

Capital Markets Day

Industrial Service

Capturing the full potential of
industry-leading lifecycle services

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Industry-leading lifecycle services

Strong position with plenty of room to grow

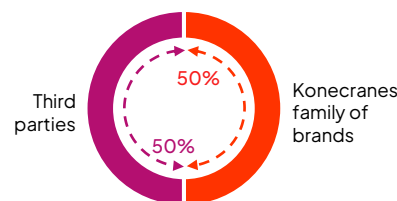
Market position

#1
globally

Market size⁽¹⁾

~15
EUR billion

Agreement base by hoist brand



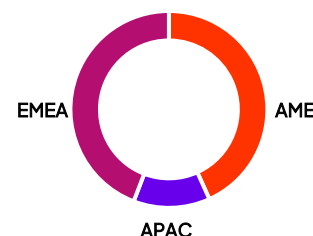
Total market share

10%

Net sales 2025

1.6
EUR billion

Agreement base by region



- Largest and most extensive service network
- Service for all types and makes of industrial cranes and hoists
- Next generation digital services
- Diversified agreement base underpins 75%-85% of overall service volume
- Significant runway across multiple markets

Long-term growth drivers

Safety

Productivity

Sustainability

Outsourcing

Digitalization
& automation

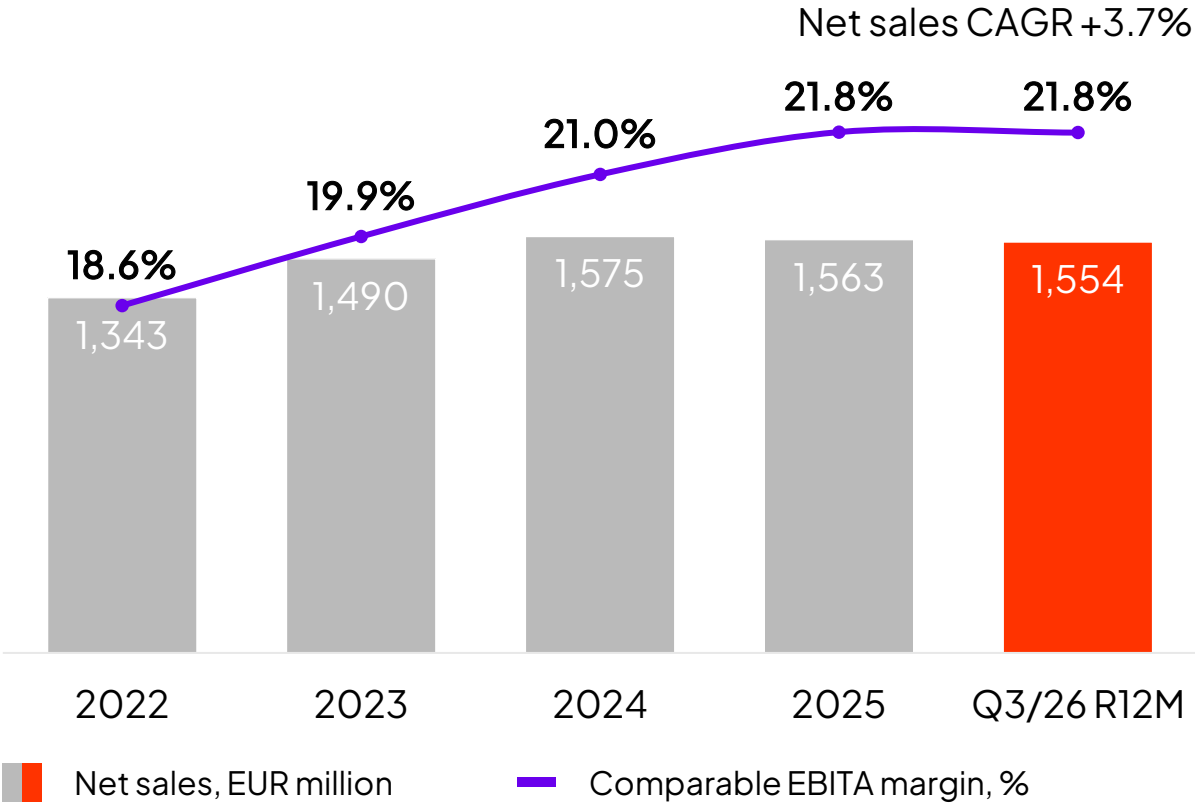
Artificial
intelligence

Own industry
consolidation

1) Not all markets / countries are accessible/addressable

Strong track record of margin expansion

Key financials



Upgraded targets reflect attractive growth opportunities and strong operational leverage

Net sales growth of

7%

(CAGR)

Comparable EBITA margin of

23–25%

to be reached latest for the year 2030

Clear path and ambition to achieve financial targets



Take care of our
people and planet



Grow the agreement
and installed base

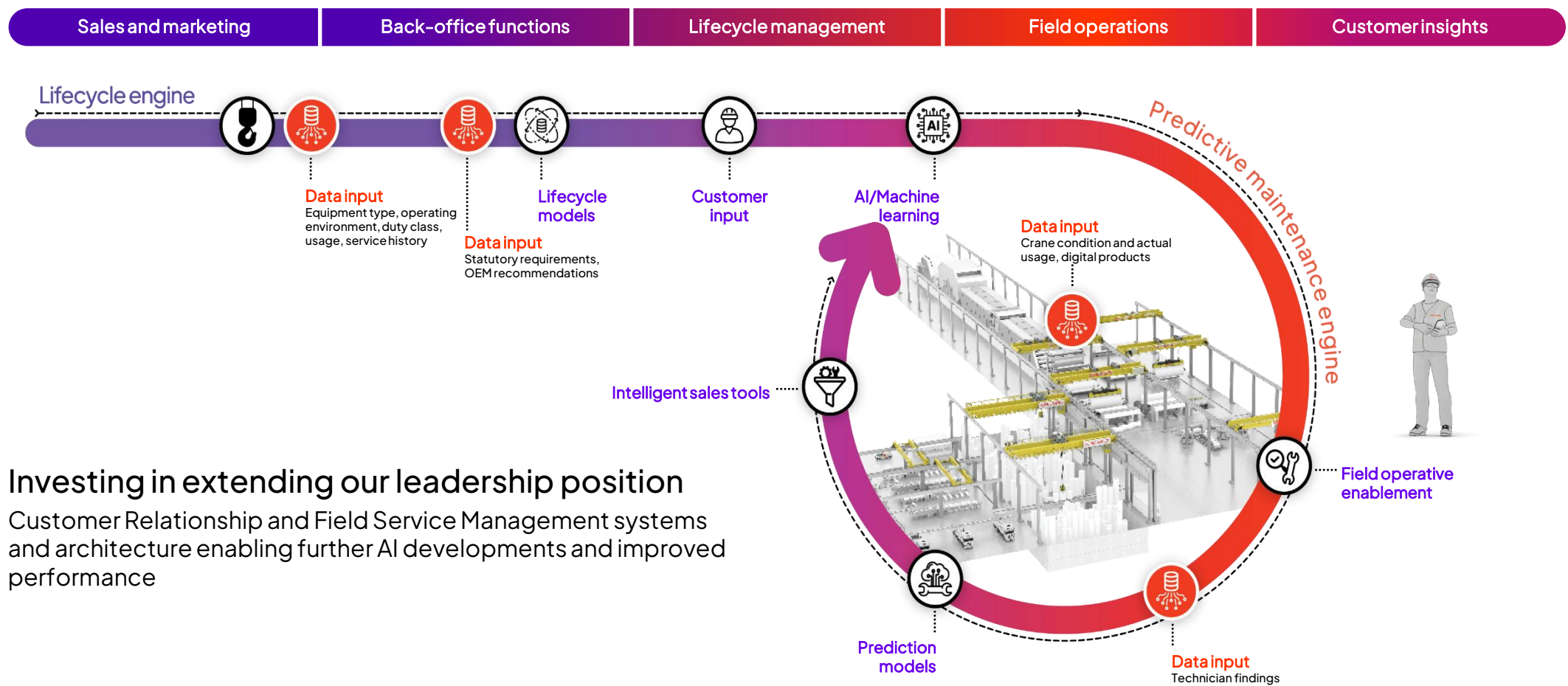


Increase presence in
selected markets and
customer segments



Unleash AI-driven
productivity

Unleashing AI-driven end-to-end productivity



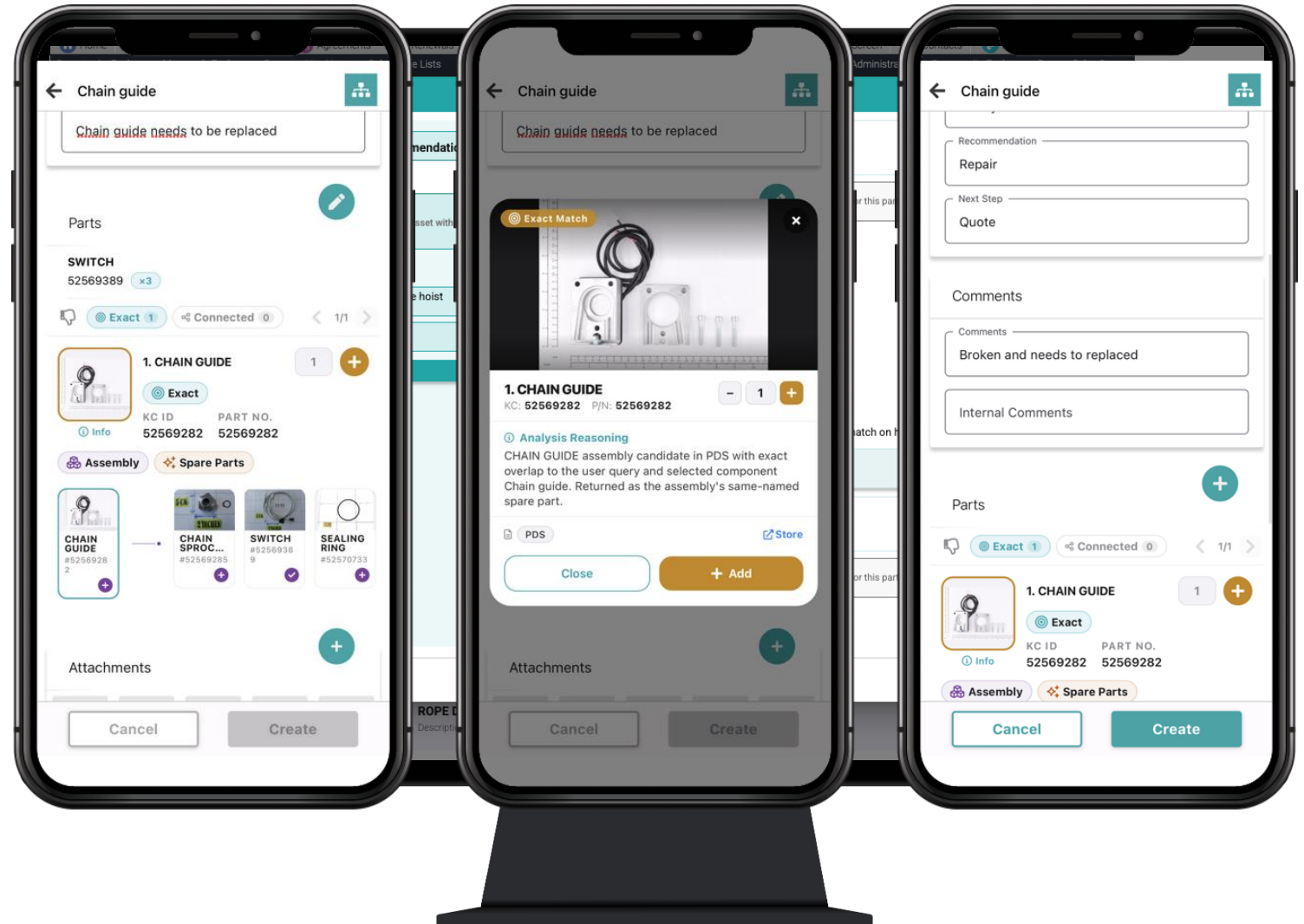
Investing in extending our leadership position

Customer Relationship and Field Service Management systems and architecture enabling further AI developments and improved performance

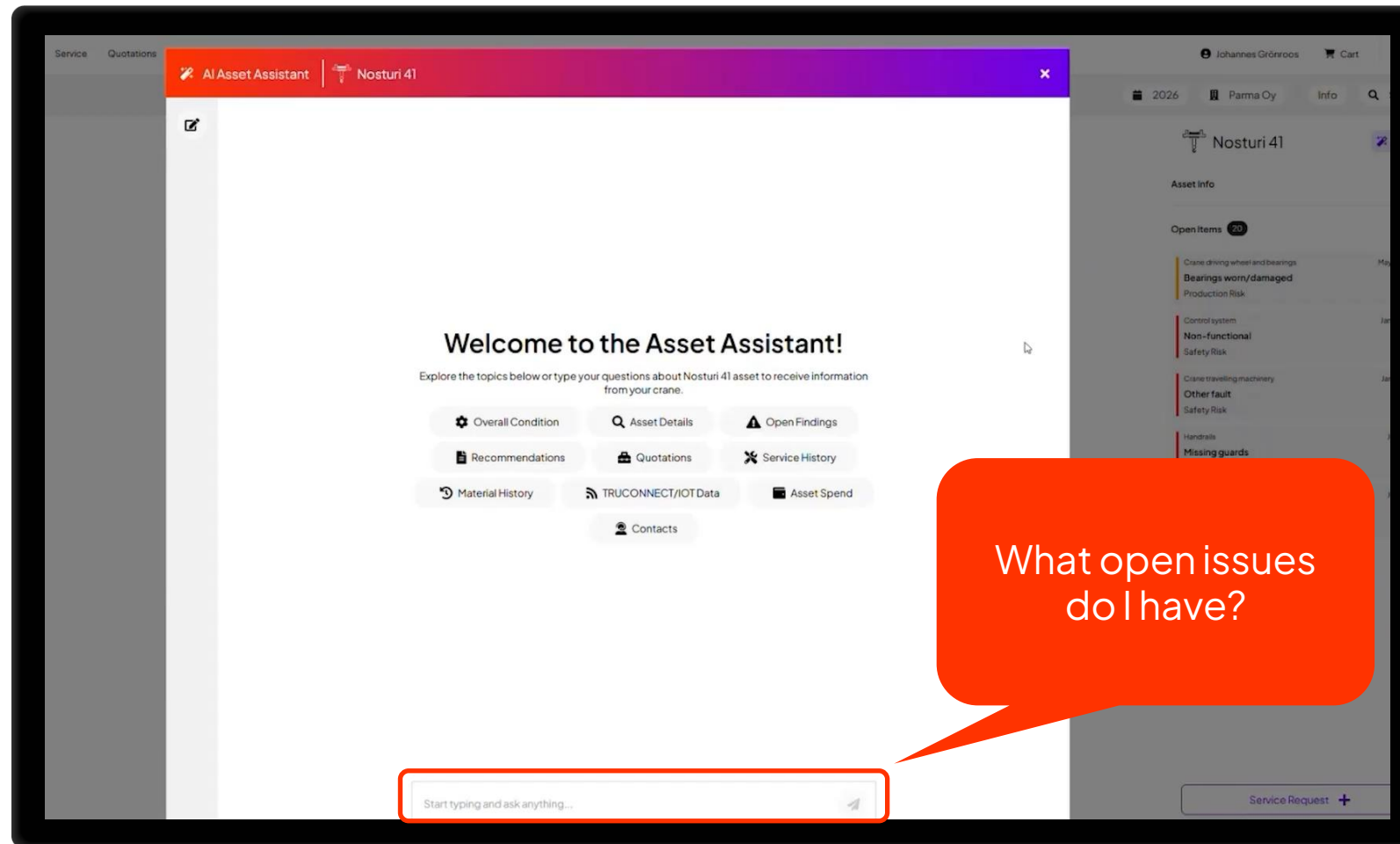
Unlocking data to drive speed and efficiency in sales

AI-assisted quoting in real-time

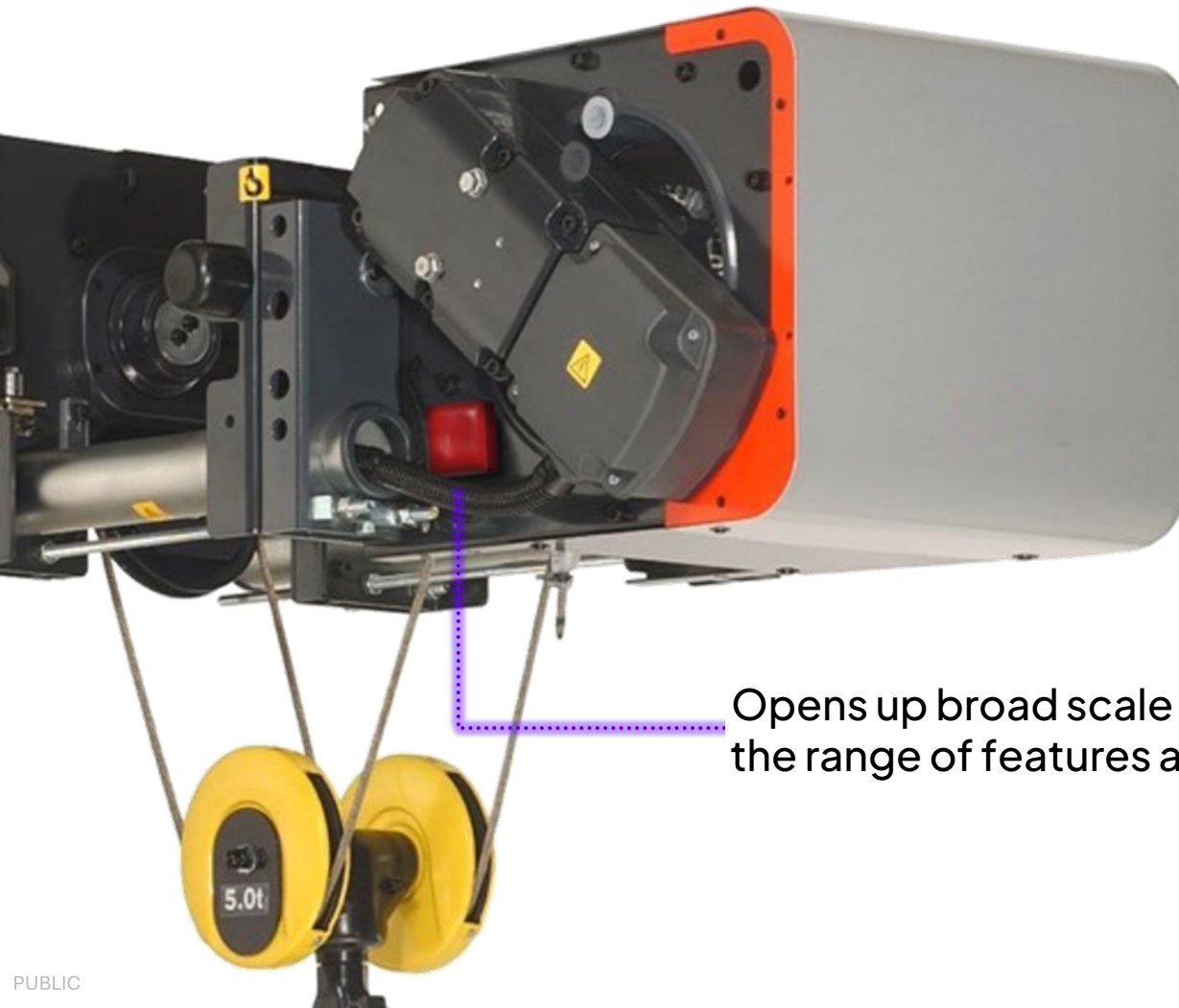
- Enables in-field quotation of parts and repairs
- Increased speed and accuracy
- Less need for technical support
- Continuously adding more brands and models



Customer portal assistants provide insights at the asset, fleet and relationship level



Fleet-wide predictive maintenance enabled by universal sensor technology



Opens up broad scale connectivity and extends the range of features and value-adding services

- Affordable, easy-to-install on all types and brands of equipment
- Supports predictive maintenance and agreement base growth
- Initial revenue stream from equipment retrofits
- Recurring revenues from subscriptions and repairs
- Opportunity to develop alternative revenue models



Developing the offering across the entire lifecycle

Grow the agreement base

- ▶ Differentiated Service programs
 - Large agreement focus
 - Mass market segment offering

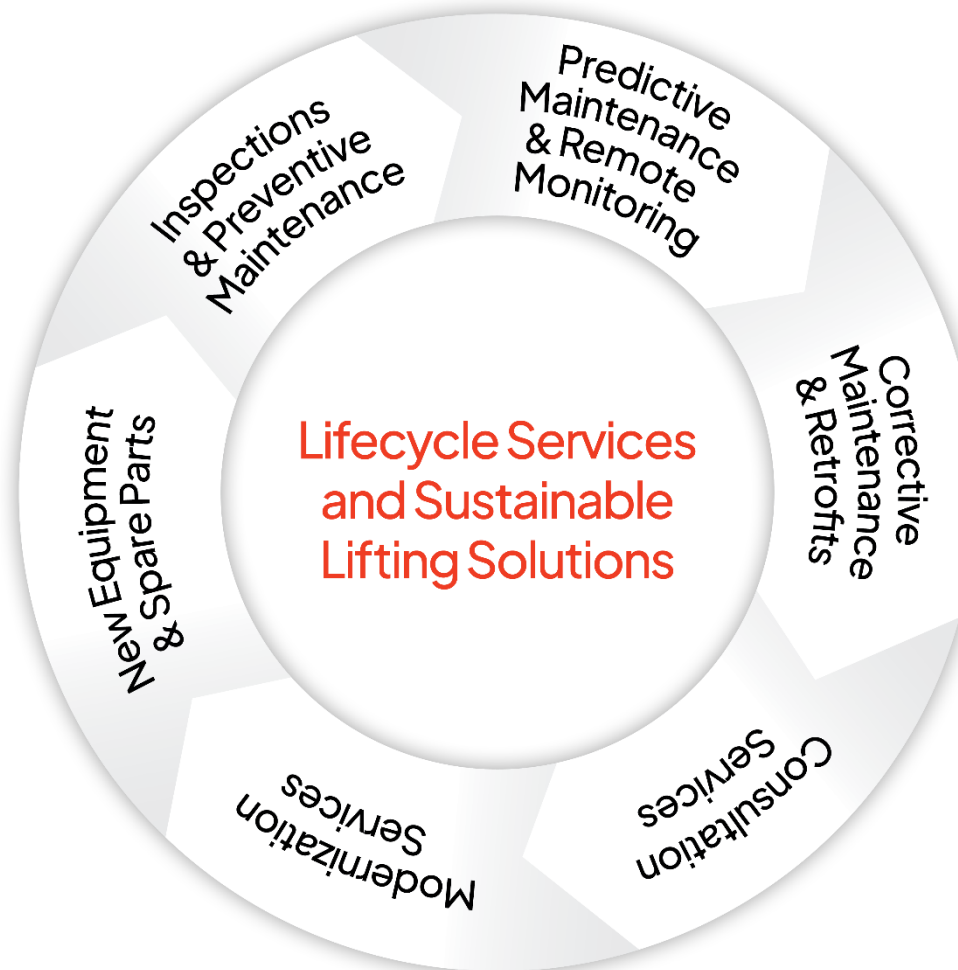
- ▶ Existing agreement expansion

- ▶ Customer retention improvement

Grow the installed base

- ▶ Renewed Retrofit and Modernization offering

- ▶ Expanded equivalent parts



Differentiated service programs tailored to customer segments



CONDITION

Inspection and Maintenance Program

Ideal for those with light lifting equipment and industrial cranes.

Delivering safety, compliance and equipment availability with industry-leading customer experience, and a cost-effective approach suitable for most industrial applications.



CARE

Asset Lifecycle Management Program

Ideal for those with critical production equipment.

Aimed at improving safety, productivity and lifecycle value. Predictive maintenance, condition monitoring and long-term lifecycle planning delivered by our technical experts and specialists.



COMMITMENT

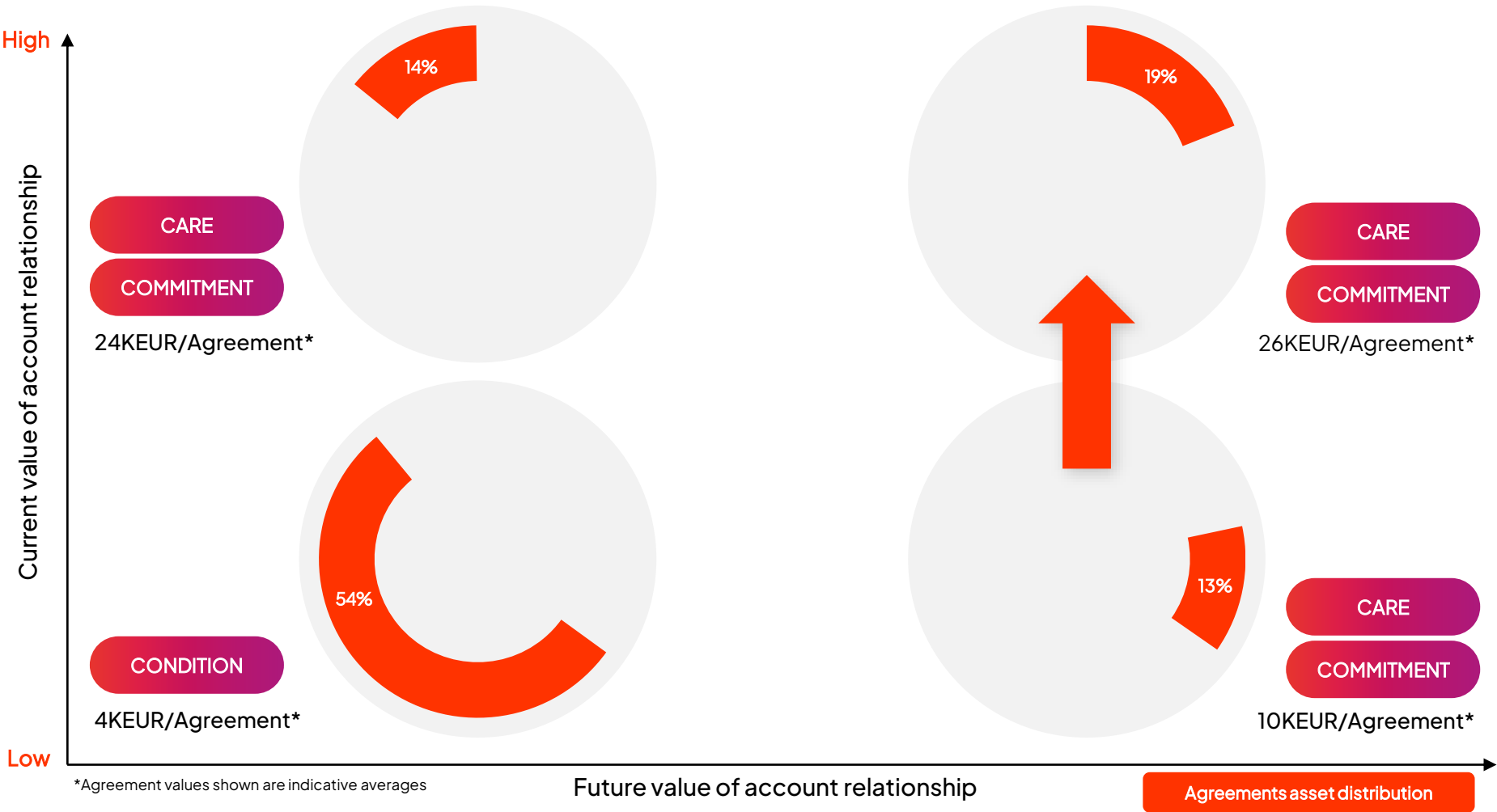
On-site Maintenance Program

Ideal for those with large installations.

A more customized and integrated approach with dedicated on-site personnel.

Shapes the customer experience, sales and service delivery

Driving growth by customer segment



Broadening our customer base across channels

Expand in developed markets

- ▶ Bolt-on acquisitions
New market entry through M&A

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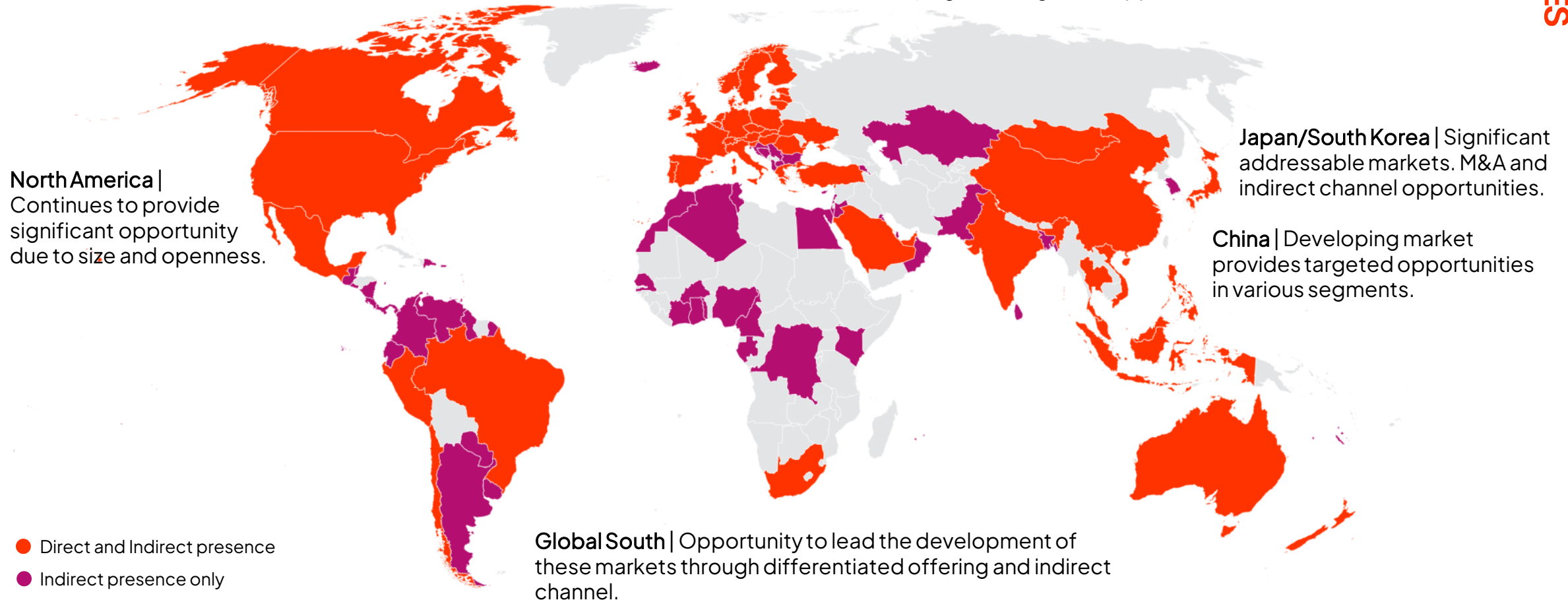
Grow indirect channel

- ▶ Spare parts, training and digital services
Complements open markets/white spots



Growing market share through differentiated actions

Europe | Good opportunities still exist throughout. Southern and eastern Europe have the highest available market share.
Middle East | Significant growth opportunities.





Capturing the full potential of industry-leading lifecycle services

Global trends support growth ambition

Attractive opportunities for organic and inorganic growth

Strong operational leverage and continuous improvement drive profitability