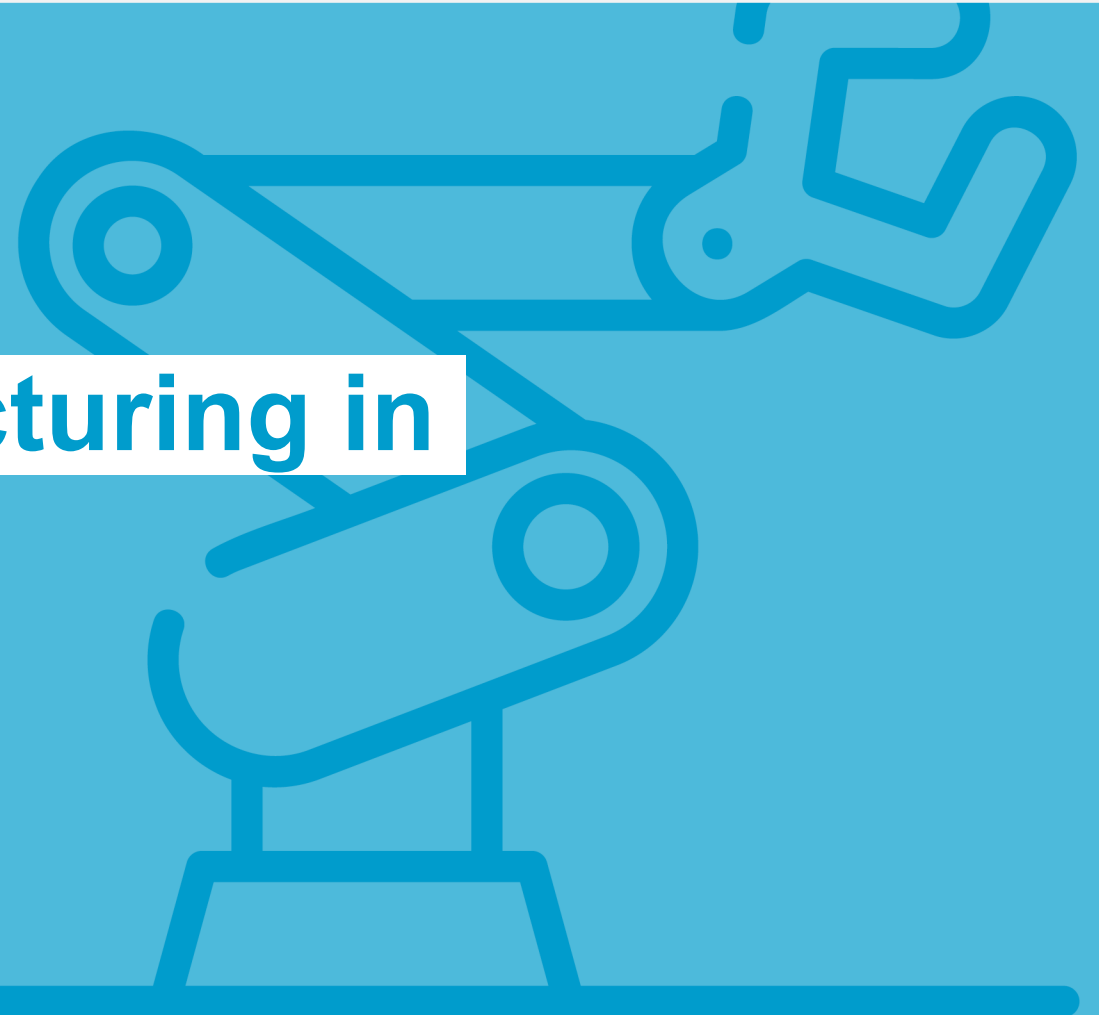


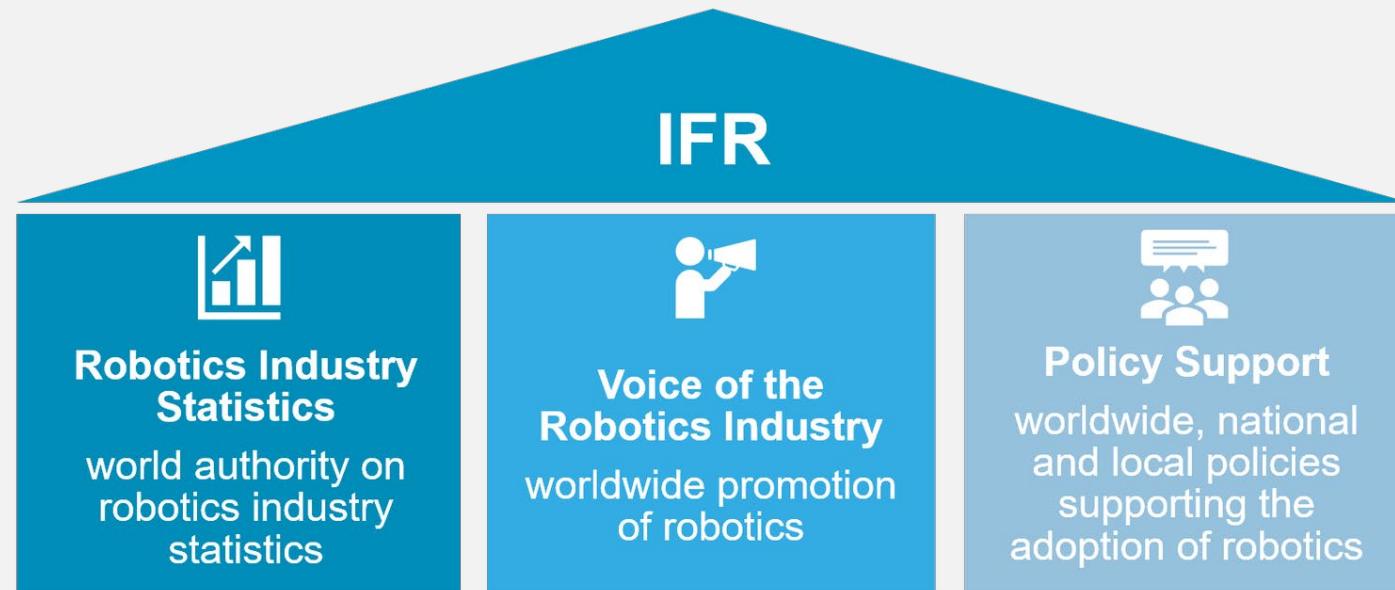
IFR Executive Roundtable on 23 May 2023

# The Future of Manufacturing in North America



# International Federation of Robotics

- **Non-profit organization** since 1987
- IFR represent **more than 2,000 organizations** from **25 countries**
- Robot manufacturers, national robotics associations, universities, start-ups worldwide
- Annual global **robotics turnover \$50 billion** (robot systems including software & peripherals)



# IFR statistics and World Robotics

- Numbers presented here are **preliminary**
- Final results will be published in World Robotics 2023
  - Available September 2023



# Global installations 2022: 531,060 units (+2%)

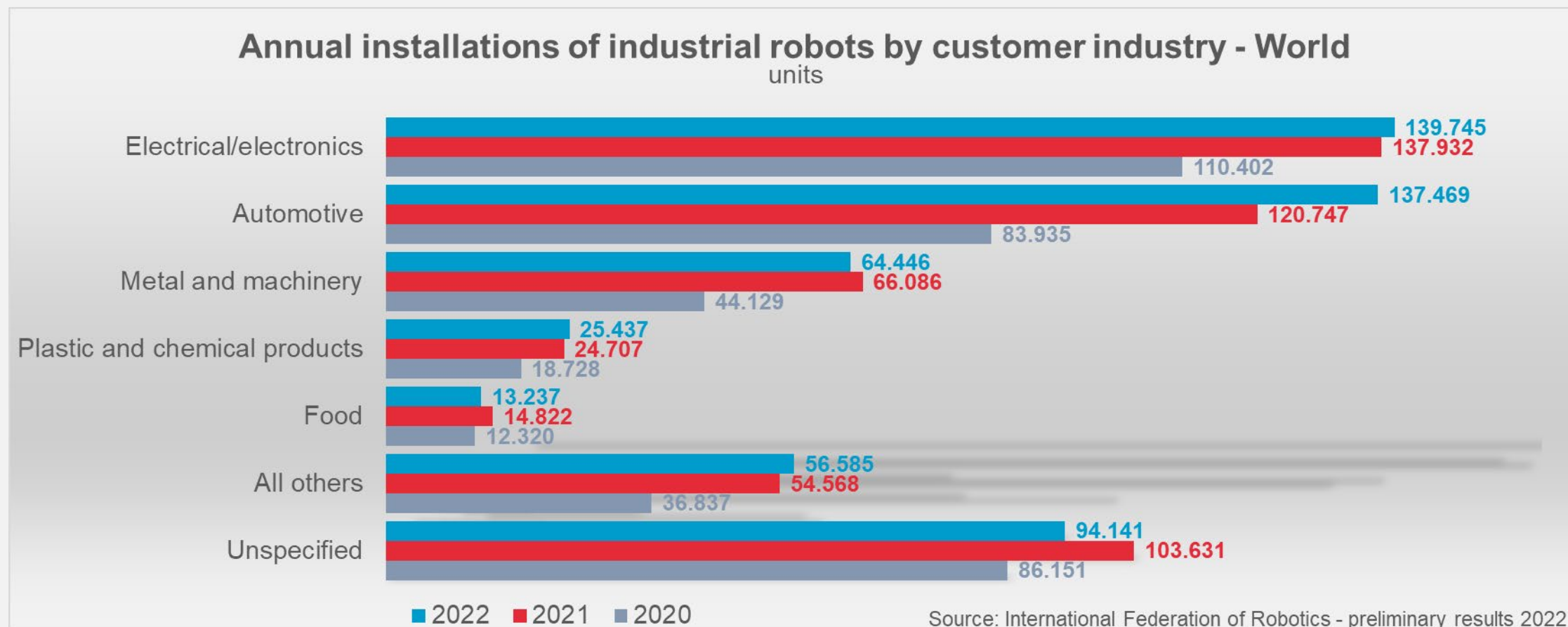
## Annual installations of industrial robots - World

1,000 units



Source: International Federation of Robotics - preliminary results 2022

# Automotive catching up – head to head with Electronics



# North America approaching all-time high

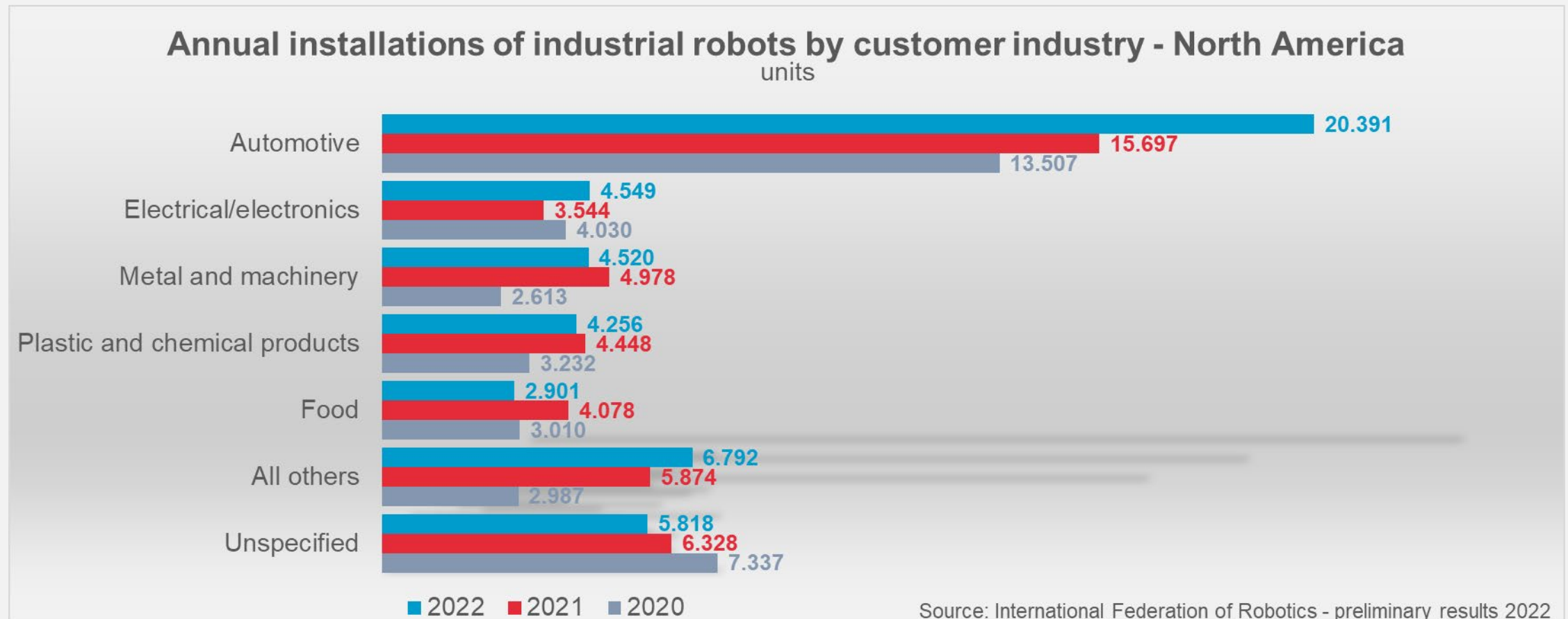
## Annual installations of industrial robots - North America

1,000 units



Source: International Federation of Robotics - preliminary results 2022

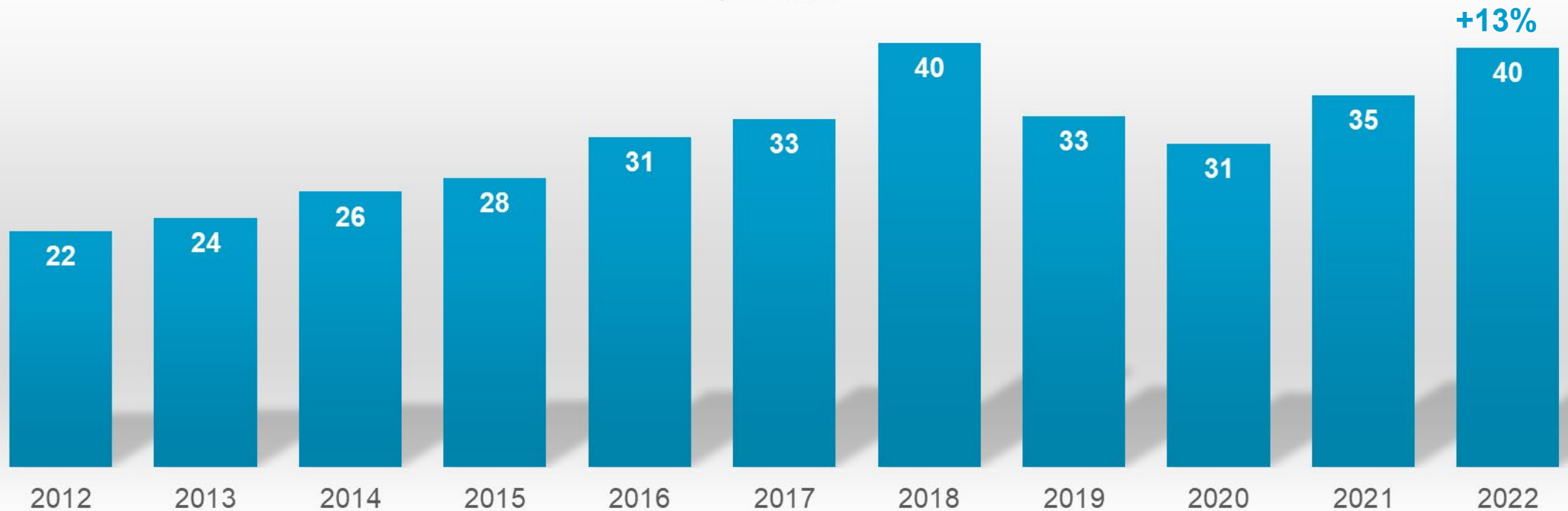
# North America approaching all-time high



# US installations +13%

## Annual installations of industrial robots - United States

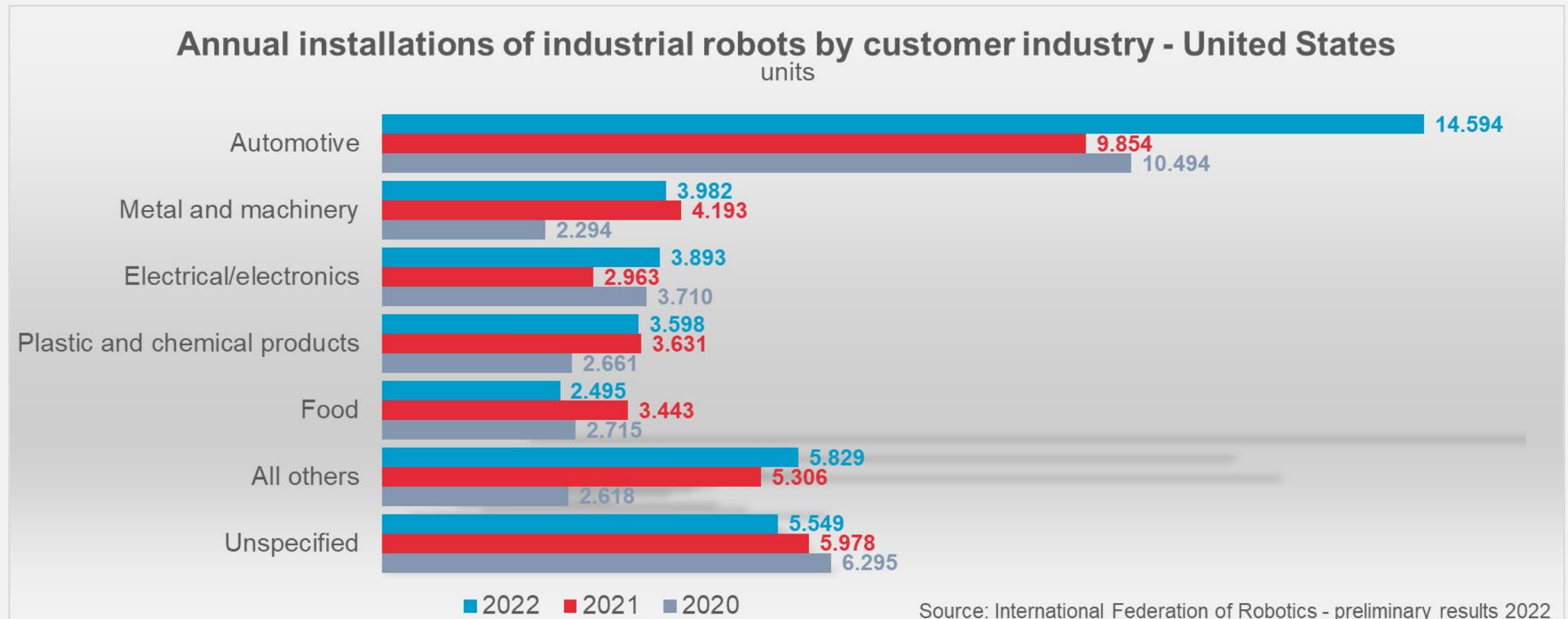
1,000 units



Source: International Federation of Robotics - preliminary results 2022



# Automotive drives growth in the US



# Mexico: strongest growth in North America

## Annual installations of industrial robots - Mexico

units



Source: International Federation of Robotics - preliminary results 2022

# Canada: very cyclical due to automotive

Annual installations of industrial robots - Canada  
units



Source: International Federation of Robotics - preliminary results 2022

## „Boom after crisis“ decelerating

- Turnover in North America was still growing strongly in Q1/2023 \*
- Order intake in Q1/2023 is declining (-5% to -10% yoy) \*
- “Base effect”: Orders were at an all-time high in Q1/2022 +



Sources:

\* IFR Quarterly Survey

+ A3 Quarterly Statistics



## ■ Global trends:

- **Uncertainty factors weigh on willingness to invest**
- Central bank policy in the US and in the Euro Area burden investments
- Chinese economy more soft \*
- Political tensions

## ■ Outlook for North America

- **Good climate for investments**
  - Labor shortage
  - Inflation Reduction Act

Source: \* VDMA Machinery & Equipment in China Q1/2023: