

The background of the slide is a dark, semi-transparent collage. It features several financial charts, including candlestick and line graphs with various indicators. A large, glowing lightbulb is positioned in the center, symbolizing an idea or insight. There are also smaller data dashboards with gauges showing percentages like 25%, 50%, and 75%, and some text-based data summaries. The overall aesthetic is professional and data-driven.

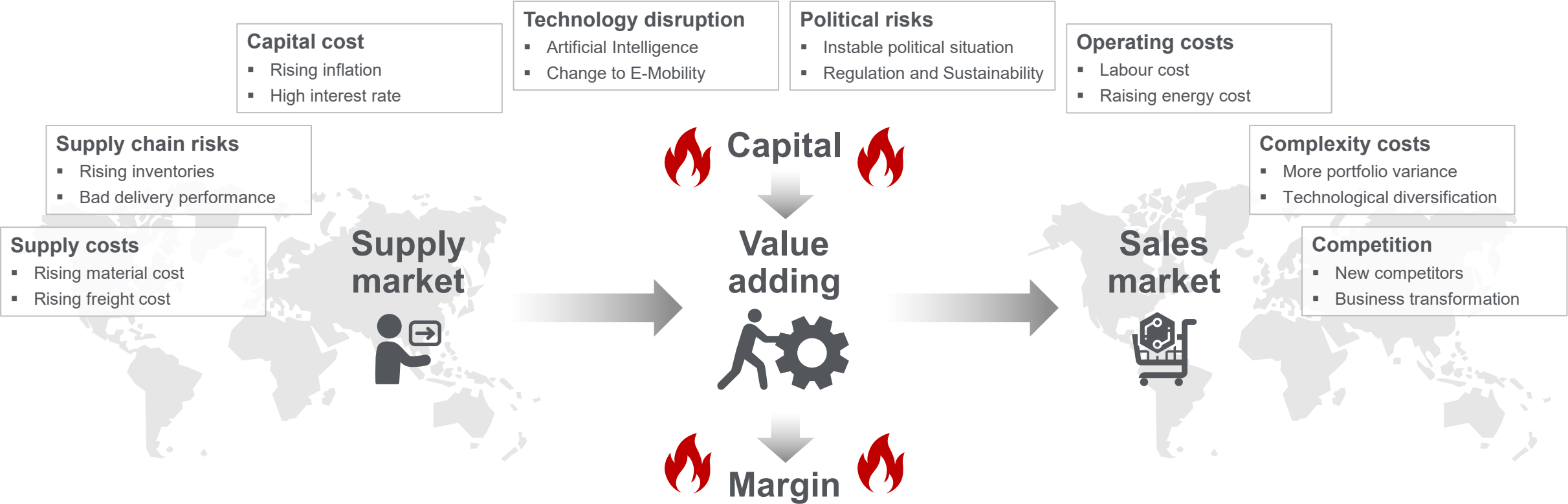
BOOST, BUILD, TRANSFORM

Strategic levers for a strong and competitive supply chain

EFESO
MANAGEMENT CONSULTANTS

SUPPLY CHAIN MANAGEMENT
INSIGHT

Multiple supply chain challenges are reducing working capital (cash) and margins

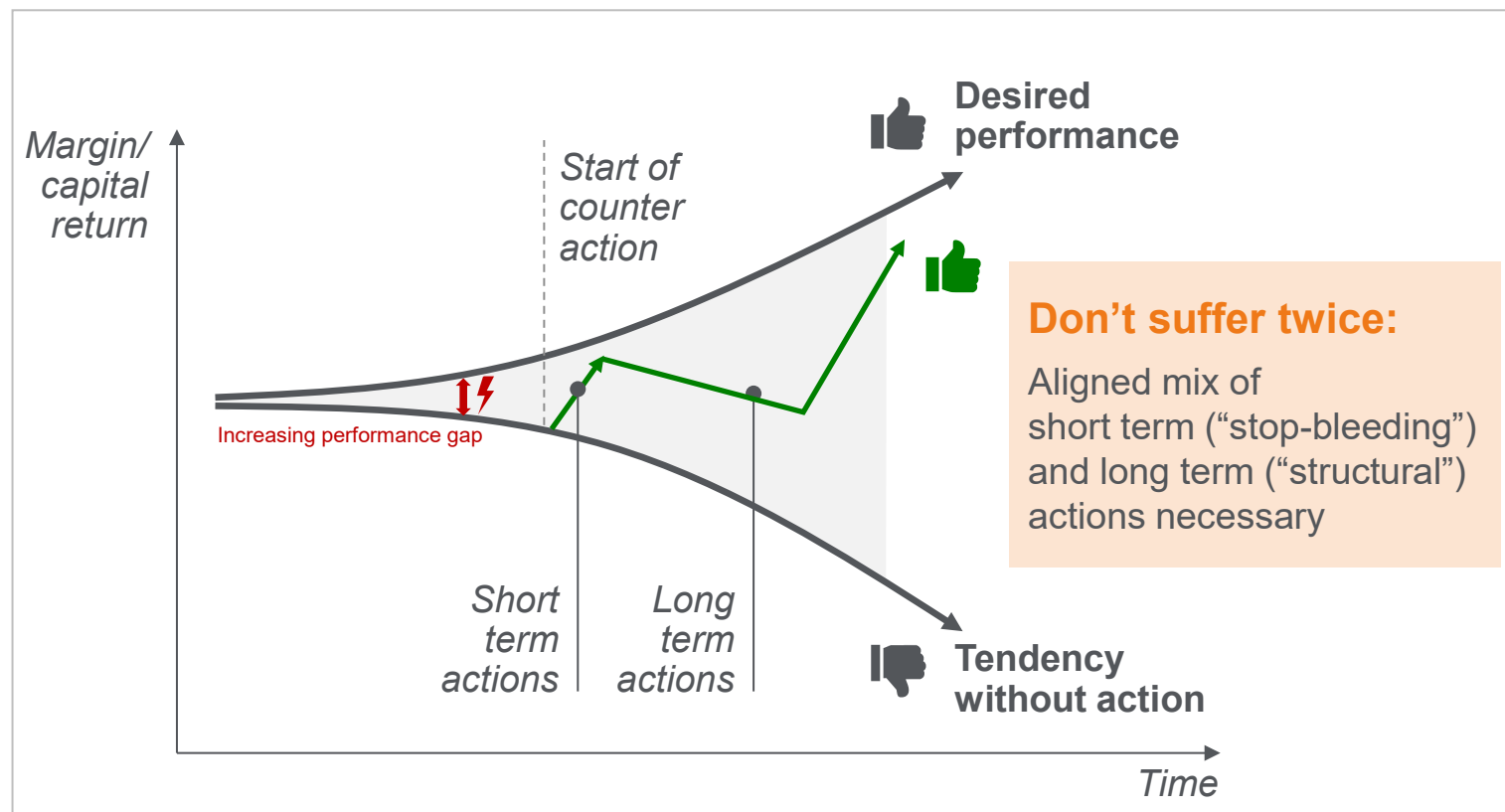


WACC*	7,3% (2019)		9,2% (2023)
Net income/sales*	7,2% (2022)		6,3% (2023)
ROE*	10,4% (2019)		0,6% (2023)
SG&A / sales*	11,9% (2022)		12,2% (2023)

Companies should leverage short and long-term supply chain strategies to minimize the effects of these challenges.

Short-term plans that stop the bleeding should be in alignment with the longer-term strategy

Performance at risk of not meeting investor expectations



Call for action

- Survival of the fittest: without taking action, **competitiveness decreases**
- Immediate **short-term actions** are necessary to stop the erosion of **cash, revenue and margin**
- Short-term action can finance the effectiveness of **structural long-term actions** that are necessary to become competitive again
- **Don't risk long term success** with "wrong" short term actions: aligned mix of short- and long-term actions necessary



Alignment of short and long-term actions result in a sustainable recovery that meets expectations.






















To successfully manage today's supply chain, an internal analysis must first be performed to identify which initiatives to focus on and in which order to deploy them



EFESO will analyze and recommend short- and long-term levers that optimize your supply chain.



EFESO aligns and optimizes multiple levers to improve your supply chain

Financial impact	Optimization levers	Financial impact	Time-to-benefit*	Actions (selection)
 Revenue increase	Sales enhancement & customer satisfaction	2-10%  Sales impact	6-24 	<ul style="list-style-type: none"> Pricing / negotiations New Products / solutions Cross Selling ...
	Overhead efficiency	1-5%  Direct EBIT impact	3-12 	<ul style="list-style-type: none"> Productivity improvement in overhead Efficiency of use of ERP / MIS Shared services / outsourcing ...
 Cost reduction	R&D effectiveness	1-5%  Direct EBIT impact	12-24 	<ul style="list-style-type: none"> Efficient R&D processes & organization Product architecture / re-use Shorter design cycles ...
	Optimised purchasing	5-10%  Direct EBIT impact	3-15 	<ul style="list-style-type: none"> Global sourcing / BCC Sourcing More efficient purchase process Price analysis / VAVE ...
	Operations productivity	3-8%  Direct EBIT impact	4-12 	<ul style="list-style-type: none"> OEE / production management Lean Manufacturing / multi-skilling Production planning ...
	Manufacturing footprint	5-10%  Direct EBIT impact	12-36 	<ul style="list-style-type: none"> Relocation to BCC Purchase at BCC suppliers BCC Logistic, value stream & distances ...
	Manufacturing overhead reduction	2-5%  Direct EBIT impact	6-18 	<ul style="list-style-type: none"> Efficient logistic & quality management Waste and scrap management Energy management. ...
 Cash situation	Working capital reduction	5-12%  Direct free cash impact	3-12 	<ul style="list-style-type: none"> Warehouse management Payment terms management Performance of ERP systems ...
	Asset utilization	5-30%  Direct free cash impact	3-12 	<ul style="list-style-type: none"> Make-or-buy decisions Sale & Lease-back Sale of non-key assets ...



Our supply chain experts bring sustainable recommendations to improving competitiveness, cash flow, and margins.



*approx. in months
 SG&A = Selling, General and Administrative Expenses; BCC = Best cost country; KAM = Key account management; SC = Supply chain

Results from recent projects!



Project scope



Your advantage



Project examples

Cash balance
projects with focus on solvency

Up to +25%

Professionalize inventory management by launching a “Plant Inventory Task Force”

Thrive for holistic invest optimization based on invest-zero-based budgeting, demand mgmt. and concept battles

Short-term (stop bleeding)



Long-term (structural)

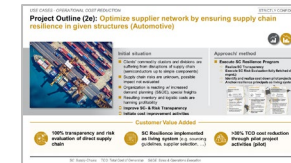


Cost reduction
projects for more profitability

Up to -15%

Optimize supplier network by ensuring supply chain resilience in given structures

Short-term (stop bleeding)



Long-term (structural)



Reduce global operating cost by optimizing R&D, SCM as well as Operations footprint

Revenue increase
projects for higher turnover

Up to +20%

Winning strategic new business by proactive negotiation support for cost and CO₂e

Short-term (stop bleeding)



Winning strategic new business by optimized end-to-end integration across strategic programs

Long-term (structural)



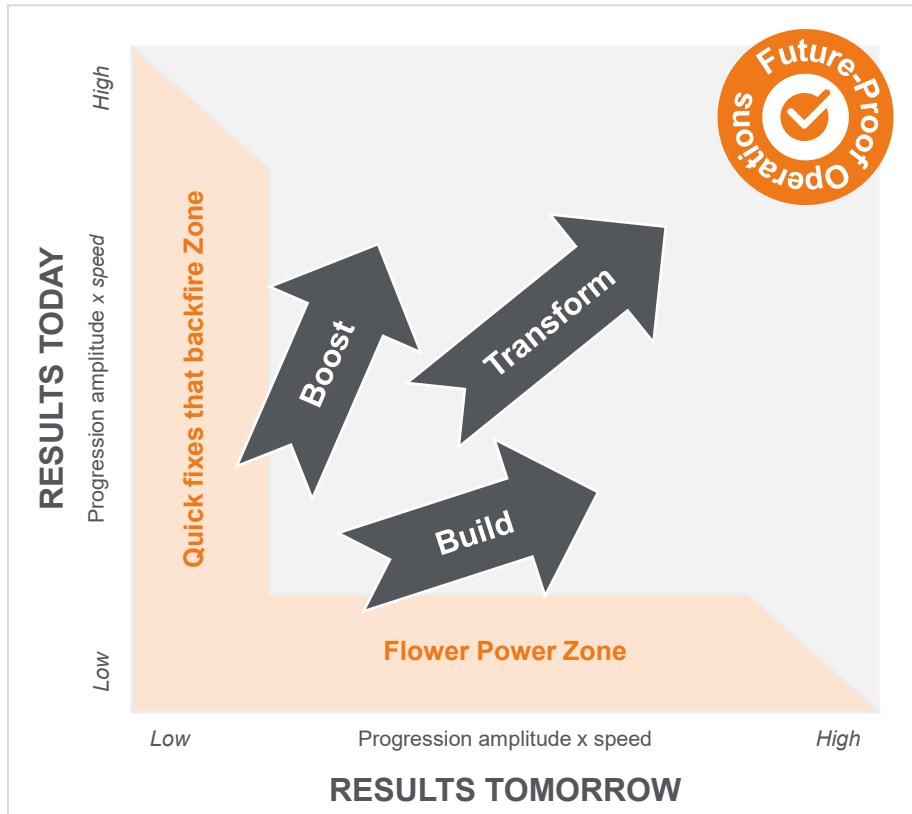
Our proven concepts have exceeded our clients' expectations, significantly improving their financial situations.



p.a. = per annum

EFESO thinks about the alignment of today's actions along with tomorrow's results

Our way of thinking



Our way of acting

- 1 We bring a **senior team** committed to the success of your company
- 2 Our experts **work alongside your team**, supporting pragmatic implementation of improvement measures
- 3 We have a **broad experience** in combination of short-term measures to stop cash, revenue and margin drain while preparing for the mid- and long-term growth period
- 4 We have a track record delivering significant improvements through **combined supply chain, operations and financial expertise**
- 5 We are a **leading service provider** for automotive industry standards
- 6 We have proprietary **tools, benchmarks and data bases** to accelerate pragmatic implementation and execution of improvement measures
- 7 We have **strong change management capabilities** focused on enabling impact and making it sustainable to preserve performance uplift



Contact us to discuss an individual approach for your company.



