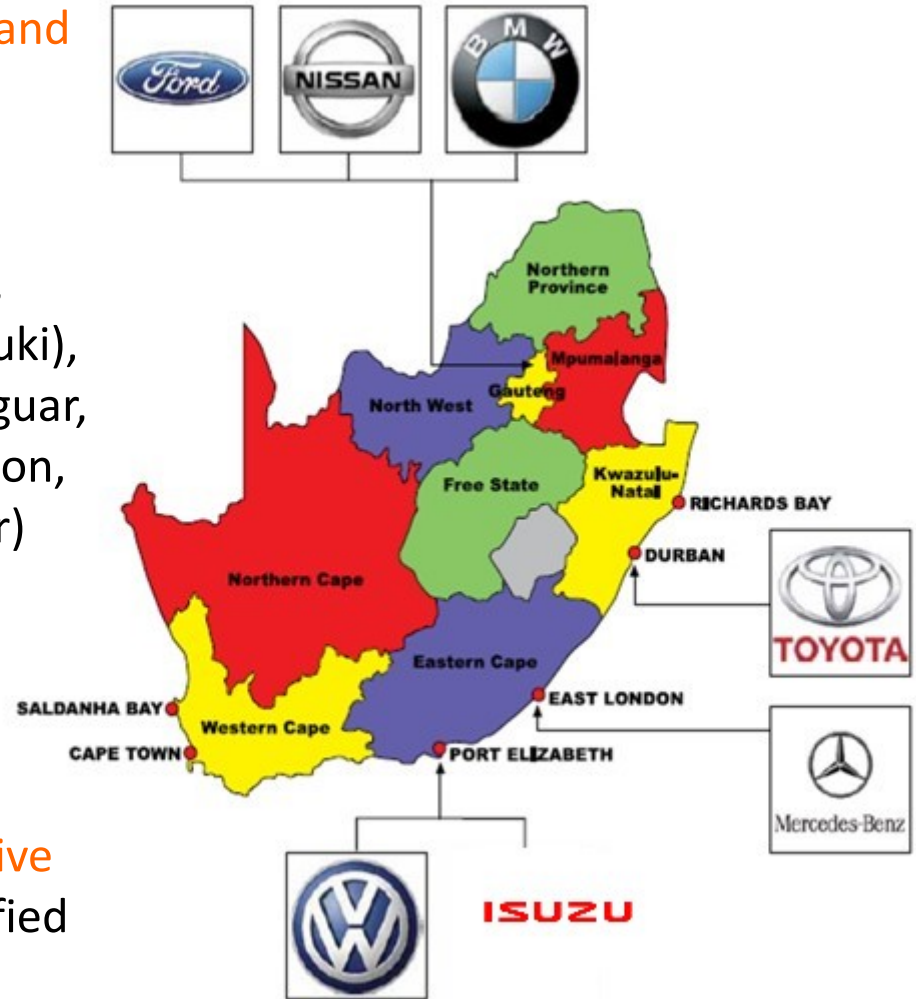


SA AUTOMOTIVE INDUSTRY: STRUCTURE

- OEMs manufacturing in SA - **BMW, Ford, Isuzu, Mercedes-Benz, Nissan, Toyota and Volkswagen**
- Other major brands are imported – European (Renault, Porsche, Peugeot), Japanese (Honda, Mazda, Subaru, Suzuki), Korean (Hyundai, Kia), Indian (Tata, Jaguar, Mahindra), Chinese brands (Chery, Foton, GWM), Italian/American (Fiat, Chrysler)
- In addition, a number of heavy commercial and bus manufacturers assemble vehicles
- There are approximately **500 automotive component suppliers** including diversified manufacturers.



MAP OF SOUTH AFRICA'S HEAVY COMMERCIAL VEHICLE MANUFACTURERS

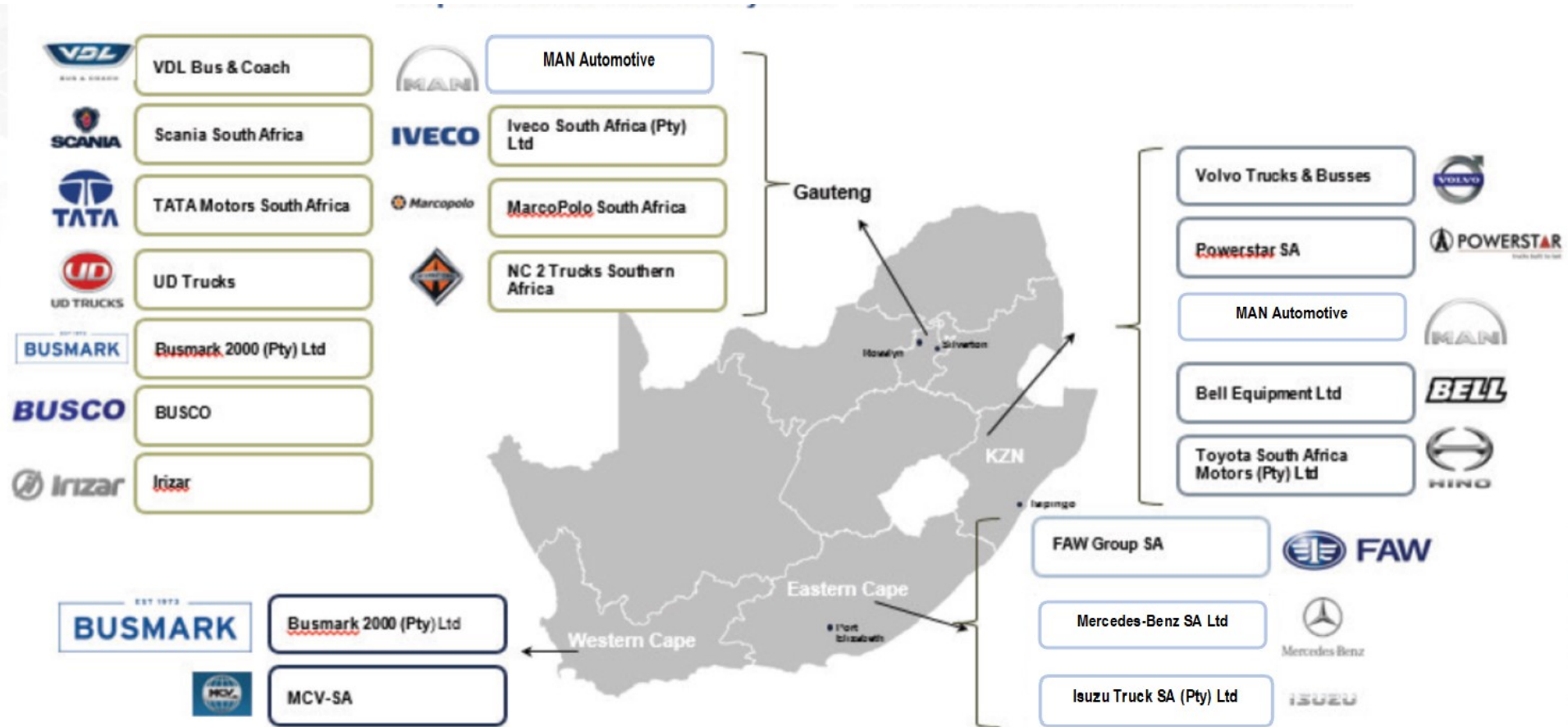


Figure 2: Heavy motor vehicle manufacturing plants in South Africa