



# ATR World



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# Dear readers



We are happy to present you this year's last issue of ATR World. We take this opportunity to welcome Henning Kaeß once more who joined ATR as Managing Director Marketing/Digitisation in September. Kindly browse through pages 08 and 09 for an introductory interview with him. As of January, Warren Espinoza will complete our Management Team. He will be introduced in the next issue.

One month ago, ATR held its Annual General Meeting. One highlight was the election of the Supervisory Board. Andrey Soyuznov from Forum-Auto Group was elected new member and succeeds Warren Espinoza. A brief summary of the meeting and the profile of Andrey Soyuznov can be found on page 06. Our ATR LatAm team organised a web conference. For more details, kindly look at page 07.

In the Industry chapter, you can find an update on COVID-19 and the IAM. We would like to conclude this issue with the subject of hydrogen-powered fuel cells in transportation in the Trends section.



Henning Kaeß and Wolfgang Menges

*Henning Kaeß* *Wolfgang Menges*

Last but not least, we want to take this opportunity to thank you all for the fruitful collaboration during this year and we hope to meet you again soon in person. We wish you all a happy festive season and a good start to 2021.



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# Two beacons of light for growth in the automotive Independent Aftermarket (IAM)

Amid a short-term demand contraction, digitalisation and the aging car parc will keep the Aftermarket less impacted by the COVID-19 pandemic.

## KEY FACTS

*The automotive Independent Aftermarket (IAM) is expected to recover better and be less impacted by the COVID-19 pandemic, with digitalisation and the aging car parc working in its favour.*

This year has been incredibly difficult for many people and businesses around the world. The COVID-19 pandemic battered some industries more than others and many experts feared how the automotive industry would fare. Within the automotive Independent Aftermarket (IAM) specifically, market growth projections have been downgraded and reverberations are expected to be felt through 2021; however, after a short-term drop in demand, the IAM is expected to be less impacted than the automotive industry overall<sup>1</sup>.

Though a decrease in passenger vehicle mileage in March of this year has impacted demand for fast-moving parts categories including tires, brake parts, lubricants, accessories and more, there are two bright lights that may help determine positive overall recovery – wide-spread digitalisation and the aging car parc<sup>2</sup>. Despite the negativities surrounding COVID-19 and its impacts on our livelihoods and global economic performance, several research bodies have indicated that these two factors will help demand in the IAM bounce back after the more immediate effects of the pandemic wear off.

## OPPORTUNITIES FOR GROWTH THROUGH DIGITALISATION

The digitalisation of parts and services retail across the industry is a trend that will accelerate recovery in the Aftermarket; it is estimated that the adoption of such digital channels for customer sales will expand by 17% in 2020<sup>3</sup>. This is in part due to social distancing and

virus contamination fears at workshops where contactless options may not exist. Additionally, IAM workshops are generally far away from being ready digitally compared to OEM workshops, which can, in turn, be seen as an opportunity for future growth. Here, challenges for the IAM workshop network tend to be the resistance to an expensive digital transformation and the lack of an empowered and centralised steering entity to set standards and drive change<sup>4</sup>. IAM players have a host of options to drive digitalisation efforts, from marketing and sales to new products/business models and operational processes, but success requires the support of an agile organisation<sup>5</sup>. It's no doubt that digitalisation initiatives are critical to ensure the long-term relevance of industry players.

## THE CURRENT CAR PARC CAN SPUR RECOVERY

The COVID-19 pandemic has changed the way in which we live our lives, and that includes our driving habits. Driver willingness and ability to spend and preferences for private transportation will both positively impact recovery for the IAM.

**Repair what you have:** with more people working from home, increased financial burdens, and a decrease in personal travel, it is more likely that consumers will postpone new car purchases in this current climate. Instead, it is expected that drivers are likely to continue using their existing vehicles<sup>6</sup>. In the US, the average car parc age is about 11.8 years, whereas in Germany, Poland and Russia, it is about

9.5 years, 17.1 years, and 13.4 years respectively. All of this is likely to mean higher investments in repair and maintenance of the existing car parc, surely to benefit IAM players<sup>7</sup>.

**An increase in mileage and transportation preferences:** despite a drop in average mileage for passenger vehicles in March of this year, mileage has since increased for both business and personal travel<sup>8</sup>. This is good news for the IAM; in line with general economic growth and easing restrictions, people are driving more. As an example, the average mileage for passenger vehicles (km per calendar week) in Germany increased by 78% between week 15 (week of 6 April) and week 22 (the last week in May) this year<sup>9</sup>. Additionally, people are choosing private vehicles over shared and public modes of transportation<sup>10</sup>.

The impacts of COVID-19 have been felt by people around the globe. For the IAM in particular, it is encouraging to already see signs of recovery and less impact than in other industries. There are many roads to long-term success in the IAM, but agility, tactfulness, and a forward-thinking mentality will surely benefit those within our industry.

<sup>1</sup>The Automotive Independent Aftermarket (IAM) – COVID-19, the new normal and digital business models, European perspective. Roland Berger. 23 June 2020. <sup>2</sup>Digitization and Aging Vehicle Parc to Help Keep Global Automotive Market Afloat Amid Demand Contraction. Frost & Sullivan. 15 June 2020 - <https://ww2.frost.com/frost-perspectives/digitization-and-aging-vehicle-parc-to-help-keep-global-automotive-market-afloat-amid-demand-contraction/> <sup>3</sup>Ibid. <sup>4</sup>The Automotive Independent Aftermarket (IAM) – COVID-19, the new normal and digital business models, European perspective. Roland Berger. 23 June 2020. <sup>5</sup>Ibid. <sup>6</sup>Digitization and Aging Vehicle Parc to Help Keep Global Automotive Market Afloat Amid Demand Contraction. Frost & Sullivan. 15 June 2020 - <https://ww2.frost.com/frost-perspectives/digitization-and-aging-vehicle-parc-to-help-keep-global-automotive-market-afloat-amid-demand-contraction/> <sup>7</sup>Ibid. <sup>8</sup>The Automotive Independent Aftermarket (IAM) – COVID-19, the new normal and digital business models, European perspective. Roland Berger. 23 June 2020. <sup>9</sup>Ibid. <sup>10</sup>Ibid.

# Annual General Meeting of ATR International AG in Stuttgart

Due to the corona pandemic, the 30th Shareholders' Meeting of ATR International AG had to be limited to only the Annual General Meeting (AGM) without physical presence. The AGM took place in Stuttgart on 23 November 2020.

The Managing Directors of ATR International AG presented the business

report on the past business year. Two new shareholders joined ATR: Mannheim Spa from Chile and AREM Group from Tunisia. ATR welcomes them on board once more.

All in all, the past business year was a positive one despite the turbulent times which the automotive sector is facing.

The projects ATR LatAm und ATR APAC are developing well. Vincent Tan, General Manager – Asia Pacific, moved to the new branch office in Singapore in July this year and regular conference calls with partners are in full swing. The ATR LatAm team, Guido Goyeneche and Francisco Carvajal Hofstätter, organised a web conference in September 2020 about commercial recovery strategies in Latin America after COVID-19. Kindly refer to

page 07 for more information about the web conference.

Another milestone of the AGM was the election of ATR's Supervisory Board. All members of the existing Supervisory Board were re-elected except for Warren Espinoza who will become Chief Executive Officer of ATR International AG as of January 2021. Andrey Soyuznov of Forum-Auto was elected as a new member of the Board and succeeds Warren Espinoza. ATR thanks Warren for his valuable contribution to the work of ATR and wishes Andrey a good start on the Supervisory Board. He brings broad knowledge of the Aftermarket sector and knows the ATR shareholders well.

ATR hopes that we can meet again in person at next year's Shareholders' Meeting.



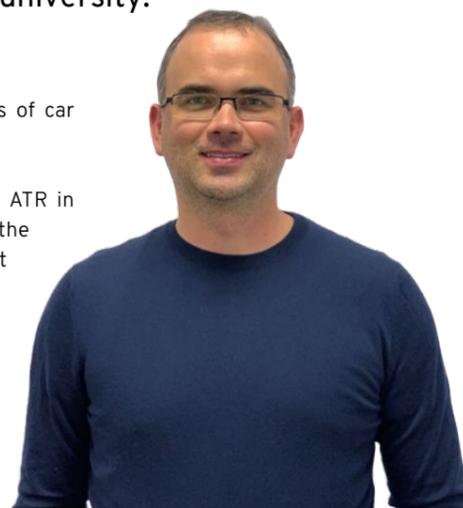
# New member of the ATR Supervisory Board

Andrey Soyuznov (born 1981) has been elected to ATR's Supervisory Board. His career in the automotive sector began in the late 90s when he started to work for Forum-Auto Group in parallel with his education at university.

In 1998, as co-founder of Forum-Auto Group, Andrey Soyuznov was involved in the reorganisation of the company after the crisis. Holding a degree in economics, Andrey has gathered over 21 years of experience in the automotive Aftermarket. Today, he is the Executive Manager and one of the main shareholders of the Forum-Auto Group. The company is one of the leading groups of automotive distributors in Russia and Belarus with a turnover of nearly EUR 600 million. They have been an official distributor to more than 200 European, Japa-

nese, and Korean manufacturers of car parts for more than 25 years.

When Forum-Auto Group joined ATR in 2005, they enabled ATR to enter the Russian market – an important step. The company has seen impressive development over the last 15 years. Andrey Soyuznov has a very extensive knowledge of the Aftermarket and its players. He knows the ATR shareholders well and is appreciated by all.



# ATR LatAm web conference

New challenges and business recovery strategies for the IAM.



The first ATR LatAm web conference and also the first Latin American focused web conference of this kind among the ITGs took place on 10 September 2020. More than 100 owners or employees from ATR shareholders, suppliers, and other interested companies participated.

The webinar was organised by the ATR LatAm team headed by Guido Goyeneche and Francisco Carvajal Hofstätter. It focused specifically on the challenges and needs in Latin America with the aim of finding business recovery strategies for the IAM after COVID-19.

Guido Goyeneche who moderated the conference first informed about the activities of ATR LatAm in the region. He was followed by keynotes of Manuel Osorio and Eduard Cyterszpiller from Simon-Kucher & Partners, the world's leading management consultancy for commercial strategies and sales. Another highlight of the conference was a panel discussion in which Delfim Calixto and Rubens Campos of two major ATR suppliers Bosch and Schaeffler took part as well as Luis Norberto Pascoal from the ATR shareholder, DPK – Distribuidora Automotiva (Brazil), and Daniel Mannheim from Mannheim Spa (Chile). They discussed the main challenges in Latin

America and strategies that the IAM should adopt after the crisis. Special focus should be paid to service provision, digitisation, telematics & access to data, pricing, training of mechanics, and changes in consumer behaviour.

This Latin American focused webinar is just one example of the result of ATR's strategy to decide to invest in a robust structure in the region. With a local team, ATR is and will be able to specifically identify and address local industry issues, act-

ing under ATR global guidelines but executing based on local reality.

The web conference was a great success and will not be the last one of this kind. Guido Goyeneche and Francisco Carvajal Hofstätter from ATR LatAm are available for further information: latam@atr.de. See and hear a short summary of the web conference [here](#).



## Relocation of ATR Headquarters / Change of registered office

The last weeks have been turbulent as ATR is relocating from Stuttgart to Denkendorf. From the beginning of 2021, ATR will start working in its new office, located at: **Object Campus, Marie-Curie-Straße 3, 73770 Denkendorf**

ATR hopes to be able to welcome you in person to its new premises soon.



# Challenges as opportunities for the IAM

Henning Kaeß has been ATR's Managing Director Marketing/Digitisation since September 2020. His activities in these two areas also include topics such as public relations, association work, dataplaces, and workshop concept management. On the latter, Henning Kaeß goes into detail in the following interview in order to give the readers of ATR World his insights on this topic while explaining ATR's activities.



**Mr. Kaeß, you have been ATR's board member for the Marketing and Digitisation departments for three months. From your perspective, what is the situation of the Independent Automotive Aftermarket?**

The IAM is undergoing change. Competition has intensified due to the consolidation of parts manufacturers, the parts trade, and new players such as car sharing fleets or platforms like Amazon. OEMs are also increasingly expanding their Aftermarket activities. The sharp increase in digitalisation and changes in customer purchasing behaviour are also contributing to the change. Market players must respond to innovations in the areas of new drive systems and technologies, connected cars, telematics, and access to data in order to maintain their market position.

**And what is the situation in the automotive repair market?**

Automotive workshops are also facing a transition from the non-digital to the digital world, from writing pads and computers to interactive work in networks. I am referring specifically to online bookings for workshop appointments, the visibility of the workshops in portals, and also the communication in these portals with the end customers. These are things that we, as private individuals, have been doing for years. We have already taken the first steps in our industry. Now it is important to take the next steps.

**This is not a new topic. Is it not taken seriously enough?**

This is certainly a mix of several things. Professional workshops have extremely high customer loyalty. This means that

there is currently no need for them to open up to new opportunities. There are people who claim that the first wave of COVID-19 has now given our industry a digital boost. I don't believe that COVID-19 is responsible for this, but rather a completely normal development and we still have the real push ahead of us.

**What is the reason why the repair industry is lagging behind in this area?**

Booking a hotel room or restaurant visit online has something to do with fun and enjoyment. It is not the same with a visit to the workshop. If we take a look into the future, all of this will be possible and transparent. The challenge is to integrate everyone involved in this process - from the driver with their cell phone and the mechatronics technician analysing errors, to the parts dealer providing the right spare parts.

**In which direction must the parts trade and workshop develop to make digitalisation work?**

The automotive Aftermarket has a unique selling point - direct access to the workshop. And with this, it also has an obligation to make workshops fit for digitalisation. Take Amazon, for example, where it's the other way around: there are a lot of people at their headquarters who are responsible for the auto parts business. Fully digitised. But they do not yet have access to a workshop. We have to take advantage of that. But that only works if we have an open solution that, in principle, allows any workshop to participate. No matter where it comes from. We need to



establish a workshop network that can be administered, managed, and marketed. Then it works.

**In what form and to what extent is ATR active in the field of digitisation?**

ATR is already active in many different fields of digitisation. As some of the readers already know, ATR is in constant contact and exchange with almost all relevant players on this topic. One topic that is currently in the foreground is the availability of the necessary data and, in particular, access to vehicle data. ATR works closely with the leading organisations and actively supports this process.

But also, the validation of already-existing services and solutions is an important focus. After all, there are already many ways of using the existing data to continue working successfully. However, what should not be underestimated is that all players must be involved in the digitisation process in order to achieve holistic data management and networking of the systems that exist today so that customers can be offered a convenient end-to-end solution. If successful, digitisation will increase the value of the IAM through improved customer loyalty and satisfaction.

**Does the future belong to workshop concepts?**

Absolutely! A workshop concept, if you live it properly, is a strong means of identification for the entire company. That is why the value of a brand is so important. That

is also a decisive reason why we place so much emphasis on quality in our concepts, for example with the workshop tests. Over the past years, we have seen how the quality of work in the workshops has improved. This is an important trend because, at the end of the day, it's all about where a driver feels comfortable repairing their vehicle.

**Are the independent multi-brand companies well positioned to keep up with current and future technology? Digitisation is having a full impact there as well.**

There are many companies that are well positioned because they have continuously worked on their qualification and workshop equipment. Other companies will find it harder to keep up. But different models are now developing in the market, such as tool or workshop equipment sharing. Or better equipped workshops offering support services to colleagues. I find all this very positive because automotive technology is developing quickly. Today we are dealing with driver assistance systems in the windshield, whereas tomorrow they will be in the headlights.

**Vehicle data, digitalisation, connected cars. Does the free market have a solution for this?**

A lot is happening in the area of vehicle data at the moment. We have often talked about Caruso - the place where you can get standardised data from different brands. They have taken a giant step for-

ward and defined 42 relevant data points that are really important. In the future, we will be able to map all our services and use cases with these data points. A major field test is currently underway in Germany with Caruso and its partners on the vehicle manufacturer side. Caruso already reported briefly on this in the last issue of ATR World. So yes, we have a solution. It would be, however, very advantageous if further parts trade cooperations would participate. Isolated solutions bring nothing at all.

**What are the next steps?**

There are still some steps to be taken to turn data into usable services. One idea, of course, is that the mechatronics technician receives error codes before the car is in the workshop. Then they know in advance what to expect. Do I have to repair something or can I simply delete the error codes? That would be a great idea for a start. And then things like proactive and predictive maintenance come along. That's not a pipe dream, because that already exists, for example in mechanical engineering. Today, there are already very good databases with vehicle information about cars. The question is how we can network this data so that it can be used by all market players. Ultimately, that will be the key to success. I am very positive about this.

## Profile

- **Name**  
Henning Kaeß
- **Born** 1966
- **Marital status**  
Married with 2 children
- **Professional career**  
Car mechanic, Economic engineering, Development and construction management
- **Previous positions**  
Development Manager, Sales Manager, CPO - Chief Purchasing Officer, Business Development, General Manager
- **Hobbies**  
Diving, Snowboarding, Mountain biking

# Create Business is investing strongly in the development of its own brand

Under three categories, the company plans to introduce a variety of vehicle repair components under the IndieParts label.

IndieParts includes several products, lubricants, batteries, discs and pads, turbochargers, injectors, alternators, starters, windshield wiper blades, and lamps. The brand identity has three distinct colours: warm red, green, and blue.



Warm red represents all mechanical components such as lubricants, brakes, and turbos. The green range comprises of electricity products which means alternators, starters, batteries, and lamps. Blue, on the other hand, represents consumables such as windshield wiper blades.



IndieParts batteries are available with 40 references and, in addition to standard technology batteries, Create Business also offers batteries for cars with a start-stop system. To create this offer they use world-renowned manufacturers with enormous experience and knowledge in the manufacturing of batteries.



The brake range includes more than 2,000 references between brake discs and

pads and aims to expand their offer for a less demanding park. All products in the range comply with European regulations, namely the ECE-R90.



The lubricants range has more than 35 references for light and heavy-duty engines and hydraulic greases and oils for heavy and industrial vehicles and machines.



The company's windshield wiper range consists of 34 references and is divided into three categories: Flexible Plus, Metal Plus, and Rear wiper blades.



The IndieParts lamp range has 62 references and includes long- and medium-range headlamps, turn signals, vehicle interior lighting, license plate lighting, etc.



In starters and alternators, they carry more than 3,000 references most of them being new products without core.



The IndieParts turbocharger range has more than 4,000 references all rebuilt.

New products will soon be available, such as liquid clean for windshield in 1- and 5-liter packages, among others.

#### KEY FACTS

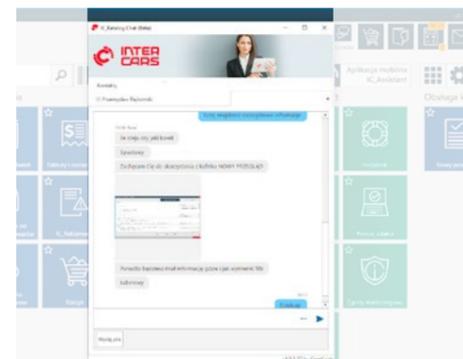
Create Business will offer mechanical components, electricity products, and consumables with their IndieParts brand.

# Tools of the future

Digital technology means arrangement of a new, convenient and widely available world.



External communication is the main pillar for every type of business, on which a strategy of operation is being built. In order for it to be stable and well established, suitable tools are required. Chat in Catalogue Online and in IC\_Assistant are exactly such digital helpers, thanks to which various business activities are becoming easier, faster and more convenient.



After a several-month testing period, with participation of a group of selected Inter Cars customers, taking this opportunity, Inter Cars would like to thank them a lot for all their efforts; the Chat in Catalogue Online has been officially launched for all the system users. As Polish users have shown favourable feedback on this tool, Inter Cars is currently working to introduce the tool for the Lithuanian market.

#### HOW DOES THE CHAT HELP THE CUSTOMERS OF INTER CARS?

- it provides a fast and easy way of contacting the company in case of any unclear situations with settlement of accounts,
- makes the claim process much easier,
- provides immediate information about deliveries,
- is a source of quick contact in any urgent case,
- shortens the path to reach the proper person to contact.

"Customers who had a chance to use the Chat functionality in Catalogue Online

confirmed that implementing this tool is the best and fastest way of maintaining relations with and providing support for customers in a convenient way," said Rafał Polewski, Manager.

#### SUCCESS IN THE POLISH MARKET

Inter Cars is pleased that its proprietary tool has become a novelty in the Polish market; because it has resulted in such a success, they are able to implement it Europe wide. Chat has been built based on one of the most popular communication platforms in the world – Microsoft Teams – which is used by over 75 million people daily. Inter Cars believe that their users will substantially increase the statistical data.

#### HOW DOES THE CHAT WORK?

In the Contacts tile next to each person, one can find, besides a telephone number and e-mail address, a chat icon which makes it possible to contact a particular person responsible for particular areas at Inter Cars (delivery, finances, claims, returns, etc.). This way, Inter Cars can shorten response time to a minimum.

#### ADDITIONAL FUNCTIONS

Besides Chat, customers using the tool will also be able to:

- take part in online meetings or in internet connections using audio-video tools of their computers,
- take part in online trainings organised by Inter Cars,
- send and receive documents with a Sales Representative, e.g. a claim, promotions, or financial documents,
- receive "live" instructions on how to use particular functionalities in Catalogue Online.

You are more than welcome to try out the all the functionalities of the Chat.

#### IC\_ASSISTANT MOBILE APPLICATION

Mobile solutions are an area which is surely worth investing in. Every company knows about that, big and small, which in

the last few months had a crash with the "COVID wall".

#### WHAT DO MOBILE TECHNOLOGIES ALLOW FOR?

- increase efficiency,
- improve the process of order realisation,
- increase the quality of customer service,
- minimise the margin for human error in the structure of orders and invoices,
- speed up the payments.

This is just a brief overview of the advantages in which the company developing mobile technologies will receive.

IC\_Assistant is a synonym of such technology, a tool providing its customers with all the above listed advantages and many more. It is a mobile assistant, thanks to which payments, orders, deliveries, and/or invoices are not the company's nightmare anymore.

#### WHAT DOES IC\_ASSISTANT OFFER TO CUSTOMERS?

The IC\_Assistant application provides the possibility, among other things, to check if a particular part has been ordered, how much limit is left in a particular contract, or settle invoices in an easy way. Additionally, thanks to its mobile character, it does not require the employee to go to the office to look up information on a computer. All activities can be done virtually on a mobile device.

All you have to do is download the application and log in using one's IC\_Premia CASH card or using your login and password to IC\_Katalog ONLINE.

#### KEY FACTS

Inter Cars' Chat in Catalogue Online and IC\_Assistant will help customers connect with the company more easily and in a more convenient way.



Johan Regefalk, CEO of KGK, and Henrik Ivarsson of KGK Academy

## KGK and Autoexperten establish partnership with Motorbranschcollege

Two strong players within the automotive industry, KG Knutsson AB (KGK) and Autoexperten, have decided to get involved in supporting schools within the framework of Motorbranschcollege, involving skills development for automotive engineering teachers, product training, and access to a national network of stores and workshops.

“Our partnership with Motorbranschcollege will open up our range of courses within KGK Academy to teachers at certified schools,” says Henrik Ivarsson, Product Manager at KGK Solutions. “KGK Academy offers a broad and comprehensive range of courses that will provide excellent skills development for the country’s certified Motorbranschcollege sites.”

The automotive industry has a major skills shortage and needs both short-term and long-term recruitment. An additional 5,300 employees will be needed over the next three years.

Motorbranschcollege certification represents a quality stamp for automotive engineering courses within automotive and transport programmes in schools. It is an

**KGK** important initiative for skills provision in the automotive industry.

“We are delighted that KGK and Autoexperten want to be part of Motorbranschcollege and further contribute to improving skills and product knowledge among teachers in our automotive engineering courses,” says Jonas Hehrne, Operations Manager at Motorbranschcollege. “The fact that another two strong players want to join forces with us is hugely important for our success.”

KGK has over 500 brands in its product portfolio, while 400 car workshops are affiliated with the Autoexperten concept.

“Collaborating with Motorbranschcollege gives us the means to offer certified schools additional product knowledge and training relating to our brands,” says Johan Regefalk, CEO of KGK. “The fact that we also have a network of local stores means that we can be accessible to the schools in their local area. It is hugely appealing to be able to support schools locally and strengthen our local partnerships.”



## KGK Finland’s subsidiary, KL-Parts, expands its operation



It’s been almost 1.5 years since Kaha (KGK Finland) broke new ground and bought the KL-Parts store chain to create their own distribution channel to workshops. The cooperation has been very productive and, this year, KL-Parts has expanded its operations massively in several locations.

### QUALITY PARTS AND PROFESSIONAL SERVICE NOW IN SEVEN CITIES

2020 has been the year of expansion for KL-Parts: a brand-new store, some relocations, and even broader product range. Despite COVID-19, KL-Parts was able to open its seventh store in Espoo in May. After the opening fuss, Espoo has extended their product range even wider – they now offer spare parts for all brands.

In addition to the new store opening, there has also been some relocations. Moreover, KL-Parts’ Vantaa location became Kaha’s neighbour in September when it moved to the same building as Kaha’s warehouse. Logistics became very easy indeed!

Also, the KL store in Jyväskylä moved to a new, twice as big, premises in November. The added space offers possibilities to improve the product range, and broader selection naturally appeals to customers. And the expansion doesn’t end there! KL-Parts’ Raisio location is also looking for a new, more spacious premises. This past autumn has been a busy time for the team.



KL-Parts in Vantaa

# Crisis 2020: the endurance race

**PHAETON**  
ultimate automotive solutions

The COVID-19 pandemic has changed the behaviour patterns of many companies and consumers. The transition to online shopping can become a long-term trend, as well as the transfer of employees to remote work. The time has come to rethink many processes and transform the business, either now or never.



Autoparts WINKOD™

The negative impact of COVID-19 on the world economy, including Kazakhstan, is the largest in two decades. Economic activity has slowed significantly in recent months as a result of a drop in commodity prices, reduced trade volume, and the impact of measures to prevent the spread of the virus. Consumer demand in Kazakhstan increased by only 1.2%, which is a result of growing anxiety, a decrease in consumer confidence, and the imposed quarantine.

Undoubtedly, the automotive parts market was no exception. And like most market players, Phaeton, being one of its ma-

ior contributors, has undoubtedly faced the consequences of the pandemic.

“This virus made us all stop, look around, think, and ask: what is the most valuable thing now?” said Marat Shotbayev, the General Director of Phaeton.kz LLC. “March, April, and May were, by far, the most difficult months for the company. However, with the decline in turnover to 70% of the plan, I had internal confidence, not only in the rapid recovery but also in the possibility of business transformation. And that was actually the case. We had gathered the top management of the company and took a number of measures that allowed us not only to retain but also

to maintain excellent relationships with employees, partners, and clients.”

Apart from the conventional measures, Phaeton has taken a number of measures to survive during the quarantine. Firstly, switching to short-term planning and reviewing on a weekly basis. Secondly, maintaining favourable relations with foreign partners by organising regular meetings, concluding additional partnership agreements, and making payments on financial obligations based on the company’s weekly revenue. Thirdly, maintaining relationships with clients through regular online meetings and briefings.

“Based on the firm opinion that the main and only goal of any business is creating, maintaining, and increasing its client base, we decided to hold regular online meetings with our clients from all over Kazakhstan to exchange experience and knowledge to assist in difficult situations,” added Marat Shotbayev. “Thus, we created a great tradition – to hold monthly

Zoom meetings with clients and employees. This helps us to be closer, and transparently convey our intentions, plans, victories, fears, and forecasts to a larger number of people at once.”

Due to the quarantine tightening, most entrepreneurs, business leaders selling auto parts, and car service stations were forced to suspend their work. One of the measures taken by Phaeton was organising online training webinars, reaching 25 in two months’ time. With the support of representatives of global automotive parts manufacturers, the company conducted online training and webinars to share technical knowledge on installation, warranty and post-warranty service, and technical advantages of automotive components gathering up to 200 visitors.

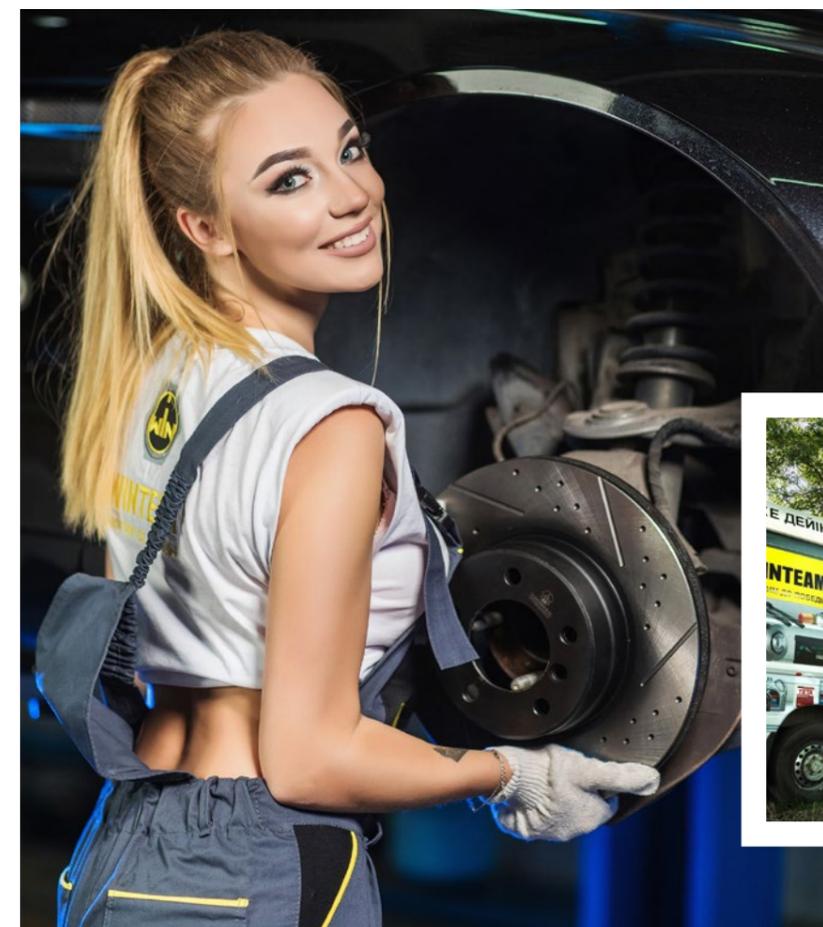
“This pandemic is a tremendous accelerator for business,” said Marat Shotbayev on the topic of business transformation. “Many businesses will go online. Consumer preferences will transform. That is why the

**KEY FACTS**

*Phaeton has taken the COVID-19 pandemic in stride, implementing several new services aimed at servicing customers of a changed world.*

first thing I did was to transfer the entire advertising budget to the creation and promotion of an online store and car service on wheels. The time has come to rethink many processes and modify the business. This made it possible to provide car owners with high-quality spare parts and services at affordable prices from the comfort of their homes. Undoubtedly, the sale of automotive parts online is still a difficult-to-understand process for consumers in post-Soviet countries. Therefore, it is too early to say that the projects will be successful. To promote online sales, we need to spend a lot of time and effort. However, I sincerely believe that this is our future, and we need to invest in now. The pandemic helped us stop and realise this in time, minding the needs of the market.”

Today, Phaeton is the largest distributor of automotive parts in Kazakhstan, Central Asia, and the Caucasus. Having high potential, the company is successfully running the B2B business and is making the first steps in development of the B2C sector, constantly improving and developing.



Mobile service station – WINTEAM



## Martaş Automotive's transformation in supply chain

Planning in the “new normal”.

**C**elebrating its 40th anniversary this year, Martaş Automotive continues to implement its future investments and projects despite the uncertainty and risks created by the COVID-19 pandemic, which has affected both the international and domestic markets.

Martaş Automotive continues to implement the new forms of life and business in this so-called “new normal” with the COVID-19 pandemic deeply affecting people's private lives and businesses. In this period, flexibility and effective management during uncertain times became essential. Martaş Automotive started one of its most important projects for the future and combined the logistics and planning departments, which are one of its most important structures, under the roof of the supply chain and planning department by designing them to cover the entire supply network.

The COVID-19 pandemic has made it difficult to provide desired products from manufacturers in a timely manner. For this purpose, Martaş Automotive started configuring its supply chain in order to manage its expanding distribution network more efficiently with its growing turnover and new distribution centers at the beginning of 2020. The company, which has

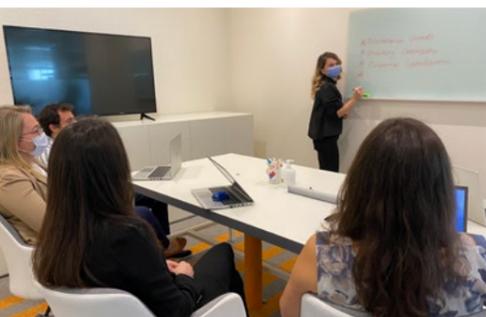


included the logistics team, has been in a leading position in the Aftermarket sector in Turkey for many years. In the supply chain structure, a planning team was added aimed at more integrated and coordinated work of internal stakeholders and external stakeholders. Currently, this seven-person supply chain and planning team, consisting of industrial engineers with different experience in the industry, is working on structuring S&OP processes with internal stakeholders and creating a sustainable supply chain network by sharing data and performance with suppliers. Martaş Automotive has taken an important step in terms of digitalization, another important project and investment for the future with this new structure. It also supported supply chain management with digital infrastructure and started to use the Slim4 software of Slimstock, which is the market leader in demand planning and inventory optimization in Europe. The project aims to maintain operational processes, increased delivery times, and the high availability levels demanded by consumers in a fast, flexible, and efficient way with Slim4; this is seen as a very important step in terms of making the expertise and knowledge in purchasing processes of



Martaş Automotive sustainably by combining them with digitalization. In order to successfully carry out this step, the project team, consisting of product management and planning teams, is meticulously performing process design and testing processes. The project will be live across all brands by the end of 2020.

The supply chain and planning team, despite the pandemic, have continued with their successful work within the scope of the project, and haven't slowed down in the renewed eco-friendly office of Martaş Automotive.



## Sales network expansion at Wint



New branches in Voždovac, Žarkovo, Subotica, and a new location in Niš.



### KEY FACTS

*Wint has opened three new branches and relocated another to be more strategically positioned to meet its customers' needs.*

**T**he leader of the spare parts market in Serbia – Wint (Wagen International) – decided to open a few more branch offices in strategically-positioned locations throughout Serbia, as a way to get closer to customers.

During 2019 and 2020, they opened the following branches: Voždovac, Žarkovo, Subotica and moved the one in Niš to a better location.

### VOŽDOVAC

- The branch was opened in July 2019.
- It currently has 11 employees: one manager, four salesmen, two drivers, three warehouse workers, and one warehouse worker/spare driver.
- It covers 24 urban and about 10 suburban areas.

### ŽARKOVO

- The branch was opened in October 2019 and has a 600 m<sup>2</sup> of storage area.
- It has 12 employees: one manager, four salesmen, two drivers, three warehouse workers, and two warehouse workers/spare drivers.
- The focus of Žarkovo branch is on professional customers and supplying the

Čukarica municipality, which consists of the following Belgrade districts: Čukarica, Veliki Makiš, Velika Moštanica, Železnik, Ostružnica, Rušan, Sremčica, and Umka. Apart from Čukarica, it also covers the municipality of Rakovica, which consists of Vidikovac, Kneževac, Miljakovac, Rakovica, Kanarevo brdo, Labudovo brdo and Petlovo brdo, Resnik and others.

### SUBOTICA

- The facility was opened in June 2020 and has a 500 m<sup>2</sup> of storage space.
- The branch has a total of 11 employees: four salesmen, three drivers, two warehouse workers/spare drivers, and one warehouse worker.
- The situation with the COVID-19 threatened to affect the opening schedule, but despite that, Wint managed to open the branch in time and even increase the number of employees that was initially planned, answering to market demands.
- The goal of opening a branch in Subotica was to improve the entire process of de-

livering goods to the customers in northern Serbia. In the past, Novi Sad Distribution Centre, which is 108 km from Subotica, was in charge for fulfilling this task. Therefore, the customers had to wait longer for their deliveries and Wint had greater logistics costs.

- Now the transport from Subotica covers the cities of Subotica, Sombor, Apatin, Horgos, Kanjiza, Senta, and Ada.

### NIŠ

- The branch in Niš has a total of 27 employees, of which there are currently two employees in the position of sales representative. That number is sufficient to cover the region and tend to the customers' needs in the best way possible.
- The new branch has 2,500 m<sup>2</sup> of storage space and is located in a town centre, therefore it is more accessible than before.
- When choosing market locations to open new branches, Wint focuses on territories where there is a good road connection between its new store, headquarters, and, ideally, clients, as well as distribution centres. This way the stock levels can be easily filled, the distances that drivers travel every day are reduced, and eventually customers are able to receive the ordered goods in the fastest way possible.
- Also, with this relocation, emphasis was placed on a higher capacity warehouse space, so that the stock would better respond to the customers' needs.

From year to year, Wint strives to justify its name and meet the demands of its customers. With a long business tradition, effort, and work, Wint has gained the status of a company that is always on the top and trustworthy. By opening the new branches, in addition to a slight increase in turnover, Wint has also achieved an increase in the quality of its services.



Board Members of Tokiic Ltd and Bartog Ltd

# Tokiic Ltd takes over Bartog – the leading Slovenian retail chain of tyres and car parts

Despite the COVID-19 crisis, the two largest Croatian and Slovenian retail chains and distributors of automobile parts have formed a strong alliance, the largest in the region.



Ivan Gadže, CEO of Tokiic

With the integration of Bartog, Tokiic is strengthening its presence in the Slovenian market but also creating a major breakthrough in the Croatian market with a significant increase in its tyre supply offer. Both Tokiic and Bartog have been in the market for three decades and have based their foundations on the family “up-bringing” of the business, sharing complementary attributes. Also, Tokiic has always kept an eye on how future trends will impact the industry in terms of assortment availability, employee development, digitalisation, digital transformation, and, most importantly, safety.

The merge of the two neighbouring players in the automotive parts market leads to completely new opportunities in the regional market. With a complementary range, similar business models, and optimal strategic position, the newly-formed group opens new business possibilities and more precisely satisfies the market needs. The synergy effect of the newly-formed partnership will be especially reflected through an even better relationship with all business partners, both existing and new.

With the widest range of tyres in the region, Bartog fits perfectly into Tokiic’s

business structure, which, in addition to a range of 260,000 unique parts, also includes a large network of branches and services, as well as special training programmes for employees and partners. Slovenian-based Bartog has, so far, operated with more than 600,000 tyres sold annually, through a large new warehouse measuring 12,800 square metres. In addition, with about 250 employees, Bartog also managed 37 of its own branches and franchise services network. On such business ground in 2019, Bartog reached a turnover of EUR 72 million.

### Facts about Bartog

- 12,800 m<sup>2</sup> of surface area
- 9,200 m of shelf space
- 11,100 pallet positions
- 600,000 tyres sold annually
- 36 tyre brands

With the acquisition of the Slovenian company, a giant especially when it comes to the tyre business, Tokiic has expanded its range with as many as 36 different brands of tyres that cover all four transport programmes which includes automotive tyres, tyres for commercial vehicles and trucks, motorcycle and scooter tyres, and those for agriculture and industry. From now on, Croatian customers and Tokiic partners will have the widest range of tyres ever in one place. “We are sure that this acquisition will ensure growth and development of the most modern business approaches, but also enable the two teams to merge into one strong community where knowledge, experience, and existing partnerships form reliable, long-term partnerships with our customers,” said Tokiic CEO, Ivan Gadže. “A big aspect of this merge is creating new job opportunities for employees who have a strong desire to grow

### KEY FACTS

*With Tokiic’s acquisition of Slovenian-based Bartog, the company forms a strong regional alliance and increases tyre market share.*

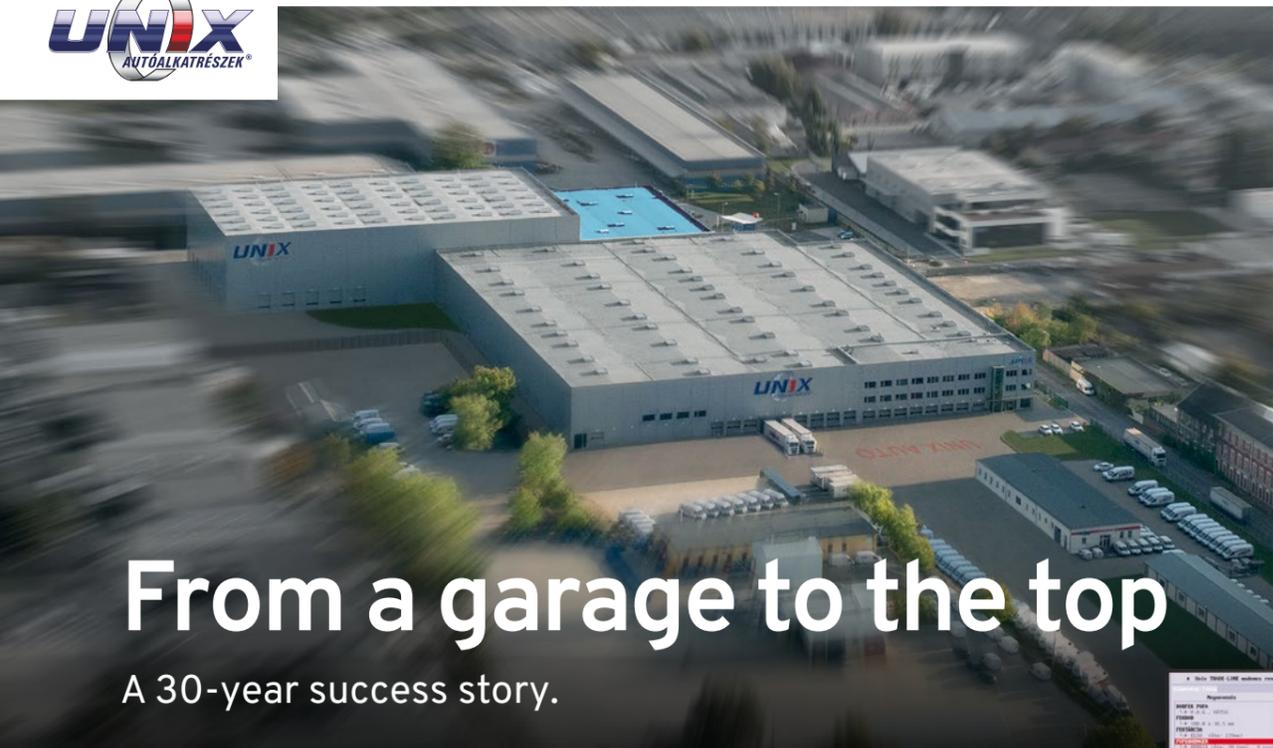
professionally within this congruent new group. The future and key to success of Tokiic definitely lies within its regional development, and merging with Bartog was certainly part of this plan. We are proud to have made this move, despite all the COVID-19 crisis circumstances, as it proves a clear focus on our strategic goals and flexibility in their realisation, even in a very destabilised environment. Both of our companies will never forget our main mission, and that is to provide safety in motion in every available aspect.”

Bartog is one of the leading companies in Slovenia, located in Trebnje which is less than 100 km from Tokiic’s headquarters in Zagreb. It is well known in the field of automotive and commercial vehicles parts distribution from spare parts assortment and service maintenance tools and equipment for all types of vehicles. The area of tyres is what especially lights up the reputation of this company and makes a perfect fit for partnering with Tokiic.



Ivan Šantorčić and Matej Umek





# From a garage to the top

A 30-year success story.

**T**hirty years is a long time in the automotive and auto spare parts business. Especially, because in the last 30 years, dozens of companies have emerged from nowhere and then disappeared into thin air, or because in 1990 no one was even dreaming of electric, let alone self-driving cars. UNIX Auto Ltd., on the other hand, is a stable market participant celebrating its 30th birthday this year. In the last three decades, it has grown into one of the most important players in the automotive business even becoming the market leader in Hungary. It is like a fairy tale in the Hungarian storybook of business.

### SPRING OF 1990: THE BEGINNING

The history of UNIX Auto Ltd. started on 1 May 1990 at a family gathering when the young Antal Zombori committed to selling the remaining 10,000 mosquito repellents for a 10% commission. He hit the road in a 15-year-old Lada 1200, selling 100 pieces on the first day. Within just a week, he became an entrepreneur and a few months later, evading seasonality, he entered into selling spare parts for Eastern and then for Western European cars.

### THE ESTABLISHMENT OF UNIX-TRADE LTD.

The Articles of Association was signed on 15 December 1990, and the company start-

ed its operation on 1 January 1991. The company was named UNIX-TRADE Ltd.

“Choosing the company name, I didn't know what the core products will be, just that we are going to trade,” said Antal Zombori. “I wanted a universal name, that's how I got to the expression UNI-TRADE – meaning “Universal Trading Ltd.” – but unfortunately it was already in use. As in mathematics, the symbol for the unknown is ‘X’, it was added after the prefix UNI and the name “Universal Unknown Trading” was born.”

### 1992-1997: THE YEARS OF DEVELOPMENT AND DIGITISATION

The real breakthrough for the company was in 1994 when they were the first auto spare parts wholesalers to set up an electronic catalogue in Hungary, long before the domestic spread of the World Wide

Web. The system was not Internet-based yet, it was a solution using dial-up Internet access, but it was still a huge competitive advantage, as the customers were tired of going through printed catalogues and then contacting call centres all the time.

The fact that the ‘UNIX TradelLine’ solution – of course, an updated version of it – is still the most popular auto spare parts catalogue system in Hungary, generating the biggest turnover, definitely shows the significance of this huge breakthrough. By January 1997, the company's monthly turnover surpassed the magical limit of HUF 100 million and the number of employees exceeded 100 people.

### MILLENNIUM: ROMANIAN EXPANSION

Actually, this development established the growth period of the late 1990s and early 2000s when the company, responding to its customers' needs, started opening a line of branches, for example at the end of 1996 in Debrecen, Pécs, and Kaposvár. After then, 5-6 new stores were opened yearly, meaning that UNIX Auto Ltd. was



operating with its own branches in a significant part of the country. The development and growth have been steady, and by the millennium when UNIX Auto Ltd. had its 10th anniversary and entered into the Romanian market, the company was already successfully running 20 branches generating a turnover of HUF 3.5 billion and having 200 employees working for the company.

Today, the UNIX Auto Ltd. network consist of 166 branches in three countries, including Hungary, Romania, and Slovakia.

### 2008-2011: “IT WAS KIND OF AN ALL OR NOTHING SITUATION.”

At this period, they chose to respond to the crisis with developments. They took, probably, the most important step in 2008 when the UNIX TradelLine programme was rewritten from its fundamentals. Most of the programme – the user interface, the search engine – was designed by Antal Zombori himself. This became the TL4 system. In the meantime, they introduced services that were not yet known in the market: for example, providing accurate deliveries in a 30-minute time interval.

In 2008, a one-and-a-half-year planning and construction phase began with many challenges. The new warehouse was ready by the 20th anniversary of the company in October 2010. Back then, the appearance of such dimensions was quite unique in Hungary. The development and growth had been steady; therefore, UNIX Auto Ltd. entered into the Slovakian market as well in 2011 where they have been operating two branches ever since.

### 2012: A.Z MEISTERTEILE BRAND LAUNCH

The next step of the continuous growth

was when Antal Zombori brought A.Z Meisterteile to life since the Hungarian market was missing a wide-ranged collection brand that can provide reliable, high-quality products matching genuine spare parts and lubricants in quality. As a result of continuous innovation and development, by this day the number of their active article groups exceeds 100 and there are more than 40,000 kinds of spare parts in their range. In 2019, the A.Z. Meisterteile brand became a registered trademark worldwide. As of this day, AZMT spare parts can be found in every third car in Hungary and, on a daily basis, thousands of A.Z Meisterteile articles are sold.



### 2014-2020:

Innovation and development have been playing an important role in the company's life. As a result, in 2014, the 100th UNIX

Auto Ltd. branch was opened, and by today in the 3 countries, this number has increased to a total of 164. In the meantime, in 2017, their Logistics Centre expanded with an additional 7,500 m<sup>2</sup> of warehouse space, bringing the total floor area of the headquarters and branches to approximately 100,000 m<sup>2</sup>, accompanied by a stock of more than 12 million parts. The constant development has brought many awards for the company; in 2016, UNIX Auto Ltd. was named Hungarian Company of the Year and, one year later, placed 12th on the Forbes Top 100 Hungarian companies list.

Nowadays they are working on the expansion of the Logistics Centre with a 10,000 m<sup>2</sup> addition to the warehouse and 3,000 m<sup>2</sup> in office space.

### AS FOR THE FUTURE? AS MR. ZOMBORI SAID:

“40% market share still means that, domestically, 2 out of 3 products are not sold by us. We aim to be selling these as well.” In the new warehouse, they are developing a patent-based logistics automation. After the receipt of the products, without a touch of a human hand, the automation will conduct the different warehouse procedures, such as entry and removing from storage or inventory; and at the end of the process, still, without human intervention, it will place the products into shipping crates.

### KEY FACTS

Celebrating its 30th anniversary, UNIX Auto Ltd. has outlasted many in the automotive spare parts business by being agile and forward thinking.



Logistic centre in 2020 ( visualisation )



# Reydi turns 30

A distributor of automotive parts in Argentina, Reydi was born with the purpose of serving parts stores in its areas of influence.



The Reydi Team

The company emerged at the end of 1990 in an environment of high uncertainty. But, the flexibility, courage, and perseverance of its founders, brothers Dario Alfredo and Enrique Abel Pacheco, made it very resilient to the changes, a characteristic that is evident in the evolution of the organisation throughout its thirty years of existence.

## THE EVOLUTION

Based on three very defined horizons adapted to the sector – respect for the commercial chain, reliable brands, and competitive prices – Reydi has a model that works in the long term and resists high fluctuation scenarios. It is this model that the company uses for its customers.

But before getting here, the company had to go through several stages, largely defined by the context of the time.

**1990-1993:** Reydi's first challenge was to promote an agile, modern company with two young managing partners and, at the same time, generate the trust of great brands with great history and positioning.

**1994-2006:** The concepts that characterise this stage are transformation and growth. Having already created the foundation that, today, constitutes the organisation, in these intense years, Reydi concentrated on generating synergies with the represented brands and customers,



Reydi's corporate culture and philosophy

with the conviction that cooperation was and will continue to be the way to make the sector grow. The next step was to launch its own brand strategy with Reymax and to show customers the benefits of the logo and the support that comes with it, still this today. It was during these years that the company participated in the most important and recognised events of the sector such as fairs and business rounds for the first time, both in Argentina and around the world. The Buenos Aires branch was opened in the capital of the country, although the headquarters remained in Mendoza.

**2007-2015:** This stage – the consolidation stage – began with the inauguration of the new building. All work and efforts that had been accomplished until this point started to become integrated and strengthened. Dario and Enrique began to



Reydi's warehouse in Mendoza

delegate many of the functions they had been carrying out up to that point. Dario began to manage his illness in 2013, and this incident pushed Enrique to delegate even more because he dedicated himself to his brother, his health, and his family.

**2016:** The reinvention phase. A series of events lead Dario and Enrique to rethink

the principles of the company they dreamed of, and a restructuring plan was developed. In September of that year, Dario passed away.

**2017-2020:** The phase of attention and concentration, with focus on its customers, Reydi's attention was put on the impact of recent events and on sustainability. The key was to be very clear about Reydi's role in the sector and where it saw itself in the future. In 2018, the company became part of ATR International AG and, in 2019, Enrique travelled to Vancouver for the ATR shareholders meeting. The characteristics of this stage of attention, focus on clients, impact of recent events, and sustainability were also essential in managing the COVID-19 pandemic.

With these stages in mind, Reydi has been through an evolution, showing how it has overcome the crises and ups and downs at each stage.

## TODAY AND THE 30TH ANNIVERSARY CELEBRATION

Everything that has been lived – the good and the bad – and every change – enjoyed or suffered – has forged a culture at Reydi that resists crises. With the values of its founders and openness to current trends,



Customers at the counter of one of Reydi's locations

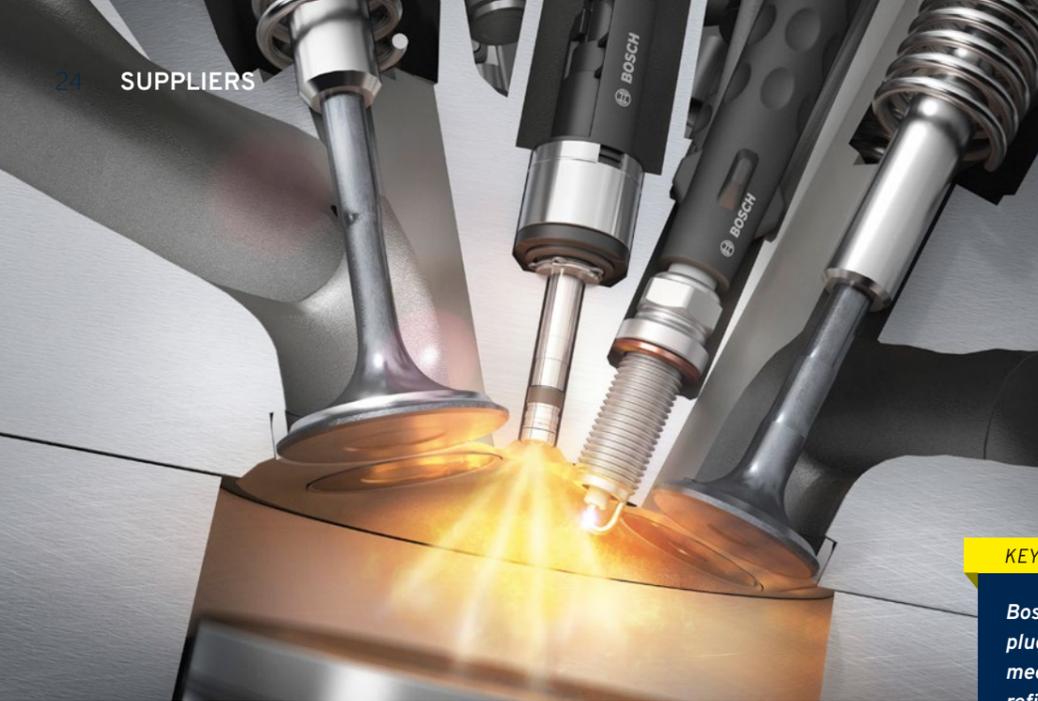
## KEY FACTS

*As Reydi turns 30, the company takes a look back at its successes and challenges as important aspects of its growth journey to the company it is today.*

the company has seen a transition from a positive personal culture to a strong corporate culture.

Reydi is not afraid to continue growing with its model that combines the traditional with the collaborative nature of the digital economy; this growth model allows them to be close to customers and suppliers – in which their philosophy, “we are on the same side”, is sustained – and, at the same time, ensures the sustainability and quality of their work. Each person at Reydi has a special role, which is increasingly secure and sophisticated, stimulating training and specialisation.

The past 30 years have shown the strength and stability of Reydi. To celebrate these successes, the team is opening their new virtual store and renewing the loyalty programme established in 1999, ‘ReydiBonus’, both with current and flexible platforms to interact better with their customers who, over the years, have always been part of the great Reydi family.



**KEY FACTS**

*Bosch launches smaller spark plugs for higher performance, meeting global requirements for refined engine development.*

# Engine trend – Spark plug size reduction

Bosch releases smaller spark plugs to fit industry needs.

**MORE POWER, LESS FUEL**

Today, providing power and economy are the most challenging requirements in the performance specifications for modern engines. Only vehicles that are comfortable and a pleasure to drive have chances of succeeding in global markets. Globally, the laws are increasingly stringent regarding reduction of emissions and fuel consumption.

Global requirements have affected the engine's development. It moved from port fuel injection systems to gasoline direct injection system and at the same time, OEMs introduced downsized, turbo-charged engines as well as a lean burn concept.

**HIGHER PERFORMANCE, SMALLER SIZE**

Consequently, pressure in the cylinder is much higher, and the space available for spark plug is reduced due to:

- Presence of more valves
- Enlarged cooling jacket
- Bigger inlet
- In case of GDI engines: required space for high pressure injector

The interesting fact is that not only are spark plug sizes changing, but also the spark plug's performance increases.

Structure of high-performance spark plug:

- Aligned and welded ground electrode for optimum ignition.

- Extremely fine precious metal centre electrode welded using the Continuous Wave Laser welding process.
- Newly-developed design of the insulator base.
- Special ceramic material with maximum dielectric strength.
- Optimised insulator design.

**CUP TERMINAL**

Engines with reduced displacement or with less cylinders (downsizing) and increased boost pressure need a higher ignition voltage. For these purposes, Bosch developed spark plugs featuring a longer insulator for improved flashover resistance. For length compensation, they are equipped with a so-called cup terminal.



**SOLID WASHER**

Regarding engines with modern gasoline direct injection, the ideal spark plug alignment towards the injection valve decides about accurate ignition of the fuel mixture. For the precise positioning within the combustion chamber, Bosch spark plugs are equipped with a solid and non-compressible washer and a specially orientated thread.



# Coping with COVID-19, the Clarios way



New challenges and opportunities for the Clarios brand VARTA® to support customers during these difficult times.



Since the coronavirus hit the world, companies in every sector have been turned upside down. Many have had to navigate lockdowns, short-time work, reduced turnover, and other financial and operational challenges. This has also left a mark on the Aftermarket battery business.

Clarios also strongly feels the COVID-19 impact in its daily business. Therefore, decisive steps have been taken. "Like many other companies in the Aftermarket we had to rethink our business during the crisis," says Ulrich Eich, Vice President Aftermarket EMEA at Clarios. "To keep our employees safe was our number one priority every step of the way. Therefore, we informed our teams very frequently on new developments. In the leadership team we had daily COVID-19 meetings to analyse the situation and to implement clearly defined health and safety measures at all of our sites."

These well-designed arrangements were crucial to ensure that Clarios was and will be able to support their Aftermarket customers in the best way possible throughout the crisis. "It was then key to maintain close contact with our partners in the Aftermarket and to constantly keep them up to date with the latest developments and serving the new demand," said Eich. "Our goal is to be a strong, reliable partner

**KEY FACTS**

*Clarios has responded to the COVID-19 situation by providing best-in-class digital tools to help meet customer requirements.*

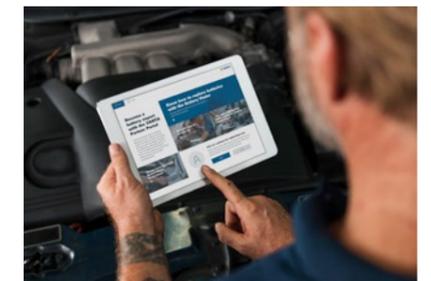


to our customers. This is especially valid during difficult times, like COVID-19."

**RETHINKING THE AFTERMARKET BATTERY BUSINESS**

"E-commerce and digitalisation were driving forces of change on the market already before the pandemic," explains Eich. "For batteries we could see now, that COVID-19 has accelerated this development significantly."

As a world market leader in battery supply, Clarios is closely connected to this development and offers a customised service portfolio with a stronger focus on digital channels for its partners. This gives Clarios' customers the resources to navigate the current situation. It includes an expansion of all digital channels to facilitate communication. Services like the 'Battery Test Check Programme' and the training programme, 'The Original Academy powered by VARTA®', help workshops to stay competitive and to cope with the fact that the battery service is getting more and more complex. Clarios



is continuously investing in enhancing its workshop support by focusing on providing the best in class tools and services. To do so, Clarios is launching an enhanced version of the 'VARTA® Partner Portal' which complements the functionality already available. Eich concludes: "No doubt, COVID-19 and digitalisation are having an effect on the Aftermarket for batteries. It's vital, therefore, to go with the change and focus more on virtual customer experiences for products and services. We see this development as a big opportunity for our partners and us, not only now during COVID-19, but also for the coming years."

# New brand, proven quality

VDO to become Continental in the passenger car Aftermarket.



Yellow will soon be one of the main colours in the workshops: The VDO product brand will be completely changed to Continental in the passenger car Aftermarket.

Packaging artist Christo (1935-2020) once said, "packaging is a promise". Others may think that the content is more important than the packaging – especially if the external packaging has been changed. Such a change is now imminent in the passenger car spare parts business, because the technology company Continental is completely changing the appearance of its VDO product brand – it will now become the Continental brand. However, the packaging will still contain what has distinguished VDO for decades now: premium quality from the original equipment manufacturer.

The technology in automobiles is becoming increasingly complex, whether it is driver assistance systems, connectivity, or engine control. As one of the world's largest automotive suppliers, Continental not only produces for almost all vehicle manufacturers, it also develops solutions for the mobility of the future. "From the many conversations we've had with our customers, we know that the Continental brand stands for comprehensive technological competence of a leading original equip-

ment manufacturer, a uniquely broad portfolio and high-quality products – and it's this know-how that we're aiming to underscore even more strongly with the brand changeover," says Peter Wagner, who heads the OE & Aftermarket Services segment at Continental. "However, our proven and very successful premium brake brand, ATE, will of course be retained."

The catalog and website have already been changed into the Continental design, but the packaging itself is being converted step-by-step. One very important fact here – no product changes will be taking place in terms of sensors, windshield and headlamp cleaning systems, fuel systems, or service equipment. "Original stays original," emphasised Peter Wagner. "Our customers can continue to rely on the proven premium quality of our original equipment. MAPP codes on the new packaging also guarantee that original Continental products are inside."

With the new image, the Continental brand is gaining even more importance in the automotive supplier and tyre manufacturer's



New brand, proven original – customers can continue to rely on the proven premium quality of the original equipment manufacturer.

#### KEY FACTS

*VDO products, with 90 years of industry relevance, will be brought under the Continental brand with products retaining the same known quality.*

range of passenger automobile spare parts. This is also reflected in the workshop concepts previously managed under VDO. They are now being given new names. For example, "VDO Electronics Partner" will become "Continental Electronics Partner" and "VDO Diesel Repair Partner" will become "Continental Diesel Repair Partner". In this way, the new, uniform Continental brand image offers not only high-quality spare parts but also a great deal of readily available know-how. As "Continental Electronics Partners", workshops will benefit from technical information and training courses on topics such as braking, diagnostics, high-voltage technology, diesel repair, and sensor technology.

Although VDO is becoming Continental in the automotive Aftermarket, the VDO product brand, with more than 90 years of tradition, will remain as a successful brand for intelligent solutions for digital tachographs, fleet management systems, and data-based services.



## Technical training – are you top of the league?

DENSO digitalises entire training program to keep technicians upskilled during Europe-wide lockdowns.

As opportunities for face-to-face technical training are limited during the Coronavirus crisis, DENSO has digitalised its entire training offering, with a series of webinars focusing on all product groups.

DENSO's technical portal offers a range of online courses accessible to technicians from the comfort of their home, or via their smartphone device. All courses provide interactive materials and are written and delivered by top industry instructors. The programmes are suitable for all skill levels including students, working technicians, workshop owners, and master technicians. Certification is part of the courses – on completion of the final test in each course, participants can download and print a personalised certificate displaying their expertise.

As part of the e-learning delivery, technicians can join DENSO's 'League of True Mechanics,' in which technicians can collect 'DENSO coins' for each completed course. The 10 participants, within each country, with the most coins are rewarded with valuable prizes, such as DENSO's vehicle inspection tool e-Videns with free

annual license (Eastern Europe only), SONOS Speaker (UK and Ireland only), Toyota Gazoo racing merchandise, branded backpacks, and more.

#### ATTRACTING THOUSANDS

Within just months of launching the online training in the summer, more than 1,800 technicians had signed up to the portal, where they can complete courses covering all of DENSO's key product groups including alternators, starters and spark plugs, and air conditioning.

The platform launched in Eastern Europe first, with content available in English and Polish, followed by the UK and Ireland. Further launches are planned for the Baltic region, the Caucasus region, the DACH region, Denmark, Finland, Greece, Iceland, the Netherlands, Norway, Sweden, and Ukraine.

The first course made available to technicians focused on air conditioning, with a series of free webinars delivered by DENSO's technical expert, Richard Groot. The course covered all aspects of air conditioning and thermal management systems, including common failures. New

courses are continually being added; to find out more, visit the DENSO EU homepage and select your country.

#### SHARING SKILLS

"Webinars have become an integral part of DENSO's training strategy to keep sharing information, tips, and developing the skills of UK workshops during these difficult times," said Fatiha Laaich, DENSO Europe's Pan-European Strategic Marketing Manager. "It is important that technicians keep their skills topped up so they can confidently work on a range of vehicle issues and ensure motorists remain safe. The purpose behind our online learning platform is to enable technicians, and the workshops they represent, to improve the service they provide for their customers and help assure the long-term future of their businesses."

#### ACCESS THE TRAINING

Technicians can access the training and join the League of True Mechanics by visiting [www.denso-technic.com](http://www.denso-technic.com). The program is constantly expanding to cover more languages and territories.



Multilayer-steel cylinder head gasket designed with coined stopper technology 475.532.



Das Original

## Elring's gasket program for US cars

“Elring – Das Original” on its way to becoming a full-range provider for the American “Big 3”.

For many years, the gasket program for US engines was of minor importance to Elring and its customers, even though the worldwide stock of US cars is likely to be around 250 million vehicles.

In the process of further global expansion in the spare parts business, Elring has put a lot of effort into the last two years. The result is a portfolio of around 2,200 items, exclusively for vehicles from US manufacturers.

### EXTENSIVE INFORMATION

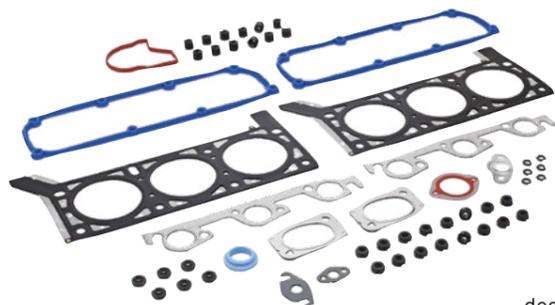
A highlight within the product range is the cylinder head gasket for a V8 diesel engine with a displacement of 6.4 litres and 355 HP, which is produced by Navistar and installed in many different vehicles.

In addition to individual cylinder-head gaskets, the product range also includes

turbocharger sets, valve cover gaskets, and all other seals and gasket sets. The product management team also took care of the smaller engines, of course. For example, the complete range of gaskets for a Ford Ecosport with a displacement of 1.0 litre can be found in the product range.

As with the current range, high-resolution images of the gasket sets and the individual gaskets are shown in the Elring online catalogue. Facing the extensive new program, this is not a task that can be done overnight.

In accordance with Elring's strategic claim to play a key role in the US domestic gasket program in the future, the product data is also available in Aces/PIES. Interested customers can retrieve all relevant data on request. In an Excel sheet format, all important data on this programme can also be downloaded from the Elring website [www.elring.de](http://www.elring.de).



Gasket set for a Chrysler Voyager 448.110

### ELRINGKLINGER'S BEGINNINGS IN THE US CAR SEGMENT

ElringKlinger's involvement in the US car segment began with the series supply to Ford in the late 1990s. At that time Ford had decided to build the 4.0 litre V6 DOHC engine in Cologne. It was, therefore, an obvious choice to place the order for en-

gine gaskets with ElringKlinger. But not only gaskets were supplied at that time, but also the oil pan.

In the meantime, several plants in the so-called “New World” have been added so that customers in the USA can be supplied directly from there. Of these plants, two stand out for their size and expertise. The plant in Toluca, Mexico and the plant in Buford, Georgia, USA. Among other things, both also produce metal-layer, cylinder-head gaskets with the height-profiled and embossed stoppers patented by ElringKlinger worldwide.

Only this gasket design is capable of permanently limiting the so-called sealing gap vibrations between the cylinder head and engine block. These vibrations occur to a greater extent in large-volume engines, which is reflected in ElringKlinger's product range.

### FUTURE INSIGHT

In order to remain at the leading edge in this product segment, the final steps towards becoming a full-range provider will be taken in 2021. The plan is to add another few hundred references so that, by the end of 2021, a product range will be available that will enable ElringKlinger customers to supply their customers with gaskets for US vehicles in the required high quality.

### KEY FACTS

*Elring has been supplying parts for American cars since the late 1990s, but now aims to become a full-range supplier for the “Big 3”.*

## Did you know that most electric vehicles are equipped with lead-acid batteries?



The 12V lead-acid battery remains a reliable power source for the majority of electric and hybrid vehicles. It maintains the entire electrical system before the traction battery is connected and whilst the electric car is parked. Safety systems, security, keyless sensors, clock,

and the computer memory are all crucial loads supported by the lead-acid battery.

As a leading innovator in lead-acid battery technology, Exide is at the forefront, with a complete range of batteries developed for latest European models.



### THE CITY BATTERY

Exide's latest generation EFB now features Carbon Boost 2.0 for improved charge acceptance, cycle life, and energy availability. In addition to being the specified battery for some Start-Stop models, it is the perfect upgrade in any conventional vehicle used intensively in urban areas, i.e. taxis, emergency and public service vehicles, etc. Only Exide's EFB has the essential qualities to capture energy from regenerative braking.



77% OF ELECTRIC CAR PARC HAS A LEAD-ACID BATTERY – EXIDE PROVIDES THE EXACT MATCH FOR OPTIMUM PERFORMANCE



MAKE	MODEL	YEAR FROM	AGM	EFB	AUXILIARY	PREMIUM	EXCELL
BMW	I3	01/11/17			AGM12-23		
CITROËN	C-ZERO	01/10/10					EB356
HYUNDAI	IONIQ	01/03/16				EA386	
KIA	SOUL II	01/09/14					EB504
MERCEDES-BENZ	B-CLASS	01/11/14	EK600				
mitsubishi	I MIEV	01/07/09				EA386	EB356
NISSAN	E-NV200	01/05/14		EL550		EA530	EB500
	LEAF	01/11/10					EB454
	LEAF	01/08/17		EL550		EA530	EB500
OPEL	AMPERA	01/11/11	EK600				
	AMPERA-E	01/05/17		EL550			
PEUGEOT	ION	01/11/10					EB356
RENAULT	KANGOO EXPRESS	01/10/11		EL700		EA770	EB740
	ZOE	01/06/12		EL550		EA530	EB500
SMART	FORTWO	01/11/09	EK600				
	FORTWO	01/05/17		EL600		EA640	EB620
TESLA	MODEL S	01/11/16					EB357
	MODEL X	01/09/15					EB357
VW	GOLF VII	01/03/14	EK600	EL600		EA640	EB620
	UP	01/07/13					EB440

# Gates introduces innovative off-road belt to better meet demands of today's powersports vehicles



Gates G-Force RedLine™ CVT belts are engineered for performance and durability in the most extreme environments.

Gates (NYSE: GATES), a leading global provider of application-specific fluid power and power transmission solutions, introduces a new line of continuously variable transmission (CVT) belts specifically designed to withstand the increased heat, power, and operating environments of today's off-road vehicles (ORVs).

Gates G-Force RedLine™ CVT belts are engineered from a patented, fiber-reinforced Ethylene Elastomer compound, providing maximum transverse stiffness and unmatched heat resistance. This allows for increased durability, greater load-carrying capability, and a higher effective operating temperature. Extensively lab and field-tested, ATV and UTV enthusiasts and

racers alike, can expect outstanding performance as Gates G-Force RedLine™ belts deliver:

- Excellent recovery from temperatures up to 170°C without power loss
- Up to 300 percent increased belt life
- Up to 50 percent lower speed losses under heavy loads and torque

"Today's high-performance ORVs demand innovative belt technology that can withstand use in the most extreme environments," says Christian Buhlmann, vice president of global product line management for Gates. "Through advanced materials science and process technology, we've created the next generation of CVT power transmission belts designed to de-

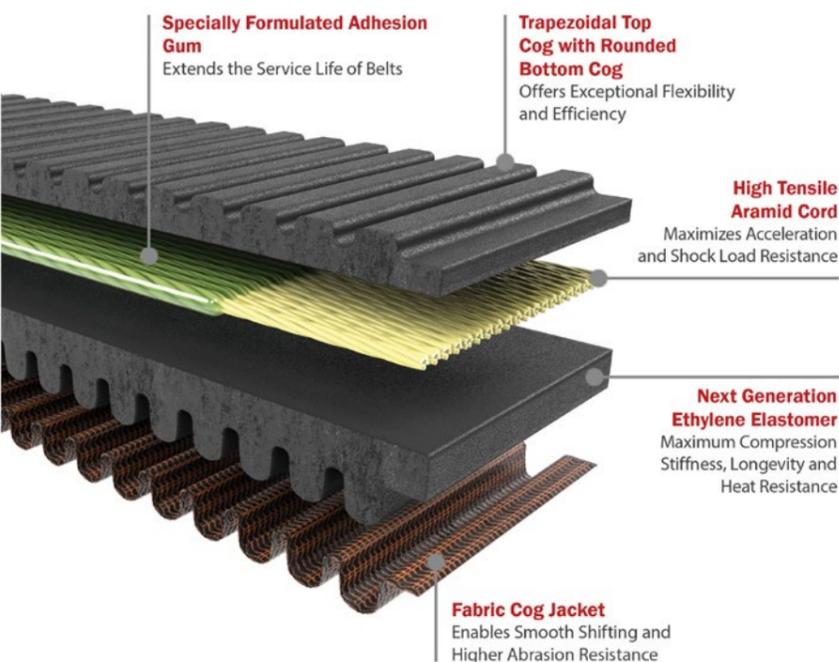
**KEY FACTS**

Gates' G-Force RedLine™ CVT belts use advanced material science to meet extreme environments and customer needs.

liver higher load capacity, higher peak torque capacity, less heat fatigue, and greater durability."

In addition to the performance benefits, Ethylene Elastomers are more environmentally friendly to manufacture and will serve as the foundation for future belt developments at Gates across a number of categories.

Gates G-Force RedLine™ belts are now available from distributors across Europe, the Middle East, and Africa. To learn more, and to see the G-Force RedLine™ in action, please visit [www.gates.com/redline](http://www.gates.com/redline).



GKN ballspline sideshaft with axial ball bearing

**KEY FACTS**

GKN Automotive's drive and chassis components deliver premium quality for the spare parts market.

Put your trust in the original

## Only spare parts from series suppliers guarantee unchanged handling

Durable, quality spare parts can improve driving behaviour and safety.

The drive specialists, GKN Automotive, are the undisputed number one in the field of sideshafts, propshafts and constant velocity joints. It is crucially important to use premium parts from series suppliers, even in the automotive spare parts market, a fact that many only realise once it is too late. The quality of spare parts is usually assessed with durability in mind, but few people consider that they also influence driving behaviour and safety.

Drive and chassis technology has noticeably improved over the last few years and is particularly sensitive to repairs and replacement of parts. This is an important issue for workshops because the market share of vehicles with complex four-wheel drives, multilink axles, and high-torque engines is constantly rising, not least due to the boom in SUV popularity. "Many of our developments have been instrumental in enabling the currently accepted active and passive safety standards to be fulfilled," says Frank Hürter, Commercial Director, GKN Automotive Aftermarket. "If a repair is necessary, it is vital to use components that comply with OE requirements in order to preserve the vehicle's performance." The following examples from GKN Automotive illustrate the high per-

formance of drive technologies that are used as standard today.

### HIGH STEERING ANGLES

The front-axle driveshafts of four-wheel-drive or front-wheel-drive vehicles restrict their manoeuvrability, as their joints limit the potentially possible steering angle. GKN Automotive's SX joints increase the steering angle by up to 10 percent (see Figure 1) and can even transmit more torque at the same time. The required technology is complex (counter-running ball tracks with an S-shaped track profile) and protected by patents. If these are replaced by components made by other suppliers that do not have the same features, it will no longer be possible for the vehicle to drive in tight curves.

### LONG SPRING TRAVEL EQUALS SAFE AND COMFORTABLE DRIVING

Modern SUVs are not far behind classic saloons in terms of road holding and driving comfort. This is facilitated by complex axles that allow for long spring travel and that guide the wheels with consistent toe and camber alignment. The driveshaft must support length compensation to allow the wheel movements to be followed. GKN Automotive has developed an unusual as well as highly in-

novative solution to this problem: an axial ball bearing that achieves longitudinal shaft displacements of over 70 mm (see Figure 2). This progressive design requires high-precision manufacturing technology and has given the GKN shaft its name: ballspline. The unprecedented longitudinal displacement values and the precise, lossless and smooth response result in comfortable and safe road performance. This has impressed numerous vehicle manufacturers so much that they employ our ballspline technology in a wide range of high-power, four-wheel-drive vehicles.



GKN SX joints improve handling



## There's a good mood in the workshop

In today's independent workshop, processes are becoming more and more complex, with technologies advancing quickly and new vehicle models coming to market with an increasing amount of electronic advancements.

The aforementioned challenges faced by workshops can be dealt with quite easily thanks to the HELLA electronics and diagnostics expertise because, true to their motto – “The Workshop's Friend” – workshops can get this industry expertise from one place, and that's HELLA. Workshops benefit not only from the extensive portfolio of electronic components backed up by vast amounts of OE expertise but they also profit greatly from the proven diagnostic know-how of HELLA Gutmann Solutions. At the same time, they are able to count on the professional HELLA workshop service, for example with extensive parts coverage, swift availability, and competent expert knowledge on top and free of charge, such as that found in HELLA Tech World.

This means that when it comes to electronics and diagnostics, HELLA offers workshops a kind of “All-Round Happiness Package” with benefits ranging from professional troubleshooting and error iden-

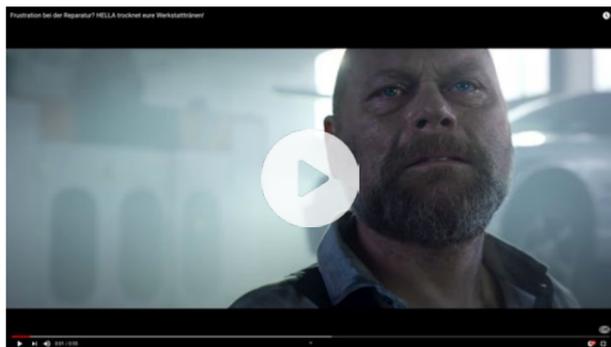
tification through quick and easy part searches and ordering right up to well-thought-out repair instructions and tips.

And it is this in which the new HELLA clip, “Men Sometimes Cry”, shows us in a humorous and emotional way. What you see exactly: the day-to-day “whirl of workshop craziness” where, admittedly in a rather exaggerated way, employees are shown sometimes almost moved to tears out of sheer desperation because of cer-

tain work situations. But thanks to HELLA, not for long because with all the electronics know-how and the diagnostics competence, everyone is smiling again pretty quickly.

### KEY FACTS

HELLA works to make working at a workshop more enjoyable, and their new video, “Men Sometimes Cry”, takes a humorous look at a day in the life at a busy workshop.



Click on the image or scan the QR code to see how HELLA's competence in the world of electronics and diagnostics quickly turns any mood in any workshop into a good one.

## KYB collaborates on next generation modular EV platform



KYB Corporation has launched a strategic partnership with Israeli company, REE Automotive (REE), who approached KYB to develop suspension capabilities for their future electric vehicle (EV) platforms.

### KEY FACTS

KYB's partnership with REE will see the development of a modern suspension for future EV platforms.



KYB has unparalleled semi-active and active suspension systems set to boost REE's next generation EV platform. This will provide design freedom and cost-effective, scalable solutions for e-mobility. The combination of KYB's suspension knowledge and REE's pioneering technology in electric vehicle platforms will revolutionise electric vehicle design.

REE is working towards putting not only the suspension but also the braking system, steering, and e-motor all together inside the wheel arch. KYB's involvement in the project is the 'in wheel' suspension. This is called the REEcorner™ - each corner being completely independent and powered by the state-of-the-art REEboard™ ECU, controlling advanced x-by-wire technology. The technology allows for extreme modularity as each

corner can be tailored to any vehicle requirements, resulting in optimum compatibility, efficiency, and cost.

The REEboard™ is a completely flat, scalable, and modular platform. It enables limitless body configurations with complete design freedom and greater efficiency of space. As there is no need to design a new platform for each vehicle type, this saves major costs and time. It provides more volume on a smaller footprint, to carry more batteries within the chassis.

This partnership is the first time that KYB has collaborated on EV platforms with a technology company. “KYB has vast experience in developing and manufacturing advanced suspension systems, and we are excited to partner

with REE Automotive and share its revolutionary EV vision by engineering a suspension subsystem that supports the needs of tomorrow's mobility ecosystem,” explains Kazunori Masumoto, General Manager of Engineering Headquarters at KYB Automotive Component Business Division.

“REE is delighted to welcome KYB to our unique network of global strategic automotive partners, bringing world-class expertise in advanced suspension systems,” said Daniel Barel, REE's Co-Founder and Chief Executive Officer. “KYB's technology will play a crucial role in the rapid development of our next-generation EV architecture, which reinvents the electric vehicle with a completely flat, scalable, and fully-modular platform, ready to carry the future of e-mobility.”

# Alternative powertrain technologies are an opportunity for workshops and trade

MAHLE sees enormous opportunities and new business segments for workshops in the mobility transformation and evolution of the automotive industry.



In the opinion of Olaf Henning, General Manager of MAHLE Aftermarket, thermal management in particular will grow in importance, in view of the increasing number of electric and hybrid vehicles. However, innovative filter systems and new developments for hygienic cleaning of vehicle cabins to protect against infections are also on the list of innovations being explored by the MAHLE Group's business unit specialising in spare parts and workshop equipment. The company offers customised spare parts and tailor-made workshop solutions – for the entire range of conventional and alternative drive types.

“The work carried out in workshops will change dramatically in view of the increasing diversification of the vehicle fleet,” explains Olaf Henning, Corporate Executive Vice President and General Manager MAHLE Aftermarket. “However, we believe that the advent of alternative powertrain

technologies in workshops should in no way be seen as a threat to their business. On the contrary, we see an array of new business areas and activities that present the company with new opportunities and possibilities. If independent workshops decide to embrace this transformation, we're the right partner to have by their side.”

The challenges are multifaceted: With an increasingly diverse selection of powertrain technologies on the market, the number of spare parts and service units required will increase dramatically. The proportion of modular components in the vehicle that combine a variety of functions is also continuously growing. This requires a broader range of tools and service units, as well as more training and further education for workshop technicians.

[mahle-aftermarket.com](http://mahle-aftermarket.com)  
[mpulse.mahle.com](http://mpulse.mahle.com)



With a broad portfolio covering conventional and alternative powertrains, MAHLE is a reliable partner for workshops and helps them to become future-proof along the diversified powertrain.

**KEY FACTS**

*In addition to thermal management when it comes to electric and hybrid vehicles, MAHLE Group has produced innovative filter systems and hygienic cleaning of vehicle cabins.*

The MAHLE Group makes use of its know-how as an original equipment manufacturer to support workshops in its Aftermarket business in opening up new business areas.



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

**KEY FACTS**

*NGK SPARK PLUG is preparing for the future with investments in its Venture Labs and applying its knowledge to new business sectors.*

## Moving boldly into the future

Growth in rapidly changing markets is a challenge faced by almost every industry. NGK SPARK PLUG, one of the biggest suppliers of automotive parts and technical ceramics worldwide, is set to meet that challenge.

Today, NGK SPARK PLUG is already ideally equipped to meet the demands of a globalised market. With 16,400 employees across 43 subsidiaries, five Technical Centres and a network of currently 33 production sites, it already has an international, yet regional manufacturing and sales network. The size and structure of that network enable the company to respond quickly and efficiently to rapidly changing customer expectations. In a time when new powertrains, globalisation, digitisation, and environmental regulations are reshaping the mobility and technical ceramic industries, this is a decisive advantage.

**KNOWLEDGE IS KEY**

The size and scope of NGK SPARK PLUG's production footprint brings another important advantage: knowledge. By sharing best practice templates across international borders, the whole organisation is able to stay ahead of the field.



sustainable society by developing products related to the environment, energy, next generation vehicles, and the medical field.

Another important element is diversification. By applying its extensive knowledge to new business sectors, the company is doing far more than opening up potential for growth. With a clear focus on the future, the company is also contributing to a

**VENTURE LABS - A HUB OF IDEAS**

But in this rapidly changing world, just using established structures, no matter how good they are, is not enough. NGK SPARK PLUG has set up a bold new 'open innovation' concept – the 'Venture Labs'. There are three of these labs around the globe, set to grow the company's future business in new, environmentally-led directions.

Venture Labs are hubs of collaborative, creative technical thinking. By openly cooperating with start-ups and other innovative companies, NGK SPARK PLUG is actively contributing to the development of a sustainable society by creating new businesses in sectors with potential for future growth.

**IMPRESSIVE TRACK RECORD**

Venture Labs enable the company to work with outside resources to supplement their own technologies and skills. This not only broadens the range of possibilities, it also enables the company to create new investment businesses with unprecedented speed.

Although still a young project, NGK SPARK PLUG already has an impressive track record for applying its core expertise to new fields. For example, the company is developing solid oxide fuel cells (SOFC), a breath analyser that helps hospitals spot airway inflammation, and an ultrasound system to measure and track brain health.

With all its technical expertise and its desire to go new ways, NGK SPARK PLUG is indeed future-ready.



[www.ngkntk.com](http://www.ngkntk.com)

# Accelerate in corona times and reinvent yourself



By taking strict measures and applying safety rules in time, NRF got through the COVID-19 situation better than most other IAM companies.



## LAUNCHING ONLINE TRAINING COURSES

From mid-March, a lot of people started working from home. For NRF it was no longer possible to provide commercial and technical training on location. The NRF team showed itself to be extremely flexible and responded immediately with the launch of new online training courses.

In six months' time, more than 8,000 people from 39 countries (509 cities) worldwide participated in these courses.

## VIRTUAL BOOTH REPLACES AUTOMECHANIKA

Normally, NRF would have participated in Automechanika Frankfurt this year with a large exhibition stand. At this fair, NRF normally meets customers from more than 80 countries worldwide. Unfortunately, this fair was canceled due to the COVID-19 situation.

NRF did not want to let this momentum pass and was the first Aftermarket supplier to launch a virtual booth. It turned out to be very successful with more than 300 online customer meetings in one week. At the virtual booth, NRF introduced two new product groups: auxiliary water pumps and expansion tanks. Another highlight was two new-to-range DAF CF/XF EURO6 truck radiators.

### KEY FACTS

*NRF responded to COVID-19 quickly with new measures for employees and customers, online training courses, and a virtual trade fair booth, seeing record sales in July despite the challenges.*

During the COVID-19 crisis, NRF didn't have to close production sites and warehouses and, thanks to its flexibility and strong customer relationships, the company completely switched to virtual customer contact within a few weeks' time. By introducing online webinars and launching a virtual booth, instead being present in person at Automechanika Frankfurt, NRF has reinvented itself ... and the Aftermarket.

## COVID-19 MEASURES AT NRF

At the beginning of March, NRF realised the seriousness of the COVID-19 situation and responded immediately. To prevent closure of production sites and warehouses, NRF informed the office staff to start working from home; the company

has supported its employees in this as much as possible and ensured that employees had good computer equipment.

NRF invested in new software to optimise digital collaboration. On a personal level, NRF offered flexible working hours, as working from home can be a challenge. The crisis gave NRF new insights, an obvious one being that video works. Collaboration between the international locations has even improved and, as a result, NRF has changed its future travel policy.

## SALES RESULTS AGAINST AFTERMARKET TREND

The ambition of NRF was to avoid a loss in April and May, which are very profitable months under normal circumstances. The company succeeded in this and, in June, NRF recovered the Aftermarket business to 80%. July and August were beyond expectations, with the company hitting a sales record in July. NRF experienced that other suppliers had availability and supply chain issues due to the consequences of COVID-19. This year, the company started with high stock levels in all warehouses and, due to increasing demand and high productivity, NRF has performed against the Aftermarket trend.



### KEY FACTS

*While Schaeffler looks ahead to e-mobility in the Aftermarket, its INA FEAD KIT solution is offered to professionally repair mild hybrids in today's market.*

# Evolution instead of revolution

Schaeffler is convinced that electro-mobility will also find its way into the independent Aftermarket and, today, already offers suitable repair solution.

**"We support independent garages in carrying out repairs professionally and efficiently,"**

*said Rouven Daniel, Head of Transmission Systems at Schaeffler Automotive Aftermarket.*

Schaeffler is certain that the switch to e-mobility will not happen from one day to the next for independent workshops. For 2025, the company is still forecasting 50 percent combustion engines and 35 percent hybrid drives – and this applies purely to new registrations. For vehicles already on the market, Schaeffler assumes that approximately 3 percent will be electric and 10 percent hybrid drives in 2025. For vehicles that are of interest to the independent Aftermarket (i.e. older than 5 years), the ratio is even more clearly in favour of the internal combustion engine. At present, there are simply still many combustion engines on the roads.

For this reason, Schaeffler will initially focus on combustion engines as well as hybrid vehicles. Even if the plug-in hybrid is the first thing that comes to mind, this segment also includes, for example, 48V mild hybrid applications that are already being used in many new vehicles today. These include new technologies such as the belt alternator starter (BAS), which converts the front-end auxiliary drive from an energy consumer to an energy supplier.

In combination with a 48V battery, BAS allows the vehicle to "sail" with the combustion engine completely switched off, thus reducing CO2 emissions in road traffic. When starting off, the BAS also increases the drive torque thanks to a "boost function", thus ensuring greater dynamics and comfort. In order to professionally repair mild hybrids today, Schaeffler offers a unique repair solution for independent garages: the INA FEAD KIT for auxiliary drives. In addition to V-ribbed belts and tension and idler pulleys, the KIT also includes the BAS and all further necessary accessories.

To provide independent garages with the best possible support for professional repairs also in the future, Schaeffler is continuously expanding its REPPERT service brand. For example, repair manuals as well as service and product information can be viewed at any time via the online platform [www.reppert.com](http://www.reppert.com) or via app.



New for the independent Aftermarket – the INA FEAD KIT for 48V mild hybrids. For more information, visit <http://aftermarket.schaeffler.com>

**SCHAEFFLER**

**PHILIPS**

# New generation of Philips halogen car headlight bulbs

Brighter car bulbs with increased beam reach and longer lifespans for a safer, elevated drive.

## PHILIPS RACINGVISION GT200: LET YOUR LIGHTS TAKE YOUR DRIVING TO THE NEXT LEVEL

If you're passionate about driving, let Philips RacingVision GT200 car bulbs elevate your automotive experience. The highest performer in its portfolio, Philips RacingVision GT200 delivers the super-bright visibility of a rally bulb in a format you can use on public roads (ECE homologated). Experience the razor-sharp clarity of up to 200% brighter light compared to the minimum legal standard. With its ultra-performance beam reaching a full 80 metres further than the minimum length<sup>1</sup>, Philips RacingVision GT200 lets you see more of the road ahead. Spot potential hazards sooner, react faster and position your car more accurately on the road. It all adds up to a safer, more satisfying driving experience.

## PHILIPS X-TREMEVISION PRO150: THE BEST BLEND OF HIGH PERFORMANCE AND LIFETIME

Combining striking brightness with the kind of lifespan previously unavailable in such a high-performance bulb, Philips X-tremeVision Pro150 provides the visibility to keep drivers and their loved ones even safer on the road. With Philips X-tremeVision Pro150, you enjoy up to 150% brighter light compared to the minimum legal standard. A tailor-made composition of precious gases further protects the filament from ageing. This means more brightness and a longer lifespan of up to 450 hours<sup>2</sup>. Because it can throw light up to 70 metres further<sup>3</sup> ahead on the road, Philips X-tremeVision Pro150 increases your ability to react to potential hazards.

**KEY FACTS**

Philips RacingVision GT200 and X-tremeVision Pro150 headlight bulbs provide improvements for a brighter and safer feeling on the road.

**EXCLUSIVE TECHNOLOGIES AND UNIQUE AUTOMOTIVE QUALITY**

Advanced filament design for both of these new ranges provides greater precision and luminance for better illumination of the road, while new Diamond Precision quartz-glass technology ensures more brightness. The new production technique for Diamond Precision quartz glass increases light throughput as well as providing great resistance to thermal shock and pressure.

[www.philips.com/racingvision](http://www.philips.com/racingvision)  
[www.philips.com/x-tremevision](http://www.philips.com/x-tremevision)



<sup>1</sup> Additional safety distance compared beam length to derived minimum after ECE regulation, based on 1 Lux. Farthest distance from the car. Applies to H4 and H7. <sup>2</sup> Lifetime and color temperature differs per type. Indication for H7. <sup>3</sup> Id. (1)

**SOGEFI** GROUP

# Sogefi filters for the best-selling light commercial vehicle in Europe

Sogefi is the Original Equipment filter supplier of the oil and diesel fuel filter for the best-selling light commercial vehicle (LCV) in Europe: Ford Transit.



Diesel3Tech+™ technology

**KEY FACTS**

Sogefi's oil, engine air, fuel, and cabin air filters cover vehicle makes for all major European, American, and Asian manufacturers.

Sogefi is one of Europe's leading vehicle filter suppliers addressing the needs of its partners thanks to its OE-DNA across oil, engine air, fuel, and cabin air filters with coverage for vehicles makes of all major European, American, and Asian manufacturers.

With the **2.0L diesel engine filter**, Sogefi (for Ford engine range) adheres to the latest emission regulations and biofuel compatibility, taking in consideration the high requirements in terms of robustness and lifetime in order to meet users' expectations, combining the very core specific know-how of Sogefi: **chevron pleating** and **Diesel3Tech+™ technology**.

The filter module has been designed to offer very high efficiency for particles down to 4 microns, ensuring a very long life of the high-pressure pump and the injectors. Diesel3Tech+™ provides an

extreme protection against water contamination in the fuel, preserving both engine reliability and injection system from rust, wear, and malfunction.

This technology separates water droplets from fuel and stores water in a dedicated water tank. Once maximum water level is reached, water in fuel sensor lights up a warning light on the dashboard and in this way, separated water can be removed from the water tank through the drain screw.

The Sogefi oil filter efficiently protects the engine in retaining harmful particles present in oil, so that clean oil can circulate around the lubrication system again and prevent unnecessary wear or damage.

This is particularly important for this category of commercial vehicles, driving

every day in intensive use conditions. The LCV car parc increased by more than 2.1 million vehicles in 2019, marking it the seventh consecutive year of growth across the European Union.

Sogefi confirms its premium filtration expertise, increasing the Aftermarket product portfolio that is manufactured in accordance with OE standards and is available for order under the well-known brands: Purflux, FRAM®, Tecnicar and CoopersFiaam.



# Greener, healthier, and digital solutions

Valeo's Aftermarket strategy "Smart Care for You" perfectly addresses these needs through its products and services offer.



**KEY FACTS**

Greener and healthier mobility are increasingly strong concerns for drivers, whereas efficient digital support has become key for distributors and workshops.

**ADVANCED DIGITAL TECHNICAL SUPPORT**

In light of the need for social distancing, Valeo reinforces the ramp-up of its e-services program:

- Valeo accelerates in the publication of online technical content on Valeo Tech @ssist, the online technical support platform for workshops, co-designed with workshops and distributors.
- Valeo reinforces its offer of online training courses for mechanics (more than 30,000 webinar sessions during first half of 2020 worldwide).
- Valeo keeps on deploying its unique Valeo Specialist Club, the 100% digital 'Loyalty Program' dedicated to workshops.

Accessible through a smartphone app, the program is straightforward and efficient, with its defining characteristic being the total freedom from cumbersome procedures: no need to cut out packaging or collect documents and return by mail.

Discover all Valeo Digital Aftermarket services on [valeoservice.com](http://valeoservice.com).



**GREENER MOBILITY**

As the world number one in vehicle electrification, Valeo fits one in every three vehicles worldwide with Valeo technologies that help to reduce CO<sub>2</sub> emissions. From mild hybrid to high-power solutions, Valeo electrification technologies span the full spectrum of requirements across all vehicle segments, from small urban cars through to SUVs and premium sedans.

Valeo, the electric mobility champion, has also emerged as the world number one in 48V electric motors, a cost-effective electrification technology that will account for 30% of the global automotive market by 2030. This 48V technology makes electric mobility more affordable – greener mobility will be accessible to all.

In the Aftermarket, Valeo's offer includes the Valeo StARS and Valeo i-StARS starter-alternators and Valeo ReStart, a reinforced starter. Valeo is the only supplier to offer Stop-Start technologies for the Aftermarket.

**HEALTHIER MOBILITY**

Protecting the driver and its passengers from viruses and bacteria has become an increasingly important concern. For the disinfection of the vehicle cabin, Valeo offers ClimSpray™. This affordable and easy-to-use automatic spray eliminates viruses (including coronaviruses), bacteria and fungi in only 15 minutes.

For the purification of the air conditioning system, which often houses contaminants and bacteria, mechanics can use Valeo ClimPur™, the quick and powerful solution to be sprayed when changing the Cabin Air Filter.

The efficiency of Valeo ClimSpray™ and ClimPur™ is proven and has been certified by an independent laboratory in May and July 2020, especially against coronaviruses.



**KEY FACTS**

Semi compound brake discs for popular Mercedes-Benz models are now also available in the independent Aftermarket. The special design contributes to weight saving and CO<sub>2</sub> reduction.

# Semi compound brake discs by TRW now available for popular Mercedes-Benz models

For over 100 years, brake systems for automobile manufacturers worldwide have been developed and produced under the TRW brand. This experience and expertise also applies to the TRW product portfolio for the independent Aftermarket, which is now being further expanded in the two-piece brake disc segment.

In response to strong demand from the market, ZF Aftermarket is expanding its portfolio of semi compound brake discs under its TRW brand. These brake discs are now also available for various Mercedes-Benz C- and E-Class models. Additional references for S-Class and GLC models of the Stuttgart-based premium manufacturer will follow in mid-2021.

ZF Aftermarket provides automotive companies with a comprehensive range of brake discs product brand. In the segment of semi compound brake discs, products are now also available for:

Model	Axis
C-Class (W205) Sedan (14-)	Rear
C-Class (W205) Sedan (14-)	Front
E-Class Coupe (C238) (16-)	Front

By mid-2021, the range will be expanded to include additional part numbers for the Mercedes-Benz S-Class and GLC models.

The semi compound design of Mercedes-Benz brake discs consists of a steel hub

which is toothed with the grey cast iron friction ring. This special design optimises thermal expansion during braking so that the disc is not deformed by thermal stress. The brake disc of this special design was developed to improve safety and performance and to extend the lifetime in more powerful vehicles.

ZF Aftermarket has developed an exclusive design for the independent Aftermarket, which has the advantages of the OE product, but differs in the connection between the brake hub and the friction ring: TRW's semi compound brake disc also consists of a steel hub riveted to the cast iron friction ring. Due to the hub material and the riveting process, a special coating was developed to protect the brake disc from corrosion even at the rivet.

**LESS WEIGHT AND CO<sub>2</sub> EMISSIONS**

The reduced weight of a semi compound brake disc, compared to a full cast brake disc, reduces the unsprung masses, which improves driving comfort and NVH (Noise, Vibration & Harshness) behaviour. In ad-



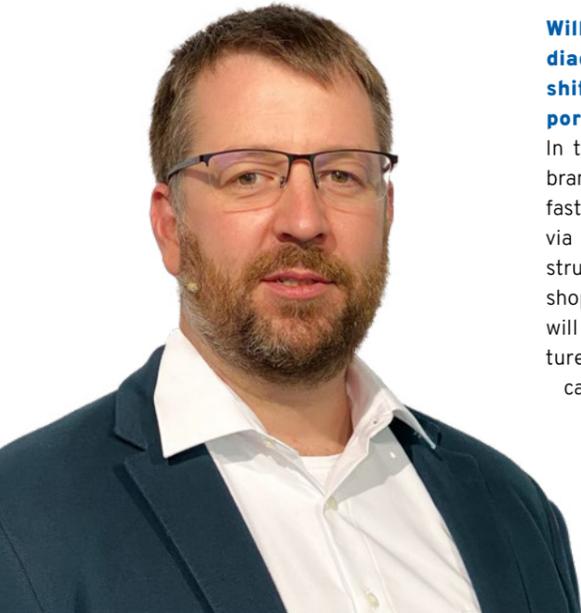
dition, the weight reduction contributes to the decrease of fuel consumption and CO<sub>2</sub> emissions. Due to the reduced thermal expansion, the braking system operates at a lower temperature level, thus creating reserves to be able to draw on full braking power in an emergency.

Since independent workshops are also serving an increasing number of fleet customers, such as cab companies, the expansion of the program in the segment of two-piece brake discs for popular Mercedes-Benz models is particularly important for them. Another example of ZF Aftermarket's strong customer orientation.



## The future belongs to multi-brand diagnostics

An interview with Rolf Kunold, Managing Director of Hella Gutmann Solutions, on the subject of changing conditions for repairs and services of new car generations.



Rolf Kunold, Managing Director

### Mr. Kunold, how do you see the developments with security gateways and VIN-specific activation codes for spare parts?

I am surprised how excited the discussion is about security gateways. I think this is overrated and the IAM has more important problems. After all, it's only natural that OEMs are looking at security-relevant vehicle systems in the era of online hacking. However, it is absolutely clear to all parties involved, including OEMs, that the independent aftermarket must continue to participate in access solutions and also in the possibilities for repairing cars. This is clearly stated in EU legislation. The technical solutions exist and will continue to exist in the market. For us as a multi-brand diagnostics manufacturer, none of this is very pleasing, because all the effort is on top. But once again, we can and will offer solutions to the independent garage market – we have no reservations about that at all.

### Will there even be a multi-brand diagnosis in a few years or will it all shift to the vehicle manufacturer portals?

In the IAM the future belongs to multi-brand diagnostics, because they are much faster and more practical than diagnostics via OE portals. The way the portals are structured, they are not efficient for workshops. The real question is whether there will be multi-brand workshops in the future. And I'm pretty sure about that, because there will be fewer vehicles in private households. The operation of the vehicle fleet will increasingly shift to institutional fleet managers such as leasing banks, insurance companies, or car rental companies. And these have no interest in dealing with 25 different brands. That's why I am firmly convinced that multi-brand workshops and tools will prevail in the future.

### Nevertheless, was the step to block OBD access surprising?

FCA was the first vehicle manufacturer to install an access blockade. That was a bit of a bumpy ride. At Mercedes-Benz and Volkswagen, implementation is much more regulated. This gives us and the other diagnostic device manufacturers the opportunity to develop a solution with the OEMs. Hella Gutmann has a cross-brand solution for cyber security management, with which the employee in the workshop only has to authenticate themselves once with their diagnostic device without having to go via the OE portal. They can then diagnose all secured customer vehicles as usual. This means that the real work process in the workshop does not change. Activation takes place in the background.

### What is the relationship between diagnostics providers and OEM in such solution developments?

It is not that we can help shape it. Nor is it the case that we can only access the respective data with a court order. A lot has changed in recent years, and we work together in a more cooperative manner on a certain level. But the reality is that we pay for the fact that we can participate. This adds to the effort for the implementation in our software. However, we try to not burden the workshops with all these costs because there are no additional functionalities for them.

### How do you see the chance that EU legislation will create a manufacturer-independent uniform regulation for access to vehicle data?

There is a clear passage in the new type approval that OEMs must protect theft-related functions in the car in such a way that they cannot be misused by third parties. But the current practice of simply closing the OBD port in principle, if someone is not authenticated, is not in line with this. This discussion is being intensively conducted at an EU level. But this is the responsibility of the associations, and a result could take years. So, there is only one priority for us: we have to make sure that the workshops and the trade can do their job in the meantime.

### And access restrictions are only one of many issues.

Exactly. This year, the aftermarket has been very busy with security gateways, neglecting a much bigger problem: access to OEM portals. Issues such as pass thru, re-programming ECUs, installing updates, unlocking components, and access to specific data are much more fundamental issues. For workshops, these are much greater challenges than security gateways. We already have solutions for these as well.

## Big bets placed on hydrogen in global energy transition

In the name of sustainability and climate change, governments and OEMs are pouring immense resources into a decarbonised energy system and hydrogen fuel-cell technology.

In Europe, as an example, a massive energy transition is already underway. The European Union's 28 Member States have ratified and signed the Conference of the Parties (COP21) Paris agreement in an effort to keep global warming at bay. This energy transition will require virtually carbon-free energy generation, increased energy efficiency, and profound decarbonisation of transport, buildings, and industry. With that said, hydrogen will be required at a large scale in order for this fundamental shift to be achieved<sup>1</sup>, and OEMs have taken notice, applying and putting hydrogen strategies into practice.

According to a KPMG study of global automotive executives, in 2018, 78% of executives surveyed believed that hydrogen fuel cell vehicles would be the future<sup>2</sup>, and that vision has certainly taken shape since. When it comes to the decarbonisation of trucks, buses, large cars, and commercial vehicles, hydrogen is the most promising option. Fuel cells and hydrogen refueling infrastructure both have significant advantages; fuel cells require significantly less raw materials than batteries or combustion engines do, and setting up refueling infrastructure requires about one-tenth of the space compared to fast-charging solutions<sup>3</sup>.

When it comes to the automotive industry, OEMs and governments are embarking on a substantial hydrogen transformation. Japan has been seen as a leader in terms of putting hydrogen strategies into practice. In 2017, the country set out a goal of establishing a global supply and customer chain with 800,000 fuel-cell cars taking to the road as a part of this plan<sup>4</sup>.



Regarding OEMs, Jaguar Land Rover (JLR) is currently undergoing a hydrogen power research project with the aim of developing fuel cell-powered versions of its larger vehicles. The research effort known as Project Zeus could see the production of a zero-emission, hydrogen-fueled Range Rover later this decade. Additionally, the OEM is currently working on several battery electric vehicles (BEVs) to join existing Jaguar models. However, the Zeus hydrogen project could give the company another powertrain option considering the British government's plan to ban the sale of internal combustion engine vehicles by 2035 or sooner. JLR's hydrogen plans are similar to other large OEMs as it has become apparent that electrification alone can't deliver emission reductions that many had hoped for<sup>5</sup>.

In the European Union, the transport sector accounts for about one-third of all CO2 emissions<sup>6</sup>. With hydrogen at the centre of an energy transition, industry experts are betting on the power source to help achieve decarbonisation.

Visions for hydrogen becoming the fuel of the future are already showing signs of becoming a reality. Costs for producing green hydrogen have fallen by 50 percent since 2015, governments and OEMs are planning and acting now, and automotive consumers are eager for alternative sources of energy to be brought forward in sustainable ways. If you fast forward to 2030, hydrogen and hydrogen fuel cells are likely to be paving the way in the transport sector.

<sup>1</sup> Hydrogen Roadmap Europe. A Sustainable Pathway for the European Energy Transition. Luxembourg: Publications Office of the European Union, 2019. <sup>2</sup> KPMG automotive survey: fuel cell hydrogen vehicles will be the future. 2018. McPhy.com. <https://mcphy.com/en/news/kpmg-automotive-survey-fuel-cell-hydrogen-vehicles-will-be-the-future/?cn-reloaded=1>. <sup>3</sup> Hydrogen Roadmap Europe. A Sustainable Pathway for the European Energy Transition. Luxembourg: Publications Office of the European Union, 2019. <sup>4</sup> Hydrogen – Fuel of the Future? Porsche Newsroom, 25 August 2020. <https://newsroom.porsche.com/en/2020/company/porsche-consulting-hydrogen-economy-21951.html>. <sup>5</sup> Jaguar Land Rover aims for hydrogen SUVs by 2030. Autocar India, 23 August 2020. <https://www.autocarindia.com/car-news/jaguar-land-rover-aims-for-hydrogen-suvs-by-2030-418390>. <sup>6</sup> Ibid

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