



**PALFINGER**



# WING KAMINABEND

## „ALUMNI IM GESPRÄCH“

**Marius Stehling**

Salzburg | Kufstein, 23.03.2021

The international mechanical engineering company PALFINGER is the world's leading provider of innovative crane and lifting solutions.



# LIFTING SOLUTIONS FOR EVERY CHALLENGE



LOADER  
CRANES



TIMBER /  
RECYCLING



HOOKLIFTS &  
SKIPLoadERS



TAIL  
LIFTS



TURNKEY  
SOLUTIONS



MARINE  
CRANES



OFFSHORE  
CRANES



WINCHES



PASSENGER  
SYSTEMS



ACCESS  
PLATFORMS



TRUCK MOUNTED  
FORKLIFTS



BRIDGE INSPECTION  
& MAINTENANCE



RAILWAY  
SYSTEMS



WIND  
CRANES



DAVITS



BOATS

# LIFTING SOLUTIONS FOR ANY APPLICATION



**Construction**



**Industry**



**Railway**



**Offshore Wind**



**Aquaculture & Fishing**



**Forestry & Agriculture**



**Transport & Logistics**



**Waste Mgmt. & Recycling**



**Passenger**



**Commercial**



**Infrastructure**



**Public Sector**



**Offshore Supply / Oil and Gas**



# GLOBAL PLAYER WITH LOCAL FOOTPRINT



## FACTS AND FIGURES



≈11,000

### WORKFORCE IN 2020

In 2020 the company had 10,824 employees.



>80

### MANUFACTURING AND ASSEMBLY, SALES AND SERVICE LOCATIONS

The PALFINGER Group is active in 32 countries and has 35 manufacturing and assembly locations in Europe, the CIS, North and South America and Asia.



≈5,000

### SERVICE POINTS

A worldwide sales and service network with around 5,000 service points in over 130 countries on all continents ensures optimum customer proximity.



89

### YEARS OF EXPERIENCE

Established in 1932 and headquartered in Bergheim (Austria) the company has for many years been among the leading international manufacturers of hydraulic lifting solutions.

**PALFINGER**

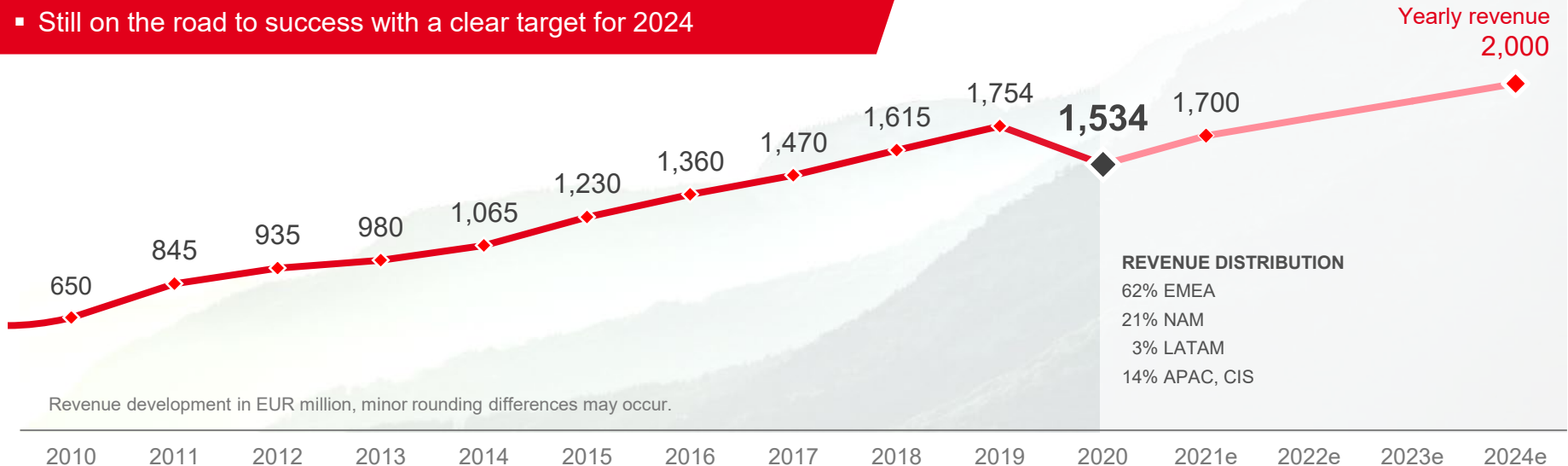
# YESTERDAY, TODAY AND TOMORROW



# WE HAVE STRONGLY INCREASED OUR REVENUE THROUGH ACQUISITIONS AND ORGANIC GROWTH



- 2020 was a landmark year
- Solid profitability and strengthened balance sheet achieved in crisis year
- 26 acquisitions and joint ventures from 2010 to 2020
- Still on the road to success with a clear target for 2024



**REVENUE DISTRIBUTION**  
62% EMEA  
21% NAM  
3% LATAM  
14% APAC, CIS

Revenue development in EUR million, minor rounding differences may occur.

2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021e	2022e	2023e	2024e
ETI Ned-Deck Marine Marine cranes	INMAN	JV SANY Dreggen Palfinger-Tercek PCR	MCT JV Platforms Italy JC Koch, PPI Nimet	JV KAMAZ PM Froup Hidro-Grubert Megarme	NDM JV FairWind JV KAMAZ	Harding Palfinger Iberica	Sky Steel Systems Palfinger Denmark	STRUCINSPECT	GPO GO LIVE	Integration Segment SEA in GPO Acquisition HINZ				

A positive market environment and full order books secure good visibility for the **1st half of 2021**; high market risk remains due to COVID-19.

Planned **reversal of cross-holding** with **SANY** **broadens financial scope for investments** and strategic acquisition.

**Record investment volume** of over **EUR 100 million** planned.

Leveraging **additional synergy potential** through **integration, system standardization and digitization**.

OUTLOOK

2021



# HOW DO WE GET THERE?

# CLEAR STRATEGIC ORIENTATION FOR FUTURE SUCCESS

**PALFINGER**

## Vision and strategy

**Together** we are making our customers' lifting solutions fit for the future.



## Brand promise and leadership

**Together** we place the focus on our customers and guarantee a PALFINGER brand promise.



## Corporate culture

**Together** we put respect, learning, and entrepreneurship into practice.



## GPO

**Together** we create added value in our new structure.



# INNOVATIONS DRIVEN BY CUSTOMER NEEDS AND TECHNOLOGY

**PALFINGER**

## AREAS OF INNOVATION



### Smart Lifting Solutions

Autonomous systems,  
PALFINGER Connected, E3



### IT Digital Backbone

CLOUD first, CYBER  
SECURITY, Power BI



### Autonomous systems

Smart Control, Intelligent Loading Assist,  
Offshore Cyber Crane



### Digital E2E Processes

SAP S/4 HANA,  
Success Factors



### PALFINGER Connected

Operator Monitor, Fleet Monitor and  
Service Cockpit



### Digital Customer

Smart Services, Product  
configurator



### E3 (electrified, emission free, efficient)

eDrive Battery Crane, P 370 KS E



### Business with Data

StrucInspect



# SUSTAINABILITY AS A MATTER OF PRINCIPLE



## Responsible Employer

- Focus on HSE & COVID-19 Task Force
- Start PALFINGER Campus



## Eco-efficiency in production

- -43% CO<sub>2</sub> compared to 2015 (-16% CO<sub>2</sub> compared to 2019)
- 74% power from renewable energy sources



## Sustainable products

- Intensification of ACE in product development  
(AUTONOMOUS, CONNECTED, ELECTRIFICATION)



## Fair business

- Reworking of code of conduct
- Online compliance training and self-assessments



# ABOUT ME



**Marius Stehling**

*Head of Competence Cluster Digital Manufacturing*

## **Professional Career:**

- |              |   |
|--------------|---|
| 2021 - today | Head of Competence Cluster Digital Manufacturing          |
| 2018 - 2020  | Global PALFINGER Production System & Industry 4.0 Manager |
| 2015 – 2018  | Research Fellow, FH Kufstein Tirol                        |
| 2014         | Customization EFG, Jungheinrich AG                        |

## **Studies:**

- |             |   |
|-------------|---|
| 2015 – 2018 | ERP-Systeme & Geschäftsprozessmanagement, FH Kufstein Tirol |
| 2012 – 2015 | Wirtschaftsingenieurwesen, FH Kufstein Tirol                |

## **Others:**

- Certified Ski instructor & coach – Deutscher Skiverband e.V.  
Passionate Skier, Mountaineer & Trailrunner

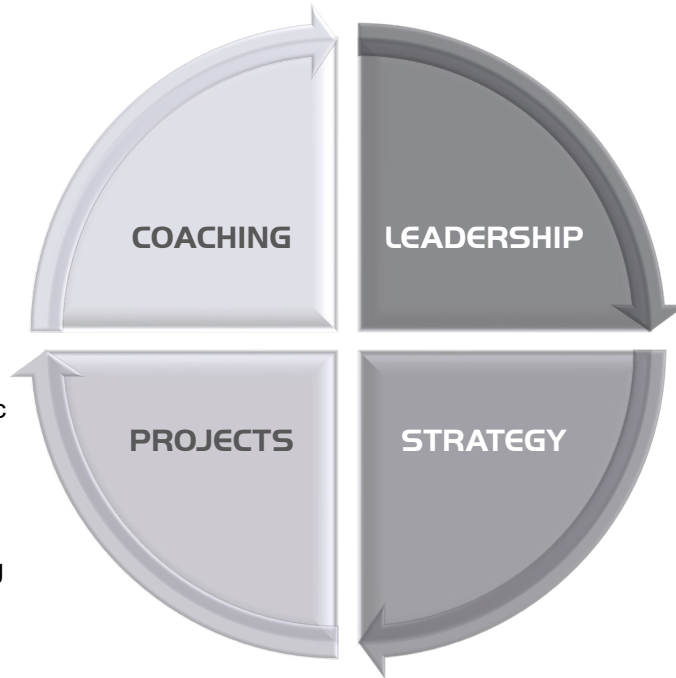


# MY WORK

## Focus areas

- Coaching colleagues and steering projects in the field of digital manufacturing (e.g. implementation of digital shopfloor management tool)

- Driving & executing own strategic projects (e.g. implementation of IIoT-platform with MES functionalities, implementation of Low-Code platform for developing mobile manufacturing apps)



- Building up & leading the Competence Cluster
- Functional leadership of Shopfloor IT in various plants

- Defining mid-/long term targets and directions in the area of digital manufacturing
- Strong collaboration with management & subject matter experts

# CENTRAL PRINCIPLES ARE GIVING GUIDANCE EVERYDAY



Understand customer needs. Know what your customers need before they know it. **Drive** current and future markets, and discover new opportunities early.



Define targets, give direction and set clear priorities. Stay **focused** on our daily business. Finish what you start.



Be authentic in demonstrating passion. Lead by example, and **inspire** people to create an open team environment.



Respectfully coach, support and **empower** your people. Show courage by proactively providing and requesting honest feedback.



Take calculated risks, and make decisions. Act and **develop** quickly in a challenging and ambiguous environment. Learn from your mistakes, and make fast improvements.



Take accountability, and **deliver** on commitments and results. Add value every day.

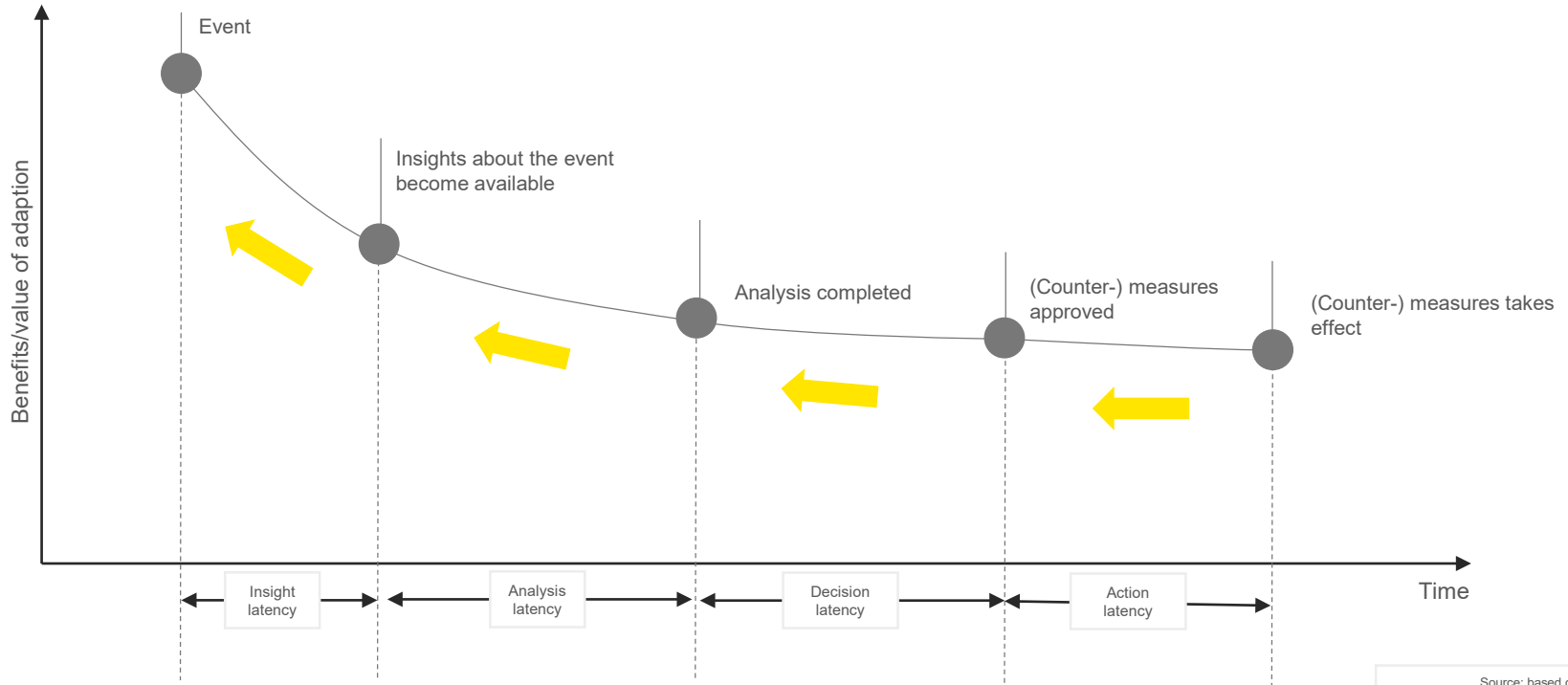


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DIGITAL  
MANUFACTURING  
THE IDEA BEHIND

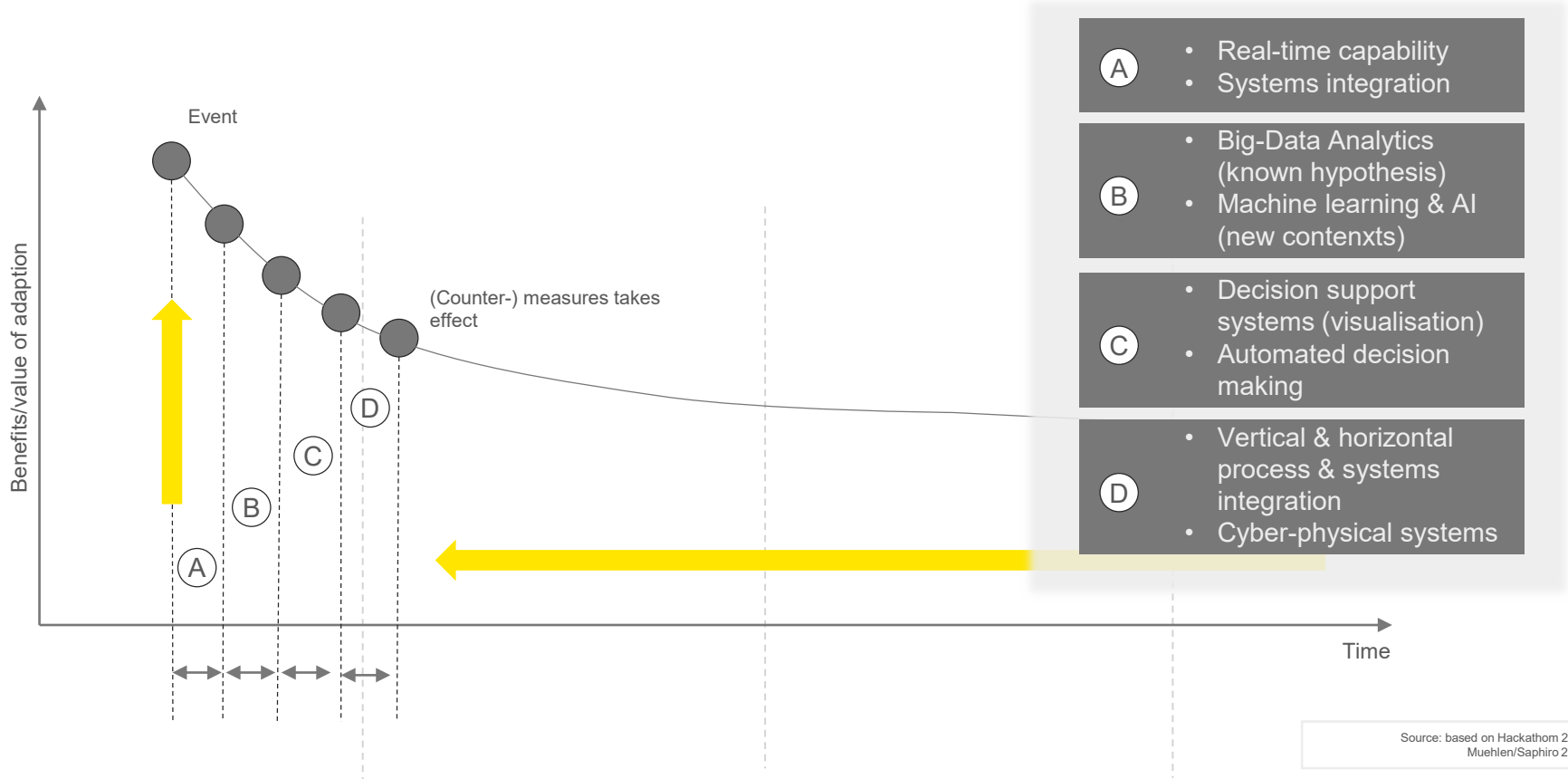


# WHERE WE ARE TODAY



Source: based on Hackathorn 2002; Muehlen/Saphiro 2010)

# WHERE WE WANT TO BE TOMORROW



Source: based on Hackathorn 2002; Muehlen/Saphiro 2010)

THANK YOU VERY MUCH FOR YOU ATTENTION!



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Head of CC Digital Manufacturing

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LET'S  
CONNECT

