

Market Surveillance to protect Innovation

Best practice examples

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Manitowoc Cranes

> Product's and service brands



Grove

Mobile telescopic
cranes

Manitowoc

lattice-boom
crawler cranes

National Crane

Boom trucks

Potain

Top-slewing and self-
erecting cranes

2



Manitowoc
Finance



Manitowoc
Crane Care

Manitowoc

Manitowoc Cranes

> Europe operations



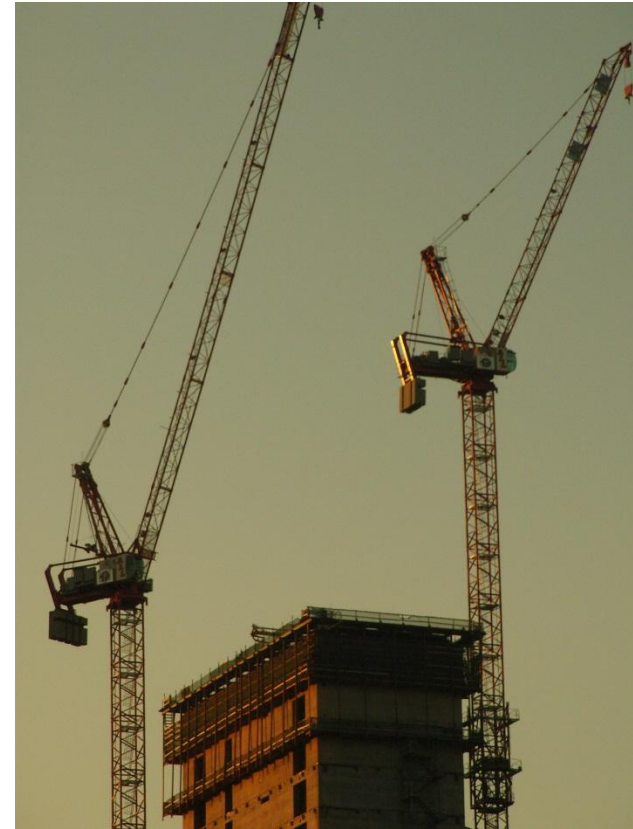
Grove Maniowoc National Crane Potain



Cranes industry

> European Market expectations

- **Safety:** risk management of lifting operations
- **Reliability:** job site productivity
- **Capacity:** reduce construction time
- **Ease of use:** operator confort, assistance
- **Sustainability:** investment for life
- **Flexibility:** adaptable to projects
- **Environment-friendly:** energy consumption, noise
- **Compliance:** regulations diversity
- **Peace-of-mind:** exposure to public



Cranes industry

> Market competition

- Europe is the **biggest market** for cranes, with advanced requirements and stringent regulations
- **Customers are diverse:** small family owned construction business, rental houses, multinational construction giants, infrastructures builders and operators.
- **European manufacturers are leaders,** developing countries competitors are emerging. **Price pressure** is high
- **Technology and Components counterfeits** are frequent (masts, jib sections, hoists, cabs, software)
- **Customers, Users, Institutional partners education** is challenging



Cranes industry

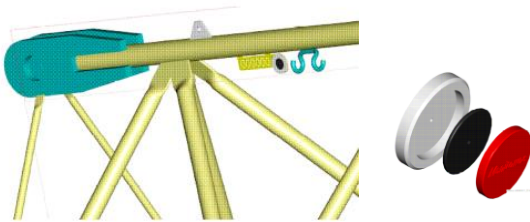
> Technology and Innovation

- Industry is **very innovative**: lattice structure, design, new materials, electronics, remote diagnostics and maintenance, job-site interactions
- **Technology provides customer benefits**, general public acceptance, reduced cost of ownership and differentiation
- **Investment is significant**: engineering centers, prototype testing, third party certifications and intellectual property
- **It must be protected** against illegal copies, counterfeits and false certifications, which are often difficult to identify
- **Unfair competition** will drive the whole industry “value chain” down



Market surveillance > a possible Manufacturer response

- **Educate** sales force and the distribution network
- **Improve information available** to third-party independent crane certifiers
- Seek out **new ways of identifying genuine parts** compared to copies: for example RFID's*



* Radio-Frequency-Identification-Device

