

# From Crisis Mode to *Benchmark*

How Companies in the Industrial Manufacturing Sector  
Successfully Transform



# EFESO Management Consultants Real Results, Together

EFESO Management Consultants is the leading international management consultancy with a focus on operations and performance improvement.

We help global corporations, mid-sized companies and private equity investors to contribute to a future-proof world and to secure their productivity and cost efficiency in the long term – and ensure success in more than 1,500 projects per year in over 75 countries.

In the field of Industrial Manufacturing, we are an established partner to companies in machinery and plant engineering, as well as in the commercial vehicle and industrial goods sectors.



## This is what distinguishes EFESO:

**40+** Years of experience in the manufacturing industry

**Ø 20 %** Material cost savings

**500+** Industrial Manufacturing projects worldwide in the past three years

**1.000+** Consultants

**Ø 40 %** Increase in efficiency in processes

**45+** Nationalities in **35** Offices worldwide

**Realize *Operational Excellence* with us:**



**> Visit website**

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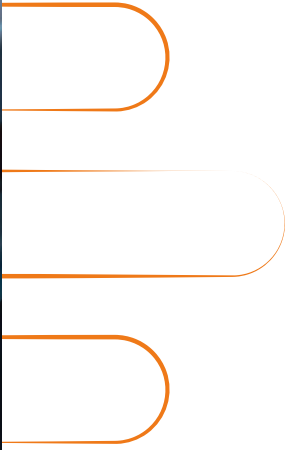
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# *Forge New Growth Paths with EFESO*

**Our Range of Services for  
Industrial Manufacturing Companies**

|                                                                                                                                                   |    |
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# From Crisis to Success

## Priorities for Action for Industry Leaders



**Dr. Thomas Troll,**  
Senior Partner & Global Head of Industrial Manufacturing  
**EFESO Management Consultants**

Transformation pressure characterizes the day-to-day business of manufacturing companies. Anyone who manufactures machines, systems, or industrial goods for a global customer base must master a demanding balancing act: ensuring the stability of the company and at the same time opening new paths to growth, competitiveness and future viability. In fact, many companies have optimized their processes, implemented cost programs and made operational structures more resilient in recent years.

This work remains important. But it is no longer sufficient as markets become more volatile, customers apply international price and performance standards, and technological developments create new competitive dynamics. In this situation, the entire value chain must be rethought – from the product idea to delivery – so that companies can secure their position in the global market in the long term.



*Companies that understand Operational Excellence not merely as a cost issue, but as a platform for transformation, will be successful.*

**Dr. Thomas Troll, Senior Partner & Global Head of Industrial Manufacturing**  
**EFESO Management Consultants**

To achieve this, priorities must be set. First, with the product portfolio itself: everything has to be put to the test, especially excessive complexity if it is not paid for by the customer. Second, in the further development of production and value-added networks in order to economically master variant complexity, smaller batch sizes and global market requirements. Third, strengthening supply chain resilience and global procurement capabilities. Fourth, in the consistent digitalization of processes in the direction of efficiency and sustainability. Fifth, these efforts should ultimately support the expansion of the business model. For example, through service, spare parts and lifecycle services that strengthen customer loyalty and profitability beyond product sales.

Companies that understand Operational Excellence not merely as a cost issue, but as a platform for transformation, will also be successful. These levers can only be implemented effectively across a global value creation network. This requires an organization that combines a readiness for change with Operational Excellence. The results of the Lünendonk® survey “Industry Performance – From Process Optimization to Transformation” underline both the urgency to act and the scale of the opportunity: 83 percent of the companies surveyed see increasing production productivity as the most important performance lever for the coming years.

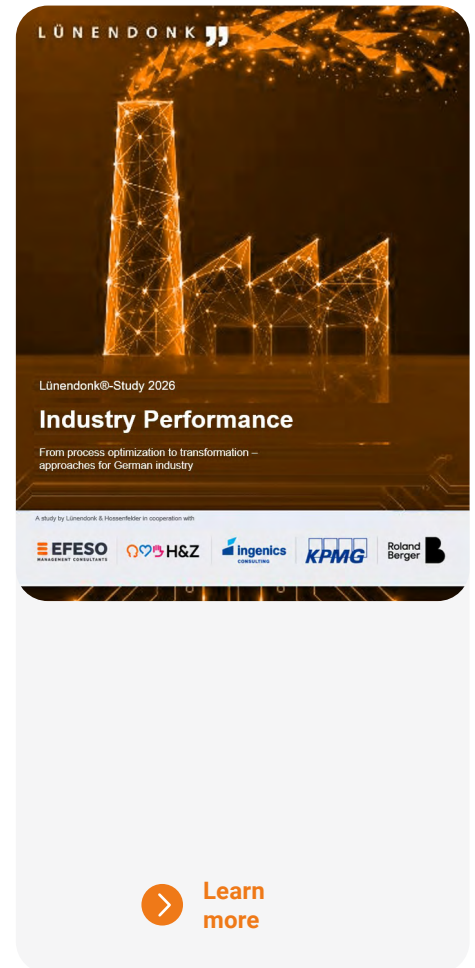
## LÜNENDONK® SURVEY 2026

### “INDUSTRY PERFORMANCE”

German industry has achieved a great deal in recent years: processes have been streamlined, costs reduced, and operational stability restored. Yet, as the 2026 Lünendonk® survey “Industry Performance” shows, the major transformation still lies ahead: growth, AI scaling, resilient supply chains, and Germany as an industrial location will become strategic tests through 2030.

The study illustrates how industrial decision-makers from companies in Germany, Austria, and Switzerland are responding to cost pressure, energy prices, and global uncertainty. It is based on interviews with 80 executives conducted in Q1 and Q2 of 2026. The respondents’ companies operate manufacturing sites in Germany and, in some cases, also in Europe or on other continents.

One key topic of the survey, cited both in mechanical and plant engineering and in other industries, is “growth orientation”: growth is expected to come primarily from new market segments, new customer groups, and innovative products and services. At the same time, production networks, supplier diversification, and regionalization are gaining importance as companies seek to build resilience against geopolitical risks and supply chain disruptions.



## “BEST MANAGEMENT CONSULTANTS” IN

### “MECHANICAL AND PLANT ENGINEERING”

For the thirteenth time in a row, EFESO has been placed in the renowned industry ranking „Best Management Consultants“ published by the business magazine brand eins and Statista (2026 edition). The respondents confirmed the top position already achieved in previous years in the “Mechanical and Plant Engineering” sector.



[Learn more](#)

# Operations as the Key to *Profitable Transformation*

## Increase Operational Excellence and Activate Efficiency Potentials with EFESO

With EFESO, companies in the Industrial Manufacturing segment professionalize their processes and structures. They use transformation as a driver of growth: after all, the operations areas offer effective levers to capture the opportunities outlined above and develop viable business models for future markets.

On the following pages, learn how companies in machinery and plant engineering, special-purpose vehicles, and industrial goods increase their operational performance and secure their profitability with us. Whether through smart factory concepts, adaptive production and logistics structures, integrated operating models, or digital solutions that create measurable added value: we identify the optimal solution for every need for action in the industry.



### Siemens Energy AG

*Across our 'Manufacturing Excellence for Growth' project, we are systematically enhancing the operational performance of our steam turbine manufacturing organization.*

*In the context of an operations analysis across multiple plants, we leveraged the support of the EFESO team, for example, to identify efficiency potential and reduce lead times. The project quickly demonstrated: when EFESO joins the discussion, new approaches and a different depth are added. This delivered clear added value throughout every project phase.*

**Oliver Meywald, Vice President Manufacturing, Industrial Steam Turbines & Generators**



### **KraussMaffei Technologies GmbH**

*The cooperation with EFESO in our project "European Operations Footprint" was very professional and opened up valuable perspectives for our team within a short time. I have been particularly encouraged by the open and constructive discussions in which the EFESO team challenged us right from the start and encouraged us to think fundamentally - and thus purposefully. So we quickly realized that we have the ideal partners for the complex tasks of our project on board.*

*We are very satisfied with the results: we benefit from a clear and sustainable concept. We can independently apply the procedure for designing a "footprint" to improve or confirm our "footprint". Furthermore, we have achieved a high level of transparency for the appropriate dimensioning of the indirect areas.*

**Günter Bittner**, Head of Industrial Engineering



### **SMT Maschinen- und Vertriebs GmbH & Co. KG**

*We have a long-standing and extremely constructive cooperation with EFESO. When designing a new production facility for our latest product, EFESO's consultants impressively demonstrated their excellent expertise and in-depth knowledge of factory planning.*

*The structured and efficient approach as well as the professional and at the same time pleasant cooperation contributed significantly to the fact that we were able to meet our ambitious schedule. Many thanks for the valuable support in our further expansion.*

**Dr. Christian Ulzhöfer**, CEO



### **Maschinenfabrik Reinhausen GmbH**

*The seminars and trainings of the EFESO Academy are characterized by a high level of practical relevance with vivid examples. Since the EFESO trainers alternate between operational projects and trainer activities, the connection to industrial practice is given to a high degree.*

*The trainers know how to convey the content in face-to-face and online formats in a professional and understandable way and to address individual questions of the participants. Interactive elements such as practical training simulations, group exercises and active discussions are used in a targeted manner and help to internalize what has been learned in the long term.*

**Thomas Kienberger**, Head of Production



**Read more  
testimonials**



# Recognizing and Exploiting *Strategic Advantages*

## EFESO Impact for Companies

With an international team, EFESO consistently aligns the value creation structures of companies in the field of Industrial Manufacturing worldwide for the future and growth – from the development of customer-specific machines and complex plant projects to the efficient series production of components. We create agile, digitally networked development and production networks with our customers, design resilient and sustainable supply chains and implement profit-oriented cost structures. Industry-specific challenges such as long project durations or the integration of future technologies into brownfield infrastructures are part of our daily business.

Realign your core operational processes with us so that you can operate successfully in your market even in times of crisis. Together, we enable your organization to identify and capitalize on new opportunities for growth and efficiency. In this process, the following fields of action are critical to success.

### Improve the Business Model / Time to Market

#### Market requirements

Faster time-to-market, rapid product & variant adaptation, shorter development cycles, robust industrialization, ramp-up readiness.

#### Services

- R&D process optimization, portfolio prioritization, and profitability assessment across the product lifecycle.
- Alignment of the industrial operating model and acceleration of NPI processes (New Product Introduction).
- Selection and application of digital twins and establishment of data-driven decision-making in engineering.

#### Business Impact

Faster industrial readiness, reduced time-to-serial production.

### Increase Production Speed

#### Market requirements

Faster ramp-ups, shorter lead times, stable output, schedule adherence, high OEE and line stability.

#### Services

- Smart factory, capacity and throughput optimization.
- Design and implementation of end-to-end programs to stabilize performance.
- Stabilization of ramp-ups through operational task forces.

#### Business Impact

Stable ramp-ups, improved delivery reliability.



### Strengthen Resilience

#### Market requirements

Transparent value creation stages, secured material availability, minimized risks, shorter supply chains, and a balanced trade-off between inventory levels and service levels.

#### Services

- Network design & management, planning excellence, inventory optimization.
- Local sourcing, supplier discovery / nearshoring, product design and standardization, and supplier base risk management.
- Creation of a governance framework and development and establishment of resilient, cross-functional operating models.

#### Business Impact

Secured supply continuity, improved working capital and financial performance.

### Optimize Footprint

#### Market requirements

Scalable capacity, CapEx discipline, robust industrialization and relocation.

#### Services

- Global network strategy, site search, CapEx optimization.
- Factory planning, production and logistics concepts, ramp-up management.
- Digital twins for simulation and validation.

#### Business Impact

Faster site ramp-up with controlled investment risk and higher capital efficiency.

### Secure Competitiveness

#### Market requirements

Inflation absorption, fixed-price control, productivity leap.

#### Services

- Cost & Value Engineering, Design to X.
- Spend optimization and procurement transformation.
- Company-wide productivity and cost management.

#### Business Impact

Margin protection and sustainable cost reduction.



### Digitalize the Value Stream

#### Market requirements

Shopfloor connectivity, real-time decisions, end-to-end digital thread.

#### Services

- Practical AI use cases and operational analytics.
- MES/MOM systems and predictive maintenance.
- Data governance and performance intelligence.

#### Business Impact

Business-relevant process information is available in real time, enabling proactive operational management.

### Upskill Employees

#### Market requirements

Finding qualified talent, fast onboarding, certified skills, and stronger employee retention.

#### Services

- Workforce strategy, capability building, leadership development / excellence.
- Shopfloor coaching and development of operational capabilities.
- Digital learning concepts and data-driven training.

#### Business Impact

Faster workforce readiness; sustainable capability building that is relevant to both the company and its employees.

### Professionalize Procurement

#### Market requirements

Sustainably reducing material and procurement costs, improving competitiveness along the entire supplier value chain.

#### Services

- Identification of savings potential at part, category and supplier level; reconciliation of internal data with market, commodity, currency and benchmark data.
- Development and implementation of supplier-oriented cost-down initiatives.
- Initiation or acceleration of digital transformation, e.g., through AI-based analysis of the procurement portfolio or the use of GenAI in the source-to-contract process.

#### Business Impact

Realization of savings in the single-to double-digit percentage range; combination of technological and commercial levers ensures long-term procurement professionalization.

### GEN AI IN PROCUREMENT AT EUROPEAN COMPANIES

Learn from the EFESO survey how procurement organizations in manufacturing companies establish and use generative AI. We provide insights into questions such as: How are procurement teams organized? What do they need to succeed? Unlock the transformative potential of generative AI and strengthen your company's competitiveness.



[Learn more](#)

# Industry Best Practices

## Case Studies

### Full steam ahead into the future

A listed manufacturer of energy technology is realigning one of its operating segments: the steam turbine unit is intended to send a company-wide signal for performance and future viability. EFESO guides the client through a structured OPEX assessment across three plants. Throughout the project, the team optimizes each site and integrates them into a connected production network, significantly improving the business unit's performance.

> [Read Case Study](#)



### Whoever masters complexity wins

International competition relies on predatory prices, while the complexity of the portfolio increases rapidly and squeezes margins – this situation puts a plant manufacturer under pressure to act. With an integrated solution approach tailored to the company, the project team led by EFESO makes the drivers of complexity transparent. It also shows the costs and suggests “levers” for profitable growth.

> [Read Case Study](#)



### Cost-Out puts the business back on track

A traditional manufacturer of drive and linear technology has to reinvent itself. Due to falling prices in the market, eroding demand and failed turnarounds, EBIT is negative for the second time in a row. Together with the management, EFESO analyses the interactions between portfolio structure and fixed cost structure. The result is a viable business case with a competitive portfolio and a lean cost structure.

> [Read Case Study](#)



### “Fit for Future”: improving performance in procurement

When an OEM of special machines is about to expand into new target markets in Europe and Asia, the company's management prioritizes the efficiency of the global purchasing organization as a success factor for the implementation of this project. EFESO establishes a clear baseline and takes global procurement performance to the next level.

> [Read Case Study](#)





# We deliver *measurable EBIT and cash impact*

## Additional results from EFESO projects

| Customer's market                 | Project focus                        | Results                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mechanical Engineering            | Production Strategy & Transformation | <ul style="list-style-type: none"><li>• Derivation of a holistic and clear transformation path to become sustainably profitable.</li><li>• Savings of EUR +33 million within 3 years.</li><li>• Size adjustment by 200 FTE / 29% in direct and indirect areas.</li><li>• Enhanced capacity usage of infrastructure and machines.</li></ul>           |
| Commercial Vehicles (off-highway) | Cost & Value Engineering             | <ul style="list-style-type: none"><li>• 450 additional technical and commercial savings measures rapidly identified.</li><li>• Quick wins identified and implemented.</li><li>• Short-term measures realized with a cost saving potential of &gt;10%.</li><li>• New tools and methods for developing and implementing measures introduced.</li></ul> |
| Electrical Engineering            | Factory Planning                     | <ul style="list-style-type: none"><li>• Created a unified planning framework integrating building, administration, warehousing, and manufacturing.</li><li>• 45K m<sup>2</sup> optimized factory layout.</li><li>• 35% reduction in overall transport efforts.</li><li>• 40% reduction in throughput time.</li></ul>                                 |
| Optoelectronics                   | Operational Excellence               | <ul style="list-style-type: none"><li>• Potential cost savings of EUR 2 million detected.</li><li>• 130+ operators and 65+ management staff trained.</li><li>• Implementation of Shopfloor Management.</li><li>• Efficiency gains for two assembly lines averaging 25%.</li></ul>                                                                    |



## EFESO customers in the field of Industrial Manufacturing (selection)

### HVAC, White Products, Consumer Goods

Miele dyson KÄRCHER oventrop Vaillant BORA  
Haier B/S/H/ SENNHEISER BWT Canon GROHE

### Machinery & Industrial Goods

Neumeister HOERBIGER FESTO KraussMaffei KNORR-BREMSE Esterer  
HYDAC GEA EISENMANN KUKA NETZSCH Schindler thyssenkrupp  
AirLiquide ThermoFisher Scientific Bonfiglioli Atlas Copco ANDRITZ SANDVIK

### Energy & Electronics

ABB SIEMENS energy alfanar Infineon ELMA MURR TDK PHOENIX CONTACT  
BOSCH SIEMENS B/S/H/ B&R blum OSRAM  
HEXAGON SCHALTBAU DC Power Under Control Nexans CATL energy recovery ASML

### Industrial Vehicle

#### Special Vehicles & Material Handling Equipment

SCHMITZ KION NEOPLAN IVECO STILL KAMAG FAUN  
Plasser & Theurer rosenbauer PisterBully Goldhofer TTI GROUP

#### Construction Machinery

LIEBHERR PALFINGER doka BOMAG menzi truck KRAMER

#### Agricultural Machinery

FENDT JOHN DEERE Challenger VALTRA CNH AGCO  
LEMKEN PÖTTINGER

## BOMAG GmbH

We engaged EFESO to transform our purchasing organization in the face of geopolitical and supply chain disruptions. This collaboration has improved our digital landscape, significantly increased operational excellence, and reduced manual effort tremendously.

This has resulted in an up to 50 % increase in process efficiency and complete real-time data visibility, providing us with a robust 'Fit-for-Future' setup.

**Matthias Bender**, Head of Advanced Purchasing



➤ Learn more:  
Customer testimonials

➤ Learn more:  
Industry expertise





## Industry Experts

### Contact



**Dr. Thomas Troll**

Senior Partner & Global Head of  
Industrial Manufacturing

[thomas.troll@efeso.com](mailto:thomas.troll@efeso.com)

 Connect



**Christian Scharner**

Principal & DACH Industry Lead

[christian.scharner@efeso.com](mailto:christian.scharner@efeso.com)

 Connect



**Helmut Wirtz**

Expert Director

[helmut.wirtz@efeso.com](mailto:helmut.wirtz@efeso.com)

 Connect



**Franz Albert**

Senior Manager

[franz.albert@efeso.com](mailto:franz.albert@efeso.com)

 Connect

## Real Results, Together

EFESO Management Consultants is a global leader in operations strategy and performance improvement. We work closely with clients across a broad range of industries to deliver real results tailored to their unique needs.

Our end-to-end services integrate industrial AI, digital solutions, sustainability, and people development, transactions and turnaround, R&D and product profitability, cost and value engineering manufacturing, procurement, and supply chain. We drive transformation through 1,500+ projects annually in over 75 countries.

Powered by deep industry knowledge and a commitment to lasting impact, EFESO works closely with global brands, mid-sized companies, and private equity to build resilience and future-ready operations.



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