# Our Business and Product Profile

With a common thread of providing solutions for customers who require materials handling machinery, the Bell business and products can be clearly defined within four groupings:

- as a global ADT specialist
- as Southern Africa's full range materials handling distributor
- as a cost effective agriculture and forestry solutions provider
- as a provider of aftermarket services

## Bell as a global ADT specialist

The decrease in commodity prices and increased pressure on the mining industry in recent times has resulted in greater emphasis being placed on the efficiency of operations. Mines and mining contractors are becoming more circumspect in their choice of capital equipment and choosing the right tool for the job is one way of getting the best possible results.

Although traditional rigid trucks have a long pedigree in the mining environment, the ADT - first introduced in the 1960s - has been gaining popularity in the mining environment since the 1980s and has also become a common feature on medium to large construction sites due to its versatility.

The ADT market can be divided into three main industries – construction, mining and quarrying. While there are exceptions, there is also an approximate geographical split with most ADTs seeing service in construction and quarrying in the Northern Hemisphere while the use of ADTs in the Southern Hemisphere is more concentrated on mining activities.

Generally speaking an ADT is an all-wheel-drive haulage vehicle. Most have three axles and are six-wheel drive, however, a smaller number are sold with two axles and a four-wheel drive configuration and Bell Equipment also provides three axle, four-wheel drive ADTs for customers not needing all-wheel-drive capability.

The front and rear chassis can rotate independently about the longitudinal axis using an oscillation joint, which effectively keeps the wheels on the ground at all times. In addition the walking beam rear suspension for the middle and rear axles provides additional capability in this regard. This machine configuration, in combination with large earthmoving tyres with low ground pressure, provides all-terrain capability that enables these trucks to effectively haul without having to spend time and money on infrastructure development. In addition, ADTs are able to continue working in adverse weather where conventional rigid and road trucks would need to be parked.

ADT customers enjoy the flexibility of the machine. One day it can be operating on good quality mine roads as part of the mining production and the next it can be breaking new ground in another part of the mine where there are no roads whatsoever.



Another benefit is an ADT's ability to be easily adapted to various roles such as a water or fuel tanker, or a service truck. This is very popular in the Australian mining industry and is a growing trend in South Africa.

Bell Equipment has been manufacturing ADTs for the global market since the mid-1980s when the first imported machines arrived in South Africa and the group saw the opportunity to improve the product to better suit the harsh African operating conditions. Trucks are now produced from either the Richards Bay factory in South Africa or the Eisenach-Kindel factory in Germany depending on the vehicle emission requirement of the final destination.

Today Bell ADTs are widely accepted in the world's largest ADT markets – North America, Southern Africa and the United Kingdom as well as in France, Germany and Australia. This has been achieved by focusing on delivering the lowest-cost-per-tonne to customers in these markets.

As a global ADT specialist Bell has the largest range on the market and is recognised as a world leader and innovator for the ground breaking technological advancements that it has pioneered over the past three decades.

Innovations are designed to improve safety and productivity on job sites and include Hill Stop, Bin Tip Prevention, Turbo Spin Protection, On Board Weighing and an Auto Park Application, all of which are standard on Bell trucks. Linked to productivity is Bell Fleetm@tic®, a satellite fleet management system that provides productivity, utilisation and machine condition data.

Bell is now on its E-series generation of trucks having first introduced this significant upgrade to the smaller B18E, B20E, B25E and B30E ADTs in 2013. This was completed across the range in 2016 with the launch of the large truck update, which comprises of the B35E, B40E, B45E, B50E and the 4x4 crossover concept, the B60E.

The group's evolutionary approach to design for this upgrade relied heavily on concepts proven over the 15 years that the D-series product had been operating on some of the harshest job sites. The E-series models have also been characterised by an increase in payload. The introduction of the new Mercedes Benz HDEP engine platform, renowned for efficiency and reliability, has brought about a useful increase in power while the seven gear ratios of the large trucks deliver better grade ability with reduced fuel consumption.

Bell Equipment's 60-ton truck is a unique concept in response to a need among mining contractors making use of rigid trucks in the 60-ton range. The B60E is a 4x4 with full articulation steering and oscillation joint that has the ability to keep all four driving wheels on the ground, and fully utilise the traction that is available to deliver more off-road capability than a conventional rigid truck.

While the Bell B60E is able to run alongside rigid trucks within the 60- to 80-ton class, the concept is ideally targeted at mines, quarries and bulk earthworks which experience conditions that rigid dump trucks cannot cope with, such as rainy periods which compromise underfoot conditions. When traditional 4x2 rigids can no longer operate, the superior 4x4-traction, oscillation tube and retardation characteristics of the Bell B60E pay off by keeping production going, which is a huge opportunity for many customers. In addition to delivering cost efficiencies related to economies of scale, the economical drive train of the B60E delivers significantly lower fuel consumption than a traditional rigid truck, as established during six years of product testing on sites around the world.

Across the range the ADT product's versatility is further enhanced through the Bell Versatruck programme that uses the ADT platform as a base for tailor-made solutions. The range is extensive and includes ejector trucks, water tankers, lube trucks, hooklift trucks, flat deck trucks, timber trucks, waste handlers, container trucks and even an underground concrete mixer.

With a long history in and a renewed focus on underground mining, Bell also has a range of dedicated low profile underground ADTs. Recent upgrades have concentrated on replicating some of the class leading technologies that have been developed for the surface trucks, into this highly specialised market segment.

# Bell as Southern Africa's full range materials handling distributor

Business is easier for customers when they only have one supplier and one point of contact for their equipment needs, particularly if that supplier is able to deliver strong, reliable support.

One of the group's key strategies has therefore been to complement its ADTs by expanding its product offering to provide a full line solution to customers in the Southern African region. This decision has provided a win-win scenario with customers enjoying Bell Equipment's strong support network across the region. Similarly the group's high level of customer focus has seen support by customers for the business.

To grow the product offering Bell has continually looked at forging relationships with like-minded global OEMs. A family heritage coupled with innovative products that deliver high performance and reliability have been major considerations when selecting partners.

Deere & Company, founded in 1837 by John Deere, a blacksmith and inventor, is one of the world's most respected businesses. The company had a similar beginning to Bell Equipment having started out serving the agricultural sector. The Construction & Forestry Division was established in the mid-1950s and follows the founder's original core values by providing advanced products and services and remaining committed to the success of customers whose work is linked to the land.

The strong relationship between Bell Equipment and John Deere Construction dates back to 1996 when Bell Equipment was awarded distribution rights for the Deere range of construction equipment in Southern Africa. Bell continues to be amongst the largest Deere dealers globally, with a competitive and comprehensive range that comprises motor graders and dozers for site preparation along with wheeled loaders for the initial bulk earthworks and a tractor loader backhoe, which offers versatility for the laying of services and intricate site work.

The range of seven wheeled loaders offer operating weights from 9 to 30 tons and GP bucket capacity ranging from 1,9 to 4,7 cubic metres. The G-series motor graders are available in tandem or six-wheel drive configurations with features like cross-slope control, automatic differential lock and a rear-view camera while the J-series dozers have dual path hydrostatic drive trains providing full power turns, counter rotation and infinitely variable track speeds. The TLB, which was upgraded to the new L-series generation towards the end of 2016, has been manufactured locally in Richards Bay for over 10 years by Bell under licence.


In 2009 Bell Equipment added compaction equipment and road building equipment to its offering when the group became a proud partner to Bomag in Southern Africa. Founded in 1957, Bomag has 500 dealers in over 120 countries worldwide, and as part of the Fayat Group of Companies it also shares the same strong family-business values as Bell.

Bomag is a world leader in the highly specialised area of compaction and delivers the best in German engineering. Products include a full range of single drum rollers for soil compaction, tandem drum rollers for asphalt and rubber-wheeled machines for final finishing.

Road rehabilitation through in-situ recycling as well as soil stabilisation with additives have become popular options for both maintenance and new projects in Southern Africa and the range of recyclers, and cold milling machines that were introduced in 2017, provide Bell with solutions to this niche. Bomag finishers are available for asphalt application before final compaction.

For smaller construction projects and repair work a full range of walk-behind compaction equipment is also distributed.

In line with the growing global focus to improve management of the environment and the handling of solid waste, the Bomag range of refuse compactors allows Bell to offer purpose-built machines to the industry. This ensures customers the best possible compaction and highest uptime in the harsh environment of landfill sites.

An agreement signed in 2017 with global excavator specialist, Kobelco Construction Machinery Co. Ltd, to exclusively distribute and support their range of excavators in Southern Africa, has been well received by the market.

A division of Japanese-based Kobe Steel, Kobelco is a leader in excavator innovation having developed Japan's first construction machine in 1930, followed in 1963 with Japan's first wheel mounted hydraulic excavator. In 1967 the company launched the first crawler type hydraulic excavator to be produced using Kobelco's proprietary technology, and in 2006 introduced the world's first hybrid excavator. With an equally proud history in

manufacturing, the company has 10 production centres located in Japan, China, Southeast Asia, the United States and India.

Key to the Kobelco value proposition is the company's philosophy of pursuing the enhancement of performance capacity and improved cost efficiency with due care for the environment. For this reason all Kobelco excavators have two digging modes – H mode for heavy duty and higher performance and S mode for normal operations with lower fuel consumption. Real life situations show that the S mode can deliver around 20% reduction in fuel when performing the same tasks as like-sized machines while engagement of the H mode delivers 8% more productivity at the same fuel burn as competitor machines.

By developing the full range of Kobelco excavators, from the small 5,5 ton mini excavators through to the largest 85 ton units, Bell customers have options for the smallest applications as well as competitively priced and perfectly matched loading tools for Bell ADTs in the construction, quarrying and mining industries. In addition the partnership offers dedicated models for waste and scrap handling, as well as forestry.

On the crushing and screening side of the business, Bell has partnered with Finlay since 2013. Based in Northern Ireland, and with roots dating back to 1958, Finlay is a global pioneer in mobile crushing, screening and recycling solutions and offers a comprehensive range of equipment to the quarrying, mining, construction, demolition and recycling industries. The company's range of innovative machines is manufactured to provide efficient production, low operational costs and ease of maintenance.

Finlay machines are distributed across the globe by an expansive dealer network and securing the Southern African dealership enables Bell to offer quarry and mining customers a complete range of Finlay mobile crushers and screens. Bringing innovative concepts to market, for example Dual Power units and Spaleck screens, ensures Finlay continues to set the benchmark in power, quality and efficiency when producing all sizes of aggregates for the industry.

At the end of 2017 Bell entered the Southern African tipper truck market for the first time through a partnership with Kamaz, a Russian-based industry leader in this market segment globally. Many Bell customers have fleets of tipper trucks and an ability to supply and service this product segment is in line with the group's strategy to cover more of its customers' equipment needs.

Established in 1969, Kamaz manufactures out of Naberezhnye Chelny in Russia and today accounts for half the trucks sold in that country, as well as being represented in 80 countries across the world.

Importantly Kamaz shares Bell Equipment's values and focuses on understanding applications and customer expectations, and designs products that speak to these. The company's standing as a 15 time winner of the Dakar, the world's toughest off-road endurance race, demonstrates the tough and reliable nature of Kamaz trucks and ties in with the Bell ethos of providing strong reliable machines.

Across the range, well-matched engines and drive trains bolster performance and the ability to deliver results while stronger fabricated structures promote durability. The trucks also feature air-suspended seats and cabs to create industry-leading comfort that drives productivity, safety and ensures driver satisfaction.

The first phase of the Kamaz introduction consists of four models, which will be available as left hand or right hand drive vehicles. The models will include two 6x4 trucks with payloads of 15 and 20 tonnes, a 6x6 truck with a payload of 19,5 tonnes and a 8x4 truck with a payload of 25,5 tonnes. The initial Kamaz trucks will be shipped RORO (roll on roll off) while the Richards Bay factory gears up for complete knockdown assembly.

Combined these five partnerships enable Bell to meaningfully augment its own manufactured products, thereby providing the full spectrum of equipment for mining, quarrying, construction, roads and rehabilitation as well as waste management.

# Bell as a cost effective agriculture and forestry solutions provider

Bell is a pioneer in the field of mechanisation having started out in the sugar industry where the unique tri-wheeler, the purpose-built rigid hauler and trailers were some of the group's founding products. They have proven to be durable and reliable with many of the earlier machines still in operation today.

Bell Equipment's presence in the forestry sector dates back to the 1960s when the group's range of tri-wheelers, rigid haulers and trailers was extended from sugar cane handling to cope with the more arduous forestry environment.

Today the group's agricultural and forestry equipment provides solutions that meet customers' needs as they move from manual to fully mechanised operations. This is achieved through a carefully selected combination of own and partner products.

Different markets require different levels of mechanisation and machinery complexity based on a number of factors such as access to labour, skills and production. Low levels of mechanisation have found acceptance in South America, Central America and Southeast Asia where conditions and the environment are similar to Southern Africa. Labour is still abundant in these regions but low cost mechanisation solutions have found a niche for the safety and productivity benefits they bring to an operation.

Whether it is sugar or forestry, Bell Equipment always focuses on giving customers what they require. Driven by providing lowest-cost-per-tonne solutions, the group looks at the whole mechanised system and not only specific parts, with a keen view to improve operational safety and reduce costs.

The Bell product range caters for low to high levels of mechanisation with the tri-wheeler sugar cane and timber handling machines providing the lowest cost solutions in rough terrain. Variations of this versatile workhorse include forklift models for industrial and agricultural applications and the all-round versalift handler with quick changing implements.

During 2016 Bell introduced its Series IV generation of rigid haulers, fitted with Mercedes Benz water-cooled engines to deliver key performance and productivity benefits. The range, which includes 4x4 variations, comprises of tractors suited to single trailers and short hauls through to larger tractors designed for longer hauls and multi rigs.

Innovation from Matriarch Equipment has added a slew loader to Bell Equipment's product offering to provide a solution to those sugar cane farmers wishing to embark on controlled traffic practices.

In addition, and based on the group's mainstream ADT products, Bell provides versatile alternatives for transport, including infield self-loading forwarders for forestry and articulated tractors geared for large sugar estates. While these products fulfill a niche to handle differing haul distances as well as poor underfoot conditions, the articulated tractors are also used in large-scale land preparation throughout developing African countries.

Complementing the rigid and articulated haulage vehicles is a range of well-matched, robust timber and cane trailers.

For forestry operations that are trending towards more mechanisation Bell has again teamed up with innovative, like-minded partners to broaden the scope of its range and offer greater levels of mechanisation.

John Deere forestry equipment provides purpose-built fully-mechanised systems, which are seen as the global benchmark in terms of safety, productivity, lowest daily operating costs and uptime. The range includes feller bunchers, forwarders, harvesters and skidders.

Waratah provides harvesting and processing heads for the John Deere range and as stand-alone units. Their 'Built to Work' tagline complements Bell Equipment's 'Strong Reliable Machines' philosophy, with their products designed to meet the harshest conditions while delivering excellent power-to-weight ratios.

The Matriarch agreement was broadened in 2017 to include the Skogger, a timber extraction and loading machine, as well as the FASTfell, a felling and bunching machine. These machines complement the existing range of purpose-built forestry equipment by enabling Bell to provide forestry solutions that meet customers' needs for different levels of mechanisation and machine complexity.

Through the Kobelco partnership, Bell is able to offer excavator carriers to the forestry industry. Kobelco is regarded globally as the benchmark in this regard and has over time perfected models to operate in this specific environment. The ability to offer and support a Kobelco carrier with a perfectly matched Waratah head allows Bell to provide full solutions to customers using these types of hybrid machines.

With an in-depth knowledge of the agriculture and forestry industries, and products well suited to meet customers' requirements, Bell remains a key player in these industries.

# Bell as a provider of aftermarket services

Bell understands that business is about more than just supplying strong, reliable machines and that providing strong reliable support is equally important. With this in mind Bell is determined to provide customers with the good, old fashioned assurance that all their aftermarket requirements are covered.

Global customers are supported by an expansive dealer network, which is in turn bolstered by strategically placed, locally staffed Bell-owned operations. A culture of treating dealers as partners ensures a commitment to direct customer communication, which ensures that the group can understand the key focus areas that promote long standing customer relations.

The Global Logistics Centre close to OR Tambo International Airport in Johannesburg, coupled with the strategically placed European Logistics Centre (ELC) - the company's Northern Hemisphere parts hub - are ideally positioned to provide quick and efficient parts supply to anywhere in the world.


During 2017 Bell completed a significant investment into the German and Central European sales and distribution departments along with the ELC. The property has a built up area triple the size of the previous facility with the new ELC warehouse equipped with state-of-the-art commissioning and handling solutions. The introduction of SAP also allows for optimisation in terms of inventory and providing the customer with the shortest possible order-to-fill rate.

The complex has also been installed with a Bell ReMan Centre where specially trained technicians repair and rebuild original Bell components. Basing this facility at the ELC improves both the reaction and lead times as well as allowing for the rebuilt items to be stored and available for worldwide needs.

Bell distributors also carry parts closer to their markets, in their own logistics centres, most notably in the USA, Singapore and Australia.

The distribution and coverage offered by Bell in Southern Africa is unrivalled in the industry largely due to the group's local knowledge and proven ability to 'grow its own timber' through a well established apprenticeship programme.

The Bell Assure programme includes a number of unique and diverse products with which the group strives to meet every customer's unique needs. These range from financing, extended warranty, maintenance contracts through to tailor-made lubricants and remanufactured components.

Machines are available with the advanced onboard satellite communication software, Bell Fleetm@tic®, designed by Bell Equipment to keep customers up-to-date on both machine status and production through real-time internet-based reporting.

Underpinning the support to our customers with the simple mantra 'if we help our customers succeed so will we' ensures that we continue to be closely aligned to what our customers need.