

# European News

## Impact of Covid-19 Less Negative than Feared

After a significant slowdown in business due to the Covid-19 pandemic, Hilti Group has reported that initial signs of recovery are emerging. Total sales for the January to August 2020 period decreased by 12.3% to CHF 3.426 billion, and by 7.3% in local currencies, compared to the previous year.

Christoph Loos, CEO of the Hilti Group, comments: "Following the unprecedented slump in our business during the spring lockdown, our figures have gradually recovered since June. We are therefore weathering the crisis better than originally feared, albeit with very large regional differences. This makes us cautiously optimistic, even though the crisis is by no means over and uncertainty remains high."

While last year got off to a good start, business in North Asia slumped sharply in February 2020 and from mid-March onwards there was a clear downward trend in all markets. After the low point in the 2nd quarter of 2020, a gradual recovery set in. From January to August, total sales fell by 12.3% to CHF 3.426 million. Net income fell by 13.9% year-on-year to CHF 314 million. The result is also burdened by the strong appreciation of the Swiss franc. The negative currency effect, for the period from January to August 2020, amounts to about 5% points in terms of sales.



## LSI Group Sees Signs of Improvement for Q3

lisi

LSI Group achieved consolidated sales of €923 million in the first nine months of 2020, with an uptick in sales between Q2 (-45.9%) and Q3 (-30.4%) driven by the automotive division.

Third quarter consolidated sales were €286.7 million, down 30.4% on the same quarter in 2019, but up 20% quarter-on-quarter. LSI Aerospace's Q3 sales were down by 39.6% at €137.5 million compared to the same period of the previous year. This decline is amplified by the deconsolidation of Indraero Siren and LSI AEROSPACE Creuzet Maroc, which represented a decrease in sales of -€28.7 million.

The Fasteners segment, which had enjoyed good momentum before the Covid-19 pandemic, posted a -34.7% sales decline in Q3 compared to the same period of the previous fiscal year. In North America, markets outside commercial aviation (business, military, and helicopters) could not offset the collapse in demand for commercial aviation. At €121 million, the quarterly sales of the LSI AUTOMOTIVE division recovered to -14.3% compared to the same period of the previous year, after the -60.1% drop recorded in Q2. In the first nine months of the year, they were down -29.1%, compared to a decline in global production of -27.9% over the period under review.

## LIGNOLOC® Now with Technical Approval

Earlier in 2020 the German Institute for Construction Engineering issued the National Technical Approval for load-bearing timber connections using LIGNOLOC® wooden nails. After extensive tests and complex calculation models, all expectations of the expert committee were met. The approval enables the planning, design and execution of load-bearing connections in timber frame construction. Planks and panels made of solid timber, wood-based materials, or gypsum fibre, can be attached to wood building materials using LIGNOLOC® wooden nails from Raimund Beck GmbH. In addition, connections can also be made with LIGNOLOC to produce bracing and load-bearing wall diaphragms.

LIGNOLOC is the first collated wooden nail for use in industrial production, made from central European beech wood. The special design of the LIGNOLOC nail point and the large amount of heat generated by friction when the nail is driven in at a high speed cause the lignin of the wooden nail to weld with the surrounding wood to form a substance-to-substance bond. This effect – referred to as lignin welding – has been tested and confirmed by scientists at the University of Hamburg, by means of UV scanning of the cell structure.

Key benefits of LIGNOLOC wooden nails include not acting as thermal bridges and avoiding unsightly wood discoloration or traces of corrosion, as well as causing less tool wear when processing nailed wooden components subsequently. Raimund Beck points out the nails are also ideal for ecological timber construction using 75% less greenhouse gases than when producing steel nails.

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## Unity is Strength

Specialinsert® highlights its new DEFORM-NUT® SELF-LOCKING deformation rivet is the ideal solution for fixing parts subject to risk of loosening and strong vibrations. Designed, patented and produced by Specialinsert®, this deformable tubular rivet with self-locking thread, also patented, in cylindrical or hexagonal version provides a nylon ring at the end of the thread to friction the screw during assembly. It can be easily installed on boxes, pipes, sheet metal, profiles and on all those supports that do not allow the insertion of nuts inside them.

DEFORM NUT® SELF-LOCKING combines advantages of the classic deformation rivet with the function of self-locking nuts. As well as installation on parts without the possibility of access from the inside, its technical advantages include anti-loosening guaranteed without the use of additional components such as a thread locker or spring washers, as well as a quick assembly of the connecting screw. This is due to not requiring the use of two tightening spanners, unlike the self-locking nut.

Available in galvanised steel and stainless steel, as well as in other different shapes and dimensions, the DEFORM NUT SELF-LOCKING features a medium tightening torque for correct installation of M6 – M8, a tightening torque 9Nm -18Nm and traction loads of 13,000N – 21,000N.



## GESIPA® Celebrates Its 65th Anniversary

In 1955 a small company named 'GESellschaft für Internationale Patentverwertung' was founded. Shortly afterwards a patent application was filed for the 'process of producing breakstem blind rivet joints' and a 'hand tool for setting blind rivets'.

This was the beginning of GESIPA®, including its first participation in the Hanover trade fair at the end of the 1950s, GESIPA was able to make a lasting impression on many customers from various industries with its blind riveting technology.

Family owned until the end of 2008, GESIPA has now been a member of the internationally operating SFS Group for more than ten years and has established itself as one of the leading suppliers in the sector of blind riveting technology. From the first battery powered blind rivet setting tool to efficient, automatic processing with setting process monitoring, GESIPA blind riveting technology has been meeting the highest demands in industry and trade for 65 years.



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# BOSSARD

## Bossard Shows Considerable Improvement in Q3 2020

After the marked decline in sales in the second quarter of 2020, driven by global government Covid-19 measures and their impact, Bossard Group has reported the third quarter showed some recovery – achieving sales of CHF 200.6 million (prior year: CHF 218.5 million).

Bossard underlines that whereas sales had dropped by 17.5% in the second quarter, they fell by only 8.2% in the third quarter (-5.6% in local currency). For the first nine months of 2020, the Group posted sales of CHF 600 million (prior year: CHF 669.4 million), a decrease of 10.4% (-6.5% in local currency). Notwithstanding the strong Swiss franc, the third quarter results give reason for cautious optimism.

As long as the Covid-19 pandemic does not lead to further significant restrictions in the sales markets of the Bossard Group, Daniel Bossard anticipates sales between CHF 780 million and CHF 800 million for the financial year 2020. “We are now seeing a slight recovery in our markets, even though some uncertainty remains as to how they will respond to the resurgence in the number of Covid-19 infections,” added Daniel Bossard.

# BULTEN

## Bulten Reports Strong Order Bookings

Bulten AB confirmed strong order bookings and increased market shares, thanks to new contracts, for Q3 after the quarter began cautiously following the Covid-19 pandemic.

Operating earnings during the quarter rose to SEK 40 million and primarily reflect the higher sales and production volumes. All employees on reduced working hours or furlough due to the pandemic have been back on full hours since 1st October 2020.

During the quarter, Bulten’s net sales increased by 18.8% and order bookings by as much as 70.2%. Anders Nyström, president and CEO at Bulten, commented: “The higher sales and dramatic increase in orders indicate that the automotive market is in recovery, and we continue to win market shares as satisfied customers entrust us with new contracts.”

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especially in large cities, more and more people prefer to use private cars instead of public transport. This choice should therefore lead to a surge in the car market. On the other hand,

## What is the Future for the Car?

The car-bolt is atavistic. The car cannot exist without bolts and, conversely, the bolt owes its technical evolution to the progress of the car's design dynamics over time.

The car industry is very important for the fastener industry both in terms of consumption – an average of about 20 kg of fasteners are used in each vehicle – and the quality of the product. Most of the fasteners used in car manufacturing are special, and therefore, technologically advanced.

Today, however, the car industry is going through a period of great uncertainty. The logical question is therefore: "What is the future of the automotive sector?" Many scenarios are opening up and all of them are disturbing. The first scenario is the one associated with Covid-19, which is proving to be more detrimental than the 2008-2009 crisis where the market lost 15% and returned to positive territory the following year. Today, due to the pandemic, the European car market is collapsing.

The real effects of Covid-19 are however highlighted by the negative percentages of car sales in the most critical period of the pandemic, i.e. in April 2020, compared to the same period in 2019. The percentages of some European countries are shown below:

Belgium	- 90.1%	An analysis of the distribution in the decline of sales in European countries shows that they are more consistent in countries where "confinement" has been harsher. In his report, the President of ANFIA (Italian Association of the Automotive Industry) Paolo Scudieri, points out that
France	- 72.2%	
Germany	- 61.1%	
Italy	- 97.6%	
Netherlands	- 53.0%	
Poland	- 67.1%	
UK	- 97.3%	
Spain	- 95.6%	
Sweden	- 35.7%	
Switzerland	- 67.2%	

in the first eight months

of 2020 the European car market lost 2.67 million units. In August, a month with traditionally low volumes, the decline in registrations was again more significant (-17.6%), although not at the levels of previous months (June closed at -24%).

The ANIA bulletin states that total registrations in Italy for the month of July amounted to 113,653 units (-10.9%), while volumes in August amounted to 88,801 units (-0.4%). In the first eight months of 2020, total registrations amounted to 809,655 units, a decrease of 38.9% compared to the volumes of the same period in 2019.

The analysis of the Italian car market by fuel type is very interesting, again according to the data released by ANFIA. Cumulatively, since the beginning of 2020, the share of new diesel cars is 35%, with registrations down by 48.5%, while the share of petrol cars stands at 42% with volumes down by 42% in the January-August period. Alternative fuel cars accounted for 23% of total registrations, down by 4%. In particular, gas-fuelled cars decreased by 41% while registrations of electric cars (BEV – Battery Electric Vehicle) grew by 106%, plug-in hybrids by 200%, and non-rechargeable petrol hybrids by 30% and non-rechargeable diesel hybrids by 78%. Electric vehicles, as a whole, accounted for 14% of the market in the period between January and August 2020.

In addition to the market trends, it must be noted that with the advent of the pandemic, the notion of mobility is also changing. Due to the danger of catching the virus,

however, it must be considered that, especially in large cities, the deterrent to use passenger cars is the chronic lack of parking and difficulty of circulation. Unfortunately, in recent years many Italian cities have developed without any consideration of the existence of the car. Furthermore, the high concentration of cars causes another drawback i.e. air pollution. This should not only make the authorities more responsible, but also large companies. They should speed up the implementation of their sustainability programmes in order to meet the expectations of consumers. Needless to say, people's sensitivities and behaviours can change radically and very quickly under the influence of events.

"We have witnessed the forceful emergence of a concept that is not directly linked to the pandemic, but that derives from an idea of wellbeing and the common good in which air quality, especially in large cities, is now considered a priority and no longer just a niche for convinced ecologists," emphasises sociologist Franco Morace. "This is especially true among the younger generations, who already show a disaffection towards private cars and instead push for new forms of urban micro-mobility. For them, the car continues to be a mysterious object and certainly no longer an object of desire."

According to the sociologist Morace, the social concept of the car is gradually changing in the minds of consumers. The car as a symbol of social status is beginning to fade, especially among the new generations, it is losing its importance due to a change of mentality because it is less and less the object of desire. Furthermore, what currently dampens the enthusiasm of those who

### EUROPEAN UNION<sup>1</sup> - NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

provisional data

	August		% Chg	January-August		% Chg
	2020	2019	2019	2020	2019	2019
AUSTRIA	20.906	29.888	-30.1	158,477	237,225	-33.2
BELGIUM	36.387	47.936	-24.1	297,524	403,534	-26.3
BULGARIA	1.918	2.929	-34.5	15,206	24,372	-37.6
CROATIA	2.601	3.404	-23.6	25,151	47,825	-47.4
CYPRUS	729	639	+14.1	6,699	8,509	-21.3
CZECH REPUBLIC	16.611	25.026	-33.6	131,410	175,340	-25.1
DENMARK	17.608	18.692	-5.8	124,974	157,625	-20.7
ESTONIA	1.461	2.534	-42.3	12,603	18,893	-33.3
FINLAND	8.485	9.994	-15.1	64,976	79,494	-18.3
FRANCE	103.631	129.257	-19.8	998,409	1,467,924	-32.0
GERMANY	251.044	313.748	-20.0	1,776,604	2,495,536	-28.8
GREECE	6.853	9.594	-28.6	52,939	86,873	-39.1
HUNGARY	10.924	15.617	-30.1	78,645	105,443	-25.4
IRELAND	4.859	5.088	-4.5	78,889	110,527	-28.6
ITALY	88.801	89.184	-0.4	809,655	1,325,704	-38.9
LATVIA	1.113	1.627	-31.6	9,181	12,827	-28.4
LITHUANIA	3.397	3.665	-7.3	23,578	30,564	-22.9
LUXEMBOURG	3.671	3.811	-3.7	29,973	39,730	-24.6
NETHERLANDS	26.461	33.724	-21.5	219,129	293,043	-25.2
POLAND	34.707	48.107	-27.9	256,954	375,504	-31.6
PORTUGAL	12.417	12.435	-0.1	92,474	159,466	-42.0
ROMANIA	11.157	23.177	-51.9	73,723	118,003	-37.5
SLOVAKIA	6.980	10.051	-30.6	49,257	71,569	-31.2
SLOVENIA	4.357	5.006	-13.0	38,791	52,086	-25.5
SPAIN	66.925	74.424	-10.1	524,706	883,540	-40.6
SWEDEN	25.522	29.477	-13.4	173,925	221,016	-21.3
<b>EUROPEAN UNION (EU)</b>	<b>769.525</b>	<b>949.034</b>	<b>-18.9</b>	<b>6,123,852</b>	<b>9,002,172</b>	<b>-32.0</b>
EU14 <sup>2</sup>	673.570	807.252	-16.6	5,402,654	7,961,237	-32.1
EU12 <sup>3</sup>	95.955	141.782	-32.3	721,198	1,040,935	-30.7
ICELAND	581	803	-27.6	6,254	9,116	-31.4
NORWAY	10.802	12.073	-10.5	79,798	99,460	-19.8
SWITZERLAND	16.260	19.437	-16.3	142,102	202,091	-29.7
EFTA	27.643	32.313	-14.5	228,154	310,667	-26.6
UNITED KINGDOM	87.226	92.573	-5.8	915,615	1,519,016	-39.7
<b>TOTAL (EU + EFTA + UK)</b>	<b>884.394</b>	<b>1,073.920</b>	<b>-17.6</b>	<b>7,267,621</b>	<b>10,831,855</b>	<b>-32.9</b>
WESTERN EUROPE (EU14 + EFTA + UK)	788.439	932.138	-15.4	6,546,423	9,790,920	-33.1

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS ASSOCIATIONS

<sup>1</sup>Data for Malta n.a. - <sup>2</sup>Member States before the 2004 enlargement

<sup>3</sup>Member States having joined the EU since 2004



are about to buy a new car is the great difficulty in choosing the right one. There are so many questions: Diesel or petrol? Petrol or hybrid? Hybrid or electric? Electric or is it better to wait for hydrogen? In short, there are many questions that embarrass, disorient and demotivate potential buyers who could, especially if they live in a city, opt for alternative solutions such as any form of “car sharing”.

A great incentive for the car of the future should come from improvements in automatic driving. The car industry is making a great effort by investing a lot of money in research aimed at completely resolving the problem within a reasonable time period. At present there are 5 levels of autonomous driving. It starts from the first level which consists, above all, of electronic driving assistance with the use of radar and

various sensors, and ends with the fifth level where the car is able to move independently in any direction and in all conditions.

The vast majority of cars sold today have level one and level two driving systems, and therefore with partial autonomy. Moving to higher levels of autonomous driving is not a simple matter; large investments in design and experimentation are required, but the progress of automatic driving will certainly lead to a great revolution in the use and perhaps in the very concept of the car. Automatic driving combined with innovative concepts of eco-friendly motorisation could be the catalyst to give new life to a sector that has been showing signs of advanced ageing for some time.

The entire and important sector of components will also be involved in this phase of renewal, which in 2019 had a turnover of about 170 billion euros and employed more than three hundred thousand people. And within the context of car components, the fastener holds one of the places of honour and must therefore play its role with the usual swiftness and ability. In order to be ready to face future events, fastener manufacturers will have to bring to the table: inventiveness, courage, initiative, professionalism and above all financial commitment. Consequently, the collaboration between the bolt and the car will be as strong as in the past, even during the renewal phase. ■

## EUROPE (EU27<sup>1</sup>+EFTA+UK) - NEW PASSENGER CAR REGISTRATIONS BY MAKE

provisional data

	August					January-August				
	% 2020	% 2019	Units 2020	Units 2019	% Change 20/19	% 2020	% 2019	Units 2020	Units 2019	% Change 20/19
<b>VW Group</b>	<b>25.5</b>	<b>27.7</b>	<b>225,520</b>	<b>297,512</b>	<b>-24.2</b>	<b>25.9</b>	<b>25.0</b>	<b>1,880,042</b>	<b>2,710,676</b>	<b>-30.6</b>
VOLKSWAGEN	11.0	12.1	97,442	129,580	-24.8	11.3	11.4	821,279	1,232,568	-33.4
SKODA	5.7	5.4	50,103	58,069	-13.7	5.5	4.8	402,178	524,939	-23.4
AUDI	4.9	5.6	43,218	60,012	-28.0	5.1	5.0	370,080	537,246	-31.1
SEAT	3.3	4.0	29,071	43,054	-32.5	3.3	3.4	237,646	363,183	-34.6
PORSCHE	0.6	0.6	5,293	6,325	-16.3	0.6	0.4	45,475	48,528	-6.3
OTHERS <sup>2</sup>	0.0	0.0	393	472	-16.7	0.0	0.0	3,384	4,212	-19.7
<b>PSA Group</b>	<b>13.9</b>	<b>14.1</b>	<b>123,143</b>	<b>151,948</b>	<b>-19.0</b>	<b>14.5</b>	<b>16.1</b>	<b>1,056,164</b>	<b>1,747,847</b>	<b>-39.6</b>
PEUGEOT	6.1	5.4	53,900	57,578	-6.4	6.2	6.1	451,407	664,992	-32.1
OPEL/VAUXHALL	3.8	4.9	33,448	52,660	-36.5	4.0	5.5	294,252	600,555	-51.0
CITROEN	3.8	3.6	33,377	38,805	-14.0	3.9	4.2	283,478	450,584	-37.1
DS	0.3	0.3	2,418	2,905	-16.8	0.4	0.3	27,027	31,716	-14.8
<b>RENAULT Group</b>	<b>10.0</b>	<b>10.7</b>	<b>88,562</b>	<b>114,649</b>	<b>-22.8</b>	<b>10.3</b>	<b>10.6</b>	<b>751,187</b>	<b>1,146,319</b>	<b>-34.5</b>
RENAULT	6.1	5.7	53,989	61,574	-12.3	6.9	6.7	501,070	722,924	-30.7
DACIA	3.9	4.8	34,112	51,680	-34.0	3.4	3.8	247,581	416,197	-40.5
LADA	0.0	0.1	382	905	-57.8	0.0	0.0	1,742	3,682	-52.7
ALPINE	0.0	0.0	79	490	-83.9	0.0	0.0	794	3,516	-77.4
<b>BMW Group</b>	<b>7.1</b>	<b>5.5</b>	<b>62,767</b>	<b>59,032</b>	<b>+6.3</b>	<b>7.0</b>	<b>6.2</b>	<b>511,358</b>	<b>674,005</b>	<b>-24.1</b>
BMW	5.7	4.4	50,615	46,964	+7.8	5.6	5.0	409,586	537,554	-23.8
MINI	1.4	1.1	12,152	12,068	+0.7	1.4	1.3	101,772	136,451	-25.4
<b>HYUNDAI Group</b>	<b>8.3</b>	<b>6.6</b>	<b>73,391</b>	<b>71,045</b>	<b>+3.3</b>	<b>7.1</b>	<b>6.6</b>	<b>518,852</b>	<b>715,202</b>	<b>-27.5</b>
KIA	4.1	2.8	35,920	30,261	+18.7	3.6	3.1	259,442	338,889	-23.4
HYUNDAI	4.2	3.8	37,471	40,784	-8.1	3.6	3.5	259,410	376,313	-31.1
<b>DAIMLER</b>	<b>6.8</b>	<b>6.8</b>	<b>59,939</b>	<b>72,603</b>	<b>-17.4</b>	<b>6.2</b>	<b>6.0</b>	<b>448,610</b>	<b>647,805</b>	<b>-30.7</b>
MERCEDES	6.5	5.6	57,892	60,468	-4.3	6.0	5.3	437,360	576,723	-24.2
SMART	0.2	1.1	2,047	12,135	-83.1	0.2	0.7	11,250	71,082	-84.2
<b>TOYOTA Group</b>	<b>5.8</b>	<b>5.1</b>	<b>51,320</b>	<b>54,309</b>	<b>-5.5</b>	<b>5.8</b>	<b>5.0</b>	<b>421,705</b>	<b>540,256</b>	<b>-21.9</b>
TOYOTA	5.5	4.7	48,578	50,783	-4.3	5.4	4.7	393,652	504,744	-22.0
LEXUS	0.3	0.3	2,742	3,526	-22.2	0.4	0.3	28,053	35,512	-21.0
<b>FCA Group</b>	<b>5.7</b>	<b>5.1</b>	<b>50,585</b>	<b>54,318</b>	<b>-6.9</b>	<b>5.7</b>	<b>6.2</b>	<b>412,270</b>	<b>671,628</b>	<b>-38.6</b>
FIAT	3.9	3.3	34,212	35,389	-3.3	4.1	4.3	294,608	467,219	-36.9
JEEP	1.2	1.2	10,950	12,418	-11.8	1.0	1.1	69,950	120,431	-41.9
LANCIA/CHRYSLER	0.3	0.2	2,262	2,520	-10.2	0.3	0.4	24,725	41,650	-40.6
ALFA ROMEO	0.3	0.3	2,845	3,421	-16.8	0.3	0.3	20,412	37,235	-45.2
OTHERS <sup>3</sup>	0.0	0.1	316	570	-44.6	0.0	0.0	2,575	5,093	-49.4
<b>FORD</b>	<b>5.9</b>	<b>5.6</b>	<b>52,232</b>	<b>60,065</b>	<b>-13.0</b>	<b>5.5</b>	<b>6.0</b>	<b>401,722</b>	<b>651,470</b>	<b>-38.3</b>
<b>NISSAN</b>	<b>2.2</b>	<b>2.2</b>	<b>19,893</b>	<b>23,905</b>	<b>-16.8</b>	<b>2.4</b>	<b>2.5</b>	<b>176,522</b>	<b>272,826</b>	<b>-35.3</b>
<b>VOLVO CAR CORP.</b>	<b>1.9</b>	<b>1.6</b>	<b>16,549</b>	<b>16,902</b>	<b>-2.1</b>	<b>2.3</b>	<b>2.0</b>	<b>168,558</b>	<b>217,497</b>	<b>-22.5</b>
<b>JAGUAR LAND ROVER Group</b>	<b>0.9</b>	<b>0.9</b>	<b>7,895</b>	<b>9,178</b>	<b>-14.0</b>	<b>1.3</b>	<b>1.4</b>	<b>92,530</b>	<b>148,360</b>	<b>-37.6</b>
LAND ROVER	0.6	0.6	5,491	5,922	-7.3	0.9	0.9	65,737	96,645	-32.0
JAGUAR	0.3	0.3	2,404	3,256	-26.2	0.4	0.5	26,793	51,715	-48.2
<b>MAZDA</b>	<b>1.2</b>	<b>1.4</b>	<b>10,840</b>	<b>14,860</b>	<b>-27.1</b>	<b>1.2</b>	<b>1.5</b>	<b>85,088</b>	<b>157,527</b>	<b>-46.0</b>
<b>MITSUBISHI</b>	<b>0.8</b>	<b>1.1</b>	<b>7,478</b>	<b>11,341</b>	<b>-34.1</b>	<b>1.0</b>	<b>1.0</b>	<b>72,934</b>	<b>104,209</b>	<b>-30.0</b>
<b>HONDA</b>	<b>0.7</b>	<b>0.7</b>	<b>6,302</b>	<b>8,052</b>	<b>-21.7</b>	<b>0.7</b>	<b>0.8</b>	<b>47,913</b>	<b>83,844</b>	<b>-42.9</b>

SOURCE: ACEA MEMBERS

<sup>1</sup>ACEA estimation based on total by market - <sup>2</sup>Includes Bentley, Lamborghini and Bugatti - <sup>3</sup>Includes Dodge and Maserati

