



OPPORTUNITIES FOR CONSTRUCTION MATERIALS INDUSTRY IN CENTRAL EASTERN EUROPE

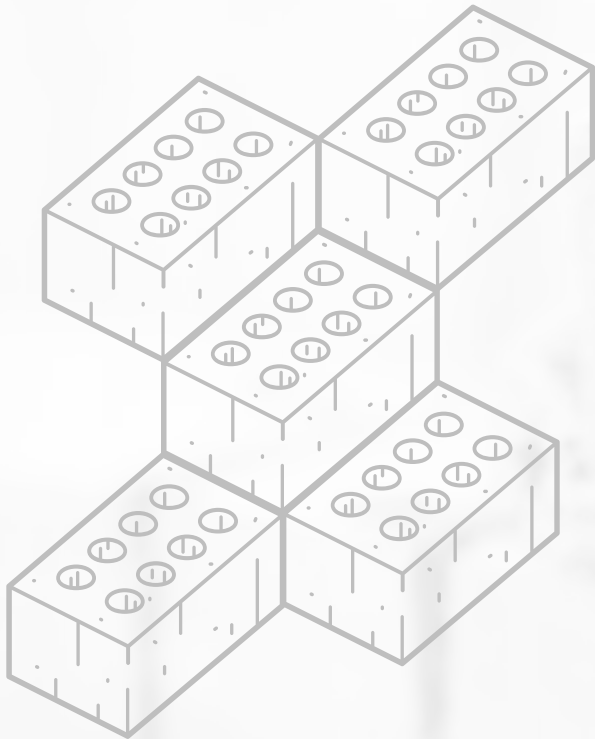
Market dynamics indicate a booming demand for construction materials

EFESO
MANAGEMENT CONSULTANTS

DIGITAL TRANSFORMATION &
MANUFACTURING

INSIGHT

Overview of construction material industry in Central Eastern Europa



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EFESO experience

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How we support our clients

The **construction materials industry in Central and Eastern Europe (CEE)** is booming, with projected revenues **exceeding \$800 billion** in 2024 and growth outpacing the EU average



The figures show the increasing demand for building materials across the CEE region.

Shifting demands are driving the construction materials sector to scale smarter, go greener, and build resilience – EFESO supports from strategy to ramp-up

Current industry challenges



Expanding production capacity:
Boost capacity via technology, efficiency, flexibility, and collaboration



Supply chain resilience:
Export restrictions require resilient supply chains to handle disruptions and policy shifts



Labour force:
Stabilize workforce and streamline production/logistics through automation to offset rising costs



Strategic location planning:
Conduct location checks to optimize manufacturing and R&D for regional benefits



Sustainability & energy security:
Prioritize green energy in CEE to fulfill regulatory and consumer needs



Energy & raw materials:
Enhance efficiency and material use through innovation to counter rising costs



Our approach and offerings

STRATEGY &
FOOTPRINT



PLANT
CONCEPT



FACTORY
DESIGN



REALIZATION
SUPERVISION

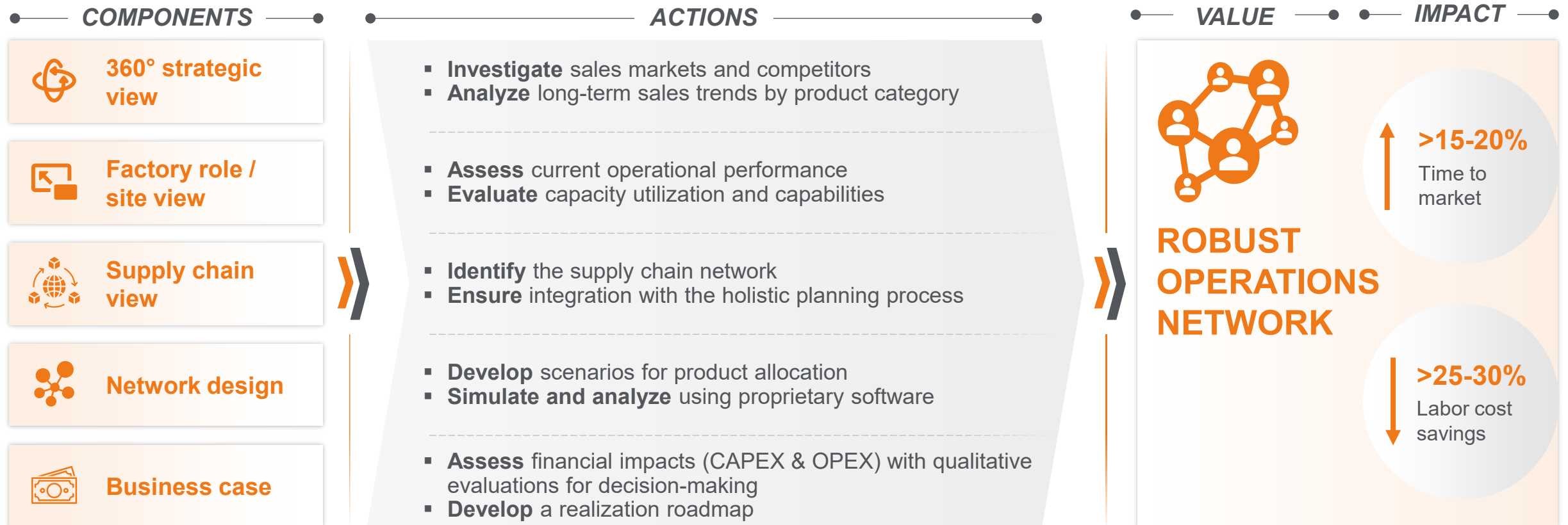


RAMP-UP &
INDUSTRIALIZATION



STRATEGY & FOOTPRINT a full market, plant, and supply chain analysis to refine strategy and decision-making with a strong business case

I. The five components of the 'STRATEGY & FOOTPRINT' phase

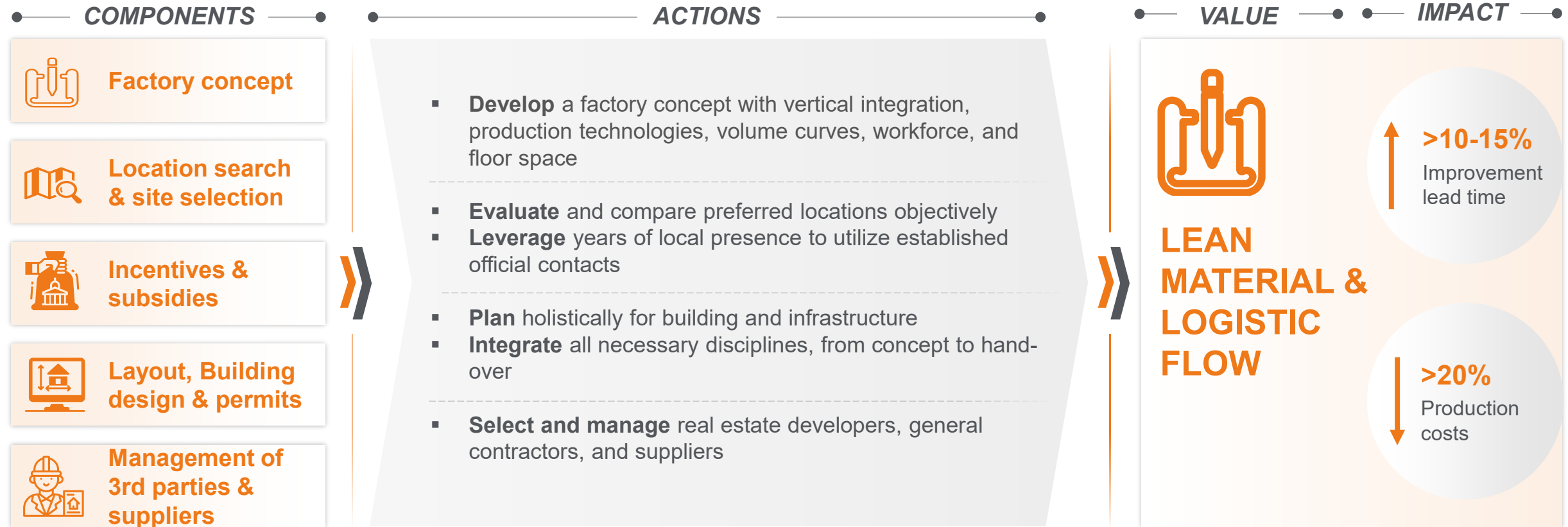


The 'STRATEGY & FOOTPRINT' phase ends with a clear recommendation in the form of a business case.



PLANT CONCEPT developing the concept framework – initiating the factory conceptualization process, scouting for locations, and selecting contractor(s)

II. The five components of the 'PLANT CONCEPT' phase

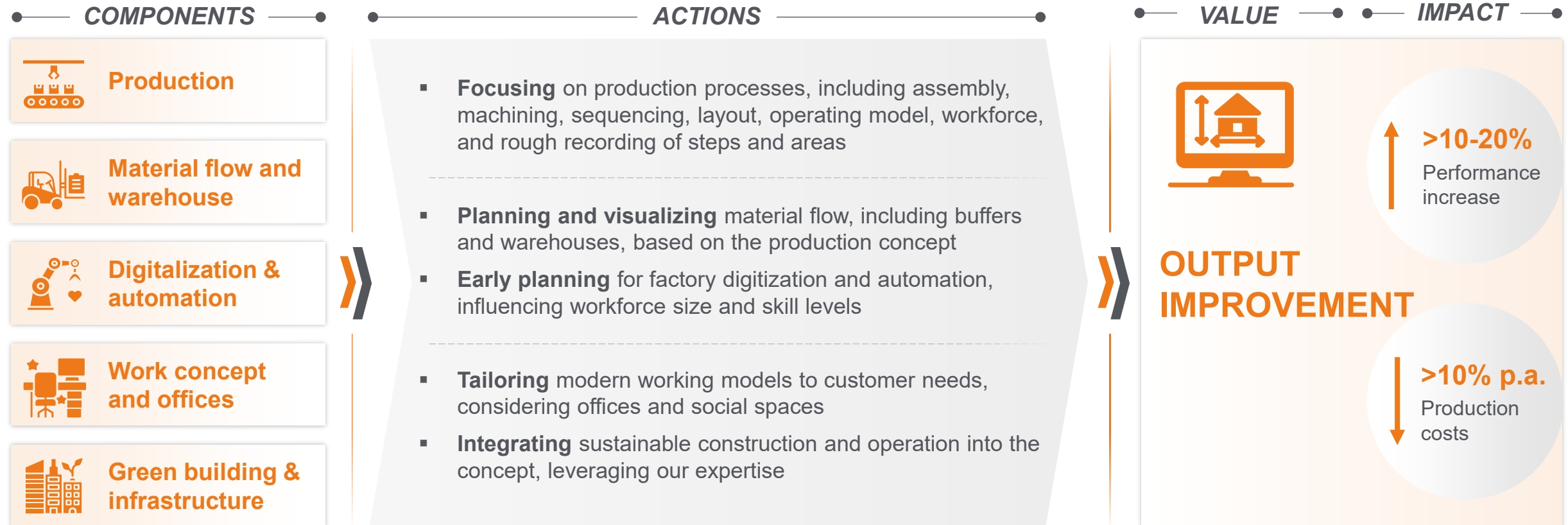


The 'PLANT CONCEPT' stage result is used to identify specific possible locations / sites in the target region.



FACTORY DESIGN based on the planned production concept, the support areas are specified according to requirements

III. The five components of the 'FACTORY DESIGN' phase

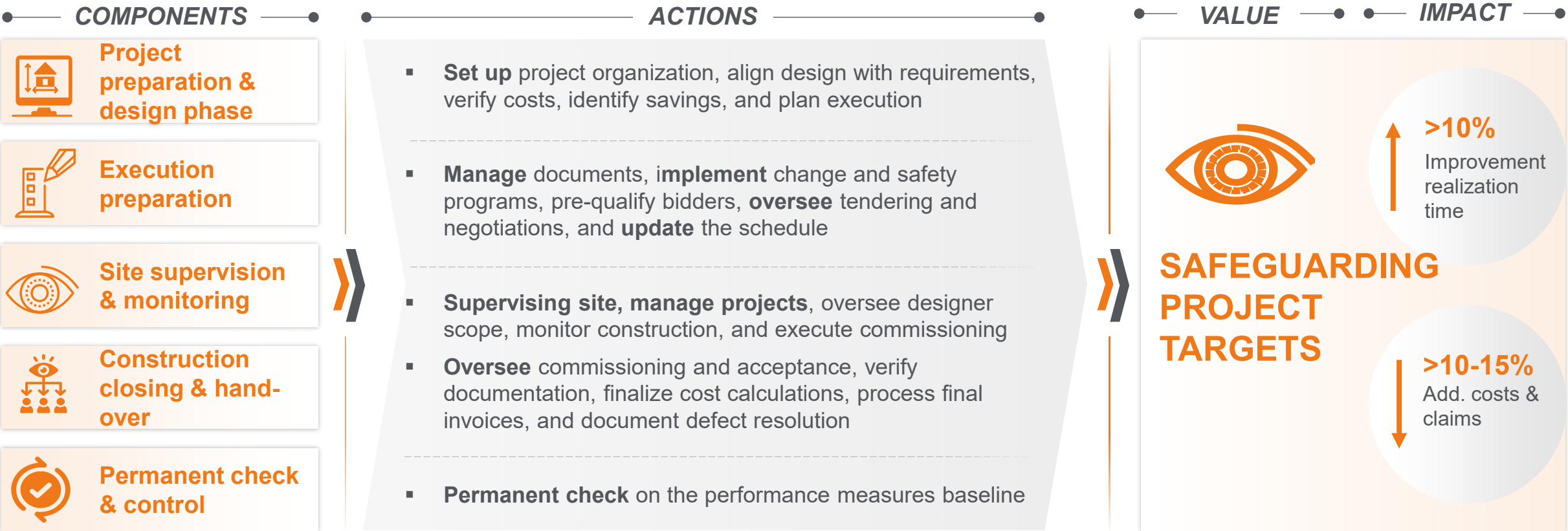


After the 'FACTORY DESIGN' phase, the factory is ready for realization - requirements, schedule and costs are now known.



REALIZATION SUPERVISION our strength is in crafting strategies, developing concepts, and executing them on time and within budget

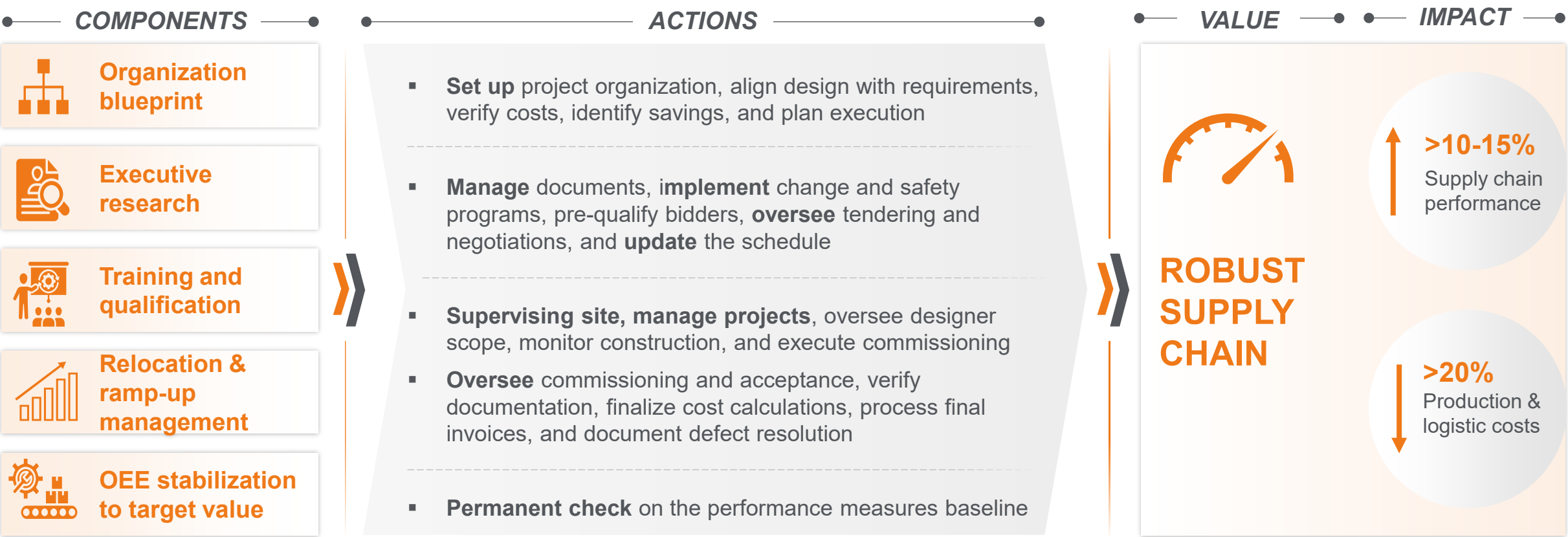
IV. The five components of the ‘**REALIZATION SUPERVISION**’ phase



>>> We safeguard our client’s timescales and budgets by providing management and coordination of the entire project with our ‘**REALIZATION SUPERVISION**’ concept.

INDUSTRIALIZATION & RAMP-UP is essential for streamlining production, reducing time to market, and ensuring scalable and reliable manufacturing processes

V. The five components of the ‘INDUSTRIALIZATION & RAMP-UP’ phase

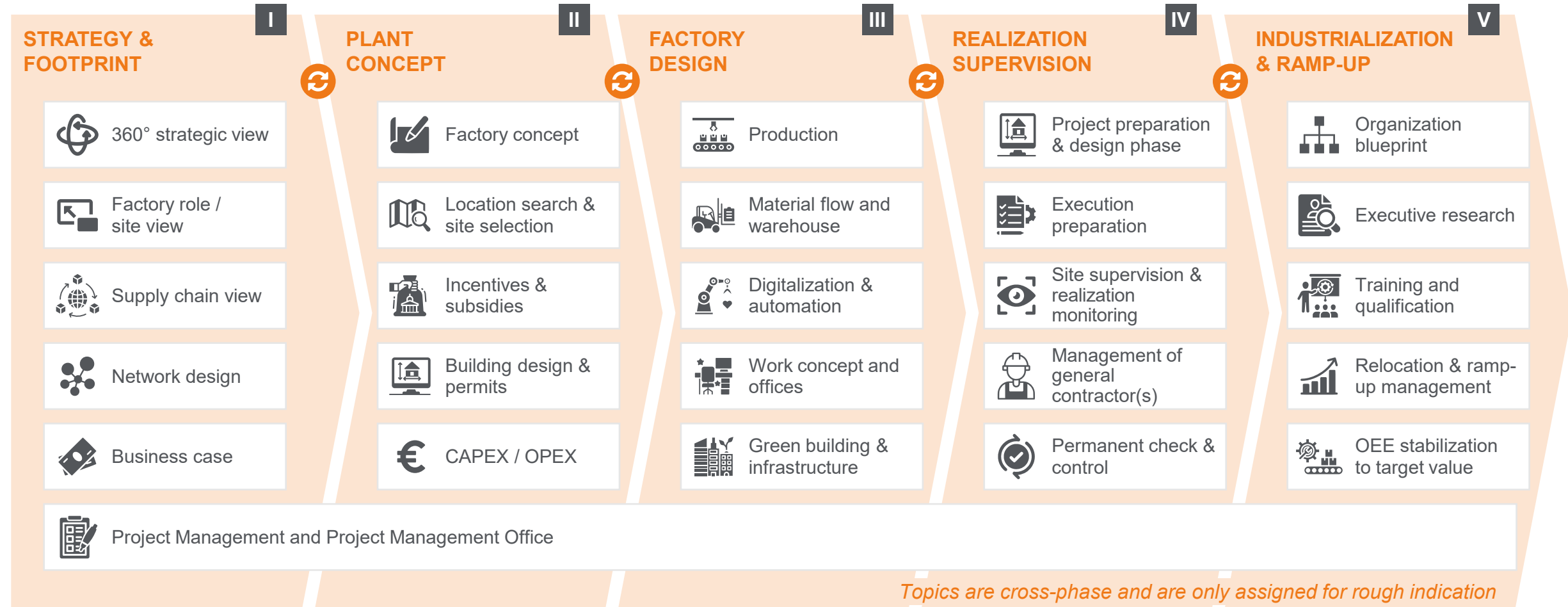


Bringing a built plant to life is a task that many have failed to accomplish in the appropriate time and budget, we support you with our extended experience for ‘INDUSTRIALIZATION & RAMP-UP’.



We have expanded and integrated our capabilities to support customers from initial ideation through to SOP

EFESO's 'one-stop-shop' capabilities and service offerings for FACTORY PLANNING



In the last few years alone, numerous successful programs across all sectors have been delivered

Constructions/Furniture

- Sourcing materials strategy and implementation
- Production footprint strategy and implementation
- Logistic network optimization and warehouse planning and implementation
- ...

Energy & Heating Technology

- Future factory concepts
- Output increase and flexibilization
- Production and factory expansion
- Plant greenfield planning and construction supervision
- ...

Industrial Goods

- Warehouse planning & realization
- Brown and green field plant planning
- Factory digitization and introduction of digital shopfloor management
- ...

Automotive OEMs & Tier-x

- Location search & obtaining subsidies
- Holistic factory concept planning
- Factory realization planning
- Factory realization & ramp-up management
- ...



» Worked with most **top players** across sectors

» Active for **40 years** in the industry

» **50+** successful projects completed globally in the last 5 years

» Deep and proven CEE **knowledge, experience and authority** contacts

» With local offices in CEE, and a Team of **20+** consultants



CEE = Central Eastern Europe

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

Future factory

We have rethought factory concepts and are leaders in the field of the factory of the future.



Factory planning as 'one-stop-shop'

We offer all services from a single source. This ensures seamless communication, lower costs, and faster execution.



Industry 4.0

We are thought leaders and visionaries for innovative factory and network digitization from idea to implementation.



*high value USPs
for our clients*

CAPEX optimization

We are pioneers in CAPEX reduction in industrialization and reduce costs before they arise.



Operational excellence

We review and adjust operational strategies to ensure the highest level of service to clients while maintaining team efficiency and effectiveness.



Benchmark champion

We have the world's best benchmark databases for product costs, CAPEX and footprint data and are continuously expanding them.



EFESO's experience in the building materials' industry



**STRUCTURAL
MATERIALS**



**WOOD & WOOD-
BASED PRODUCTS**



**ARCHITECTURAL
HARDWARE**



**INSULATION &
ROOFING SYSTEMS**



**HIGH-PERFORMANCE
MATERIALS**



**CONSTRUCTION &
INFRASTRUCTURE**



**FLOORING &
DECORATIVE FINISHES**



**OTHER BUILDING
MATERIALS**

**Worked with many
recognized top players**

**Active for over 40 years in
the industry**

**90+ successful projects
completed globally in the
last 3 years**

“ A pragmatic hands-on advice that has helped us to focus always back on the essentials. So, we have achieved our excellent results, thanks to EFESO! ”

Says one of the world's leading window and door manufacturer

