

# O' mag

[O] THE NTN-SNR GROUP PARTNERS' MAGAZINE

N°3



## At the crossroads of technologies



**02** **MARKET  
IN THE SPOT LIGHT**  
CONSTRUCTION:  
the largest  
industrial employer  
in Europe

**05** **RENDEZ-VOUS**  
INDUSTRIAL DISTRIBUTION  
ALBECO in Poland

**06** **DESTINATION**  
GERMANY:  
The automotive market  
in all its aspects



editorial

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RCS Annecy B 325 821 072  
Editorial board: C. Donat  
Design/production: Service publicité SNR  
Staff reporter: J. Traverse  
Contributors to this issue:  
D. Sepulchre, JM. Heller, V. Stienhans, S. Dreyer,  
B. Law, A. Konopka, A. Konopka-Rozwadowska,  
W. Konopka, A. Berlowski, JP. Demorge,  
M. Oelschläger, M. Hähner, E. Goury, N. Greiner,  
B. Gauthier, T. Vallet.

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## PRESENCE AND TRANSPARENCY TO STRENGTHEN OUR BUSINESS RELATIONSHIPS, PERPETUATE YOUR BUSINESS ACTIVITIES...

Our world is currently going through a period of intense turmoil, which forces us to face previously unheard-of challenges. But let us look first at how the crisis has affected our business activities.

In November 2008, an initial wave hit the automotive industry head-on and, in consequence, the original equipment (OE) market.

Then, beginning in February 2009, the entire industrial distribution sector was also adversely affected. However, during this same period, some businesses and industrial sectors remained stable or even expanded, such as the railway sector. This was also notably the case for the aerospace and automotive spare parts industries. In our 2010.2 strategic plan, we have defined a new mix of activities that, undoubtedly, will allow us to meet the challenge of this crisis and prepare for the future. In summary our top priority objectives are:

- 1- Automotive Spare Parts: To develop and expand our presence in this thriving sector, particularly in Germany where we are gaining share in areas of this market. (See p. 6 and 7.)
- 2 - Industrial Distribution: To optimise the synergy between NTN and SNR and make our group the favoured partner in this business sector. (See p. 5.)
- 3 - Aerospace: to develop medium-term prospects while taking into account this market's own particular cycles.
- 4 - OE Industry: To invest in this sector's significant potential for growth, particularly in Italy and Germany. (See p. 2 and 3.)

This 2010.2 plan is also the opportunity for you, our client-partner, to gain a clear view of our strategic commitments and our ability to support you.

Mr Sépulchre de Condé,  
Managing Director, SNR Bearings.



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IN ALL ITS ASPECTS

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## 02 | MARKET IN THE SPOTLIGHT CONSTRUCTION



# CONSTRU the largest in Europe.

From gigantic dams to cycle tracks, including housing, roads and other infrastructure projects, construction holds a major place in the global economy and particularly in Europe. NTN-SNR has always been a partner of the major equipment manufacturers involved in this business sector. To provide an overview, we took a grand tour in the company of Jean-Matthieu Heller, head of NTN-SNR Group's construction market division.

### CONSTRUCTION: SCOPE AND INVOLVEMENT.

"A basic definition is in order, first of all," explains Jean-Matthieu Heller. "The term 'Construction', on the face of it is simple and obvious, and embraces four main areas of activity, i.e.

- Single or multiple-occupancy housing, private or public,
- Non-residential building (hospitals, hotels, schools, offices, industrial buildings, ...)
- Public works and civil engineering (roads, railways, bridges, tunnels, electrical networks, water systems, ports and other work on maritime and waterway sites)
- Maintenance and refurbishment

€1,304 billion

This was the construction industry's turnover in the 27 countries of the European Union in 2007, or 10% of GDP (gross domestic product).

26 million workers

in the European Union depend, directly or indirectly, on construction.

In addition, the sector is made up of: 2.7 million companies

It represents:  
16.4 million jobs, i.e.  
- 7.2% of the active population in Europe  
- 30.4% of industrial jobs







# CONSTRUCTION : industrial employer

## ON A GLOBAL SCALE...

Everywhere in the world the construction market is the 'motor' of industrial activity. The structure of this market varies greatly by geographical area and especially the degree of development of each country. Very broadly, we have two main 'models'. In a developing country, the exponential growth of cities involves wide scale building work and significant infrastructure needs (transport and utilities).

In developed countries there is already substantial existing infrastructure. Activity is more directed towards maintenance, large extension projects, city redevelopment, ...

## FOCUS ON EUROPE...

In spite of the current economic crisis, the European market retains strong potential through the development of its infrastructure: roads, railways, waterways, utilities and urban redevelopment. There is also strong potential for residential and service-sector building, particularly in Eastern Europe.

In 2007, construction saw an exceptional level of activity right across Europe. In 2008, there was a global slowdown but with marked differences between geographic areas. Due to the development of its cities, countries in Eastern Europe maintained a significant level of growth, in excess of 20%. This was most notable in Bulgaria, Slovenia and Romania. In contrast, countries in Western Europe saw a degree of downturn caused by a reduction in residential and

service-sector building work. Spain is currently the country worst affected. And the future? Let's dare to make a prediction, although it is dangerous to do so. In 2009, the decline in activity is set to continue (down 7.5% from 2008), essentially because of the crisis in new residential and, to a lesser extent, non-residential building. A further fall in 2010 (down 1% on 2009) before an upswing predicted for 2011

## AND THE LARGE PROJECTS.

During the coming years the large scale projects that are undertaken as part of various economic re-launch plans will support this sector. Improvements in trans-European transport systems (rail, road and waterways) are already benefiting from an overall budget of €600 billion. Thirty priority projects, representing only €225 billion of it, are scheduled to begin before 2010 and be completed by 2020.

We cannot help but think of a few: the Berlin-Palermo rail link (€960 million), the Seine-Scheldt waterway link (€420 million): the Ireland/UK/Benelux road link (€81 million) and there are many others.

## DEMANDING MANUFACTURERS.

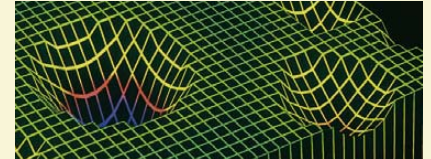
Caterpillar 31% of the global market, Komatsu 16%, Volvo 8%, Deere 7%, Hitachi 7%, CNH 6%, IR 5%, etc. We can see that the production of machinery dedicated to the construction market is very concentrated. For these manufacturers the key words are: quality and innovation, robustness and reliability, comfort and security. Always a partner to these big names in construction, NTN-SNR is present across the whole range of construction machinery, whether stationary (crushers, cranes) or mobile (dump trucks, mechanical diggers, compacting rollers, levellers). The applications supplied by NTN-SNR vary widely: vibrating systems, wheels, engines, transmissions, hydraulic pumps, ...

## AMONG THE NTN-SNR SOLUTIONS:

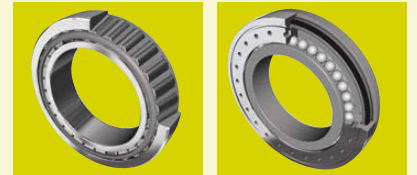
### HL : « HIGH LUBRICATION »

For particularly difficult conditions for lubrication, such as operating with high loads at low speed, NTN-SNR offers the "HL" surface treatment. This consists of producing a special surface condition allowing improved lubrication of the contact between the rolling elements and the bearing raceway. Combined with a nitride heat treatment the "HL" definition enables the working life of the bearing to be increased by a factor of 9.2 times in poor lubrication conditions.

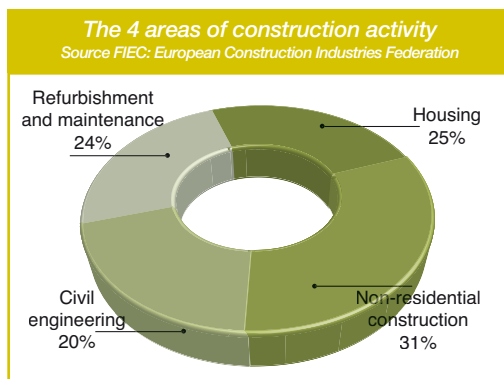
Typical applications: planetary gears, hydraulic pumps, hydraulic motors, transmissions.



Lubricant reserves are created to guarantee the presence of lubricant at the contact point



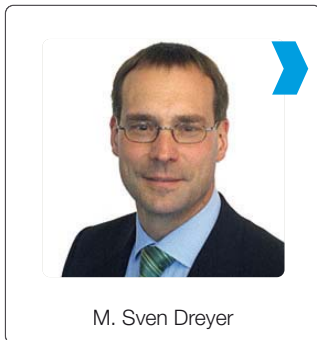
- High-performance tapered roller bearings adapted to each application thanks to a multitude of technical solutions: high-quality steel, appropriate heat treatment (case-hardened, through-hardened, carbonitrided), low torque, internal geometry with optimised profiles.
- Ball bearings with multiple sealing and greasing solutions.
- Needle bearings with drawn cup, machined outer rings or "super high capacity".
- Type "E" cylindrical roller bearings.
- Bearings with integrated speed/angle sensing.
- Spherical roller bearings whose Premier range is particularly suitable for high load carrying.
- Self aligning housed bearing units.
- Single and double row angular contact ball bearings.
- Four-point contact ball bearings.



NTN-SNR  
solution



## ON THE ROAD WITH VOLVO...



M. Sven Dreyer

**F**ounded in Sweden in 1927, the Volvo brand is synonymous, throughout the world, with quality, safety and environmental care. Born of a desire for excellence, Volvo Construction Equipment (Volvo CE) is the oldest and one of the largest construction machinery manufacturers in the world. To find out more about NTN-SNR's strengths in this area, we talked to Mr. Sven Dreyer, Director Purchasing and Supply Management Central Europe Volvo ABG, who is based at their production unit at Hameln in Germany.

### THE VOLVO GROUP: PASSIONATE ABOUT MOVEMENT.

Did you know? Volvo was originally a verb taken from Latin. It means "I roll". In fact, today the Volvo Group flourishes in all forms of transport: trucks with Volvo Trucks, Renault Trucks, Mack Trucks and Nissan Diesel; buses and coaches through Volvo Buses; naval industry through Volvo Penta; aircraft and aerospace through Volvo Aero and construction machines through Volvo CE. Volvo Construction Equipment factories can be found in Sweden, Germany, France, USA, Mexico, Canada, Brazil, Korea, China, India and Poland. With a demanding worldwide clientele, Volvo CE offers more than 150 models of excavators, wheel loaders, pavers, compactors, milling machines, graders and articulated dump trucks. Thanks to a strong desire to innovate and an eye on constant improvement, these machines are known for their robustness, safety, reliability and manoeuvrability, as well as for their excellent performance at work. Volvo CE is also well-known for its commitment to the environment.

asphalt pavers at Hameln in Germany and to supply them to the world market.

"NTN-SNR has long been an important partner for ABG. The reasons for this trust and relationship? First of all, the standard range of products is well suited to our requirements in terms of their technical performance and quality. So, for example, spherical roller bearings used in our asphalt pavers and vibrating screens are suitable for the severe operating conditions in which they are called upon to operate: pollution, severe vibration, speed and high temperatures.

However, in applications where standard bearings will not perform well, special solutions have been developed. This is the case with various bearing solutions used in asphalt compactors: the four-point contact bearings with special sealing arrangements and integrated fixing function; the special tapered roller bearings; and the Premier spherical roller bearings mounted in special housings. To optimise our procurement, we have worked with our suppliers in a KANBAN system since 1994. NTN-SNR was one of our first KANBAN Partners. This system enables us to respond quickly to fluctuations in production and to reduce storage costs. Therefore we are supported by very reliable partners, among which we naturally count NTN-SNR. In short, the NTN-SNR group is a company for the future. This means both a wider product range and a strengthened international presence."



Compactors



Asphalt pavers

**HAMELN PLANT:**  
Manager of the plant: Udo Heukrodt  
Production area: 90.000 m<sup>2</sup>  
Number of employees: 490

### VOLVO ABG – NTN-SNR: TRUST AND SHARED REQUIREMENTS.

"In recent years," explains Mr Dreyer, "Volvo CE has based its business strategy on widening its product offering, particularly where dedicated road construction equipment is concerned. Because it has solid experience in this sector, Volvo acquired the former IR-Road Machinery Business Line and with it ABG. With this last acquisition Volvo began to manufacture, under its own brand, compactors, milling machines and

### VOLVO GROUP IN FIGURES (2008)

**Turnover: US \$46,1 billion**

- 67 % Trucks
- 18 % Volvo CE
- 6 % Volvo Buses
- 4 % Volvo Punta
- 2 % Volvo Aero
- 3 % financial services

To find out more: [www.volvo.com](http://www.volvo.com)



## RENDEZ-VOUS WITH...

Waldemar Konopka co-founder  
and President of Albeco in Poland

On 18 June 2009, Albeco celebrated its 20<sup>th</sup>  
anniversary, the ideal occasion to recount the success  
story of this dynamic Polish company.



## KEY DATES:

## 1989 :

Creation of Albeco in Plewiska, close to Poznan, by Waldemar Konopka (1) and Andrzej Berłowski (2), the current President and Vice President respectively. (photograph above)

## 1991 :

Signing of the Association Agreement between Poland and the European Union.

## 1992 - 1993 :

Opening of offices in Olsztyn (600 m<sup>2</sup> to service the northern part of the country) and Katowice (150 m<sup>2</sup> to service the southern part)

## 1995 :

Albeco becomes the authorized NTN distributor for Poland

## 1996 :

Collaboration begins with SNR

"We can say, therefore, that we have much experience cooperating with NTN and SNR," Waldemar Konopka declares.

## 1 May 2004:

Poland becomes a member of the European Union.

## 2005 :

Opening of a new warehouse in Plewiska, near Poznań.

## December 2007:

Poland becomes part of the Schengen Area.

Albeco receives ISO 9001: 2000 certification

## 18 June 2009

Albeco celebrates its 20<sup>th</sup> anniversary

AND IN  
THE NEAR FUTURE...

In addition to the 770 m<sup>2</sup> head office in Plewiska, Albeco intends to develop a 12,000 m<sup>2</sup> plot of land for offices and warehouses in order to carry out its expansion plans.



18 June 2009: The entire Albeco team celebrates its 20<sup>th</sup> anniversary along with its suppliers

With a turnover of nearly 7 million euros in 2007/8, 33 employees and an impressive stock that is the pride of the company, Albeco has gone, in those 20 years, from being a simple project to a reputable company recognised well beyond the Polish border for its efficiency in any situation. A journey built on thoroughness and precision, and the quest for the most efficient and competitive suppliers in the market.

"It all began in June 1989 at the Poznan International Fair," Waldemar Konopka explained. "Andrzej Belowski, a friend from the University of Economy, and I decided to seek out adventure and create our own company. So Albeco was born, serving the ever-diversifying Polish industrial landscape: agriculture, the food industry, mines and quarries, automotive and high-precision equipment manufacturers, ..."

## OBJECTIVE: QUALITY WITH CONTROLLED PRICES.

"Since the beginning, our ambition has always been to be associated with top quality at very competitive prices, and we offer a wide range of products in this way: bearings and bearing assemblies, linear motion components, transmissions, accessories, etc."



## SOLUTIONS READILY AVAILABLE AT ALL TIMES.

"If Albeco can't supply a bearing, then it's very likely that no one else can. We are well known for the size and quality of our stock. Even if it's expensive nowadays to do so, we make it a point of honour to have special, hard-to-find products readily available for our clients around the world."

## UNDER THE BANNER OF WARMTH AND HOSPITALITY.

Anna Konopka-Rozwadowska, Sales Director and daughter of Waldemar, speaks up. "To celebrate Albeco's 20<sup>th</sup> anniversary, we have invited all our employees and main suppliers, of which NTN-SNR is one, to a special celebration evening for about sixty people. The place? An equestrian centre about 50 km (30 miles) from Poznan, in a restaurant built in a typically Polish architectural style. Activities on the agenda: speeches, nostalgic recollections of our journey together, a banquet with traditional Polish dishes, jazz and dance party and more. An evening of exciting ideas for tackling the future with enthusiasm and, perpetuating and, strengthening our collaboration with our steadfast partners, which includes NTN-SNR.



# THE AUTOMOBILE MARKET IN ALL ITS ASPECTS.



Michael Oelschläger



Germany is getting ready to celebrate the 20<sup>th</sup> anniversary of the fall of the Berlin Wall this autumn. After its reunification, the country formed an area of 357,000 km<sup>2</sup> and a population of 82 million. With a GDP per capita of €35,400, Germany has the largest economy in Europe and the third largest in the world, thanks mainly to a tradition of openness and an industrial base that is highly competitive in world markets. To discuss the situation within the automotive market, we met up with Michael Oelschläger, OE and Spare Parts Sales Manager for Germany.

**O'MAG:** What kind of economic "weight" does the automotive market have in Germany?

**M. OELSCHLÄGER:** With 41.5 million private passenger vehicles and 2.8 million lorries in circulation, the automotive market in Germany represents approximately 24 billion euros (spare parts, accessories, ...). This being said, we have to distinguish between the OE and spare parts markets.

**O'MAG:** What are some recent developments in the OE market?

**M. OELSCHLÄGER:** As in the rest of the world, this market is currently going through quite a bit of turmoil. Between November 2008 and January 2009, we witnessed a huge drop in activity of approximately 40%. Since the introduction of the "super bonus", we have noticed a significant upturn in certain segments; some vehicles sell well or very well while others still find themselves in a difficult situation. Overall, the activity in 2009 should not go below 20% of that of 2008.

**O'MAG:** How is NTN-SNR positioned in this OE market?

**M. OELSCHLÄGER:** Let's not forget that 8 out of the 10 best-selling cars in Europe today come originally equipped with NTN-SNR ASB® (Active Sensor Bearing) bearings. Recognised for its knowledge and capacity for innovation, the NTN-SNR Group is the technical partner and favoured supplier of great German manufacturers such as Volkswagen, Daimler and Opel...

**O'MAG:** And in the spare parts market?

**M. OELSCHLÄGER:** The OE and spare parts markets are different but inextricably linked. Our presence as an original equipment supplier for world famous German constructors allows us, on the one hand, to consolidate our technological advantage and, on the other, to hold a premier spot as either an independent supplier of spare parts or an Original Equipment Supplier (OES) of spare parts for constructors.

With respect to this market, our chief objective is to promote the NTN and SNR brand names as specialists in wheel bearings. Our approach consists of meeting with the managers of the different subsidiaries of our clients, as well as contacting garage owners and mechanics, in order to meet their requirements and expectations better and to provide efficient, reliable and competitive solutions.





DESTINATION GERMANY

# SOLID PARTNERSHIPS WITHIN THE AUTOMOTIVE DISTRIBUTION WORLD.



Marcus Hähner

In Germany, the automotive spare parts market is dominated by large groups who are the leaders in the market. Anxious to meet the needs and expectations of end users, garage owners and mechanics, these groups are behind the many fairs, exhibitions and regional trade shows. NTN-SNR actively participates along side them at these events. Why? How? To better understand these questions, Marcus Hähner, Manager - Corporate Customers, responds.

**O'MAG:** What are the characteristics of the Distribution industry in Germany?

**M.HÄHNER:** The main characteristic is that the automotive spare parts market in Germany is quite centralised. Important groups play a major role in this area. ATR and GAU, for instance, are among the leaders. Some facts and figures: the ATR Group alone comprises no less than 2,000 garages, 78 STAHLGRUBER subsidiaries, 80 WM-Fahrzeugteile subsidiaries and 14 MATTHIES subsidiaries.... The scale of these German groups allows them to organise their own fairs, exhibitions and trade shows with great professionalism.

**O'MAG:** NTN-SNR participates in these shows and exhibitions in an increasingly regular basis – Why?

**M.HÄHNER:** Actually, we participate in an increasing amount of shows every year, such as the Johannes Matthies show in Hamburg last May. Since 2007, we have participated as partners in three Stahlgruber GmbH shows as well as three WM-Fahrzeugteile shows.

Our objective at these events is:

- 1°- To make the NTN-SNR brand name well known and recognised as an automotive equipment manufacturer specializing in wheel bearings.
- 2°- Create contacts with garage owners and mechanics by responding to their needs and expectations with practical help and assistance.



**O'MAG:** In practical terms, what are the real benefits for these end users?

**M.HÄHNER:** When garage owners or mechanics visit our stand, they are surprised and delighted to discover our ASB® technology, the function of which is not well known enough in the spare parts industry and often comes as a "revelation" to them. They are also captivated by our special products, and our demonstrations of assembly and disassembly, etc. This market is focused primarily on the products, innovations, and technical data. During these moments of privileged interaction, we make sure that we share all the useful information and practical, concrete solutions we can provide.

## → Viewpoint

### WESSELS+MÜLLER AG

- (an ATR Group member)
- No. of active customer accounts: 40'000
- No. of subsidiaries: 80
- 2008 turnover: €541 million

**WM-FAHRZEUGTEILE** has been an important NTN-SNR partner in Germany for nearly 10 years! Nina Greiner, Corporate Design, Events and Marketing Manager, explains that the longevity of this relationship is due to "the quality of the 'original equipment' as well as the high technology of the products, the continuous

expansion of the range of products, the competitive prices and relevant advice, the skill and knowledge exhibited by the teams and their prompt reaction in the event of any problem. Thanks to NTN, the access provided to Japanese "original quality" references is definitely a 'plus' for us."

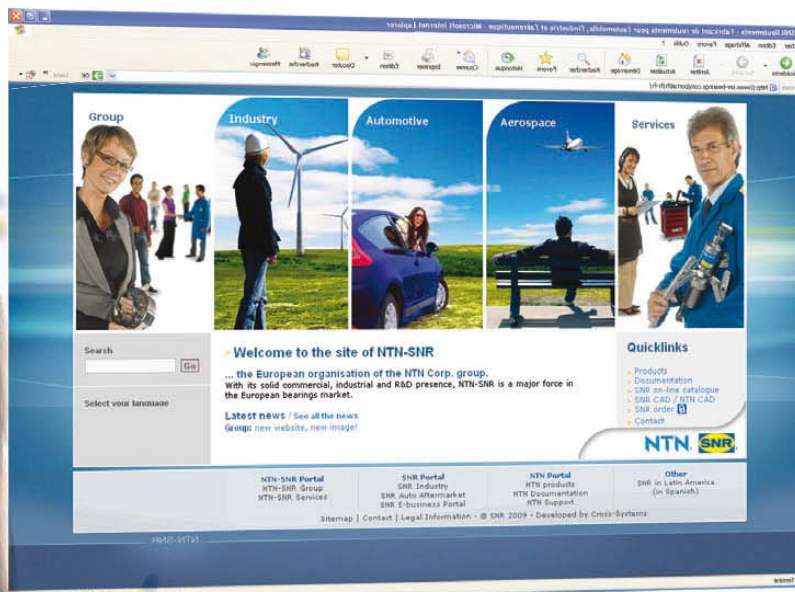


Nina Greiner



in situ

# WET PAINT



## SOMETHING NEW ON THE WEB!

September 1<sup>st</sup> 2009: NTN-SNR UNDERGOES A TRANSFORMATION on Internet by launching its new Website: [www.ntn-snr.com](http://www.ntn-snr.com): a colourful portal, a presentation of the NTN-SNR Group in Europe and its range of products ...

That's right; more than ever, the NTN-SNR Group positions itself as a major bearings actor in Europe.

## LET'S BUILD CLOSER LINKS ON THE WEB!

On this website, everything is available so that in few clicks, you can enter the NTN-SNR world, understand our aspirations, our values and use our tools!

Proximity, professionalism, quality and technical proficiency are at the heart of our culture and at the heart of the NTN-SNR Group strategy.

NTN and SNR share the same philosophy: passionate development for new technologies answering your needs.

Without further delay, connect to  
[www.ntn-snr.com](http://www.ntn-snr.com)



[www.ntn-snr.com](http://www.ntn-snr.com)