco
Production 2015: 102.158 units



Source: ACAP - Associação Automóvel de Portugal

VEHICLES PRODUCTION 156.626 UNITS

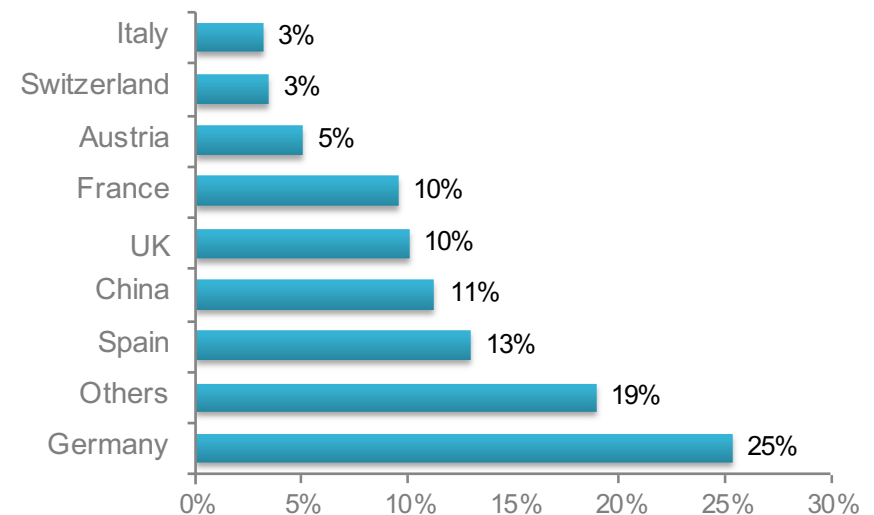
NUMBER OF VEHICLES BY OEM AND TYPE, 2015

	Cars	LCV	Heavy Bus	TOTAL
VOLKSWAGEN (Autoeuropa)	102,158	n.a.	n.a.	102,158
PEUGEOT-CITROEN (PSA)	13,310	33,292	n.a.	46,602
MITSUBISHI Trucks	n.a.	2,253	3,984	6,237
TOYOTA (Salvador Caetano)	n.a.	1,589	40	1,629
TOTAL	115,468	37,134	4,024	156,626

Source: ACAP - Associação Automóvel de Portugal

EXPORT DESTINATIONS 96%

VEHICLE EXPORT DESTINATIONS, 2015



OEM IN IBERIAN PENINSULA



Iberian Peninsula is **number one region in Europe** for production of Light Commercial Vehicles

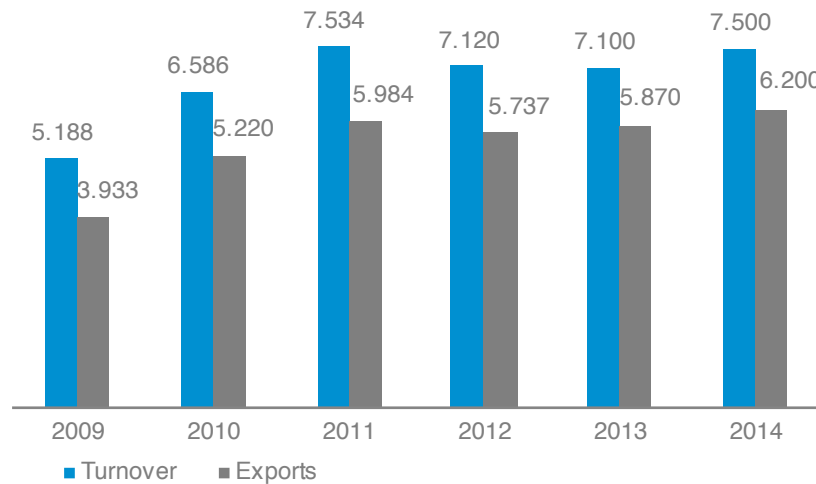
2.5 million vehicles per year are produced in the region, making it one of the largest production region in Europe.

Several assembly units with volumes higher than 100 000 vehicles per year

AUTOMOTIVE COMPONENTS SUPPLIERS

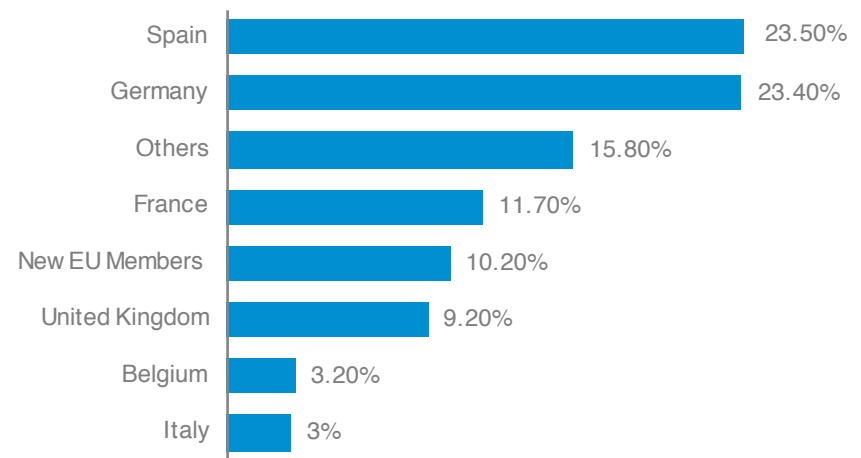
EXPORT DESTINATIONS

Key Figures	NºCompanies	Turnover	Exports (%)	Employment
2015	200	8.400 Mn€	84%	45.000



AUTO COMPONENTS INDUSTRY EVOLUTION

Source: AFIA – Associação de Fabricantes da Indústria Automóvel, February 2016



AUTO COMPONENTS EXPORT DESTINATIONS, 2014

AUTOMOTIVE COMPONENTS SUPPLIERS

The components industry grew 200% in the past 15 years;

Main Customers are the major OEM: BMW, Daimler, Fiat / Chrysler, Ford, GM, Mitsubishi, Nissan, PSA Peugeot Citroën, Renault, Toyota, Volkswagen;

Main Tiers One located in Portugal: Aspöck, Benteler, BorgWarner, Bosch, Coficab, Continental, Delphi, Faurecia, Gestamp, Huf, Kirchhoff, Mahle, Preh, Renault, Sakthi, Saint-Gobain, SAS, TRW, Tyco, Visteon, Yazaki;

Main Portuguese owned companies: Cabelauto, Caetano Coatings, Celoplás, Coindu, Couro Azul, Epedal, ERT Têxtil, Fehst, Iberomoldes, Inapal Metal, Inapal Plásticos, Incompol, Manuel da Conceição Graça, Microplásticos, Prenso Metal, Schmidt Light Metal, Simoldes, Sodecia, Sunviauto, TMG, Veneporte.

Portuguese suppliers have international standards. All companies have quality certification ISO 9001 and the majority achieved the technical specification for the automotive industry ISO/TS 16949 and the environmental certification ISO 14001;

Activity sectors include: electrical and electronic equipment; infotainment; interiors; exterior; chassis, brakes, suspension, steering wheels and wheels; power train; engines and components and others.

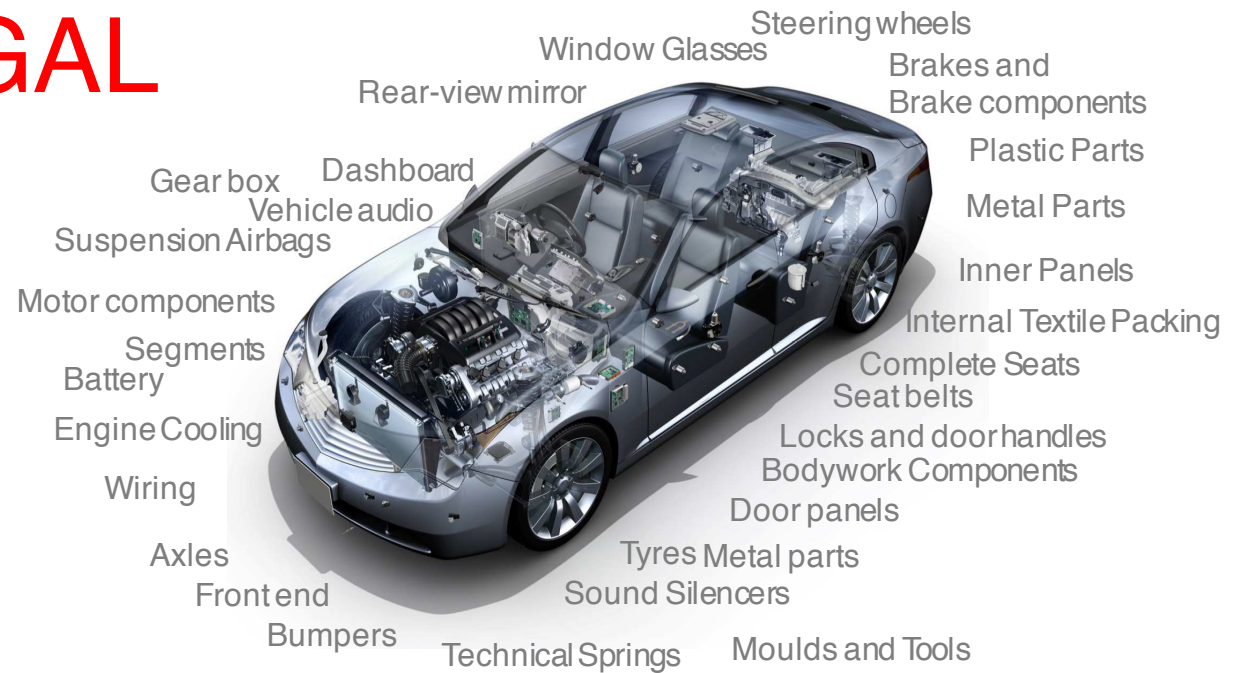


Source: AFIA – Associação de Fabricantes da Indústria Automóvel

AUTO PARTS PRODUCED IN PORTUGAL



Leading brands choose Portuguese auto parts



Source: AFIA – Associação de Fabricantes da Indústria Automóvel

RECENT TRACK RECORD

VOLKSWAGEN AUTOEUROPA	In 2014, VW announced an investment in Palmela's plant of €677 million to introduce new car production technology called "Modularer Querbaukasten". This new production technology is aimed at increasing flexibility in the production of passenger car models.
PSA PEUGEOT CITROEN	In 2015, PSA Peugeot Citroën group has announced investment of €48 million in Mangualde's production unit to produce an upcoming light commercial vehicle (LCV). Production is set to begin at Mangualde during 2018.
BOSCH	In 2015 Bosch Car Multimedia Portugal, in Braga, announced the closing of the first phase of the €19 million project between Bosch and University of Minho, the Human Machine Interface Excellence project, and new investments of €55 million. 12 patents were already submitted. These projects aimed to develop advanced multimedia solutions to the automotive industry.
TOYOTA SALVADOR CAETANO	In 2015, Toyota Caetano Portugal announced an investment of €10 million in Ovar's plant to produce the Toyota Land Cruiser Series 70.
SAKTHI	In 2016, Sakthi Portugal announced a new greenfield investment in Agueda, to produce safety critical automotive components. The project will create 135 new jobs and 36,7 M€ of investment.
FAURECIA	In 2015, Faurecia announced an €40 million investment in Bragança's plant to produce new emission control systems, with the most innovative technology.
GMD GROUP	In 2015, the French Group GMD has opened a new greenfield production facility in Arcos de Valdevez to produce automotive components. Total expected investment is 24,9 M€.

SUCCESSFUL PROJECT IN PLACE

National platform for electric cars

Portugal benefits from the first national wide, fully interoperable electric mobility system. A grid based on Portuguese innovation and technology with more than 1.100 charging points where any vehicle can be charged.

The 1300 normal charging points are placed in the cities of:

Almada, Aveiro, Beja, Braga, Bragança, Cascais, Castelo Branco, Coimbra, Évora, Far Guarda, Guimarães, Leiria, Lisboa, Loures, Portalegre, Porto, Santarém, Setúbal, Sintra, Torres Vedras, Viana do Castelo, Vila Nova de Gaia, Vila Real e Viseu.



Utilities



R&D



Vehicle Manufacturers



Find more at www.mobie.pt

SUCCESSFUL PROJECT IN PLACE

Portuguese Salvador Caetano Group presented in 2011, the **100% electric bus** and launched in 2013, the **1st 100% electric bus for exclusive use at airports.**



In 2014, Tramagal production site of Mitsubishi Fuso Truck and Bus Corporation announced that **Fuso Canter E-Cell trucks**, with battery-electric-powered “Zero Emission”, were officially completed in Portugal.



OPPORTUNITY - LITHIUM FOR ELECTRIC VEHICLES BATTERIES

PORTUGAL IS A MAJOR PLAYER IN THE LITHIUM INDUSTRY

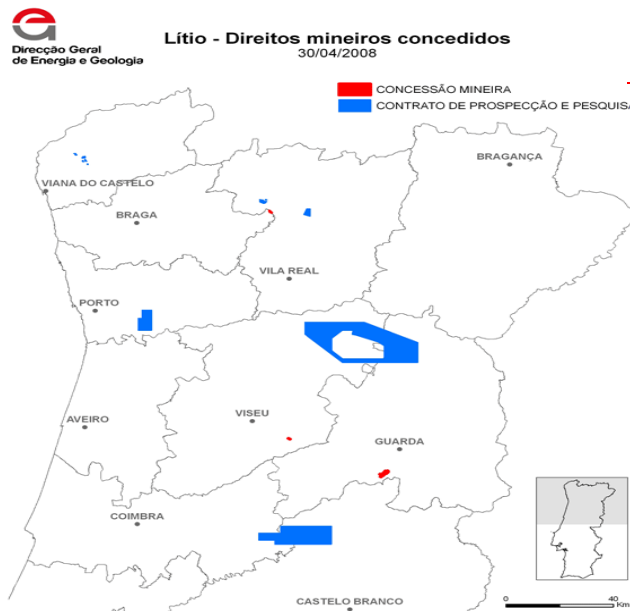
PORTUGAL IS THE TOP LITHIUM PRODUCER IN EUROPE

LITHIUM: World Mine Production

	Mine production		Reserves ¹
	2013	2014	
United States	870	W	38,000
Argentina	2,500	2,900	850,000
Australia	12,700	13,000	1,500,000
Brazil	400	400	48,000
Chile	11,200	12,900	7,500,000
China	4,700	5,000	3,500,000
Portugal	570	570	60,000
Zimbabwe	1,000	1,000	23,000
World total (rounded)	34,000	36,000	13,500,000

Source: U.S. Geological Survey, Mineral Commodities Summaries, February 2015

OPPORTUNITY - LITHIUM FOR ELECTRIC VEHICLES BATTERIES



Areas where mining and quarrying has been approved by the Energy and Geology Bureau. One Portuguese company is already

Areas that have been identified by the Energy and Geology Bureau for lithium prospecting after reserves have been identified in that area.

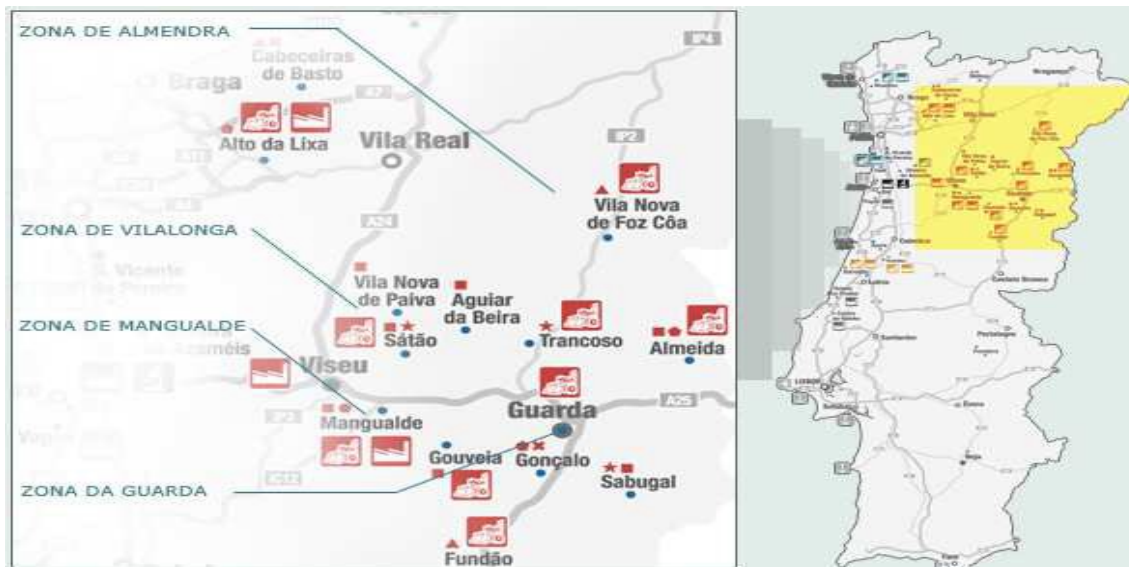
Lithium, given its extreme reactivity does not occur as free metal in nature.

The most important lithium minerals in Portugal are:

- Apodumene
- Lepidolite
- Petalite
- Amblygonite

OPPORTUNITY - LITHIUM FOR ELECTRIC VEHICLES BATTERIES

LITHIUM EXPLORATION IN PORTUGAL – FELMICA COMPANY



FELMICA is a mining company part of the Mota Group:

- Founded in 1967;
- Vast experience in the extraction and processing of raw materials for the ceramics industry;
- Dedicated to the mining activity currently holding exploration rights on more than 25 mining concessions of quartz and feldspar;
- Holds exploration rights for the lithium reserves in the central area of Portugal and is planning to setup a processing facility for lithium.

OVERSEAS NETWORK & FDI SCOUTS



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RIGHT TIME.

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