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Interview with Stéphane Guillon, Vice President  
of Marketing & Innovation of Winoa

**Building A Bright Future Together  
With Customers... Through Innovation**



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## Building A Bright Future Together With Customers... Through Innovation

**Winoa, until recently known as Wheelabrator Allevard, is one of the world's leading groups and specializes in two major activities: steel abrasives and diamond tools. Steel abrasives are used in the metal industry for cleaning metal parts, preparing surfaces before coating and enhancing fatigue resistance, and also in the stone industry to cut granite blocks into thin slabs. Diamond tools are used in the stone cutting and processing industry. Since 1961 Winoa has been a market-leading innovator in both these areas. Headquartered in Le Cheylas, France, Winoa employs a diverse and highly skilled global workforce consisting of 1500 employees in 30 countries on five continents. Group sales in 2011 totaled €420m. MFN was able to interview Stéphane Guillon, Vice President of Marketing & Innovation of the company.**



**Stéphane Guillon, Vice President of Marketing & Innovation of Winoa**

After a sharp drop in activity in 2009, the industry experienced strong recovery in 2010 and 2011, and has almost returned to pre-crisis volumes. Looking ahead, growth in the steel abrasives market is expected to remain high, at around 3.2% p.a. between 2012 and 2016, still driven by the emerging countries.

The share of high carbon steel abrasives has remained globally stable, at about 90% of the total steel abrasives market.

**(?) MFN:** What is Winoa's position on the steel abrasives market?

**(!) S. G.:** Winoa is the only player that can boast leading positions in almost

all regions of the world, with a global market share of 34%. These leading positions and global presence give Winoa a number of advantages. We are able to minimize transportation costs since we produce where customers are located. We can offer them products for all types of application in a variety of end-markets, providing a high level of diversification. We offer high-quality products and services, in terms of marketing, R&D, distribution capabilities and technical support. We benefit from the highest brand recognition in the industry. W Abrasives, Winoa's main brand, is recognized throughout the world. And last but not least, Winoa has accompanied the shift in growth towards emerging markets by aggressively developing in Asia, South America and Russia.

**(?) MFN:** What are the main end-use markets?

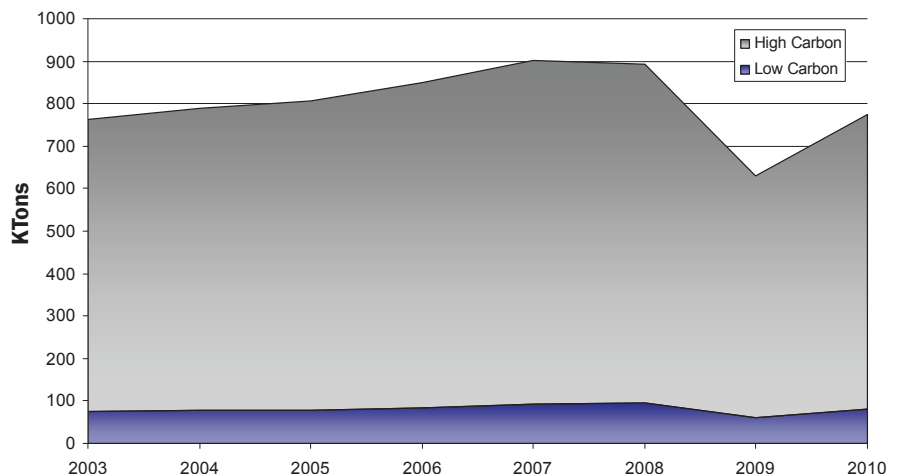
**(!) S. G.:** Steel abrasives play a determining role in the production processes of numerous activities. Winoa produces a dedicated range of steel abrasives for each end-market to address specific needs in certain key processes. The main markets are road transportation, construction, equipment goods, the iron and steel industry, other forms of transportation, and energy.

**(?) MFN:** Who are your customers and what do they expect?

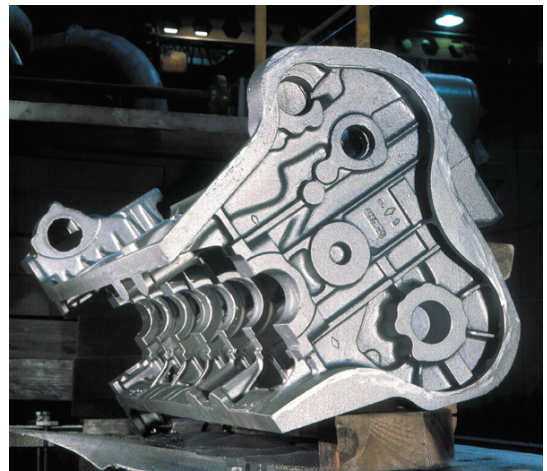
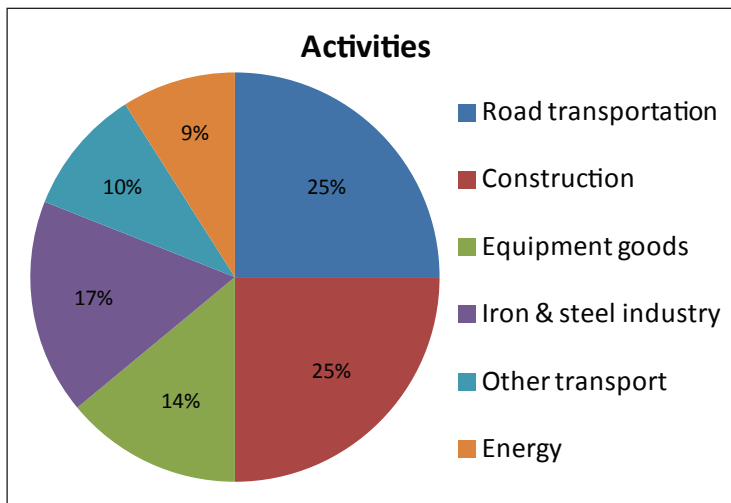
**(!) S. G.:** Our customer base in the industry segment is pretty fragmented

**(?) MFN:** How is the steel abrasives market doing today?

**(!) S. G.:** The steel abrasives market represented 1.3 million tons in 2011. Over the past 5 years, demand has shifted from the advanced economies to the emerging and developing countries and market growth has been driven largely by them. In 2010, the emerging and developing economies accounted for 53% of the steel abrasive market compared to 41% in 2003.



**Steel abrasive market evolution – industry w/o China low carbon and high carbon**



Road transportation

and split into several industrial end-markets.

Our mission is to team up with our customers, everywhere in the world, to offer them economical, ecological, and easy-to-use solutions to transform the surfaces of their products. Customer-centricity is one of the pillars of our business principles.

In practice, this means being attentive to them and forming long-lasting relationships. We conduct a customer satisfaction survey twice a year. We provide training and regular information to improve customers' knowledge and skills. We have introduced a reliable and efficient complaint management system, a well-defined internal organization, and clear processes. Continuous improvement of production and administrative processes provides the best products at optimum cost.

In 2011, we launched a survey to measure customer satisfaction regarding our on-site technical assistance and Test Center solutions, which we named WALUE. Feedback from 170 customers in 24 different countries revealed that almost 75% of WALUE operations were for process improvement or machine control and adjustment.

Winoa is the only manufacturer of steel abrasives to invest extensively in R&D facilities (in France, the Czech Republic and Japan), and Test Centers (in France, the Czech Republic, Austria, Japan and Brazil). These allow the company to offer an unmatched level of products and services and to enhance the perceived value of Winoa amongst its customers.

Winoa is able to supply customers in the shortest possible times thanks to an extensive network of 14 production plants, 13 for steel shot and 1 for cast iron shot, and a unique direct distribution sales model, with 86% of total revenues generated through direct sales and 14% through agents and distributors.

Our strong sales force coverage includes 80 offices and warehouses in 30 countries, 102 sales people in the field, 25 technical experts and 240 agents and distributors.

Metallic abrasives represent a small part of total manufacturing costs for industry customers but they play a critical role in terms of overall cost reduction in the production process, both in industry and in the granite cutting segment. Consequently, customers set a high value on choice, product suitability, innovation, technical support, and on-time delivery. To take one example, when the objective is cleanliness, our high carbon solutions provide optimum results, even when complex shapes are involved, thanks

to the high energy transmitted and the high rebound. In addition, with regard to roughness, even the smallest particles have enough energy to impact the surface, providing a higher number of peaks and ensuring optimum adhesion of the coating. Winoa is developing a new product range for its foundry customers aimed at ensuring overall cost reductions.

**(?) MFN:** What other solutions are proposed by Winoa?

**(!) S. G.:** Winoa has also focused on the development of premium products and solutions for superior performance.

In 2011 we carried out 110 trials for our customers in our Test Centers and provided 1800 days of technical assistance via our WALUE members on our customers' sites!

Innovation is part of our DNA and we are committed to transforming our knowledge into value creation with and for our customers. We are currently launching two patented innovations

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**Stéphane Guillon, Vice President of Marketing & Innovation of Winoa**



on the market, a solution for nano-structuring metallic surfaces and Ultra Fine Shot (UFS), to be used for fine shot peening.

**(?) MFN:** Why is your ultra fine shot peening solution unique?

**(!) S. G.:** Thanks to our innovative processes, we can produce very hard and resilient UFS (from 70 to 150  $\mu\text{m}$ ) at an economic cost. We have also patented special blasting equipment (COP) to improve control of the fine peening process and enable innovative applications such as surface texturing and precise coating deposition to be carried out.

**(?) MFN:** What are the benefits for customers?

**(!) S. G.:** In the case of fine shot peening, they obtain a very high level of stress on the surface at a lower cost and with higher media availability. The solution is a possible substitute for fine ceramic beads.

In the case of surface texturing, they can achieve precise texture or mechanical deposition of the coating.

**(?) MFN:** Why is your nano-peening solution unique?

**(!) S. G.:** It is a productive and reproducible process for generating a nano-structure on industrial parts. It is a purely mechanical operation involving no temperature regulation, no chemicals, and no coating, which ensures a high level of hardness, wear, fatigue, corrosion resistance and so on.

**(?) MFN:** What are the benefits for customers?

**(!) S. G.:** In the case of forging die applications, service life is increased from 20 to 50% and costs are reduced by 10 to 40%.

In the case of pinion applications, thermochemical treatment is more efficient, thus reducing costs and providing higher performance, and service life is increased due to the NP layer's superior properties.

**(?) MFN:** Can you tell us something about your solutions for replacing slag?

**(!) S. G.:** We are capitalizing on the current success of Phenics, our sustainable solution for on-site blasting and recycling for steel rehabilitation jobs. Because the mobile recovery and recycling system is rented, this state-of-the-art system is accessible to all customers without the need for additional investment in equipment or maintenance costs.

The new range of Profilium premium steel grit is designed for blasting surface preparation, ensuring faster surface cleaning, improved coating adhesion and optimum paint consumption through better surface profile quality. The Phenics team of experts provides regular technical support on site, ensuring that customers make the most efficient use of their equipment and obtain maximum blasting performance. We are currently identifying some extremely interesting new applications for our Phenics solution, including shipyards, penstocks, incinerators and refineries.

**(?) MFN:** Why will your Phenics solution be unique for shipyards?

**(!) S. G.:** Because we are developing a new dedicated grit and additional equipment, including a mobile confinement system, washer and dryer.

**(?) MFN:** What are the benefits of steel grit versus slag for customers?

**(!) S. G.:** There are many, including better paint adhesion due to the improved roughness profile, lower disposal costs (up to 50 times less), greater productivity (50 to 100% more), and lower surface preparation costs (30% less).

**(?) MFN:** What is your new solution for acid pickling and why is it unique?

**(!) S. G.:** During heat treatment at high temperature, an oxide layer is formed at the surface of most types of steel (carbon, stainless, silicon, etc.). We are currently working with a number of partners to optimize both descaling and acid pickling operations to reduce the consumption of chemicals while ensuring consistent and acceptable surface quality. The management of strong acids is indeed becoming a huge



Phenics combined unit



Bridge works: bridge refurbishment

environmental issue and customers are increasingly sensitive to acid pickling. The ultimate aim is to reduce or even eliminate this stage of the process. We will be using original products and processes adapted to the specific needs of our customers.

**(?) MFN:** What are the benefits for customers?

**(!) S. G.:** We expect a reduction of 10 to 20% in their total blasting and pickling costs (in some cases by eliminating pickling), and less usage of chemicals, which will help to improve health, safety and environmental performance.

At Winoag, innovation is really guided by the voice of the customer!

*MFN would like to thank Stéphane Guillon for the interview!*

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