

# ATR World



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Alongside some of the world's largest OEMs, the companies look to access telematic data

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# Dear readers



We hope that you liked the new layout of ATR World as much as we do. From this issue onwards, we also have a new chapter called “New Mobility” in which we want to regularly provide information on topics related to new mobility in general, telematics, trainings in this area or parts that have been developed by our IPAS suppliers. In this issue, Caruso reports on the current state of affairs of their platform and about the market for telematic data. Kindly navigate to pages 36 and 37 for more information.

The Covid-19 pandemic is still on everyone’s lips. Both our Shareholders’ Meeting and the Automechanika had to be postponed due to the pandemic as the health of all those involved had top priority. We have, therefore, dedicated the Industry chapter to this topic. The pandemic has a profound impact on our physical and mental well-being including the fear of the worst global recession since the Great Depression, while also affecting the business world. The crisis has changed the way the automotive industry operates but some experts think that the IAM will suffer less than the OEMs. Our article is rounded off with a statement by our Supervisory Board. Please see pages 4 and 5 to read the article. When reading through this issue, you will notice that some shareholders have also addressed this topic and report on different measures taken to mitigate the risk of infection or donation campaigns.

In the Trends section on page 35 you can find an interesting article about Mobility-as-a-Service (MaaS) and the role of car/ride sharing in connected living.

I hope you enjoy reading this issue! Stay healthy!

Stephan Bens

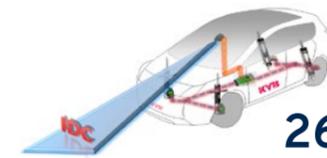


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# The resilience of the Automotive Independent Aftermarket (IAM) amidst Covid-19

IAM emerges as “white swan” in automotive industry despite significant impacts.

Covid-19 has sent shockwaves throughout the world and global economies. Millions of people have become infected with the disease and/or lost their jobs and livelihoods, economies are seeing severe declines in projected growth for 2020, and major global corporations have had to make unprecedented moves in order to stay afloat.<sup>1</sup> On an individual level, people around the world have lost the ability to conduct routine activities in their day-to-day lives, borders were closed, and public life came to a standstill. However, as bleak as Covid-19 has been, there could be an important outlier, or “white swan”, in the automotive industry – the Automotive Independent Aftermarket. Can the IAM emerge resiliently from this crisis? Some experts think so.<sup>2</sup>

In 2020, the automotive industry in Europe is expected to experience significant changes based on three main factors: supply, demand, and innovation. Over the last few months, some OEMs have cut production, global supply

chains have been disrupted, stay-at-home orders put in place, inventory sell-offs have occurred, and a decline in consumer confidence/spending has been seen. In the mid- to long-term, Covid-19 is expected to delay product cycles, investments, and cause financial pressure on automotive manufacturers. In good news, hypotheses from experts regarding the IAM indicate that the industry will suffer less than the automotive industry as a whole.<sup>3</sup>

## Relevant resilience factors for the IAM:

**Performance resilience:** though an initial short-term demand shock will hit the industry, history indicates that the older car parc IAM will be impacted less than new car sales, for example.

- Despite negative growth, the IAM is expected to stay relatively resilient. If you take the U-shaped (delayed cure) economic growth scenario as an example, the IAM could see a full ramp-up in Q4 2020 with recovery in FY 2021.

With this scenario, vehicle production is expected to see a 20-25% decline in 2020, compared with a more resilient 5-10% decline for the Aftermarket gross value added. This scenario also points to stabilisation in global trade, including the automotive supply chain, in Q4 2020.<sup>4</sup> In Germany, however, garage business was expected to increase by 24% in April 2020 compared to March 2020, with tyre changes being the main driver for this.<sup>5</sup>

**Structural change:** in Europe, significant opportunities for ongoing structural changes of the IAM may become accelerated, particularly for vigilant and financially-strong industry players. More structural changes can mean more market share and new “rules”.

- According to pre-Covid IAM trends and projections of the impact of current developments, increasing consolidation and integration (vertical and horizontal) is thought to accelerate in Europe. Additionally, companies with a stronger financial backbone will emerge successful post crisis, though short-term impacts on cashflow are



inevitable. Further, after a peak in merger and acquisition (M&A) deals in 2016-17, it is expected that another spike could occur in 2021-22 as a result of the Covid-19 crisis.<sup>6</sup>

**Supply chain reset:** a ‘glocal’ (global and local) paradigm shift may become the new ‘global’ as agile order fulfillment may shift to a more locally-based supply chain and logistics network.

- Pre-crisis, global supply chains, production networks, and delivery footprints were the norm. Thinking ahead, those global networks may become more ‘glocal’ in nature as those global ways of working turn local in nature in order to sustain operations.<sup>7</sup>

While the Covid-19 crisis has and will continue to change the way the IAM and

automotive industry as a whole operate, it is important for industry players to look at all aspects of their operations to find synergies, strengths, and opportunities in order to emerge stronger than before.

## ATR’s Supervisory Board has provided their point of view on the current situation:

“The Covid-19 crisis hit us quickly, surprisingly and with huge impact. The management of companies in all industries was severely challenged. However, positive insights can also be gained for the future. At ATR, we recognise that our shareholders have been impacted by the crisis and are proactively reducing our cost structure to be more efficient. We have reduced our travel and other costs

by embracing new technologies, moved the shareholder meeting to an electronic format and postponed all non-essential expenses, while continuing to focus on the essential business to ensure we are prepared for the coming rebound in demand. We also have seen that our market segment is much more crisis-resistant than, for example, the sale of new vehicles.”

## KEY FACTS

Experts are predicting the IAM to emerge resiliently from the Covid-19 crisis thanks to opportunities in industry performance, structural changes, and a dynamic supply chain network.

<sup>1</sup> Covid-19: Implications for business. McKinsey & Company. <https://www.mckinsey.com/business-functions/risk/our-insights/covid-19-implications-for-business#>; <sup>2</sup> Covid19 – The Automotive Independent Aftermarket (IAM) opportunity, European perspective. Roland Berger. 6 April 2020; <sup>3</sup> Ibid; <sup>4</sup> Ibid; <sup>5</sup> The Impact of the Covid-19 Crisis on the Autoservice Market in Germany. Monthly View, April 2020. wolk after sales experts GmbH; <sup>6</sup> Covid19 – The Automotive Independent Aftermarket (IAM) opportunity, European perspective. Roland Berger. 6 April 2020; <sup>7</sup> Ibid

#helptohelp

# Reaction from the automotive industry in Poland to Covid-19

The program includes safety packs, free-of-charge webinars, and ready-to-use marketing support.



Safety packs of the #helptohelp campaign.

change in approach to running a business and reacting to changes, and on the other hand these are problems resulting from a reduced number of customers visiting garages during the outbreak of Covid-19. Together with its business partners, Inter Cars offers garages support and willingness to help in solving problems for which nobody was really prepared.

**The support program #helptohelp is based on three pillars, which contain:**

1. A safety pack containing 5 liters of antibacterial fluid, 5 pieces of protective face masks, 100 pieces of protective gloves, which allows garages to adapt to safety regulations and requirements announced by the Polish government, and to stay safely in contact with customers.
2. Free-of-charge webinars
3. Ready-to-use marketing content, i.e. posts for social media (texts and graphics), which are to help garage owners reach the drivers, using the most modern online tools.

Safety packs were already delivered to 10,000 garages at the beginning of April via branches of Inter Cars. All the other materials were distributed free of charge,

via electronic means of contact. The initiators of the campaign are already working on additional steps that will help mechanics keep their businesses running during the outbreak of Covid-19. The #helptohelp program aims to encourage drivers to use the services of automotive repair garages.

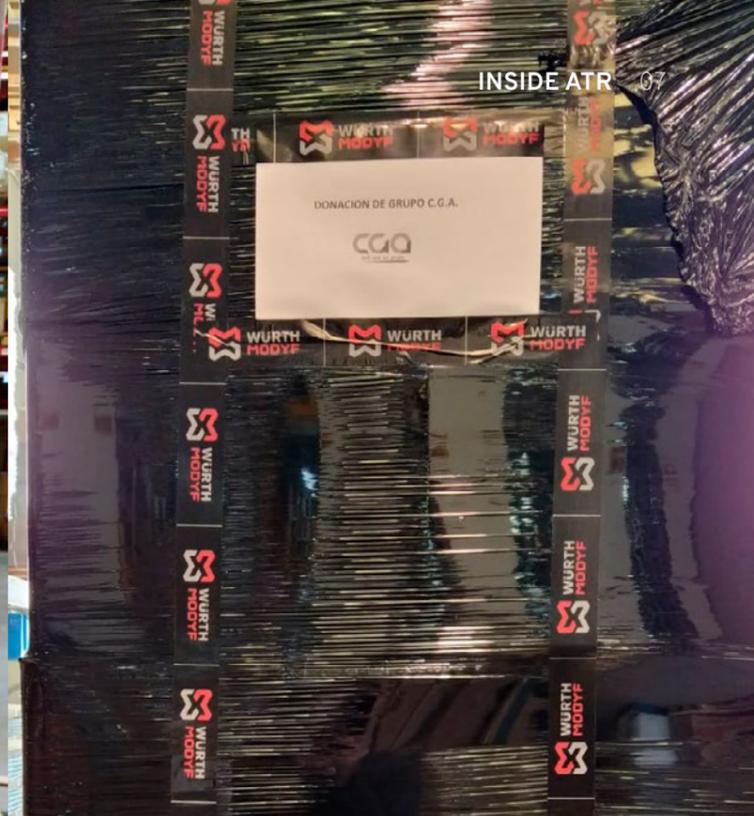
Companies involved in the project #helptohelp are Inter Cars, Castrol, ZF Aftermarket, Bosch, Schaeffler, MANN-FILTER, FILTRON, Delphi, Febi, VARTA/Clarios, Contitech, Valeo, OSRAM, Magneti Marelli, Vredestein, Bridgestone, and Goodyear.



#helptohelp campaign – support for garages.

**KEY FACTS**

The #helptohelp program was developed to help garage owners currently facing problems due to the Covid-19 crisis.



## Donations during the Covid-19 crisis



CGA Group has given away overalls and work coats for healthcare personnel and patients to help in this health crisis.

**KEY FACTS**

CGA Group donated 1,400 pieces of clothing, including overalls and work coats, to healthcare personnel at Madrid's Ifema field hospital.

Following the announcement by Ancera, the Spanish Association of Spare Parts Dealers, of the need for Individual Protective Equipment (EPIs) for health professionals, CGA Group set out to donate the clothing they had available for workshops and shops. "We cannot stand with our arms crossed," one of the staff members at CGA Group said to the healthcare personnel. "Each of us will do our bit."

total donation consisted of 1,400 pieces of clothing including overalls and work coats.

**10 years in the business - CGA continues to grow**

As you might have seen from the logo, CGA had its 10th anniversary this year. They had planned a great celebration event on 26 March in Madrid together with all the partners of the group and main IPAS suppliers. Due to the health alert, the event was postponed to either 24 September (first option) or 17 December (second option) depending on the situation and measures taken by the government to fight the spread of the virus. They hope to be able to celebrate their anniversary as this would be a sign that the health alert has been overcome.

Thus, on 23 March, the first donation of material was delivered to the field hospital, which had been set up at Madrid Fair Ifema, in order to support patients with Covid-19 from the community of Madrid.

On 30 March, CGA Group made the second donation to the Ifema field hospital. The

The CGA Group currently has 72 associated companies and 372 delegations throughout Spain and Portugal. Last year, the group expanded more towards Portugal, thanks to the incorporation of Grupo MCoutinho Peças and AutoDelta. The latter is doing a great job, expanding their network of workshops throughout Portugal and the Azores. The entire network consists of 1,230 workshops that are standardised in their CGA workshop network, with three different forms: CGA CAR SERVICE, MULTITALLER SERVICE and SACORAUTO SERVICE.



Thermal camera to detect infected staff; all employees' body temperatures are checked when they arrive at work in the morning.



## Thermal scanning and well-stocked shelves at KGK's logistics centre

Keeping production going amid the threat of an infectious virus is not particularly easy, but inventiveness at KGK's central warehouse in Enköping, includes a thermal camera being used to detect any infection among staff.

The effects of the Covid-19 pandemic can be seen throughout society. However, things are relatively normal at KGK's Enköping logistics centre. The company has taken action to prevent

the spread of infection, including a ban on visitors, thermal camera scanning of all employees, and restrictions on loading and unloading goods. The shelves are well-stocked, orders are coming in and goods are heading out. Overall, it is still business as usual.

of selected items. As a result, their shelves are well-stocked in Enköping and their logistics are currently operating as normal. However, they have also acted to prevent the spread of Covid-19.

"Our actions to prevent the spread of infection are working well," says Magnus Almgren, Logistics Manager at KGK. "We have not seen any increase in sick leave, and have no reported cases of Covid-19 among our employees or their families. We are currently working to safeguard our deliveries as more countries go into lockdown. For example, we've just placed an order to double our oil barrel balance in preparation for tougher times ahead."

KGK Logistics, with its goods flow department in Sollentuna and its logistics centre in Enköping, is the engine of the KGK Group and a key element of their customer service. They took quick action when news about the spread of Covid-19 first reached them. The goods flow team has worked hard to increase their stock levels, and continues to purchase more

**KEY FACTS**

At KGK, several measures are in place to support the health and wellbeing of employees. Overall, it's business as usual with stocked shelves and incoming/outgoing orders.

### Actions taken at KGK to reduce the risk of spreading infection:

- Management status meeting every morning.
- All employees' body temperatures are checked when they arrive in the morning, using a thermal camera from FLIR.
- A ban on visitors to the logistics centre.
- KGK staff unload all vehicles. Drivers who deliver goods may not enter the premises. Information signs in Swedish, English and German.
- No order collection at the logistics centre. All deliveries use regular transport.
- Drivers who collect goods may only enter the loading area. They have free access to disposable gloves and hand sanitiser.
- Dialogue with staffing company regarding additional KGK-trained personnel in the event of staff shortages.
- They focus on training if staff have spare time, so that more employees will know about more stages of the process for greater flexibility in the event of absences.
- It has been recommended that office staff, such as the goods flow team, work from home, and laptops have been purchased.
- Ongoing information is being provided to all teams. There is an emphasis on the importance of avoiding unnecessary risks, including during leisure time, and on protecting each other by staying at home as soon as someone feels unwell.
- Holiday leave is being restricted and approved at short notice in view of the current situation.

## KAHA's outlook on the summer travel season

It's no doubt that travel will look different in the near future, and this summer, domestic travel by car is gaining traction.

### This summer is all about domestic travel

Even though there are still many question marks when it comes to the Covid-19 pandemic, one thing we know for sure is that we will have an unusual summer. Since most airplanes still remain grounded, this year's summer vacations are all about domestic travel, and this will mainly be done by passenger car.

### Public transportation should be avoided, usage of own car is increasing

After the long period of self-isolation and staying at home, people really want to get moving. The urge to meet relatives and friends, to visit the summerhouse,

and to travel in general has grown a lot.

Governmental recommendations and public perception are still against public transportation, which means that planes, buses and trains should be avoided if possible. So, this summer is perfect for a road-trip vacation by car.

### More driving kilometers, more need for a car maintenance

The more you drive, the more your car will need repair and maintenance. For



this reason, this summer might be exceptional for our automotive aftermarket too. We just have to wait and see.

**Be strong, stay healthy and have a nice summer!**

# The challenges of the BioSmart world after the Covid-19 pandemic

A look at digital technologies and the importance of people in their organisations.



Today, leaders must constantly be in tune with the economic, social, educational, and technological fields. In times of crisis, leadership must be focused on adaptation and not disruption. This reality also means that dilemmas must be solved and choices made.

The digital transformation in the world should not be disruptive, but a fundamental new tool focused on low-cost manufacturing, minimum stocks and better demand planning in the supply chain, and distribution to

garages and auto centres. The key to solve the trade-offs between the offline world, digital technologies, and the human side is to use these three spheres together, absorbing the best of each one.

### BioSmart means a digital B2B ecosystem platform

The leadership focus should be on connecting the systems in use, proposing a new applicability of digital B2B ecosystem platforms to reignite their companies. There is no future without a

BioSmart B2B ecosystem platform, connecting manufacturers and distributors with garages, in a single and unique platform as a standard for the industry. The supply chain will also demand a fully-digital connection B2B concept, designed to reduce inventory from factory to the distributor and serve digitally in 24 hours maximum. Only a few companies will be ready for this transformation.

Often, the answer to problems and challenges lies in the systems and solutions already developed. But now, new leader-



Meeting and training through digital tools.

ship is necessary. Some companies are very advanced in the field of digital connections like Bosch and SKF, with many others catching up fast.

Top management needs to be attentive to these transformational movements and not be fooled by “superficial waves” without deep knowledge and with a true understanding of innovation strategies. Industry managers aim to engage and stimulate an environment conducive to the central practices that support the digital world, and for this to occur in a sustainable way, vision, integration, and sharing with the players in the automotive chain will be fundamental.

### The challenge for Industry 4.0 in the post Covid-19 paradigm

As Industry 4.0 continues to advance with impressive speed, distribution leaders can succumb if they do not open their eyes to technological platforms to drive operational improvement and results.

Many managers believe that the 4.0 world is nothing more than an electronic system or an investment in equipment. Automation, advanced analytics, digital performance management, cloud computing, and machine learning offer powerful and revolutionary ways for organisations to reach new heights in operational performance, but that is not enough. It is essential that industry managers value some different skills and discover solutions that other companies do not see or highlight. These managers must become a talent trainer for the new era.

The companies that will survive the 4.0 challenges structure their organisations according to the roles and responsibilities of their managers who are able to combine advanced technologies and balanced human effort. They can reconcile advances in management, motivation, human development, and technology.



Luis Norberto, Chairman of the CDP council.

The Covid-19 pandemic has changed the world forever and leaders must adapt by engaging in virtual daily team meetings and developing new processes using “Brainathon”, brain marathons to solve challenges in one week that before would have taken 3 or 4 months, as examples. These leaders will implement a culture focused on the future and innovation, where mistakes and small-scale testing are allowed for large-scale hits to be achieved. They also will create environments and apply favourable methodologies for the imagination and creativity of their talents to emerge, seeking solutions in other markets and applying them within our sector. They will be skillful at disseminating standards and creating process strategies, executing them strictly following the schedules, closely monitoring the integrity of equipment and systems, identifying problems, and solving them proactively. They will engage in root cause problem solving to determine underlying causes and implement practical, holistic solutions. Its technicians and engineers will draw on a variety of data sources, tools, resources, and subject knowledge. Another common practice will be that they all will have investments in robust systems to manage, preserve, disseminate, and update their knowledge base, including analysis of design patterns.

### Advancing in the BioSmart B2B world

The great contribution of the digital world is in the creation of predictive systems that anticipate events for customers and suppliers, resulting in a sustainable, effective supply chain and focused on the customer’s needs.

#### KEY FACTS

*DPK takes a closer look at the BioSmart B2B ecosystem platform as a necessary means of connecting manufacturers and distributors.*

Leaders cannot expect Industry 4.0 technologies to be a complete solution. Rigorous processes, information-based decisions, clarity of function, and clear accountability structures that align with the broader organisation will be essential components in the future. All-in-one: B2B ecosystem platforms plus designers with special talent and vision.

Everyone must invest and prepare these talents for the future. A future that, by the way, has just arrived. The priority is and will be focused on people, especially now.

# Tokić is looking forward optimistically

A quick response and the ability to adapt to unpredictable situations are reasons for its optimism.

Together with franchise partners, Tokić is the largest retail chain of auto parts in Croatia. The company, 30 years in business, has grown from a family business into a regional leader and a leading Croatian company dedicated to innovative technologies in the car parts industry. Their logistics and distribution centre in Sesvete is on the same level as the leading European companies in the car industry and even in this unpredictable situation, they are looking forward optimistically.

**Data management is the key to further development of supply chain**

The retail sector has drastically transformed in the three decades since Tokić's inception, from classic counter sales to full customer service, and from education and recognition of its needs to delivery at your doorstep. As Tokić is also a supplier, distributor, and seller of car parts, they have recognised data management as the key to further development.

The supply chain structure of the company is very complex and includes a strong international component. Currently, it includes suppliers, transportation, storage, and further distribution of goods, both domestically and abroad. In addition to more than 600 people, a few dozen automated and robotic processes are an indispensable link in Tokić's logistics chain today.

Currently, the procurement department plays an important role in the entire supply chain, in which they have successfully automated a part of the procurement, as well as the Tokić Stock team, which deals with inventory management and their optimal availability. Also, the Tokić Replenishment team is in charge of inventory management and supply of their retail outlets with goods. Tokić also pays a lot of attention to analytics, which gives them numerous answers and helps them make business decisions. In the previous year, they upgraded the warehouse management system (WMS), which plays a great role in optimally managing the warehouse business.

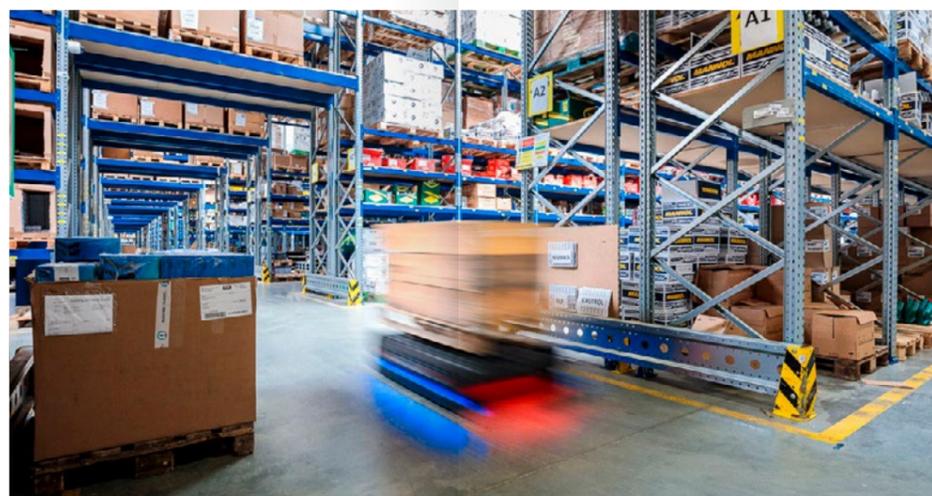
As a company focused on new and developing technologies, Tokić is constantly investing in the development of artificial intelligence and data science, which already contributes to better and more efficient inventory management, as well as the entire supply chain.

It is important to point out that Tokić, today, has a large number of its own delivery

vehicles, which is also an important link to the entire supply chain, and in this way, they have optimised transport to the maximum.

**Quick response and ability to adapt as foundation for uninterrupted supply chain during Covid-19**

Just like many other companies, the Covid-19 crisis is a situation that Tokić could not prepare for or anticipate. However, problems need to be faced, so, from day one they tackled all the problems and set out to solve them. One of the first steps was the establishment of a crisis headquarters consisting of management and directors of various sectors, which, on a daily basis, monitor changes that occur, adapt the business to new circumstances and assist the Management Board in making decisions. The first goal of the crisis headquarters was to ensure the health of



Tokić's logistics and distribution centre in Sesvete is one of the most modern and innovative in Europe.



The warehouse management system that optimally manages the warehouse business is of great importance for a strong supply chain.

"We are looking to the future and the development of new technologies, the development of online business and a whole range of other projects that we believe will be crucial in the future for market survival and overcoming the crisis in general," said Mr. Ivan Gadže, Tokić's CEO. "What has been of immense importance to us is the availability of products for business partners and large customers whose business is directly dependent on us – not only car repairers who have continued to work, but also the hundreds of carriers and public service providers who need car parts for regular operations and accessibility to citizens. The attitude of our employees whose solidarity and understanding have and will have a large share in our future achievements also proved to be positive together with their strong desire to further optimise the business."

employees, their families and all our partners, customers, and suppliers. In accordance with the instructions of the national headquarters, they adapted the business to the new circumstances. A large number of employees worked from home, and for those whose nature of work does not allow them to work from home, they were provided with all the conditions for the protection of health and safety at work.

As a forward-looking company, one of the first steps in the very early phase of the crisis was, as well, the establishment of a post-crisis headquarters, which is a combination of experienced managers and young and promising employees tasked with working out different scenarios for what will happen to the company, how this crisis will affect business development in the future, and what strategic moves Tokić will take. The main goal of the post-crisis headquarters was to clearly describe the new normal.

including small customers who also had a demand for Tokić's products. Through the contact centre, Social Networks and Distrikt and in accordance with the measures in force, they also offered citizens delivery or collection of goods.

**KEY FACTS**

*Tokić acted quickly and proactively in dealing with the Covid-19 crisis by establishing a crisis headquarters, with plans for a post-crisis headquarters, to ensure their customers and employees are well taken care of.*

From the challenges that have befallen all of us in recent months, we could see that long-term plans are no longer so crucial, but the key is a quick response and the ability to adapt to the current situation. And while Tokić as a regional leader in the sector is using innovative technologies and the highest health standards, they will do everything to maintain an uninterrupted supply chain in the future. The constant in their business is, as they point out, trust and responsibility to customers, partners, and suppliers.



Tokić has a large number of its own delivery vehicles, which were crucial for supplying all their customers with the products, especially after delivery to citizens were introduced.



# Martaş Automotive is now on the European side of Istanbul

The Turkish spare parts company continues its investments with a new distribution center on the European side of Istanbul, now with centers all over Turkey.

**M**artaş Automotive, which has not ceased its investments despite the economic crises in the past years, continues its investments uninterrupted while taking all necessary precautions against the Covid-19 epidemic which the world and Turkey have struggled with. Martaş Automotive continues its steady growth by adding its Istanbul European Side Distribution Center to its distribution centers in Istanbul/Gebze, Ankara, Izmir, and Adana.

Martaş Automotive's Istanbul European Side Distribution Center, which has a strategic location with its proximity to the surrounding industrial sites and customer groups, is equipped with state-of-the-art storage areas and superior quality standards and shall continue the high quality, and fast and reliable services that Martaş Automotive offers to its customers mainly in Istanbul's European side and Trakya.

The new distribution center opened in Ikitelli, Istanbul, has more than 55 employees providing services to Martaş Automotive customers in a total area of 15,000 sqm, including 10,000 sqm of in-



door area and 5,000 sqm of outdoor area. Having a capacity of 20,000 pallets and a ceiling height of 10.5 m, the shelf length of the Istanbul European Side Distribution Center is 25 km. In the distribution center, which has five different doors, this feature enables the transport vehicles to move comfortably by separating the goods acceptance and shipment areas.



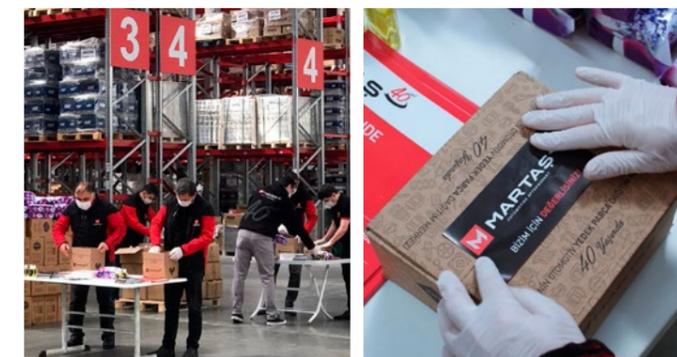
**KEY FACTS**

*Martaş Automotive opens new distribution center on European side of Istanbul, and is supporting customers and stakeholders with the "Coronavirus Measure Package."*

## They support their customers with the "Coronavirus Measure Package"

While they continue their investments and efforts unabated without losing their faith that they will defeat Covid-19, they are making their best efforts to keep their customers and stakeholders in good health. For this reason, Martaş Automotive has prepared a "Coronavirus Measure Package" for their customers, who have always been with them on their 40-year journey, to stay healthy.

The package consisting of the most used hygiene products in the fight against the Covid-19 had been prepared under hygienic conditions at their newly-opened distribution center on the European side of Istanbul and was distributed to their customers – automotive spare parts retail locations – all over Turkey.



You can watch the video of their "Coronavirus Measure Package" project here.

# Ability to deliver and digitalization have top priority at LKQ Europe

Despite the Covid-19 crisis, the company is moving forward with the integration of its 70 acquisitions and will soon be opening a new central warehouse in the Netherlands.

LKQ Europe, the largest independent spare parts supplier in the Aftermarket in Europe, has so far come through the Covid-19 crisis without any supply bottlenecks. “We were and are able to deliver, even if our suppliers are temporarily not producing,” said Arnd Franz, CEO of LKQ Europe. Even in the worst crisis in decades, Arnd’s top priority was to be able to ensure security of supply for customers, “just as much as the safety of our employees has been a priority,” said the company’s CEO. The

tem-relevant business and we support our customers by ensuring a comprehensive, quality product range and fast delivery of vehicle parts.”

Despite the Covid-19 crisis, LKQ Europe is working on integrating the companies it has acquired over the last nine years. “We have set up a program called ‘1 LKQ Europe,’” said Arnd. “In doing so, we are driving forward both organizational development and the strategic strengthening of our European units.” After 70 acquisitions in 22 countries, the focus is now primarily on integration. LKQ Europe includes Euro Car Parts, Fource, Rhiag Group, Elit, Auto Kelly, STAHLGRUBER Group, and the recycling specialist Atracco. LKQ also holds a minority stake in Mekonomen.

In the current integration phase, LKQ Europe is investing in a uniform European IT infrastructure and common standards, for example in purchasing and materials management. “With the European integration, we will be able to better utilize our strengths in the interest of our customers,” said Arnd. “LKQ Europe already sees itself as a strong partner for European companies such as fleet operators.”

The ongoing investments in new central warehouses will also be pursued further;

in the past three years alone, LKQ Europe has made multi-million Euro investments in two new fully-automated central warehouses in the U.K. and the Netherlands, the latter to be commissioned at the end of 2020. The acquired companies are clearly benefiting from the high level of investment, as the example of Euro Car Parts in England shows; since the Euro Car Parts takeover in 2011, the number of employees has tripled, the number of branches has quadrupled, and turnover has increased fivefold. “Our assets are our strong brands, highly motivated employees, and their customer proximity in all our regions,” mentioned Arnd. “We are supporting the further expansion of the business with continued investments in order to offer our customers all over Europe the best products and services.”

Once the integration of the regional companies into the new European organization has been completed, and the Covid-19 crisis has largely been overcome, LKQ



Rendering of LKQ Europe's new Central Distribution Center outside of Rotterdam.

## KEY FACTS

*LKQ Europe is well positioned to manage the current crisis while preparing itself for a stronger future as an integrated market leader.*

Europe intends to expand further. “We will of course continue to monitor the market and will also return to external growth when the time comes,” said Arnd in a recent interview with the Frankfurter Allgemeine Zeitung. “After the current crisis, we want to focus back on growth. But the priority at this moment is to overcome the crisis.”

A further aim of LKQ Europe is to prepare its own business, but also its customers, for the challenges of future technologies, especially digitalization and electrification. “The CO<sub>2</sub> regulation in the EU will massively change the drive mix for new registrations over the next ten years,” explained Arnd. “But the vehicle fleet will not become electrified overnight. Nevertheless, especially as the market leader in the vehicle parts trade, we have to address the question of how we support the workshop for these future technologies.”

LKQ Europe sees great opportunities for the parts trade and workshops in digitalization. On one hand, this can mean better identification of spare parts. After all, there are still uncertainties, such as which brake disc fits which vehicle type. On the other hand, the company also sees digitalization as an opportunity to communicate directly with drivers. “We have several pilot projects in the Netherlands and in Great Britain,” said Arnd. “Our aim is to make life easier, both for the driver and for the workshop.” To this end, Arnd said, it must be ensured that maintenance-relevant data from connected vehicles are also available to independent garages if the customer so desires. “We will enable independent market players to access the data of connected cars and use them to tailor a range of services for drivers who do not necessarily want to drive to an authorized garage – while ensuring data security and data protection. Drivers must be free to choose their workshop and other contract partners.”

Parallel to the crisis, LKQ Europe continues to push forward with its strategic orientation throughout Europe. “As a European distributor and service provider, we have to make a visible contribution to keep Europeans and their cars mobile, clean, and safe,” stated Arnd. The company is well positioned to achieve this while systematically expanding its market position. The Aftermarket business regarding automotive spare parts in Europe is a €100 billion market with LKQ generating a turnover of more than €5.2 billion in Europe in 2019. A total of around 700,000 people work in the automotive spare parts trade, including around 27,000 employees at LKQ Europe. “Europe is a highly-fragmented market,” said Arnd. “A certain size is needed for the investments that will be necessary for the future. LKQ is in the right position to make these investments, but we are also interested in strategic collaborations.”



Arnd Franz, CEO of LKQ Europe.

company had already taken precautions in January 2020 and prepared itself for the emerging crisis, by increasing safety stocks in its warehouses, for example. “The automotive workshops ensure safe and clean individual mobility,” says Arnd. “Automotive service and repair is a sys-



## New Brembo Brake Caliper Repair Kits for professional-standard maintenance

Brembo recently supplemented its Aftermarket product range with 300 new brake caliper repair kits.

The important braking caliper system in fact features some internal parts which can wear and deteriorate with time. This is due to the component reaching the natural end of its life cycle, the weather, and presence of salt and chemical agents on the roads, which may lead to the corrosion of the rubber and metallic parts of the calipers.

Now, these parts can be replaced with new, Brembo quality components, to

ensure the brake calipers continue to work in total safety and to ensure maximum performance levels for the braking system. Since brake calipers are responsible for the car's active safety, these components should only be replaced by industry professionals.

As of today, spare parts professionals can choose between four different families of Brembo kits, comprising of caliper components which are most subject to

wear and deterioration, such as the sliding guide pins on floating calipers, dust covers, piston seals, and the pistons themselves.

A complete set of components for rapid, safe, and professional repairs, which supplements the Aftermarket range of hydraulic components that now includes more than 8,000 part numbers.

## The VARTA® application database now covers 38,000 car models

Clarios has enlarged its service offering for workshops and consumers by updating its application database with several new models.



VARTA updated its automotive battery application database with an additional 7,176 car models from 165 brands, equalling 19.8 million additional vehicles in Europe. With the latest update, VARTA increased its car model coverage to a total of 94% of car models in Europe which corresponds to a car parc coverage of 99.6%, or 381 million vehicles. Customers and workshops can now search for a total of 38,000 car models and their batteries in linked customer portals, on the VARTA Automotive website and in the VARTA Partner Portal.

With the VARTA Partner Portal, Clarios aims to optimally prepare workshops for new situations around battery service. The tool has been designed to support workshops in the current challenges they are facing due to the growing number of start-stop vehicles in the European car parc: Not only are vehicle electronics becoming increasingly complex, but battery testing and replacement are getting more difficult for workshops, too. Battery

service time has increased up to 60 minutes because batteries are installed in the trunk, under the seats or in other places that are hard to access. Mechanics face much more complexity in the battery service, requiring numerous steps to replace a battery, e.g. 28 steps in a Volkswagen Touareg. That's a big challenge for aftermarket workshops which are not yet adequately prepared for servicing start-stop vehicles.

Access to the VARTA Partner Portal is fast and easy on all internet-enabled devices: after a one-off registration, each workshop employee has free and unlimited access to step-by-step instructions. Besides the Battery Selection module, it also provides workshop employees with various other options for entering the individual vehicle's details to immediately obtain all the key information for replacing the battery in three more modules:

### KEY FACTS

*With the VARTA Partner Portal, Clarios aims to prepare workshops for today's battery service needs. The updated battery application database now covers 99.6% of Europe's car parc.*

### Battery position

Fifty percent of modern vehicle models have a complex battery location. With the VARTA Partner Portal workshop employees can see at a glance where the battery is installed. Further details can be called up at a click, such as how to reach the battery's position in the fastest possible way.



### Fitting instructions

In some cases, it can take up to 28 steps to replace the battery. Step-by-step instructions make the battery replacement process easier for start-stop vehicles and show the estimated service time. In the process, the system observes every single detail and indicates whether you have to connect with the battery management system.

### Battery knowledge

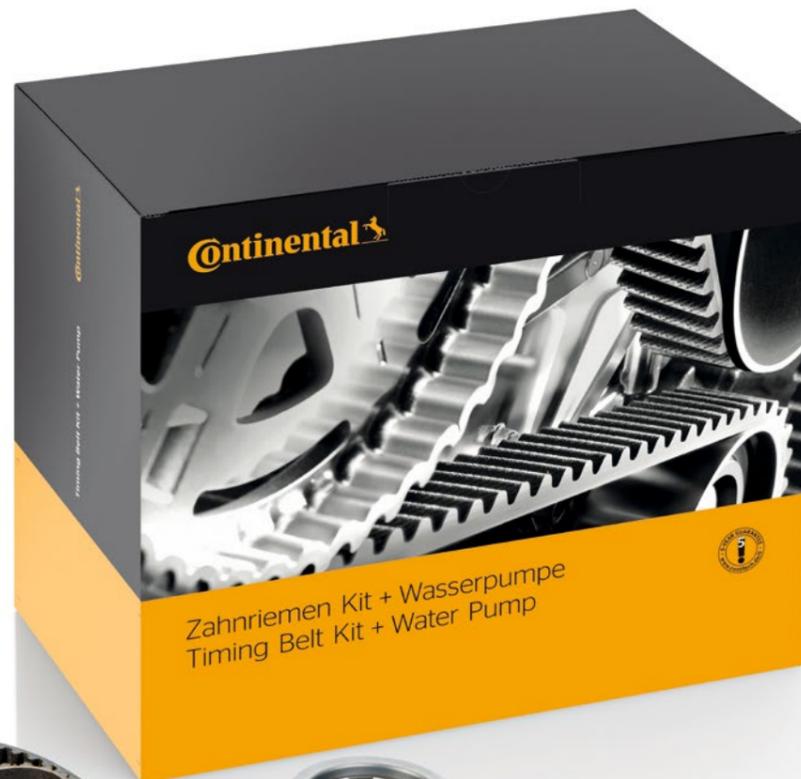
Anyone who wants to become a real battery expert can acquire even more know-how here. How has the battery's role changed? What do you have to consider when testing batteries in start-stop vehicles? What makes the VARTA Silver Dynamic AGM the optimal battery for start-stop vehicles?

Visit the VARTA Partner Portal: <http://www.varta-automotive.com/en-gb/business-portal>

Swedish Pop:

# New kits for Volvo models from MY 2013

Continental adds to its timing belt kit offering for Volvo vehicles.



Effective immediately, Continental has added new timing belt kits for a large number of Volvo vehicles to its range because vehicles such as the XC60, V60 and S60 from MY 2013 onwards are now increasingly due for a timing belt change. Depending on the repair task involved, workshops can select the product appropriate to the

job: either CT1216K1 with a timing belt and tensioning pulley or, from the summer of 2020 onwards, the CT1216K2 kit, which contains a belt and tensioner but also all the other components needed, such as an idler and bolts. The same applies to the CT1216WP1 and WP2 water pump kits.

The best thing is that the number of parts contained in the kit always exactly matches the relevant vehicle type. Unlike when you often find yourself looking at a number of leftover screws after assembling a bookcase bought from a certain Swedish furniture shop. The water pump sets for the above vehicles are also new additions to the range. As always with Continental, these are in 100% OE quality and come complete with a 5-year guarantee for registered workshops.



Continental's new ATE Super DOT 5.1 premium brake fluid flows at  $-40^{\circ}\text{C}$  and has a high wet boiling point of  $180^{\circ}\text{C}$ .

## Always brake safely – even in icy cold conditions

Safety first – Continental's new ATE Super DOT 5.1 premium brake fluid flows at  $-40^{\circ}\text{C}$  – and its high wet boiling point of  $180^{\circ}\text{C}$  ensures an extended replacement interval of three years.

### KEY FACTS

Continental expands portfolio of ATE brake fluids for automotive aftermarket with ATE Super DOT 5.1.

Anti-lock braking systems, brake boosters and traction control systems require brake fluids that are modern, effective and capable of coping with the increasing demands on braking systems. As a result, the technology company Continental is expanding its portfolio of ATE brand brake fluids for the automotive aftermarket with a new premium product in OE quality: ATE Super DOT 5.1. It combines a high wet boiling point with outstanding flowability, even under very cold operating conditions. "We're setting technological standards by combining two properties that previously could not be combined in this way," says Johannes Both, the program manager responsible for hydraulic brake products at Continental. "More and more leading car

manufacturers are either using DOT 5.1 class brake fluids or are about to use them," he adds. "We have responded to this market change at an early stage in our product range for the automotive aftermarket, ensuring that independent workshops will always have manufacturer-recommended brake fluids available," says Both.

### "Super" stands for excellent viscosity values

With a maximum of  $750 \text{ mm}^2/\text{second}$  at  $-40^{\circ}\text{C}$ , the viscosity values of the ATE Super DOT 5.1 brake fluid even exceed those of ISO Class 6 – well above the specifications for DOT 5.1 class brake fluids. This is the reason why "Super" has been added to the product name. Thanks

to its low viscosity, ATE Super DOT 5.1 enables driving safety systems to react quickly even in extremely cold conditions. The high wet boiling point also ensures the best possible functionality under high brake loads – and an extended replacement interval of three years.

All Super DOT 5.1 container sizes have the new fresher design for ATE brake fluids. It will be gradually introduced on all brake fluid containers and also on other product groups. The fresh visual impact, the new tagline and other design elements, such as the trademark reference, "A brand of Continental" of this new, uniform brand identity all underscore the premium claim of ATE products.

DENSO

## Benefit from smart consolidation with DENSO Lambda Sensors

Lambda Sensors are a crucial component not only for optimising engine performance but also for reducing a car's emissions.

The European aftermarket has always been tremendously adept at evolving to remain competitive in a business landscape driven by fast-changing technology. Thanks to continual advancements by parts manufacturers, there is a trend for wholesalers to stock a smaller but just as widely applicable range of parts, enabling them to meet customers' needs while reducing their overhead.

The challenge for wholesalers comes in working out how far they can reduce their stock without compromising their offering to workshops, or inadvertently introducing issues with fitting or efficacy.

That's where DENSO's concept of "smart consolidation" comes in: merging products in a range just enough for wholesal-

ers and workshops to benefit, but not so much that they experience problems.

### An optimised offering

Let's look at one component where smart consolidation is already at work: Lambda Sensors. Some manufacturers have identified these parts as a target for range consolidation – and with their variety of wire lengths and fit types, it is easy to see why.

But Lambda Sensors are a crucial component not only for optimising engine performance but also for reducing a car's emissions – something the entire industry knows to be important in the context of global governments' climate goals. Therefore, their performance cannot be compromised.

Consider a group of 10 different OE sensors, which all share an identical sensor core, connector type, and pinout. The only differences are wire lengths. Here, DENSO puts smart consolidation into practice by selecting only three optimised wire lengths, thereby greatly improving the stock efficiency of servicing all related vehicles. As a result, workshops can ensure maximum vehicle coverage without having to buy a prohibitive amount of stock.

### When is a saving not a saving?

Would it be possible to take the concept further and reduce the range all the way

### KEY FACTS

*DENSO's smart consolidation of its Lambda Sensors merge products in a range enough to provide benefit but not so much that problems arise.*

down to one cable? In theory, yes – and other manufacturers have indeed done this by increasing wire length. However, reduce the range too much, and the constraints start to outweigh the benefits. With high temperatures, fast moving parts, and heavy vibrations, wire harness fixation is a safety and reliability issue that DENSO is not prepared to compromise on. In general, DENSO does not allow wire to be more than 35% over length (depending on the actual wire length). Others in the aftermarket do not apply such a limit, and may even permit wire that is more than 100% over length.

### Choose smart consolidation

The DENSO Lambda Sensor range is optimised for smart consolidation: maximising benefits without incurring negative impacts. Not only do the sensors themselves match strict quality standards, the segmentation of the range confers the maximum possible benefits to wholesalers and workshops, calculated across the entire life cycle of a product from purchase to installation to use.

[www.denso-am.eu](http://www.denso-am.eu)



MONROE

## Monroe® launches new support- and product-focused website

Improved functionality, additional features, and a new design for the ultimate user-friendly experience.

### KEY FACTS

*Monroe's new website has been designed to offer a user-friendly experience and is compatible across a range of devices, including smart phones and tablets.*

DRiV™, a Tenneco Inc. (NYSE: TEN) business and a leading global aftermarket and OE ride performance supplier, recently announced the launch of a new website for its Monroe brand. One of the global automotive industry's best known and most trusted brands, Monroe delivers innovative original equipment and replacement ride control solutions – including shock absorbers, struts, springs, and steering and suspension components – to professional technicians and vehicle owners.

The new Monroe website has been designed to offer an ultimate user-friendly experience and help users to quickly and easily navigate the website. The website is compatible across a range of devices including smartphones and tablets. In addition, the website includes new content and features developed to support the Monroe brand's current and future customers.

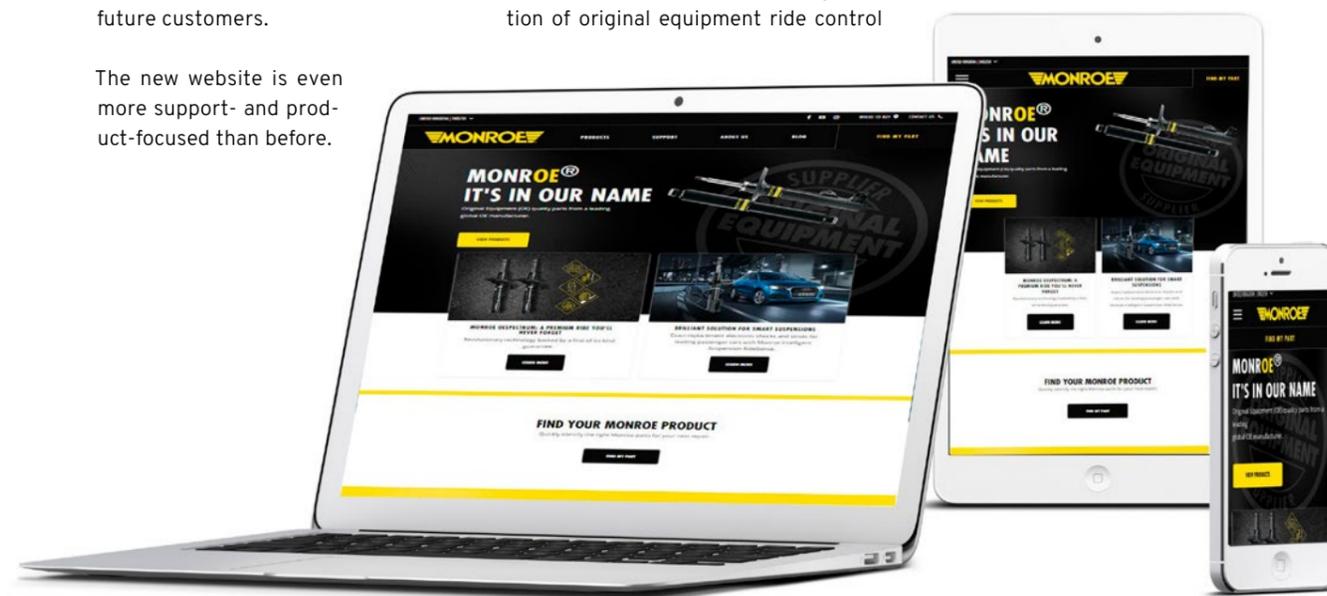
The new website is even more support- and product-focused than before.

On the product side, extensive product information allows users to easily navigate Monroe's entire product portfolio and find related technical tips and part numbers. On the support side, technical installation tips help support technicians and garage owners with the installation of shock absorbers, struts, springs, and steering and suspension components. There is also the option for downloading catalogues and browsing an eCatalog called "find my part", which is accessible from every single page for users to easily find Monroe part numbers. The support section also includes warranty information and reference to the DRiV Garage Gurus "Technician First" support program. Lastly, the website also features the latest Monroe news via the blog section, which will be updated regularly.

"Monroe helps bring innovative solutions to the aftermarket as each new generation of original equipment ride control

technology will eventually become an aftermarket service opportunity. With the creation of the new website, we wanted to reflect innovative Monroe solutions and make it as easy as possible for current and potential customers to find what they are looking for. We are very proud of the new website and all its new features," explains Karen Ameel, Senior Brand Manager, DRiV Motorparts, EMEA.

Monroe invites you to visit the new website: <https://aftermarket.monroe.com>.



## Three new hose ranges from Gates add more revenue opportunities



A fuel hose and two air hoses extend the number of applications covered by a growing product portfolio.

Gates (NYSE: GTES), a leading global provider of application-specific fluid power and power transmission solutions, launched three new OE quality Gates automotive hose ranges into the market for passenger car applications. The hoses have been released in Q2.

### The three new hose ranges are:

- Crankcase ventilation hoses for air control systems
- Molded fuel lines for petrol and diesel applications in fuel management systems
- Air intake hoses for air control systems

The launch phase of each of the new OE quality range satisfies existing market end-user demand, focusing on the most popular vehicles already being received for service and repair maintenance procedures at garage level.

### Crankcase Ventilation Hoses

Engine oil vapour and leaking gases from the crankcase are fed to the intake manifold via crankcase ventilation hoses. Some materials used in the construction of such hoses were made from plastic materials that were too rigid and have now begun to fail. All crankcase ventilation hoses in the new Gates range contain plastics that are more durable. Applications covered by the first 25 part numbers of the new Gates range will include BMW E38, E39, Ford Focus Mk 1, as well as 1.4L Fiat 500 and 1.4L Punto Grande.

### Molded Fuel Line Hoses

The role of the molded fuel line hose is to circulate fuel from the fuel tank to the injectors. The new Gates range provides more durable solutions to problems caused by poor fuel quality, which can cause blockages. Damage to O-rings through prolonged use and failure of line joints and plug-in/plug-out failures can take place during injector replacement or maintenance procedures. The first 50 fast moving OE quality part numbers from Gates are designed to fit fast moving parts



for Citroen, Mercedes-Benz, and Renault. They will include models such as the 1.4L HDi Citroen C3Mk 1 and 11, 208 and 316 M-B Sprinter as well as 1.5L Renault Clio Mk 1-4 DCi.

### Air Intake Hoses

Air is fed from the air filter box to the engine via the air intake hose. Sensors inside each air intake hose balance the air pressure and help to ensure maximum engine performance. Constant contact with engine oil on the inside, as well as accidental spillages during oil changes on the outside, cause gradual degradation. Vibration accelerates wear and tear to the nodes. Tears are caused by inconsistent internal pressure which is often attributed to changing wall thickness or low quality materials. Thanks to a strong OE pedigree, Gates air intake hoses are manufactured to as-



sembly line standards from proven EPDM and NBR materials. The first 25 part numbers will include a variety of applications, such as 2.5L BMW E39 and 523i ('96 onward) 1.6L Ford C-Max TDCi ('03 onward) and 1.5L Dacia Logan DCi.

The new ranges have been introduced complete with online technical support ([www.gatestechzone.com](http://www.gatestechzone.com)) and follow the introduction of cooling system and turbo hoses added to the Gates product portfolio last year.



## Strong brand meets DTM legend

Timo Scheider becomes Hella Pagid brand ambassador.

### KEY FACTS

One of Germany's most famous racing drivers, Timo Scheider, joins Hella Pagid as brand ambassador.

The extensive range from the brake specialist Hella Pagid offers accessories for all vehicle models in addition to wear parts, brake hydraulics, and fluids and chemicals. This covers vehicles from the compact class to light commercial vehicles, as well as electric and hybrid vehicles through to sports cars. The Hella Pagid range is being continuously expanded and adapted – for example, the brake caliper portfolio was expanded by 987 vehicle applications with a total vehicle population of more than 19 million within the last year. The high market coverage is a major reason for the brand's good reputation and success, in addition to high parts quality and convincing functionality. Hella Pagid covers almost 100 percent of the European vehicle population with brake pads and brake discs.

Just as successful as Hella Pagid is in the field of braking systems, Timo Scheider is in the field of racing. As a two-time DTM winner, multiple winner of various 24-hour races (Spa-Francorchamps and Nürburgring), current FIA RX rally cross driver and BMW

works driver, Timo Scheider is without a doubt one of the most famous German racing drivers today.

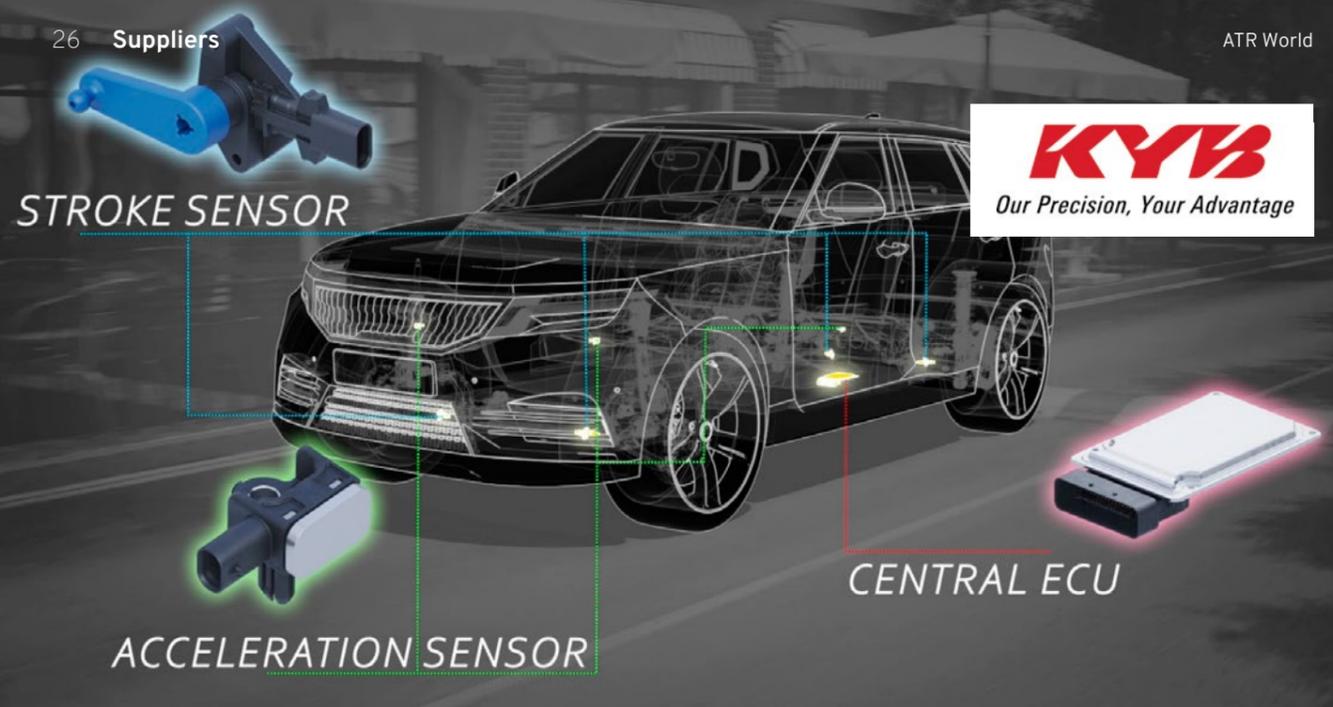
A successful range of brakes and a successful racing career: it is logical to combine these two success factors. And this is exactly what Hella Pagid and the Scheider Motorsport team are doing in a cooperation from 2020, in which Timo Scheider will also act as brand ambassador for Hella Pagid.

The Scheider Motorsport team also relies on Hella Pagid quality for maintenance work and conversions on the "treasures" of lovers of sporty vehicles. "Here we can clearly demonstrate the advantages of the Hella Pagid brand," said Timo Scheider.

"It transfers the many years of motorsport know-how of the sister company "PAGID Racing" to the independent aftermarket. In addition, the Hella Pagid brand is convincing thanks to the extensive OE competence of the original equipment brand "PAGID", which has been equipping vehicle manufacturers such as BMW, Porsche, Audi, and Mercedes for decades."



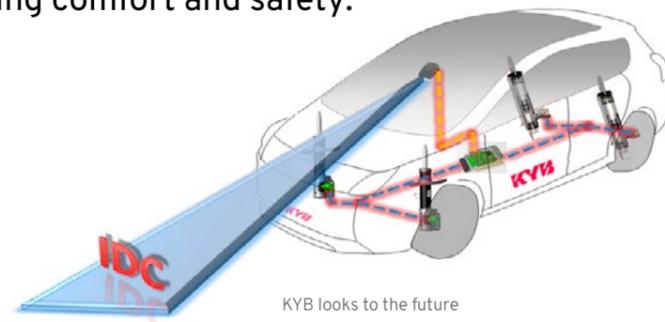
Scan QR code now and experience the Hella Pagid know-how!



## KYB gives insight into Intelligent Damping Control

The new technology improves driving comfort and safety.

**K**YB's Intelligent Damping Control suspension system is the latest innovative technology developed by KYB and is used on a selection of prestige vehicles. In Europe, it is used by PSA on the DS7 under the name DS Active Scan Suspension. It will also feature on the Peugeot 508 and the new DS9 to be launched in 2021. In Japan, it is available on the Lexus LS and LC, and Toyota Crown and Avalon.



KYB looks to the future

to measure the vehicle's reactions including speed, braking, and steering angle.

The control unit continuously calculates the optimum shock absorber settings to mitigate any irregularity, improving comfort to create a unique and smooth driving experience. It does this via a proportional solenoid valve on each damper which adjusts the inner pressure between the upper and lower chambers, giving individual control to both the compression and rebound on all four wheels.

Testing shows the benefits are especially noticeable in the rear seats, with the

scanning system reducing the oscillation which can occur over bumps. This may sound like just improvements in driving comfort, however it will also have a positive effect on safety. Smoother driving means all four wheels will maintain a better contact with the road, allowing for safer steering and braking. A smoother ride will also reduce driver fatigue.

"This original equipment system is another great example of the world-class technological advances created by KYB research and development engineers here in Europe and in our Japanese headquarters," explains Juan Carlos Diez, Executive Director of KYB Europe Aftermarket.

### KEY FACTS

*KYB's Intelligent Damping Control suspension system measures vehicle reaction to speed, braking, and steering angle for a better driving experience.*

This smart technology uses a monocular camera behind the windscreen which analyses the road profile and sends it to the IDC electronic central unit. It works with four height sensors and three accelerometers

## Availability and range are crucial when it comes to spring replacement



In peak replacement season, Lesjöfors recommends stocking up on OE quality springs.

**D**ue to the Covid-19 pandemic, there has been an obvious drop in demand for spring replacement. But, the number of potholes and suspension faults still remain and we expect an almost 'v' shaped return to normal as restrictions lift and mileage increases.

Distributors know how crucial availability and range is, especially during peak season. This peak season has been moved and a professional distributor should aim to have at least the top 750 part numbers on the shelf at all times, covering just over 90% of demand.

Lesjöfors supports its customers with a range of re-profiling services to ensure their stock profile is continually updated with the very latest references, meaning the most popular springs are on the shelf and ready to go.

Each Lesjöfors spring is made from the highest quality specialist spring-steel, protected from corrosion using the galvanic protection method of zinc phosphating, before being powder-coated with epoxy resin to provide additional protection.

Breakage is the main reason for spring replacement, and producers of quality springs therefore strive to maximise fatigue strength. A spring's fatigue strength is essentially the maximum stress it can withstand without breaking.

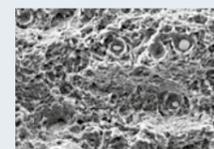


Image 01 - Non-metallic inclusions evident within the wire.

### What affects fatigue strength?

Poor quality spring wire, containing non-metallic inclusions (imperfections within the material (see Image 01) influ-

ences fatigue strength, and will lead to premature breakage. The risk of breakage is therefore significantly greater for 'budget' springs using lower-quality steel.

Heat treatment is a critical part of spring manufacturing and, if not performed to OE standards, can leave a spring too brittle. The more brittle the steel is, the more sensitive to defects such as corrosion, with resultant lower fatigue strength and increased risk of premature breakage.

Surface defects also lower fatigue strength and lead to early breakage.

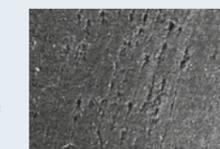


Image 02 - Cracks in a poor-quality wire surface.

Lower quality spring steel can have many microscopic cracks in the material surface, increasing the risk of breakage (see Image 02). Use of OE quality spring wire combined with shot peening and pre-setting will improve fatigue strength.

### How to reduce the risk of premature failure?

Coil springs are under continuous attack from the road below. The sudden impact of a pothole is a well-documented cause of suspension damage. Road debris is a significant danger too; with stone chips and grit thrown up by the tyres striking the spring with sufficient force to damage the surface coating; this exposes the bare steel which, if untreated, will quickly rust.

To reduce the risk of premature failure, it is clear that an OE quality spring should employ a surface treatment which provides protection between the steel and the paint layer. The technique, specified

by car manufacturers, is normally a special zinc phosphate method. The substance contains zinc ions, a less noble metal than iron, which gives the required galvanic protection.

The OE standard includes activating, zinc phosphating, passivating and painting, and is not to be compared with iron phosphate or other phosphate methods less effective in corrosion protection. An OE quality spring will be zinc phosphated (see Image 03) and protected with a powder coat paint system, of fifty micron thickness, to ensure suitable protection against corrosion, and a good cosmetic finish.

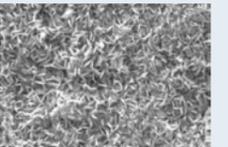


Image 03 - Zinc phosphate surface protection layer.

As previously mentioned, the traditional spring season has been suppressed and so we expect a sudden return of spring related issues as restrictions ease.

A spring is a safety critical product, and to minimise the risk of breakage in use OE standards require one million cycles of fatigue testing, one thousand hours of salt spray testing, and zinc phosphate protection. For the driver's safety, and that of your customers, it makes sense to stock and promote an OE quality spring.

### KEY FACTS

*Following suppressed demand due to Covid-19, Lesjöfors evidence suggests 2020's peak season has moved forward and advises customers to review their stock of Lesjöfors OE quality springs.*



## Aftermarket of the future

Prepared for any situation.

If you want to repair modern vehicles with alternative drives in the future, you need two key things: spare parts and expertise. As an original equipment manufacturer, MAHLE is geared toward the mobility transformation, and that includes its aftermarket portfolio – with its high level of availability and top quality. MAHLE also supports you with a wealth of services and information, including diagnostic tools and service units, training, and repair and maintenance information (RMI).

### The road to e-mobility

MAHLE has built up a broad product portfolio in the area of e-mobility. This traces the path of electrical power in the vehicle – from charging through power electronics, more efficient air conditioning for greater cruising range, and the electric motor.

- Large-scale charging infrastructure with chargeBIG
- Wireless charging system: MAHLE Wireless Charging
- Noise filters to minimise electrical interference
- Onboard charger for fast and gentle charging
- Battery housing with integrated thermal management – protecting the environment while maximising cruising range
- Inverter and DC/DC converter for vehicle electronics
- Efficient air conditioning for driving comfort
- Electric traction motors for all alternative drive types

### DC/DC converter: the alternator of tomorrow

Fuel cells and electric car batteries supply up to 800 volts, far exceeding the 12- and 24-volt levels that are customary in the automotive sector. In order to continue using existing components such as headlights, fans, window lifts, or windshield washer pumps, the high-voltage electrical system that includes the battery must be separated from the low-voltage electrical system with the various units. This task is performed by a DC/DC converter developed by MAHLE. The DC voltage converter brings the power to the required voltage level for the 12- 24-

and 48-volt units and separates the high- and low-voltage electrical systems safely.

### Traction motors: thermal management is becoming increasingly important

The trend toward electric motors is set to change vehicle servicing. When it comes to thermal management of the battery and drive, the combustion engine and electric motor differ fundamentally. Thermal management for electric cars has two tasks: to dissipate heat and to use it for efficient air conditioning. The less the battery is used, the greater the cruising range. Handling these issues professionally requires you to have a great deal of expertise—and MAHLE can give you specific support in this new business area. MAHLE already offers drive solutions for mild and full hybrid vehicles and for vehicles with a range extender, as well as for purely electric vehicles and fuel cell vehicles.

### Oil management module: all in one unit

Some electric cars have an oil-cooled powertrain, and MAHLE has introduced a new oil management module for these vehicles. It comprises a filter, electric oil pumps, coolers, and a thermostat in one unit. This oil management module saves weight and increases efficiency – for a greater cruising range. The advantage for you is that MAHLE also offers replacement parts for maintenance and repair – such as filter elements, coolers, or pumps.

#### KEY FACTS

*MAHLE is geared for the mobility transformation of the future while highlighting its road to e-mobility, DC/DC converter, traction motors, and oil management module.*

**MAHLE**



## Sustainable products from MANN-FILTER

**MANN  
FILTER**

Increased material and process energy efficiency, recycled plastics and fibres, and an FSC®-certified production site all point to sustainability.

With its MANN-FILTER premium brand aimed at the independent automotive spare parts market, the filtration expert MANN+HUMMEL not only offers innovative solutions for clean mobility, but also provides sustainable filters and packaging manufactured with resource-saving methods.

### Spun-bonded fabric plant increases material and process energy efficiency

The world's only spun-bonded fabric plant is being used to produce synthetic filter media for MANN-FILTER at its site in Marklkofen, Germany. The combination of spun-bonded fabric production processes and integrated furnaces for thermally bonding the non-woven material is new compared to previously applied processes such as melt blowing. The new production method enables annual process energy savings of up to 70% compared with current production techniques. This amounts to a CO<sub>2</sub> reduction of more than 4,000 tonnes per year.

In addition to spun-bonded fabric plant, a recycling plant has also been built where edge trim and rolls of defective material resulting from production are reprocessed into granulate and reused in the process. As a result, the facility is nearly waste-free and highly sustainable.

### MANN-FILTER air filters made from recycled plastics

MANN-FILTER air filters made from recycled plastics make another significant contribution towards the conservation of resources. One square metre of C 24 005 filter medium contains recycled plastic from about two 1.5-litre PET bottles. Moreover, thanks to its high dirt-holding capacity, the air filter only requires 30% of the filter media surface area of tradi-

tional air filters with cellulose media. Further air filters using the innovative medium are currently in development and will be available soon.

### MANN-FILTER packaging made from recycled fibres

The global filtration expert also places an emphasis on sustainability with its MANN-FILTER packaging: Each green-yellow box consists of about 80% to 95% recycled fibres. For the European market, more than 4,800 filter elements are available for over 48,000 vehicles and machines, including more than 12,000 cars and transporters, more than 9,100 lorries and buses, nearly 1,000 motorcycles, and 25,500 applications in off-highway vehicles and industry.

### FSC®-certified production site for sustainable forestry

By using environmentally friendly filter media in its air filters, MANN+HUMMEL has already been committed to sustainable forestry for many years. In addition to complying with technical specifications, the company strives to operate in a sustainable and environmentally friendly manner. For this reason, MANN+HUMMEL has therefore had its production site in Zaragoza certified pursuant to the guidelines of the Forest Stewardship Council® (FSC) so that it can manufacture products that contain wood from certified sources.

### CO<sub>2</sub> savings

By using modern lighting (LED) and intelligent lighting control, switching compressors and other measures,



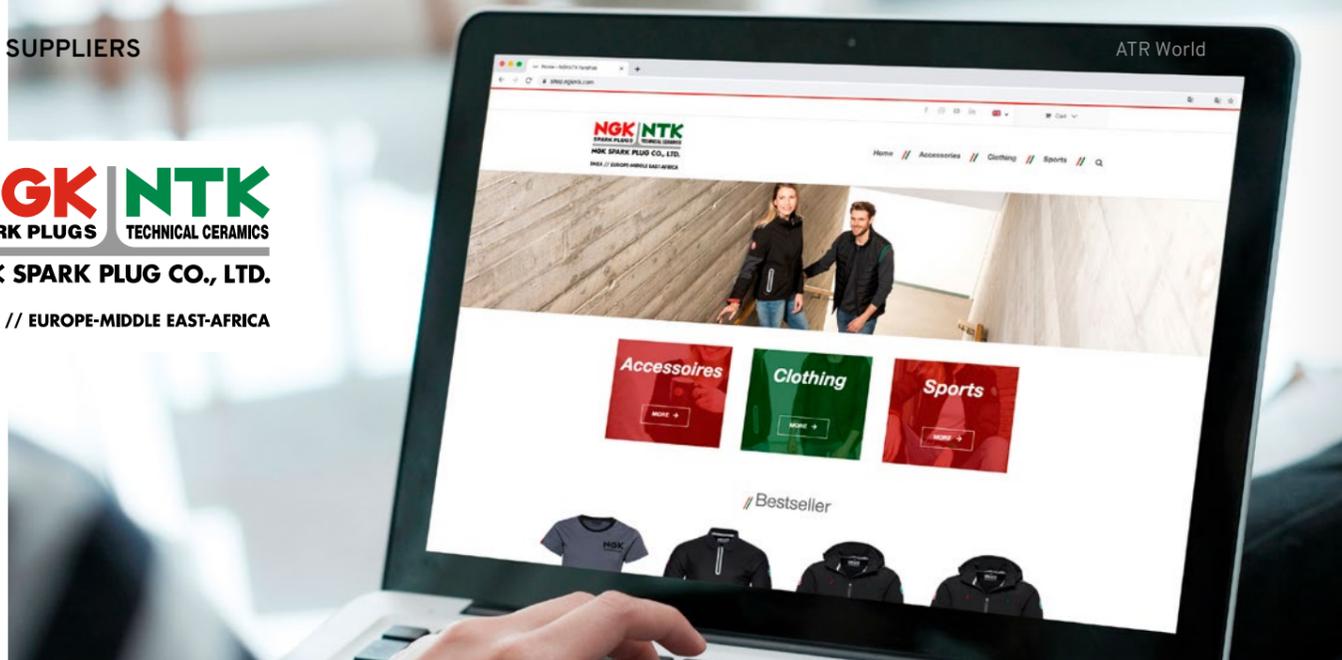
MANN+HUMMEL was able to reduce its CO<sub>2</sub> emissions by around 3,300 tonnes in 2018. All these measures aim to continually reduce the CO<sub>2</sub> footprint of MANN+HUMMEL and all aspects of the value chain and to ensure that natural resources are used responsibly.

You can find further information about MANN-FILTER products in original equipment quality here: <https://www.mann-filter.com/en/mann-filter/products/>

#### KEY FACTS

*Spun-bonded fabric plant, air filters made from recycled plastics, packaging made from recycled fibres, and an FSC®-certified production site for sustainable forestry help make up MANN+HUMMEL's sustainability portfolio.*

**NGK NTK**  
 SPARK PLUGS TECHNICAL CERAMICS  
 NGK SPARK PLUG CO., LTD.  
 EMEA // EUROPE-MIDDLE EAST-AFRICA



In the three categories – Accessories, Clothing and Sports – true fans and petrolheads can choose from items emblazoned with both brands.

## Increasing brand recognition

Fans have been waiting for this. At the beginning of April 2020, NGK SPARK PLUG, the world's leading ignition and sensor specialist, opened its first web-based fanshop.

The online fanshop offers the many fans and enthusiasts the opportunity to buy high-quality, lifestyle products emblazoned with the brands NGK Ignition Parts and NTK Vehicle Electronics. Now, true motor enthusiasts can show who they are by choosing from a product range that extends from t-shirts,



bodywarmers and baseball caps through to notebooks and keyrings. And this is just the beginning.

### Everything for the fans

Buying and receiving the goods has been made as easy as possible. The new fanshop is available in both English and German and uses standard online payment methods such as PayPal, instant bank transfer, direct debit, and Giropay. The site ships to all EU countries and all parcels are shipped, insured and traceable via DPD.

### A smooth start

The site belongs to and is run by the regional headquarters in Ratingen, Germany. To ensure that customers get the best possible service, the company is working closely with a partner who is highly experienced in online and merchandise sales. This ensures that the

shop provides the best user experience at each stage of the customer's interaction with the site, from ordering and paying through to shipping and even returning goods. In line with the company's commitment to sustainability, all deliveries from the fanshop are CO<sub>2</sub>-neutral and packaging is free of plastics.

### User friendly

Using the mobile first-design concept, the site has been designed to be user-friendly across a range of devices. The bright, friendly design and intuitive, easy-to-use structure is just as accessible on a mobile phone as it is on a laptop. The site is fully integrated and easily accessible as a sub-domain (shop.ngkntk.com) of the website (ngkntk.com). The fanshop is also embedded into the company's Facebook page to give the 445,000 followers the opportunity to quickly get to know the shop. And of course, the shop is clearly linked to the company's other social media channels, such as Instagram and LinkedIn, to ensure a maximum amount of traffic for the site.

Curious? Then visit the shop now and see the cool things it has to offer!

### KEY FACTS

NGK SPARK PLUG's first online fanshop offers lifestyle products from t-shirts and baseball caps to notebooks and keyrings.



## NTN-SNR – your manufacturer and partner for the automotive aftermarket



Powertrain: Performance Inside.

Manufacturer of original equipment and major supplier of automotive spare parts for the aftermarket, NTN-SNR is like the engine: it synchronises its energy to deliver to its customers the best performance. As one of the main manufacturers of pulleys in the OEM, world leader in hydraulic tensioners (VAG, Toyota, Mercedes, Hyundai, etc.), NTN-SNR capitalises on its manufacturing expertise to provide quality

parts and offer one of the widest and most innovative ranges of the market.



### POWERTRAIN in numbers

- 10 million pulleys manufactured per year
- 40 million of bearings for pulleys manufactured per year and 100% controlled
- 650 timing kits + timing kits with water pump
- Over 600 timing pulleys, hydraulic, tensioners & idlers
- Over 700 auxiliary belts
- Over 200 dampers and dampers kits



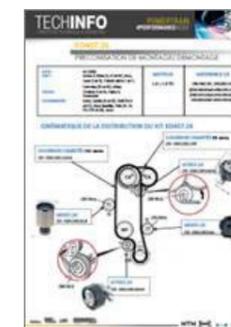
Partner to its customers and garages, NTN-SNR makes proximity and customer relations one of its engines. Aware of their constantly-renewed needs in terms of information, recommendations, analyses, and technics, the group develops and adapts its support, services, and aids to the attention of those who trust it.

## NTN-SNR: more than a supplier, a real co-pilot

### TechScaN'R

New version for the NTN-SNR application! Available on Apple Store and Google Play, TechScaN'R gives customers and mechanics easy access to technical information of all NTN-SNR references. For quick and easy ways to access all the necessary data: technical videos, augmented reality display of the part, assembly (step-by-step) or maintenance instructions, vehicle applications, catalog, new product, TechScaN'R is the ideal tool for mechanics to find the right part and all associated technical materials.

A new feature available: the entry of the license plate for French vehicles and the VIN code for the European license plates!



### KEY FACTS

NTN-SNR's TechScaN'R app offers access to everything from new products and their catalogue to instructions on assembly and disassembly of POWERTRAIN products.

### TechInfo

NTN-SNR constantly creates and adds on new technical data sheets accessible via the TechScaN'R application, TecDoc, or on its website. Dozens of multilingual Techinfo are available to distributors and garages to guide and advise them in the assembly and disassembly of POWERTRAIN products, especially tensioners and pulleys. NTN-SNR offers a preventive approach that guarantees the optimal use of its components.

OSRAM

# OSRAM today and tomorrow: tradition meets innovation

A hybrid strategy combining tradition and innovation is what sets the company apart.



Powerful halogen-based performance: the OSRAM NIGHT BREAKER® performance lamps.

OSRAM has been the market leader in automotive lighting for years and one of the industry's leading innovators. As a globally active company, OSRAM stands for its "made in Germany" quality for over 100 years and still produces core technologies and certain products in Germany to this day. In addition to its many years of technical know-how, customers also benefit from the company's high-quality standards and a wide range of products.

OSRAM Automotive has successfully established itself as a leader in innovation in the automotive sector in recent years and regularly launches new products in both the traditional and the LED sector. Its spectrum in the automotive aftermarket ranges from standardized automotive headlight lamps and special interior lighting to complete LED headlight systems.

All in all, OSRAM's entire aftermarket portfolio is closely aligned to the needs of its customers and always provides them with the right upgrade lamp thanks to its products in the Performance, Design, Comfort and Innovation categories.

## Aftermarket trends

In the aftermarket, there is one trend that continues to favour individualisation. The vehicle as a personal living space is becoming more and more important – basically as an extension to the home. This also means that customisable designs for the vehicle's interior are gaining in importance, for example a personal feel-good colour. Different colour scenarios could be used to inform the driver in which driving mode he or she is currently in while on the road, such as sport or eco mode.

LEDs are playing a key role in exterior lighting. In original equipment, LED currently is and will be in the next few years the dominant technology for modern lighting systems in and around the car. Standardisation and certification of these products are still obstacles to replacing conventional technologies in cars with LED solutions on a large scale; quality brands such as OSRAM already have high-quality retrofit products available.

But halogen and xenon will probably also remain proven solutions for basic lighting in vehicles. OSRAM will continue to offer its customers high-performance and high-quality retrofit options. Upgrade products such as the Night Breaker Laser lamps can achieve up to 150% more brightness with a light beam of up to 150 metres in length compared to standard products – a good result for a traditional halogen light source. There will always be different lighting technologies that will exist side by side because each technology has its advantages. Depending on the region, however, the focus will shift more or less quickly from classic technologies to new technologies such as LED. Thanks to its broad portfolio and many years of experience, customers will continue to find the right products for their application at OSRAM.

## KEY FACTS

*OSRAM's diverse automotive lighting solutions help drivers improve and customise lights with high-quality products.*

SKF

# Speaking of contributions to the automotive industry...

SKF began with an innovation and, today, registers around one patent per day for inventions.

In 1907, Sven Wingquist, a plant engineer responsible for repairs and maintenance in a textile mill, was dissatisfied with the ball bearings in use. This led him to invent a double-row self-aligning ball bearing, which marks the start of SKF, a company that now has a global presence in 130 countries. By 1908, Wingquist's patent was granted and the first branch offices opened in additional European countries. This global expansion continued, and by 1912, SKF had a presence in 32 countries. By 1919, 14,000 employees were employed around the world.

During these early years, SKF put resources and effort into research, gaining a foothold in a broad range of products and solutions including seals, lubrication systems, services, and bearings. Today, SKF registers around one patent per day for inventions.

## Did you know that SKF founded Volvo?

The brand name Volvo was originally registered as a trademark in May 1911, with the intention of being used for a new series of SKF ball bearings (Volvo, in Latin, translates to "I roll" in English). However, the idea was short-lived, and SKF instead decided to use its initials on all of its bearing products.

In 1924, Assar Gabrielsson, an SKF sales manager, and Gustav Larson, an engineer educated at the KTH Royal Institute of Technology, decided to begin construction of a Swedish car able to handle Sweden's rough roads and colder climate.

In 1926, AB Volvo, then a subsidiary of SKF, began activities, producing a trial series of 10 cars. After a year of preparations and prototyping, the firm was ready to start work in the car manufacturing business within the SKF Group. The first car, a Volvo ÖV 4, rolled off the production line in 1927 at the factory in Hisingen, Gothenburg – one of 280 cars manufactured that year. But just three years later in 1930, Volvo sold 639 cars. The first truck, the "Series 1," was introduced in January 1928 and became an immediate success, attracting attention outside Sweden. The export of trucks to Europe began soon after.

In 1935, AB Volvo was introduced at the Stockholm Stock Exchange. That same year, SKF decided to sell its shares.

## A race to the top

SKF's role as an important contributor of car technology dates back to the start of the automotive industry itself and its de-

## KEY FACTS

*SKF's long and storied history involves the development of double-row self-aligning ball bearings, the founding of Volvo, and collaborations with Ferrari, Bugatti, and Ducati.*

mand for roller bearings during the 1920s. Over the years, SKF became involved with the industry in many ways, and eventually their expertise attracted the attention of racing teams around the world.

First, it extended to the classic blue Bugatti of the 1930s. Then, in 1946, SKF became a supplier to the motorcycle manufacturer, Ducati. A year later, the company struck a deal with Scuderia Ferrari, and the longest uninterrupted technical collaboration in Formula 1 history was initiated.

And it was a good match. At their second appearance in the Grand Prix circuit in 1947, Ferrari won. We realised early on that the conditions of top-class racing provide the ultimate testbed for proving new designs, new techniques, and new ideas.

## ZF Aftermarket expands its range of electronically-controlled dampers significantly

With around 28 million units produced, the CDC system is one of the most widely used electronic chassis systems for passenger cars. In order to provide workshops with the best possible support for maintenance work on vehicles with CDC dampers, ZF Aftermarket is expanding its offering in this area.

The extended product range includes Sachs CDC spare parts for mid-size and compact cars, in conjunction with many new additions from the luxury class. These high-tech shock absorbers offer an attractive opportunity for workshops as there are currently no low-quality replacement parts available.

Electronically-controlled dampers such as the CDC system by ZF Aftermarket have a great advantage over conventional chassis systems: Using CDC dampers, drivers can select and drive different driving settings dynamically according to their personal preference. In contrast, conventional chassis systems dictate the setting (standard or sport) once the vehicle has been configured. In such a case, a change is only possible with the installation of new parts.

On the other hand, the Sachs CDC is electronically controlled by solenoid valves which adjust the optimum damping force within a fraction of a second. This allows the driver to enjoy outstanding driving comfort without loss of driving stability during an evasive maneuver or emergency braking. In such a case, the CDC sets the damper characteristic curve to a 'hard' setting in a lightning-fast manner.

Since the market launch in 1997, ZF Aftermarket has produced and equipped



**AFTERMARKET**  
LEMFÖRDER SACHS TRW

### KEY FACTS

*Sachs CDC spare parts for compact, mid-size, and luxury vehicles offer workshops an attractive opportunity as no low-quality replacement parts exist.*

an enormous range of vehicles with approximately 28 million CDC dampers. Previously, only present in the luxury class, car manufacturers have gradually also equipped mid-size or compact cars with CDC dampers on customers' request. Even small cars such as the new Volkswagen Polo can be equipped with CDC.

Under its Sachs brand, ZF Aftermarket provides automotive companies with a comprehensive range of CDC dampers. The CDC spare parts are available for but not limited to:

- Audi A4 (YOM 2007 to 2015)
- Audi Q5 (YOM 2008 to 2016)
- Audi Q7 (YOM 2006 to 2015)

- Porsche Cayenne (YOM 2002 to 2010 and 2010 to 2017)
- Volkswagen Touareg (YOM 2002 to 2010 and 2010 to 2018)

Throughout 2020, the range will be expanded by up to 30 additional part numbers.

ZF Aftermarket offers these and other technical innovations to the independent aftermarket. Find out more on: [aftermarket.zf.com](https://aftermarket.zf.com)

## Mobility-as-a-Service (MaaS) is a simple concept that has tremendous impact on transportation

Evolutions in digital technology and lifestyle have resulted in shared and user-friendly mobility.

The concept of MaaS is simple – it describes the shift from personally-owned vehicles to mobility available as a service. As simple as it is for the end user to utilise, MaaS is made possible thanks to a complex infrastructure and advanced technologies. This notion is certainly not the first thing that comes to mind as customers use their contactless keycard to unlock a vehicle or order transportation by way of a smartphone app, but without these advancements in technological infrastructure, the future of transportation might not look so mobile.

MaaS relies on three main technologies to power its ecosystem: 1) big data, 2) mobile applications, and 3) the Internet of things (IoT).<sup>1</sup>

**1. Big data:** demographics, payment information, and location data are included in the types of information collected from customer profiles and

devices. With this data, reliable information and predictions can be made for the end user.

- 2. Mobile applications:** besides providing an interface for customers to utilise such mobile services, apps can allow users to connect anywhere while collecting traveler information.
- 3. IoT:** devices can provide customers with a variety of data including weather, passenger information, and routing.

In addition, MaaS has a major impact on the individual user when it comes to staying mobile, especially considering that the need for personal vehicles is becoming less important. In essence, MaaS promotes the use of shared vehicles and public transportation services meaning there are less cars on the road. Furthermore, it can help vehicle owners offset the cost of ownership when vehicles are used for ride-sharing and vehicle lending.

Around the world, many cities have jumped at the opportunity to improve infrastructure and operations to support MaaS,<sup>2</sup> but car sharing in particular requires high population density in order to work. Take Los Angeles and Houston in the USA as examples; given each city's urban sprawl, car ownership still reigns supreme as large distances between locations act as a barrier for car sharing.<sup>3</sup>

While MaaS may not work everywhere, it has the right ingredients to shape the future of mobility. When modes of transportation are readily available and can be easily rented and returned, user rates increase substantially. That in addition to the increased awareness of climate change and taking on more of an environmentally-friendly lifestyle point to MaaS as a way to stay mobile, now and in the future.<sup>4</sup>



<sup>1</sup>Why Mobility as a Service is the Future of Transportation. Eddie Segal, IBM Developer Recipes. April 2, 2020. <https://developer.ibm.com/recipes/tutorials/why-mobility-as-a-service-is-the-future-of-transportation> <sup>2</sup>Ibid <sup>3</sup>Shared mobility and Mobility as a Service (MaaS). Just Auto Magazine. [https://justauto.nridigital.com/just-auto\\_magazine\\_dec19/shared\\_mobility\\_and\\_mobility\\_as\\_a\\_service\\_maas](https://justauto.nridigital.com/just-auto_magazine_dec19/shared_mobility_and_mobility_as_a_service_maas) <sup>4</sup>Why Mobility as a Service is the Future of Transportation. Eddie Segal, IBM Developer Recipes. April 2, 2020. <https://developer.ibm.com/recipes/tutorials/why-mobility-as-a-service-is-the-future-of-transportation>

# Access to multi-brand OE telematic data

ATR & Caruso paving the way for the connected aftermarket.

As reported in the April 2020 issue of ATR World, the increasing number of connected vehicles will have a significant impact on the aftermarket industry in the coming years. ATR is actively exploring this topic, among others through its involvement in Caruso ([www.caruso-dataplace.com](http://www.caruso-dataplace.com)).

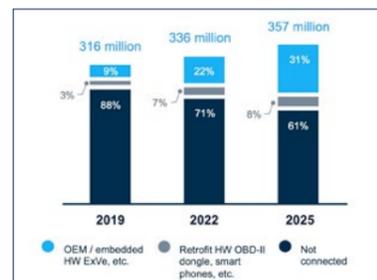
Caruso was founded in March 2017 by the data specialist TecAlliance, with the aim of building a digital platform to allow third parties to get access to OEM telematic data. ATR was the very first trade partner to support this initiative from the industry and to enter Caruso's capital with a 10% share. It was followed shortly by other parts wholesale organisations, including LKQ.

Three years down the line, the platform is up and running with data already available for five different brands: Audi, BMW, Mercedes, MINI and Volkswagen. Two further OEMs plan to join the data marketplace this year. As a B2B platform, Caruso collects data from different car

manufacturers, standardising it before distributing it to data consumers, such as IAM workshop chains, that can use it to develop new services around predictive maintenance:

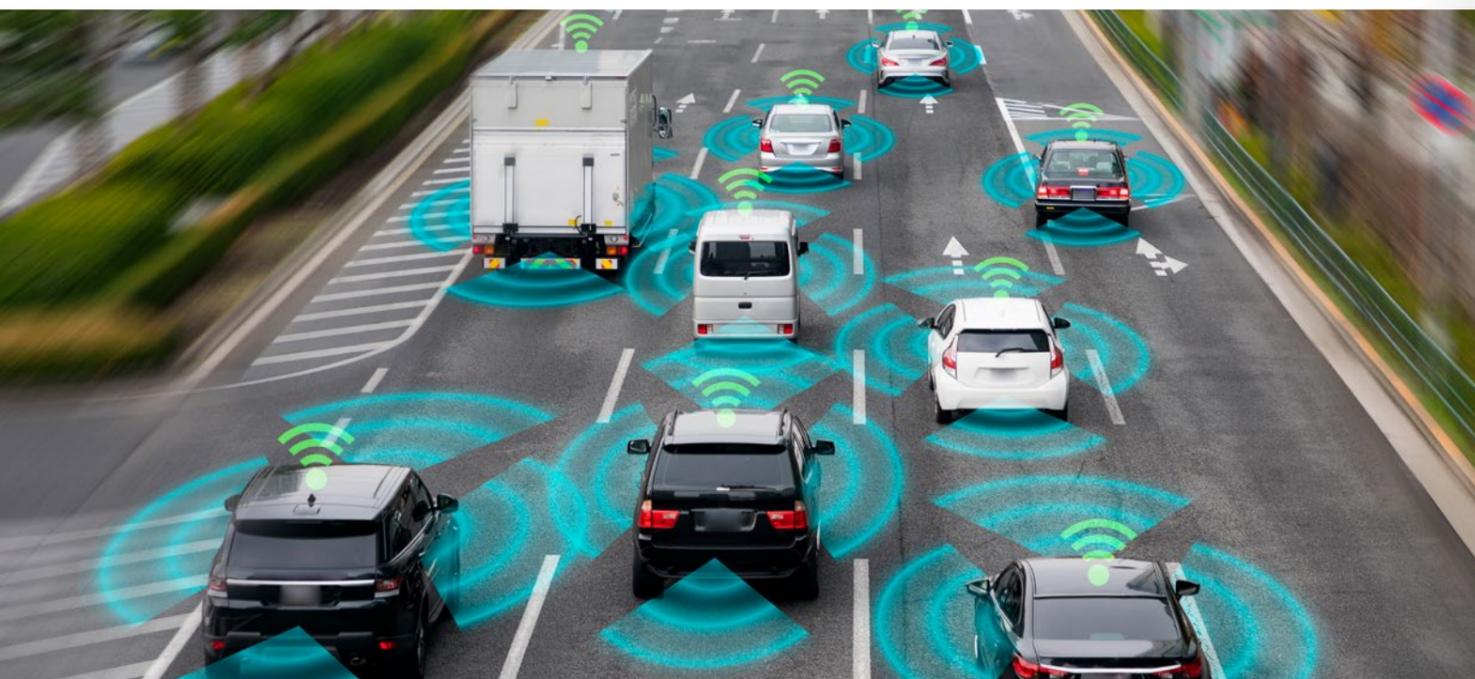


Providing in-vehicle data for mobility services.



Growing connected car parc in Europe.

The market for telematic data is still in its infancy with about 15% of the European car parc for passenger cars being currently equipped with telematic hardware. However, Caruso expects this portion to reach 40% by 2025:



OEMs are the driving force behind car connectivity as the majority of newly-registered vehicles come with connectivity as standard equipment. Telematic Service Providers are also active in connecting the “older” vehicles through dongles or black boxes.

The range of potential applications for telematic data is extremely wide. Specifically, for IAM workshops, predictive maintenance and remote diagnostics could be game changers as a way to interact with end-customers:

Ideas of use cases – already possible today.



“Caruso enables all stakeholders of the aftermarket to develop and grow their connected Mobility Services.”

**KEY FACTS**

Caruso and ATR have been working alongside some of the world's largest OEMs to access telematic data. Caruso has also launched a Connected Vehicle Field Test in Germany (with ATR and LKQ participating) to access data from thousands of connected cars.



Alexander Haid, Managing Director at Caruso

Parts distributors will have a key role to play in accompanying workshops from the “traditional” repair business into the new connected aftermarket. In this process, both the parts distribution logistics and the overall IAM value chain will have to evolve. “Caruso enables all stakeholders of the aftermarket to develop and grow their connected Mobility Services,” explains Alexander Haid, Managing Director at Caruso. “We do this by constantly improving the coverage and quality of vehicle data from OEMs.”

Caruso recently launched a Connected Vehicle Field Test in Germany. The aim of this test is to gather and study OE telematic data from thousands of connected cars across several companies. Both ATR and LKQ are participating in this test which will last over a 6-month period from June to December 2020. This will allow ATR to get “hands-on” experience on telematic data and to start testing possible applications for its members.

ATR World will share with you the key learnings of this test in its April 2021 issue: stay tuned!

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