

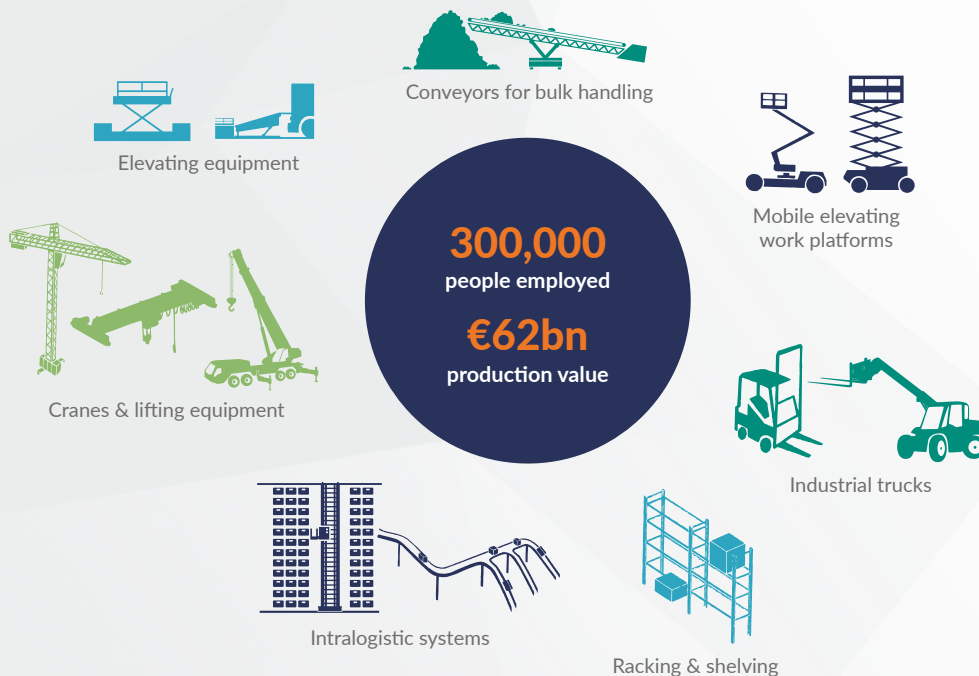
# FEM Strategic Vision 2025



European  
materials  
handling  
federation

# The European Materials Handling Industry

Part of Europe's technology industries, the European materials handling industry manufactures technical equipment and systems for complex production, storage and logistics requirements. Our companies deliver organisational solutions for efficient and sustainable materials flow. We are present in nearly every production and distribution facility, throughout the entire supply and logistics chain and during the whole lifecycle of products. In a world that goes faster, we keep things moving.



# Context

## *a global transformation*

A **societal transformation** is underway as a result of a combination of various global megatrends: demographics, urbanisation, globalisation, sustainability, decarbonisation, digital transformation, knowledge society...

The evolution of society and people's lifestyle notably results in a **logistic transformation**.

E-commerce, value chains, big data, blockchain are among the new patterns and technological innovations that are reshaping logistics, placing the consumer at its centre.

In the face of the societal and logistic change, our industry is reinventing itself. For our companies,

this **industrial transformation** mostly translates into an evolution from manufacturing equipment to providing complete and integrated logistic solutions. New – sometimes disruptive – business models are developed (e.g. sharing economy, long-term rental). As equipment gets smarter, our industry goes through a 'servitisation' process with more and more value coming from new services attached to the use of the equipment than the equipment itself. Meanwhile, sustainability has also become an integral part of our companies' strategy. More than ever, our industry must show versatility and agility to tackle the challenges ahead.





# Our Purpose

*In a world that goes faster,  
we keep things moving*

## We help manage the societal transformation and its challenges

- We provide equipment and systems that make supply chains work
- We help our customers lower their carbon footprint by increasing their energy efficiency thanks to optimal use of equipment

## We bring wealth to Europe

- We directly and indirectly provide jobs to hundreds of thousands of Europeans, achieve a positive trade balance and generate revenue to Europe with the turnover we make and the taxes we pay
- We contribute to Europe's autonomy thanks to our strong industrial and technological base

## Concretely

- *Electric and hydrogen solutions are rapidly replacing fossil fuels and now represent 85% of the production of forklift trucks in Europe*
- *A crane manufacturer has committed to power its factories with 100% renewable electricity by 2025*

## Concretely

- *We employ 300,000 European directly and at least another 100,000 indirectly*
- *We have a positive trade balance of some €16bn (2018)*



## We bring progress through innovation

- We develop cutting-edge solutions, notably in logistic process automation
- We increase safety and comfort at work thanks to technological solutions that alleviate physical strain

## Concretely

- *13 of the global top 20 intralogistic systems manufacturers are European; together they generate as much turnover as their US and Japanese competitors combined*
- *By integrating optimal ergonomics at pick stations and cobotic solutions to eliminate repetitive tasks, our companies improve workers' safety and comfort in warehouse logistics*



# Our Aspiration

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*turning societal challenges  
into opportunities...*



## ... for European citizens

- By optimising production and distribution processes and supporting responsive and flexible logistic chains, our industry can help address consumers' expectations and improve life comfort
- By designing solutions that improve workers' safety or relieve them from physically demanding tasks, we improve working conditions and environment





### ... for the European industry

- We want to remain at the forefront of innovation. Indeed, our ability to constantly design, develop and provide advanced solutions to our customers is key to our success
- We want to maintain our global leadership on supply chain solutions and contribute to a strong European industrial base



### ... for Europe

- We are deeply convinced that our future lies together, as Europeans. Mindful of the role our industry plays in Europe's wealth and development, we want to contribute to a more prosperous, sustainable and united Europe that builds on common values and with a strong internal market at its core

For these aspirations to become reality, we need enablers, strategic prerequisites of a successful Europe that brings value to its citizens. Together, these conditions form the FEM Strategic Vision 2025.

# Our Strategic Vision

## *An adapted infrastructure*

**Rationale:** supply chains have changed profoundly, transforming into value chains and value networks. Now omni-channel, digitised and with the consumer at their core, they remain in constant evolution, relying on fast, developed and flexible infrastructure

### **Requirements:**

#### **An energy infrastructure that supports the diversification of energy sources:**

- A modern and robust multi-source electricity grid facilitating our industrial electrification
- A framework supporting the production and storage of hydrogen

#### **An IT infrastructure that fosters our digital transformation:**

- A rapid roll-out of the 5G in order to maximise the potential offered by the Industrial Internet of Things
- A strong and industry-friendly cybersecurity framework that protects citizens, countries and businesses
- A data framework that ensures the protection of legitimate interests whilst enabling our industries to use data as a major innovation driver

#### **A transport infrastructure that is fit-for-purpose in the face of new urban & inter-urban mobility needs and models whether for persons or goods**





## *A supportive framework*

**Rationale:** Our companies' competitiveness largely depends on their ability to innovate, a domain in which they excel. The EU policy and regulatory approach should aim at providing a supportive framework that fosters and protects innovation both internally and on foreign markets

### **Requirements:**

#### **A stable, predictable and coherent legal framework:**

- Preserving the stability and reliability of the Machinery Directive which remains fit for purpose also in the face of digital technologies
- Ensuring that there are no conflicting requirements or overlaps between exhaust emissions' and outdoor noise requirements to avoid disproportionate technical constraints
- Promoting the development of batteries in support of the electrification of our products

#### **Protecting innovation and sustaining competitiveness:**

- Defending intellectual property rights both in the EU and on foreign markets
- Ensuring effective market surveillance and enforcement of the rules on the internal market

- Encouraging R&D investments, notably by making EU funding available for strategic projects

#### **Promoting an international approach:**

- Shaping international standards according to EU's interests and values
- Remaining open towards foreign investments, provided reciprocity is ensured
- Including a global perspective in EU competition rules
- Pursuing a trade policy that facilitates access to foreign markets whilst promoting and protecting EU norms, rules and values

#### **Enabling new business models:**

- Preserving the freedom of contract in a B2B environment so that our companies can make the most of the opportunities that the digital transformation offers
- Removing obstacles to cross-border asset leasing
- Facilitating the valorisation of industrial data for new services and artificial intelligence developments



## *An advanced workforce*

**Rationale:** Human capital is our industry's most valuable asset and that at the core of its success. The transformation process our companies are going through, whether in terms of internal processes, value propositions or even sometimes entire business models, has a direct impact on their people. In a world changing fast, industrial growth can only be sustained by an agile workforce that is educated and trained according to new needs

### **Requirements:**


- Skills transformation: developing digital skills in order to ensure continued employability
- Facilitating mobility, notably thanks to better Member States' cooperation on the coordination of social security, promotion of foreign language learning at all ages, increase of cultural awareness and better information on job vacancies across Europe
- Increasing education levels and working on the convergence of education schemes that are geared towards labour market needs: better mutual recognition of professional qualifications, promote vocational education and training, including apprenticeship
- Promoting gender balance and equal opportunities





In a world undergoing a global transformation at an unprecedented pace, where protectionism is flourishing, external competition toughening and internal populism rising, Europe's value and values are under threat. Yet, it is also a time of opportunities. Europe has the talents and assets to address these challenges successfully, preserve its values and reaffirm its value. This success depends on bold decisions and clear directions. It also depends on how all of Europe's vital forces can be mobilised and work together. The European materials handling industry has a role to play, not least by making supply chain work and more generally contributing to a strong industrial and technological base.

We stand ready to work together with the EU institutions, national authorities, civil society and our partners from other technology industries to achieve this common objective.







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