



# Global Footprint & Manufacturing Excellence

From production strategy and manufacturing footprint to factory planning, ramp-up, and industrialization

Friedrichshafen | September 2024



# EFESO is one of the world's leading international 'pure play' consulting firms, specializing in Industrial Operations and Performance Improvement

- A fast-growing pure player, operating globally
- Serving **Process Industries, Discrete Manufacturing, Infrastructure-based Services and Private Equity**
- Helping **transform, boost and/or build** operations
- Offering **Operations, Supply Chain, Idea-2-Value** support, fully integrating **Process, Human, DigiTech and Sustainability** dynamics
- Working **side-by-side** with clients to **accelerate** their progression towards completely **future-proofed** operations



**+900**

Consultants with hands-on experience in the industry

**45**

Nationalities in **>30 offices** worldwide

**+1,000**

Projects in **>75 countries** annually

**+10**

Average savings multiple of consulting fees

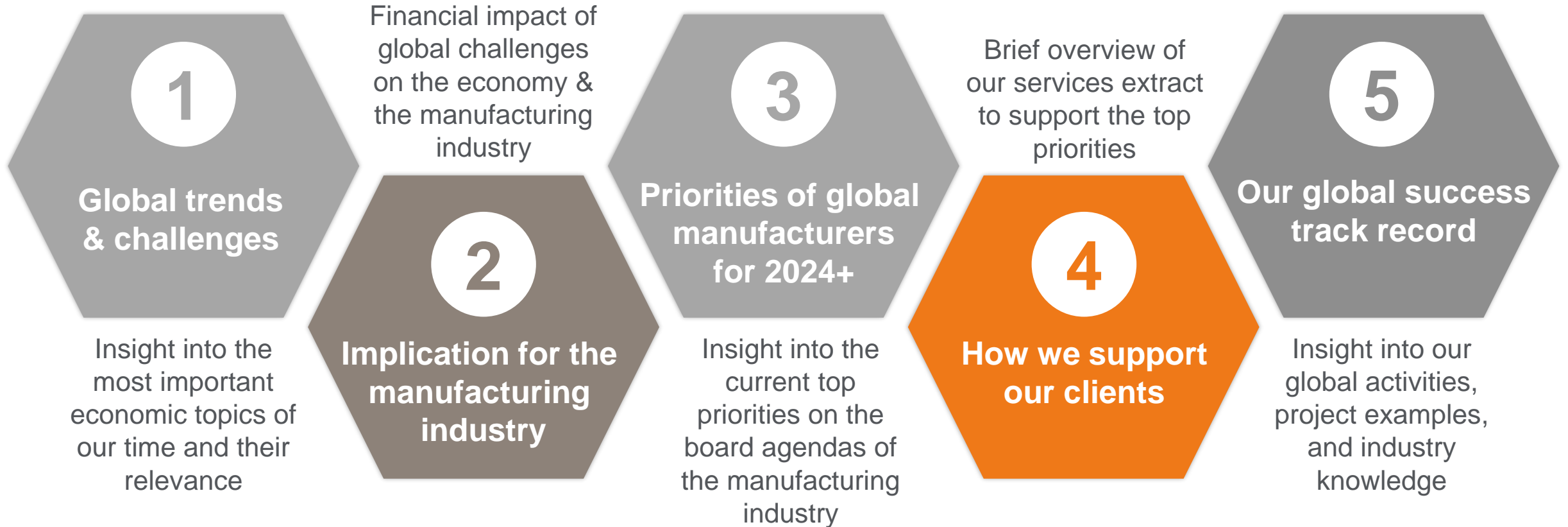
## Our group-wide awards



... and there are many more.



# Overview



# Regional endeavours all over the globe to strengthen local economy, create a world of geopolitical isolation

## Americas



### China 301 Tariffs

... increase in tariffs on selected imported goods from China to the US.



### Inflation Reduction Act (IRA)

... tax refunds & subsidies for climate friendly technologies & projects with a total amount of \$433bn.



### Uyghur Forced Labor Prevention Act

... import ban on goods from the province of Xinjiang (CN) assuming they have been produced in forced labor.

## Europe



### European Climate Law

... to gain net zero greenhouse gas emissions in the EU by 2050 by defining rules for all economic sectors.



### Supply Chain Due Diligence Act

... to identify, prevent or minimize risks of human rights violations & damage to environment.



### Net-Zero Industry Act

... aims to enhance European manufacturing capacity for net-zero technologies and their key components.

## Asia, incl. ME



### New Energy Vehicle Subsidy Act

... financial incentives for purchasing electric and hybrid vehicles and subsidies for local EV manufacturing network.



### Foreign Investment Law

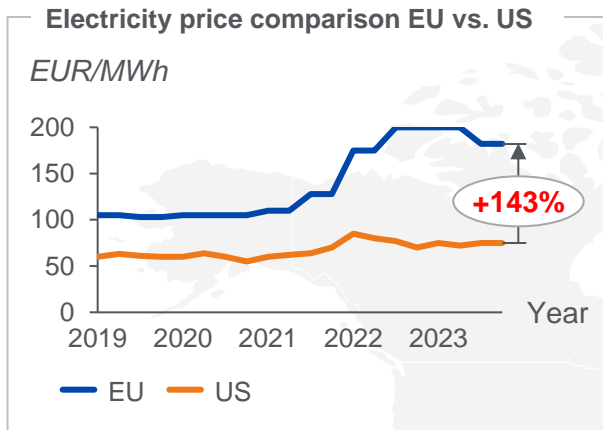
... governing foreign direct investment including a 'negative list' with sectors not allowed to invest in.



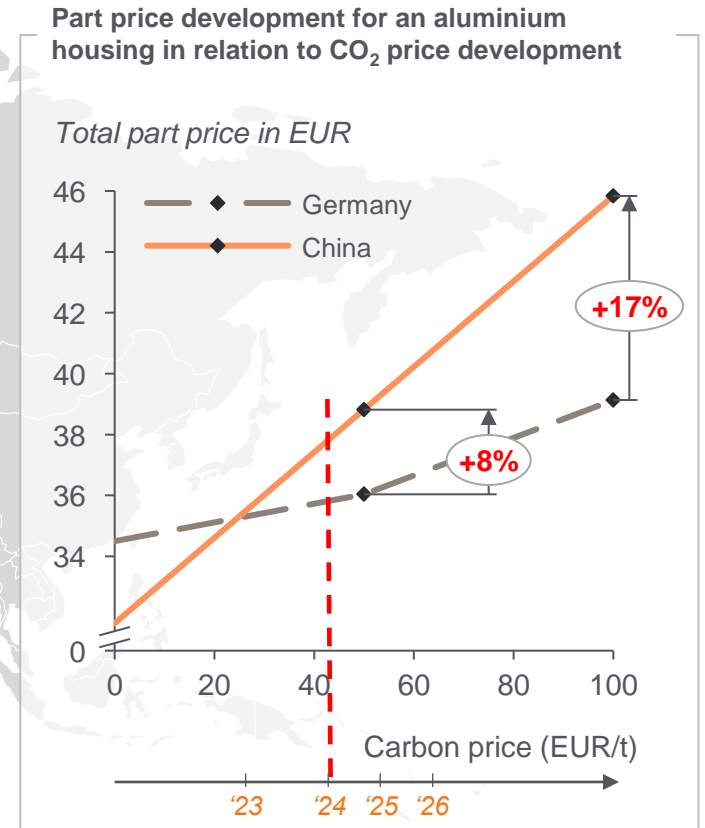
### Anti-Foreign Sanctions Law

... to counteract foreign sanctions on entities or individuals who participate in sanctions against CN.

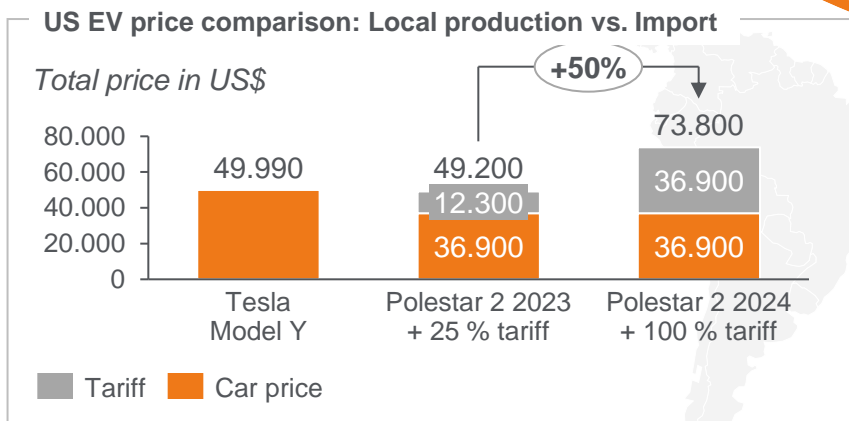
# The three major blocs are strongly interwoven economically which complicates the process of seeking manufacturing excellence



**Energy cost is putting pressure on companies to rethink their footprint if not already in the US**



**Carbon price development has big impact on further purchasing strategies**



**Export of tariff-impacted Asian products is no longer economically reasonable**



# Given the increasing trend of regional bloc-building and geopolitical isolation, manufacturers should focus on the following for 2024 and beyond

## Focus for 2024+

## Details



### Adaptation to regional regulations

Manufacturers must navigate varying regional policies like the IRA in the Americas, CO<sub>2</sub> pricing in Europe, and the RCEP in Asia. Adapting is critical to maintaining market access and compliance.



### Supply chain resilience

With export restrictions, such as initiatives like the CHIPS and Science Act in the Americas, manufacturers need to build resilient supply chains that can withstand disruptions and policy changes.



### Strategic location planning

Conduct location checks to ensure that manufacturing and R&D operations are optimized for regional benefits, considering local incentives, tariffs, and trade agreements.



### Technological investment

Focus on investing in key technologies and complying with region-specific laws, such as European Chip Law and the Connected Vehicles Investigation in Americas, to remain competitive and future-proof.



### Sustainability and energy transition

Prioritize sustainability initiatives and energy security, especially in regions like Europe where energy transition is a key focus, to meet regulatory demands and consumer expectations.



### Market localization

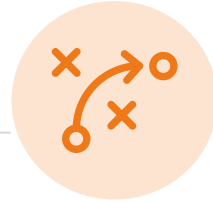
Address the unequal support for foreign versus local companies, particularly in Asia, by tailoring strategies to local markets and strengthening relationships with local authorities and partners.

# The overarching question that needs to be answered is how market challenges and needs can be reconciled with an optimized global production network

## Guiding question as task definition

- Where will the **sales markets** be in the future and is the **production network set up correctly**?
- **Where** should which **products be produced** for the sales markets?
- **What role** does each of the **plants** have to play in the **global network**?
- What is the **right dimensioning for a plant** and how is this achieved?
- How will the **plant** and the **building** be **designed and built**?
- How is the **construction secured** and **managed in terms of time, budget and quality**?
- How should the plant be **operated** and how can **industrialization** and **ramp-up** be achieved?

## Our approach as an answer



### Strategy & Footprint

360° strategic view on manufacturing network



### Plant concept

Factory, location, and business case definition



### Factory planning

Specialized on manufacturing plants, infrastructure, and distribution centers



### Realization supervision

Construction, site and transfer supervision of realization phase



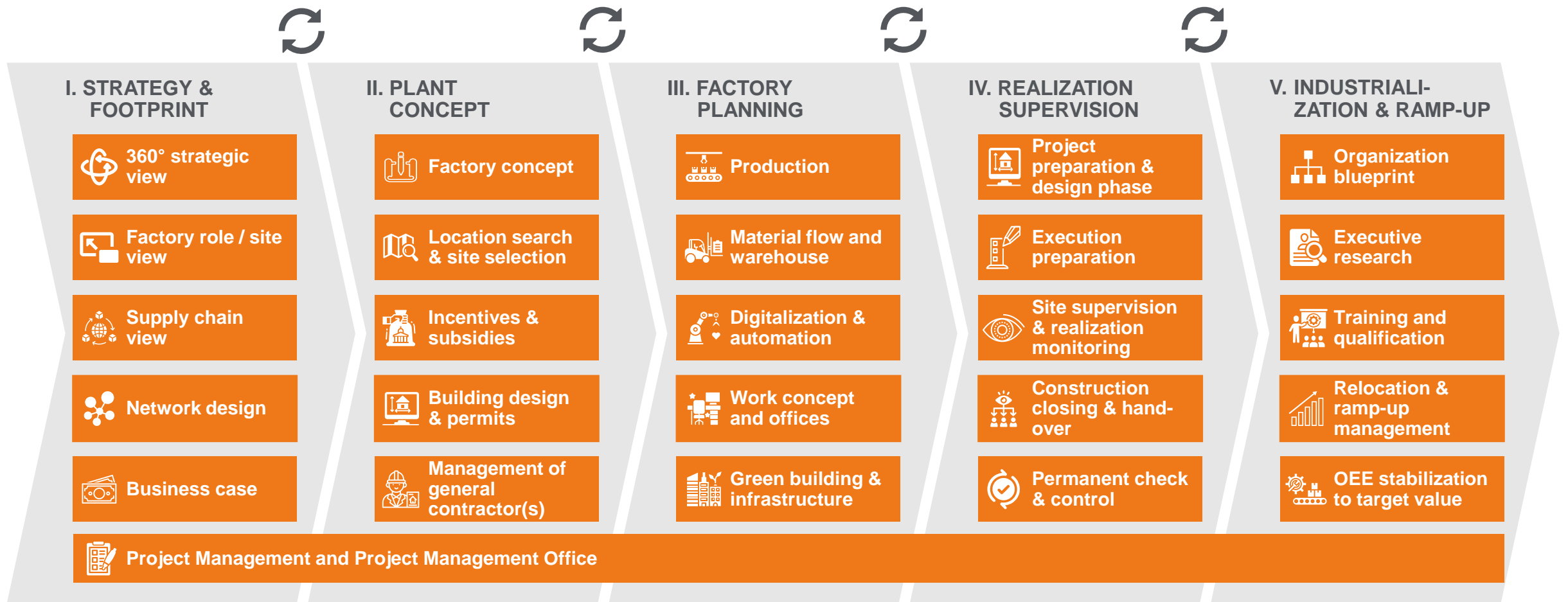
### Ramp-up & Industrialization

PMO relocation, set-up of new operations, and secure SOP targets



# We have bundled, and expanded, our capabilities so that we can provide our customers with the best possible support, all the way from initial ideation to SOP

## EFESO's 'one-stop shop' operations capabilities and service offerings\*



*Topics are cross-phase and are only assigned for rough indication*

\*We support our customers holistically or in every phase in which our customer currently finds himself  
 OEE = Overall Equipment Effectiveness



# In the last few years alone, numerous successful programs across multiple manufacturing sectors have been delivered, incl. for automotive OEMs and Tier-X



Experience within footprint strategy, production optimization, factory planning, and set up of new plants

## USA



- Animal nutrition manufacturer
- Manufacturer of prefabricated houses
- Leading packaging manufacturer
- Water treatment chemical producer
- Leading pharmaceutical distributor
- Fast-growing biotech company

## Canada



- Alkali chemical manufacturer
- Aircraft assembly, Brazilian based
- Pet Food Manufacturer

## Mexico



- Leading manufacturer of window shades, USA based
- Worlds largest brewery
- Server controls / connectors manufacturer, USA based

## United Arab Emirates



- Leading Aerospace & Defense company
- Packaging manufacturer

## Czech Republic



- Leading crane producer
- Leading high-tech electr.
- Leading machine producer

## Poland



- 1<sup>st</sup> tier aerospace supplier
- Leading household products
- Leading heat pump supplier

## Romania

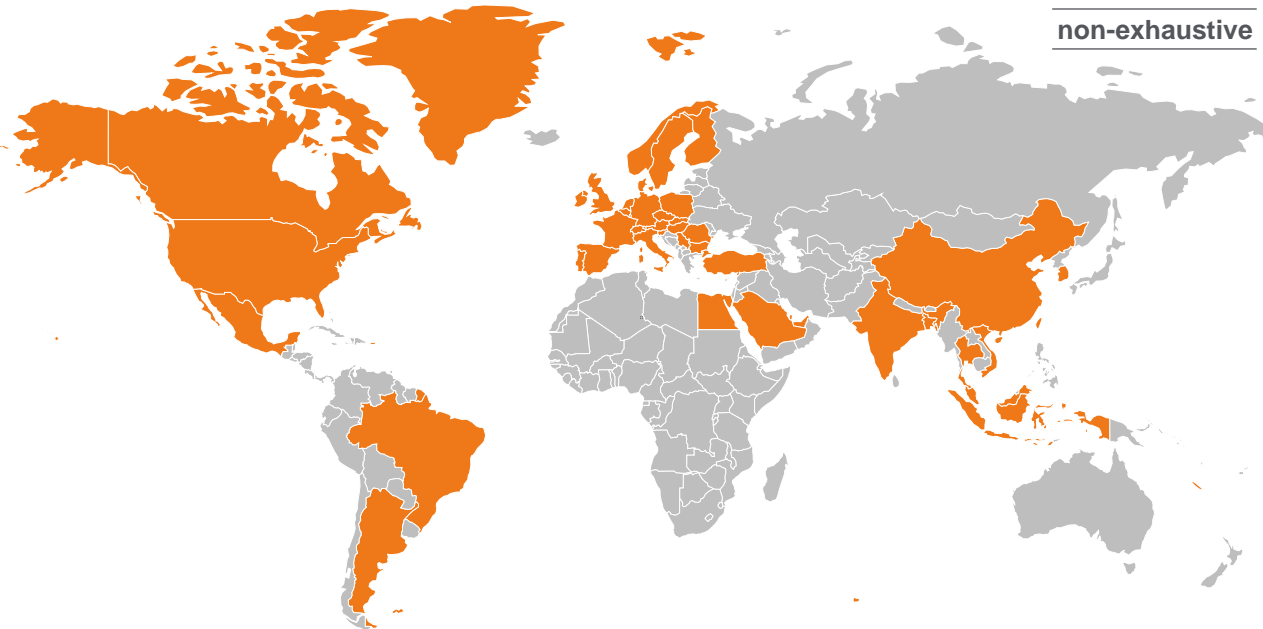


- 1<sup>st</sup> and 2<sup>nd</sup> tier automotive
- 1<sup>st</sup> tier supplier aerospace
- Pharma producer

## Hungary



- 1<sup>st</sup> tier automotive suppliers
- Leading chemicals producers
- Leading high-tech electronics



non-exhaustive

## Germany



- Leading heat pump producer
- 1<sup>st</sup> and 2<sup>nd</sup> tier automotive supplier
- Leading sanitary goods producer

## Switzerland



- Leading pharma packaging manufacturer
- Leading F&B packaging manufacturer

## Austria



- Special vehicle manufacturer
- Railway equipment manufacturer
- Head pumps & systems manufacturer

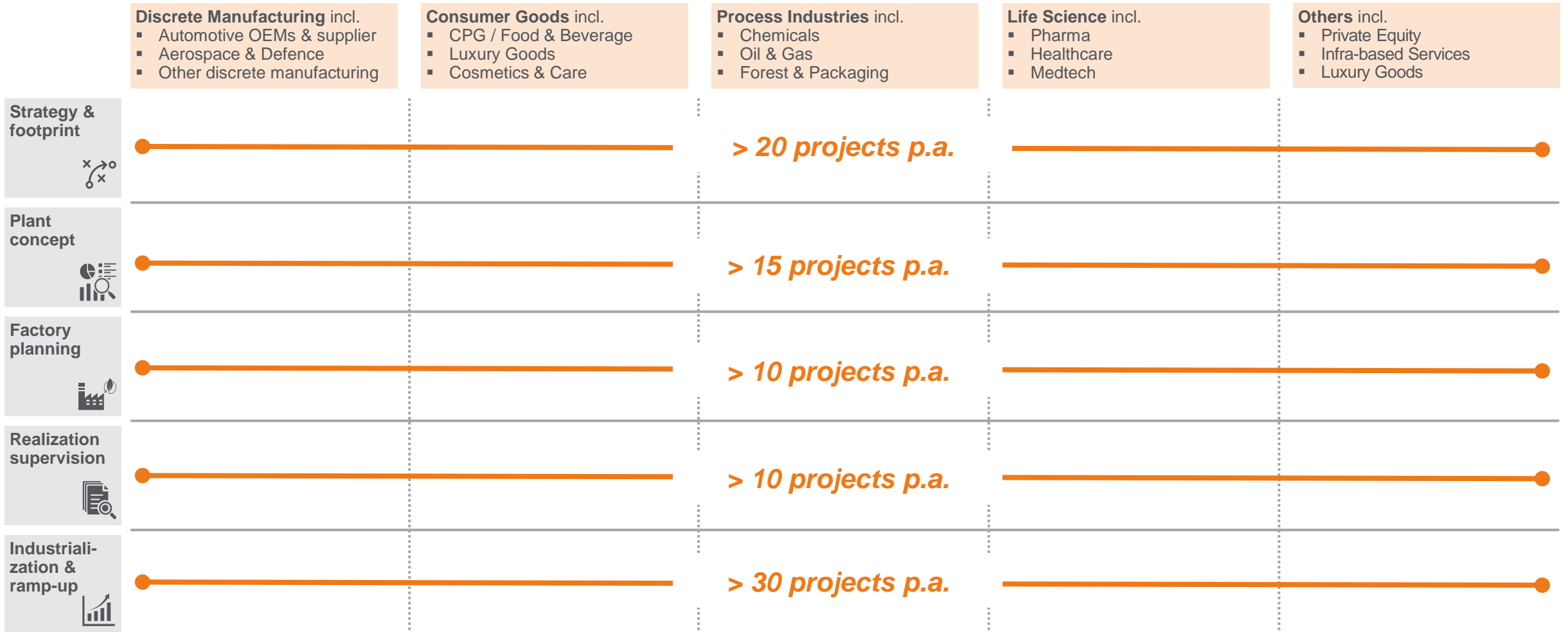
## Italy



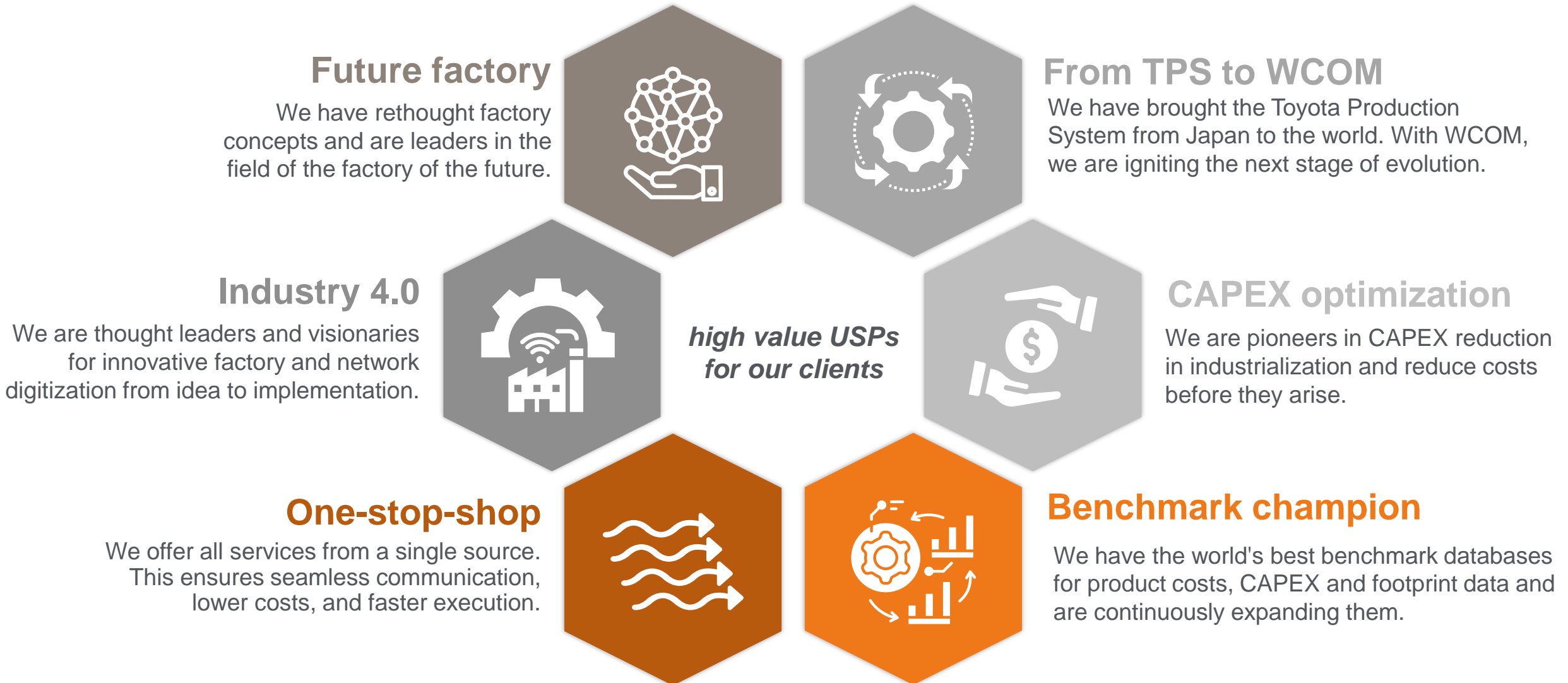
- Luxury OEM manufacturer
- 1<sup>st</sup> and 2<sup>nd</sup> tier automotive supplier
- Agricultural machinery producer



# We have gained in-depth experience across all major manufacturing sectors through successfully delivered projects covering all aspects of our service offering



# EFESO is one of the world's leading 'pure play' consulting firms in Industrial Operations and Performance Improvement with high value USPs for our clients



# We have a proven track record across all manufacturing industries around the globe

## STRATEGY & FOOTPRINT

Redesign European production network for a FMCG client

- Simulation of scenarios
- Re-allocation of products
- 32 m€ (18%) cost reduction



From regionals to a global network for a glass manufacturer

- Organizational restructuring acc. to target global network
- 59 m€ (40%) cost reduction
- 14% utilization improvement



Optimized global operations footprint for a FMCG producer

- 23% reduction in OPEX
- 31% global stock reduction
- Improved inventory mgmt. and freeing up capital



## PLANT CONCEPT

Site selection and Masterplan for an electronic components plant

- State-of-art site concept increases efficiency of production & material flows
- Concept w/ flexible expansion options and modular units



Site selection & plant concept for an electronics plant in CEE

- State-of-art SMD production
- Validation of cost saving potential by 20% vs. act. plant
- Subsidies strategy defined



Footprint, site selection & masterplan for medical tech comp.

- Assessment of footprint and definition of production scope for EEU plant
- Modular layout concept with large flexibility for expansions



## FACTORY PLANNING

Plant structure planning for merging of several locations

- Optimization of material flows as well as log. & indirect areas
- Overall PM incl. CAPEX and realization roadmap



Holistic planning of a site in HU for a turbine blades manufacturer

- Scope of relocation defined
- Efficient production and logistics concept worked out
- Project plan for realization



Factory planning & realization for injection molded high-quality parts

- Plant & building concept
- Tender specification and contractor management
- Project management for construction supervision



## REALIZATION SUPERVISION

Building planning & realization support for a packaging plant

- Interdisciplinary general planning, provision of works results over all planning & architectural disciplines
- DC > 8.000 pallet spaces



Building Planning & Realization supervision of aircraft parts plant

- Flexible and modular concept with expansion potential
- Supervision of construction works and infrastructure



Developer selection, Building planning & Realization supervision

- Sites & developer selection
- Building and infrastructure concept over all disciplines
- Site supervision



## INDUSTRIALIZATION & RAMP-UP

Ramp-up support and PMO for set-up new plant in CEE

- Reaching planned project timeline within 12 months
- Compliance with project targets (budget, timing, quality)



Ramp-up management and OEE stabilization for a gearbox plant

- Improvement of productivity and cycle time
- Installation and lead of 7 work packages to stabilize organization
- Implementation of measures



Cost-efficient ramp-up of eMobility transformation in production

- Improvement of Production KPI – OEE, Scrap, Cycle Time
- Reduction of CAPEX and Assembly Costs
- Integration of existing footprint and processes




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