



Mahtikoneet Suomesta

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An aerial photograph showing a large-scale construction or industrial site. The top left shows a dirt area with several orange excavators and trucks. The top right is a paved area with several large, colorful shipping containers (red, blue, yellow) and a few vehicles. The bottom half of the image shows a lush green forest with a winding path or stream. The text is overlaid in the center of the image.

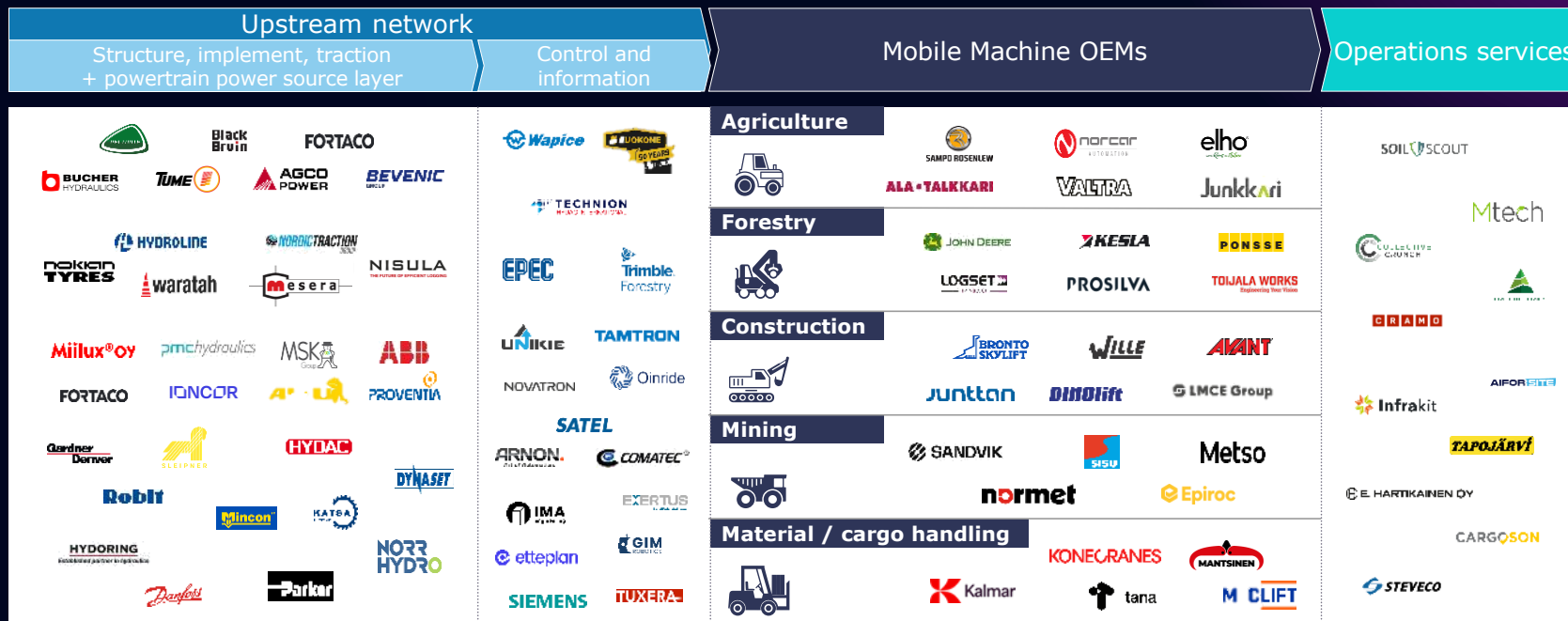
Mighty Machines, Powered by Finland

Finland's National Mobile Machine Growth Strategy 2035

The mobile machine industry in Finland

€19B Annual revenue, 45,000 Employees, 10% of Exports

Sample of companies operating in Finland across the scope industries (*non-exhaustive list*)



Vision and Targets

We set the global standard for mobile machines and solutions with superior customer value

Triple the mobile machine industry revenue by 2035

~10% annual revenue growth

Add up to 45,000 new jobs

International talent key contributor

Finland recognized as a leading R&D player globally

Existing products and services continue to be relevant – but ongoing disruptions create entirely new opportunities



Selected key disruptors that alter the mobile machine market

Macroeconomic shifts



Geopolitical
instability



Sustainability
& regulatory
environment



Urbanization
& population
growth

New technologies



Electrification
& alternative
powertrains



Autonomy
& robotics



Connectivity,
AI & smart
controls

New business models



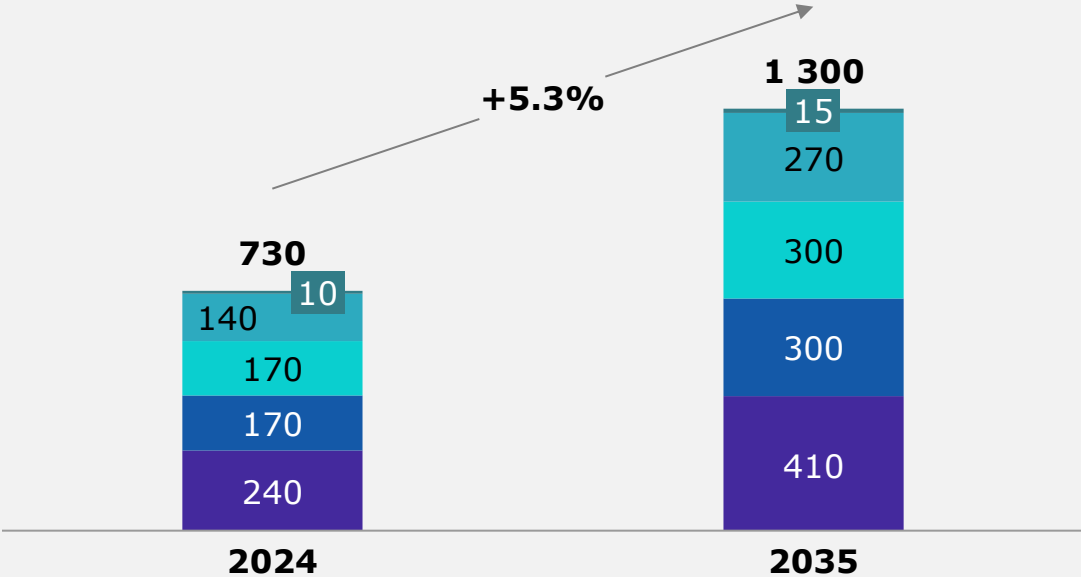
Service-based
business models

These disruptors fuel growth; annual sales of mobile machines and parts is projected to reach around €1.3 trillion by 2035



Mobile machine market size & growth by sector

Annual sales of mobile machines and parts (€ billion, 2024-2035)



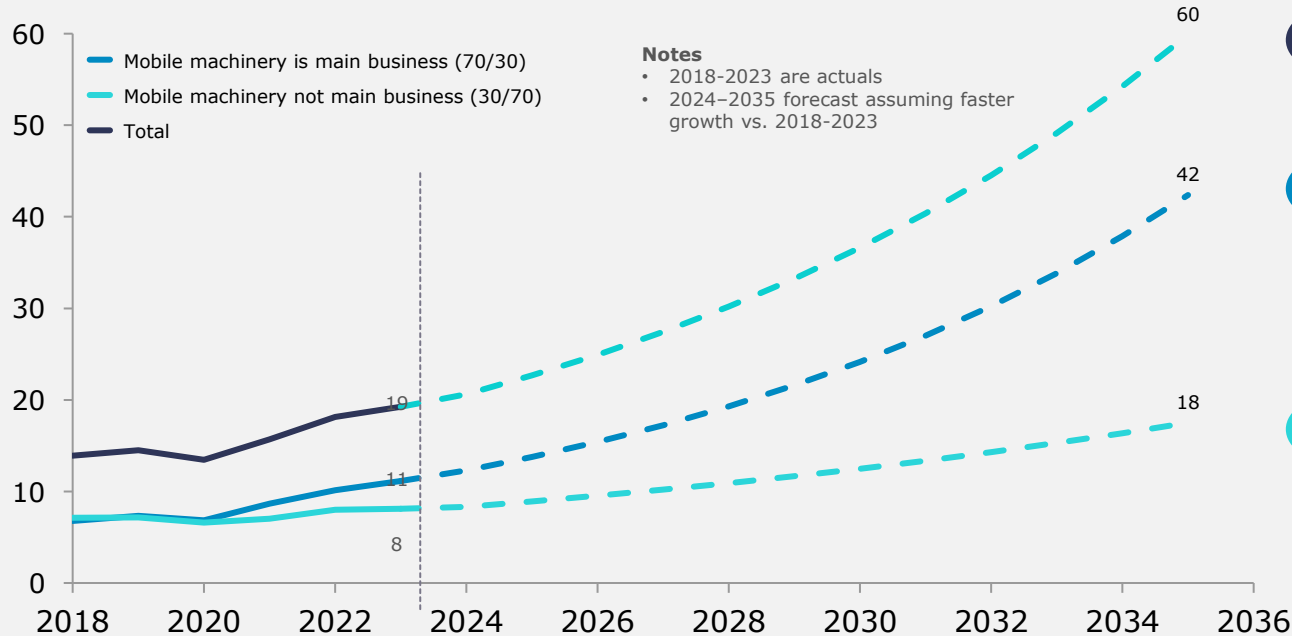
● — CAGR ('24-'35) — ●

- Forestry 3.8%
- Mining 5.9%
- Material & cargo handling 5.4%
- Agriculture 5.3%
- Construction 4.8%



Growth ambition | Tripling 2035 industry revenue realistic; assumes 10% CAGR

Revenue (€Bn)



Notes

- 2018-2023 are actuals
- 2024-2035 forecast assuming faster growth vs. 2018-2023

CAGR %
18-23'

+6.7

+10.4

+2.6

CAGR %
24-35'

+10

+12

+7

*Global CAGR references
2024-2035 (%)*

6% total market

17% electrified

22% autonomous

New sources of customer value will emerge beyond machine itself – machines increasingly becoming 'enabling platforms'

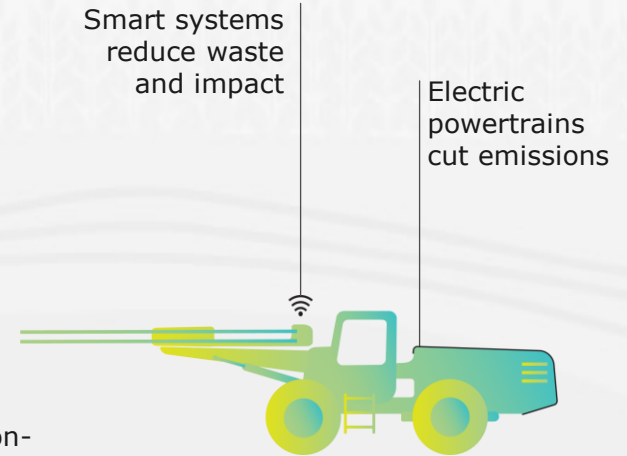
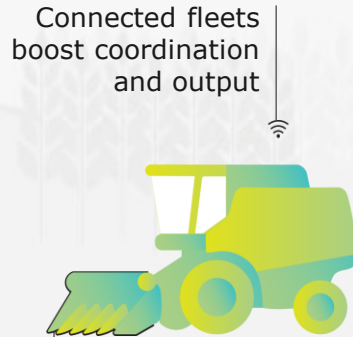
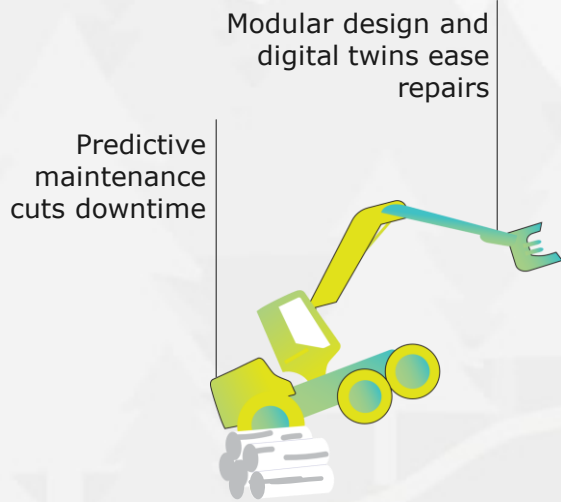


Lower lifecycle costs

Increased productivity

Safer, sustainable operations

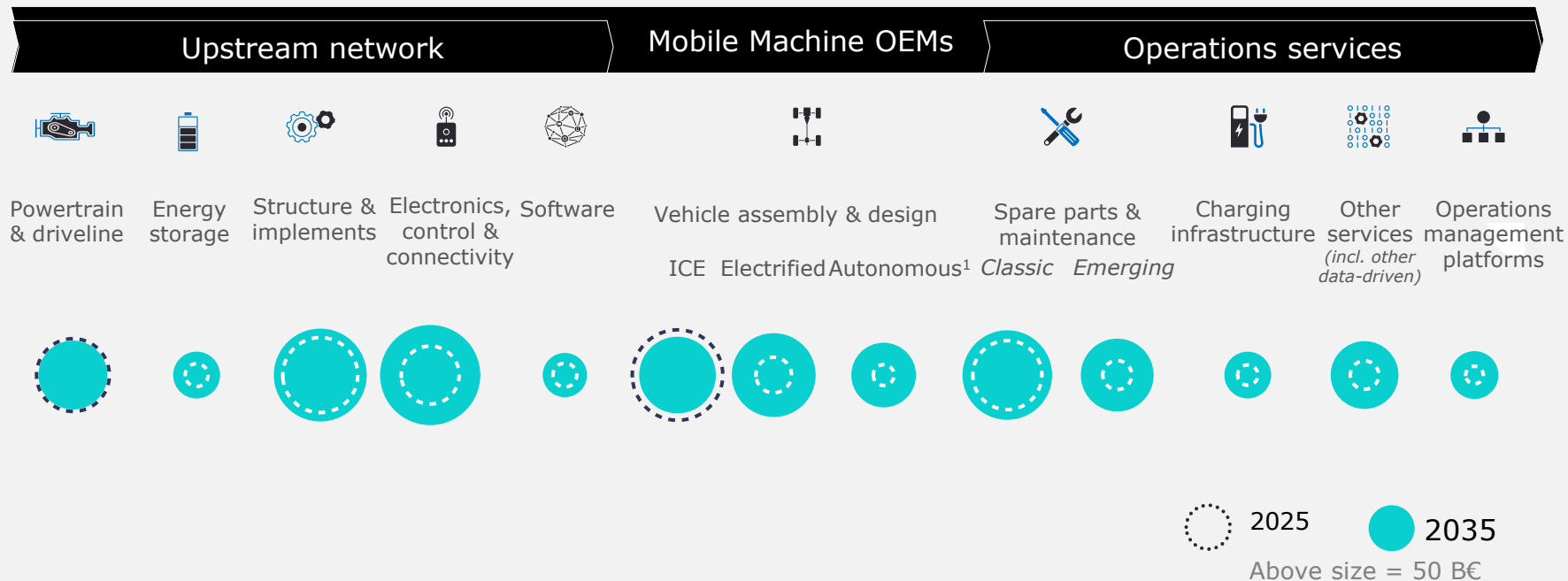
Examples include:



Revenue pools shifting from classic components to emerging components and services



Global revenue pools across value chain elements (2025 vs. 2035, B€)





From vision to action

~30 initiatives identified to drive the strategic priorities, each with specific actions and assigned responsibilities

The industry companies are committed, with stakeholder engagement ongoing and leadership by the SIX Mobile Work Machines cluster

Progress is now mobilized and monitored through events or reports, for example by Technology Industries of Finland

Finland has 8 strategic growth priorities to drive the vision for 2035

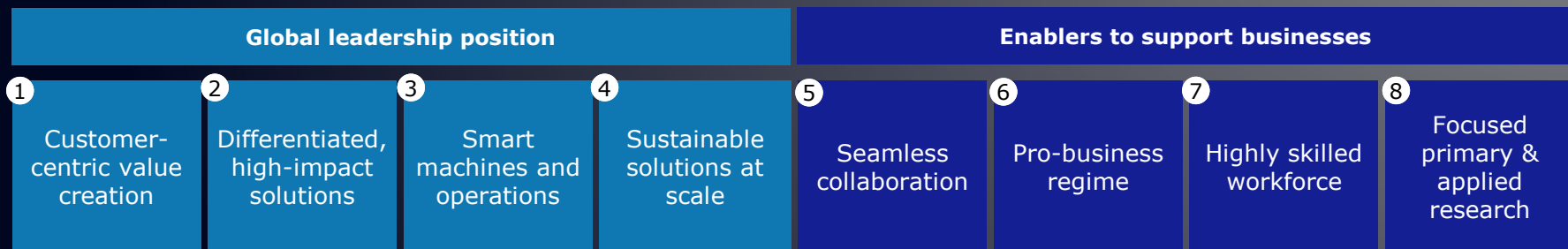
Targets

Triple the industry revenue

Add up to ~45k jobs while improving productivity

Finland recognized as a leading R&D player globally

Strategic priorities



Positive spillovers beyond mobile machine industry

Automation & robotics

Data & AI

Battery & energy solutions

Electronics & semiconductors

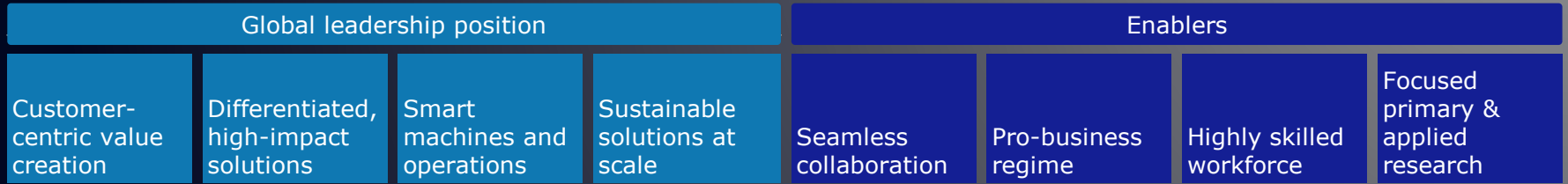
Engineering & manufacturing services

Each priority has a clear set of initiatives to drive it forward

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|--|---|--|--|---|--------------------------------------|
| Customer-centric value creation | Differentiated, high-impact solutions | Smart machines & operations | Sustainable solutions at scale | Seamless collaboration | Pro-business regime | Highly skilled workforce | Focused primary & applied research |
| Deepen integration into customer operations | Strengthen leadership in advanced offering | Utilize data for value-added E2E solutions | Build sustainability into product design | Develop and expand joint infrastructure | Streamline permitting, regulation, tax processes | Improve structural access to talent | Strengthen university specialization |
| Deliver lifecycle focused solutions | Promote Finland's mobile machine excellence | Develop machine-specific AI and operator integration | Develop next-gen, energy-efficient powertrains | Create efficient E2E research-product pathway | Incentivize investments in infrastructure | Make the industry attractive for top talent | Enforce strategic long-term research |
| Disrupt service models and expand customer base | | Advance autonomy-enabled services & set standards | Embed circularity across the value chain | Strengthen intra-industry collab. & co-innovation | Ensure consistent innovation policy | Align education for industry needs | |
| Ensure best-in-class operator experience | | Develop smart connectivity & utilize digital twins | Lead customers towards sustainable end operations | Strengthen cross-industry collaboration | Support startups throughout full growth journey | Expand training systems for continuous upskilling | |
| | | | | Boost start-up and scale-up collab with incumbents | Promote Finland as a leading innovation hub | | |
| | | | | Strengthen EU & public-private collab | | | |

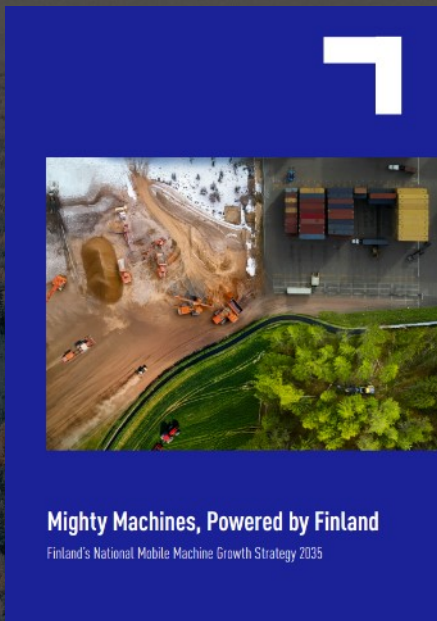
For each strategic priority, clear ownership has been defined for action-oriented initiatives

STRATEGIC PRIORITIES



| Example initiative | Action | Responsible | Example initiative | Action | Responsible |
|--|---|-------------------------------|---|---|--|
| Disrupt service models and expand customer base | Offer flexible service options like pay-per-use, uptime guarantees, and tailored support packages; Support customers in adopting new technologies through aligned incentives and business models. | <u>Industry</u> , Research | Strengthen research-industry collaboration | Increase industry involvement in the research process and enable joint resourcing through collaboration platforms, also allowing smaller companies to participate in and benefit from top-level research | <u>Associations</u> , Research, Industry |
| | Expand offerings to new customer segments emerging from new technologies and services; Explore opportunities beyond traditional mobile machine customers ... | <u>Industry</u> , Research | | Improve researchers' understanding of industry needs by presenting research outcomes in practical, accessible formats using concrete examples, and arranging joint events to enhance transparency and knowledge sharing between research and industry | <u>Research</u> , Industry |
| ... | ... | | ... | ... | |

Now we mobilize and execute – with all stakeholders



SIX Mobile Work Machines cluster leads the work with companies, researchers, and public partners, building on earlier progress

First actions include building a Center of Excellence with VTT and universities, strengthening cooperation with partners such as the Semiconductor Group, and starting joint work to make better use of shared infrastructure

365-day plan with key stakeholders to kick off the strategy and guide implementation

To find out more, download the report from teknologiateollisuus.fi or six.fi/mobile-work-machines



Mighty Machines, Powered by Finland
- Moonshot for mobile machines!



Kiitos!