IFR International Federation of Robotics

IFR Executive Roundtable on 28 June 2023

Building Resilience for Europe through Automation

Schedule

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- Welcoming and presentation of the participants of the Executive Round Table
  Dr. Susanne Bieller, IFR General Secretary

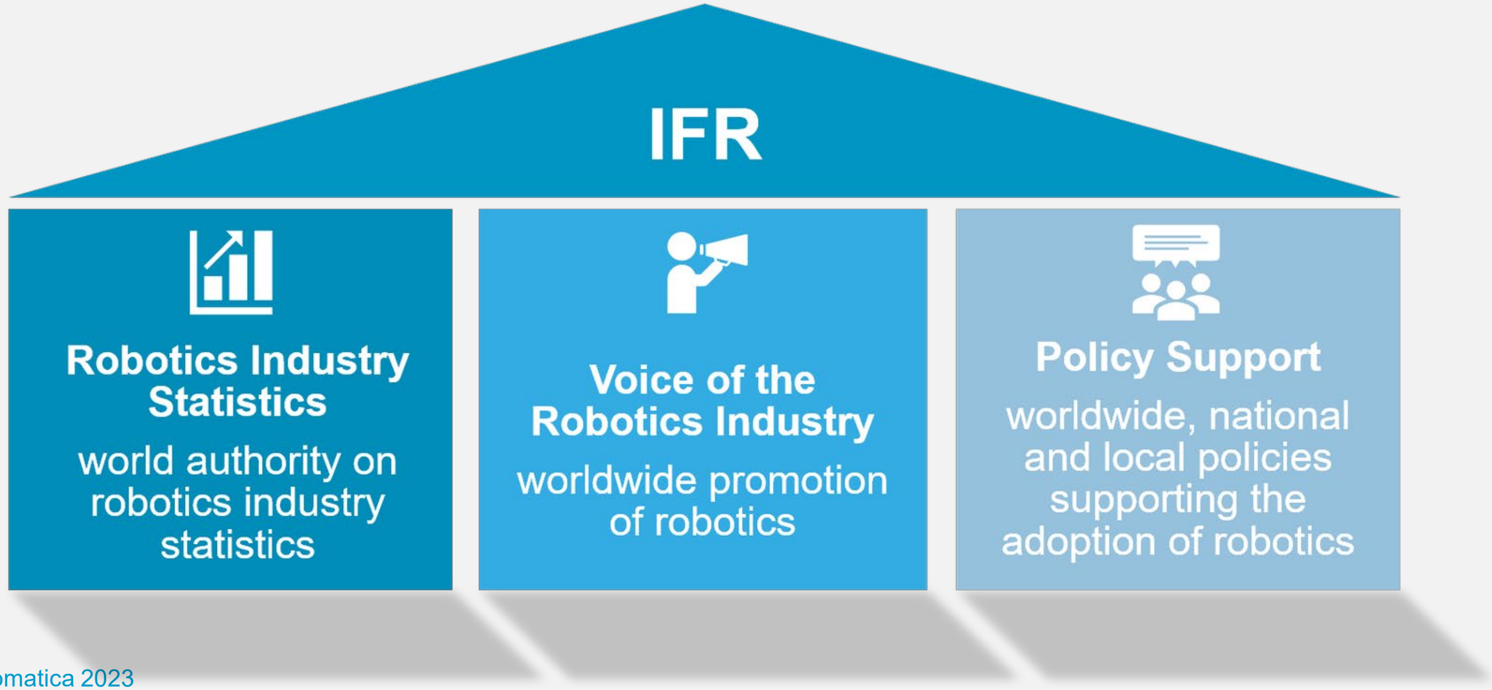
- **Preview on preliminary results of World Robotics Industrial Robots 2023**
  Marina Bill, IFR President

- Discussion on **“Building resilience for Europe through automation”**

- Personal interviews with the participants

International Federation of Robotics

- **Non-profit organization** since 1987
- IFR represent **more than 3,000 organizations** from **25 countries**
- Robot manufacturers, national robotics associations, universities, start-ups worldwide
- Annual global **robotics turnover $50 billion** (robot systems including software & peripherals)



Your panelists today

Ralf Völlinger
GM Robot Business Division
Fanuc Europe

Enrico Krog Iversen
CEO
OnRobot

Adrien Brouillard
Global Head of General Industry
STÄUBLI INTERNATIONAL

Thomas Burger
Managing Director
SBS-Feintechnik

Your host: **Susanne Bieller**
General Secretary
IFR

IFR statistics 2022: preliminary results

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Marina Bill
IFR President

Dr. Christopher Müller
Director IFR Statistical Departmernt

IFR statistics and World Robotics

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- Numbers presented here are **preliminary** as of May 2023

- Final results most likely are subject to changes
- They will be published in World Robotics 2023
- Available 26 September 2023

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

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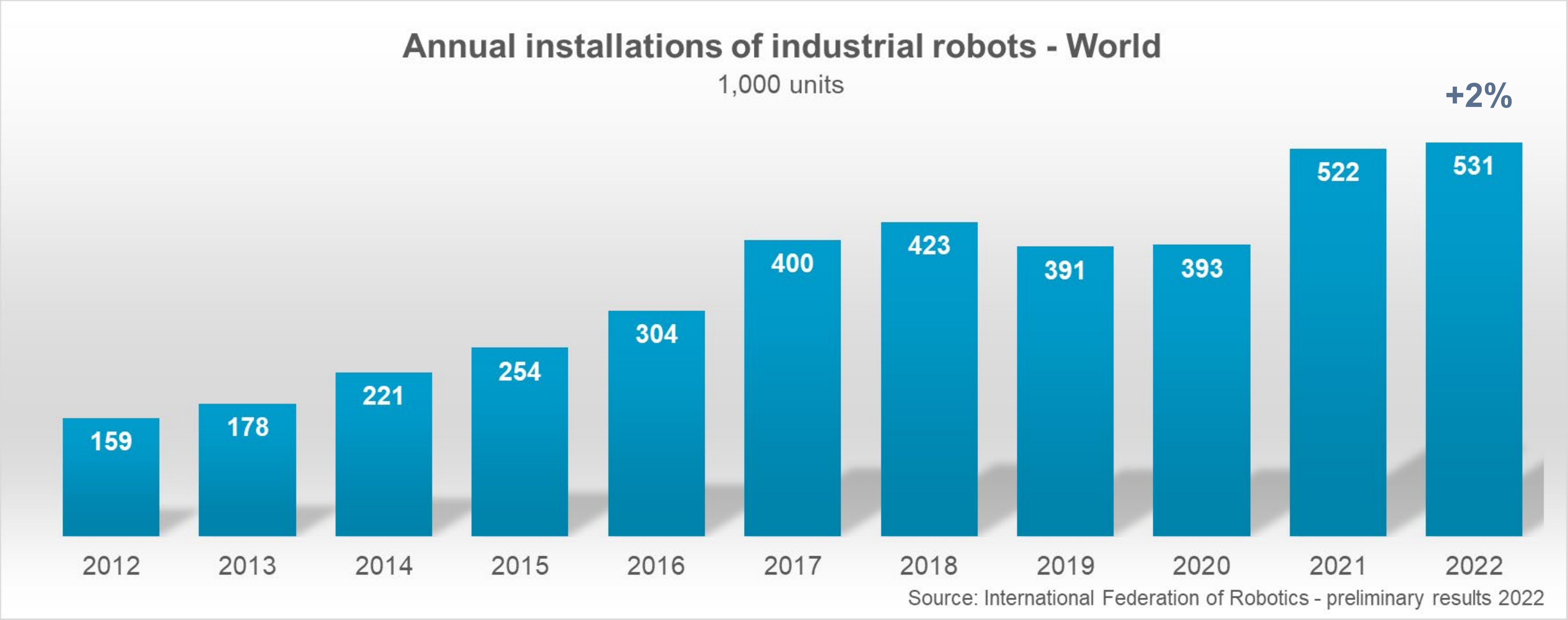
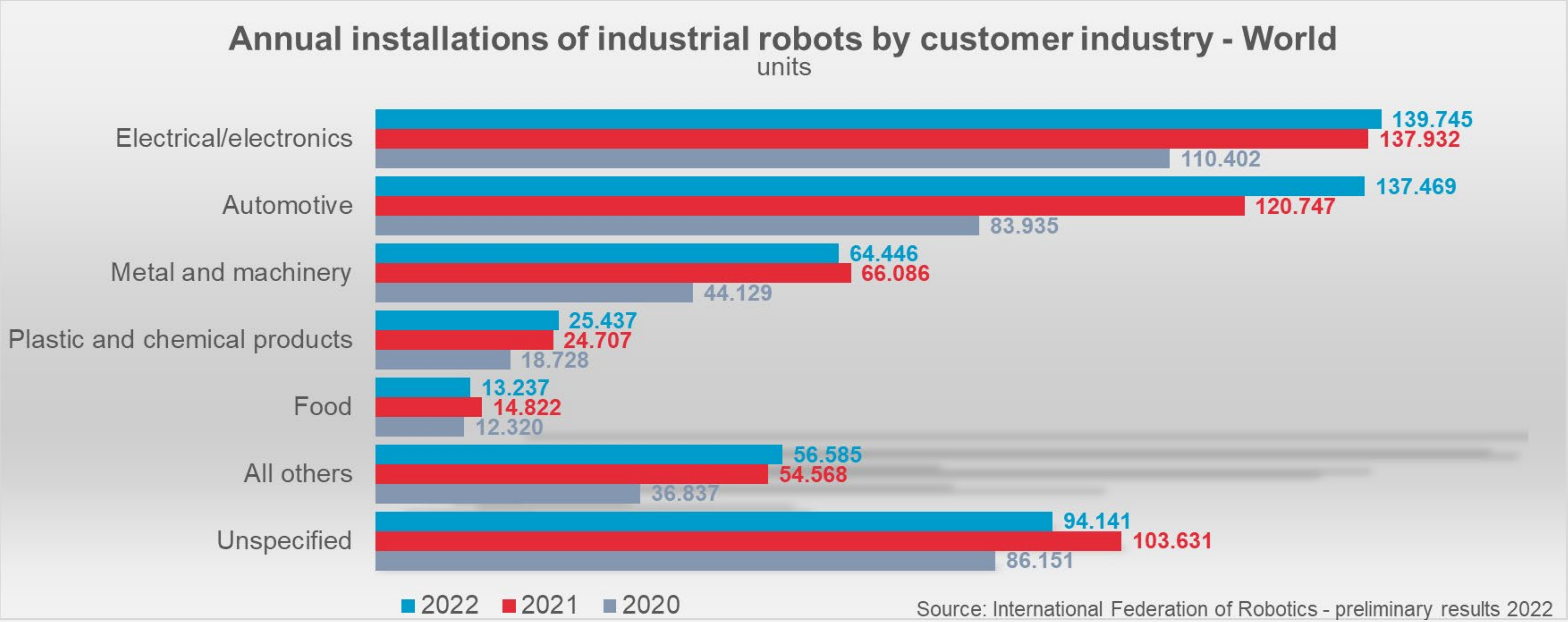


Automotive catching up – head to head with Electronics



Strong growth in all regions

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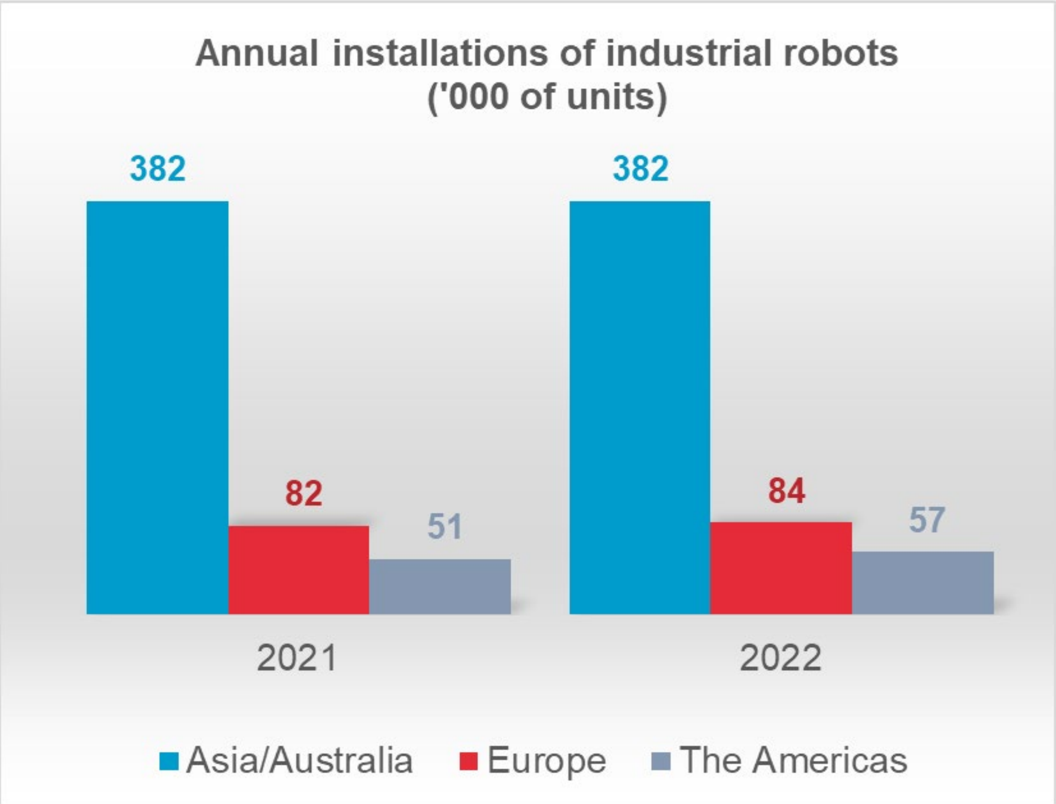
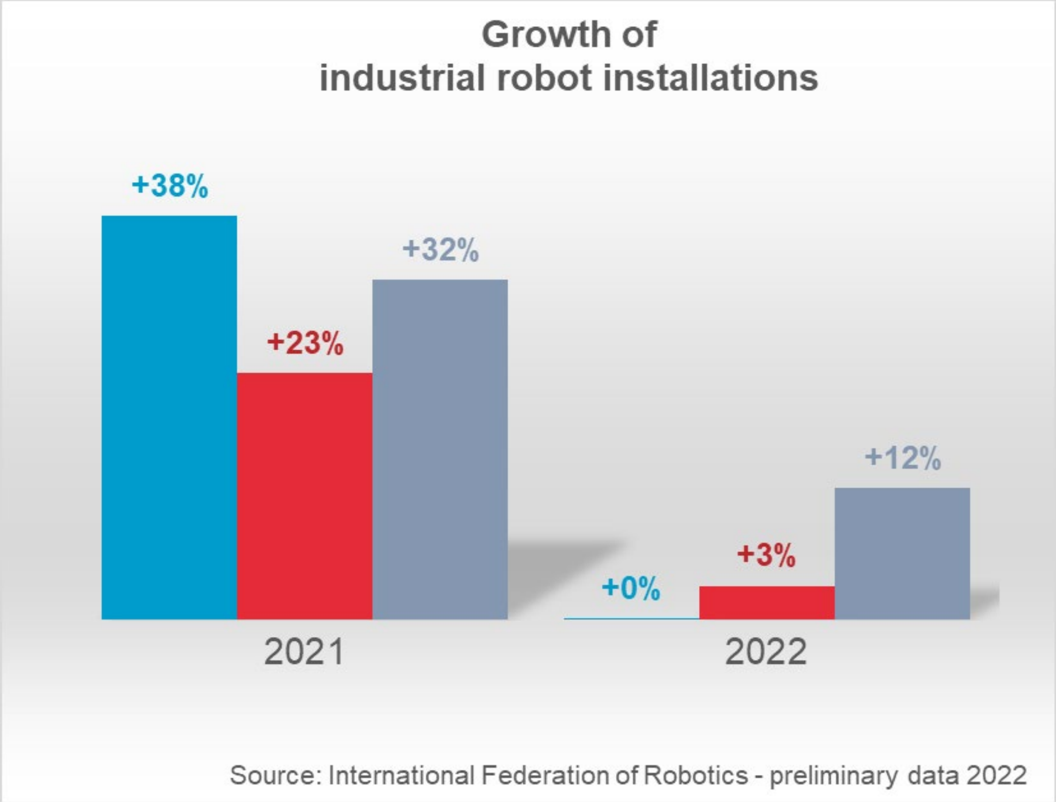
Note: Asia figures are very preliminary yet



Preliminary data 2022 as of May 2023



Top 5 markets in the World and the EU

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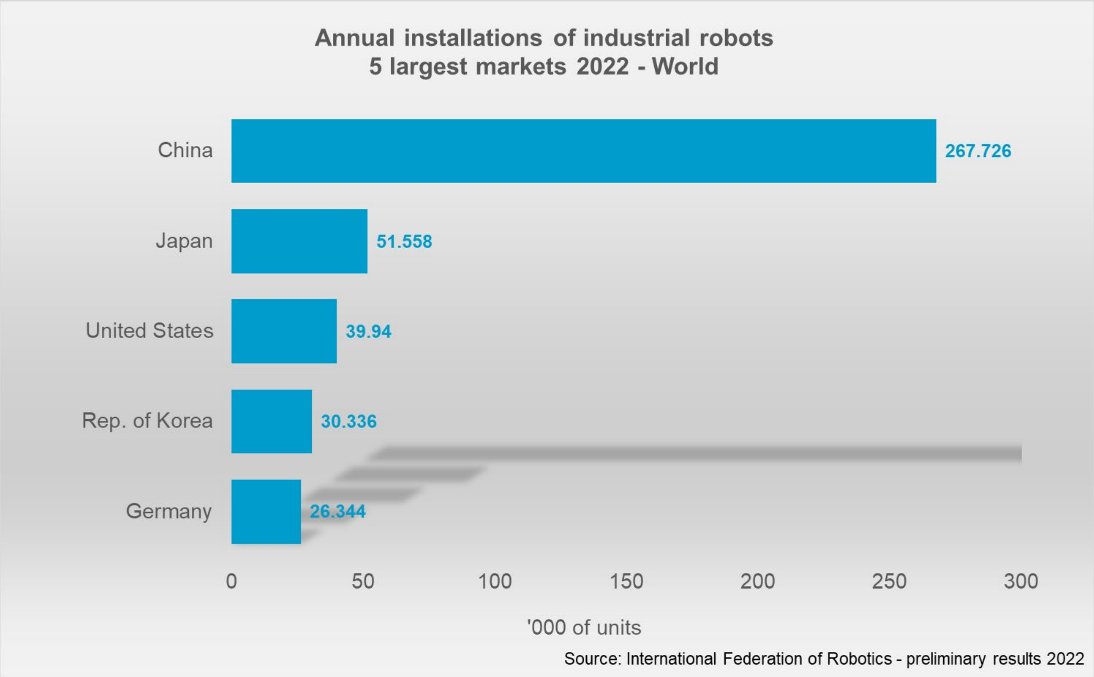
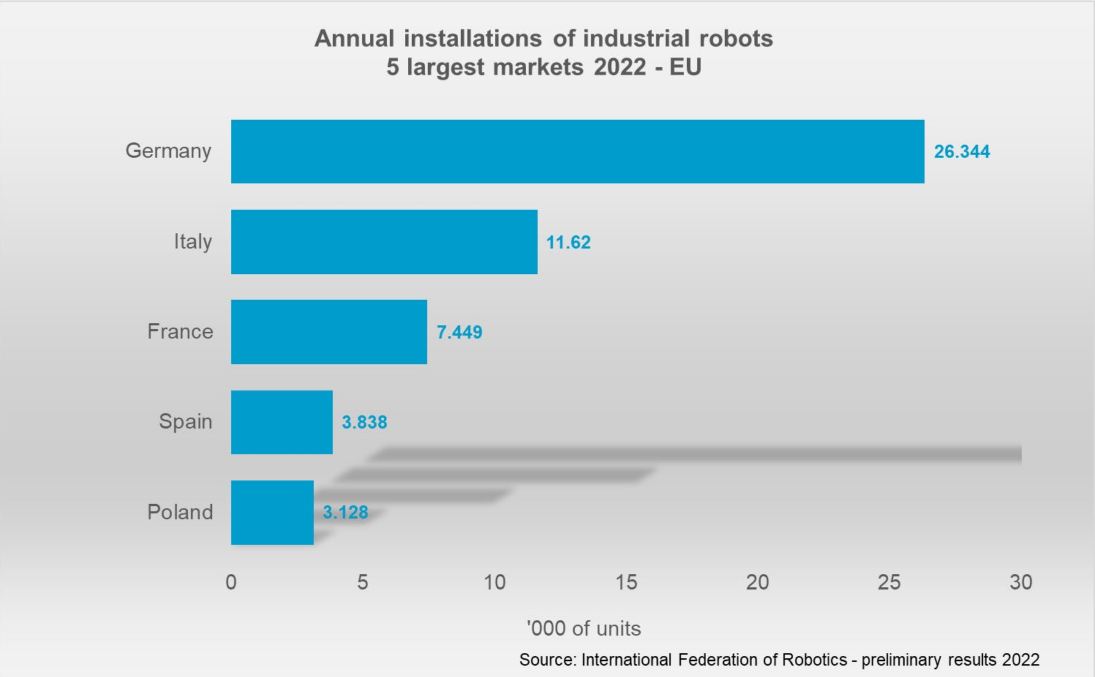
TOP5 markets in the World



TOP5 markets in the EU



Europe growing +3% on record level

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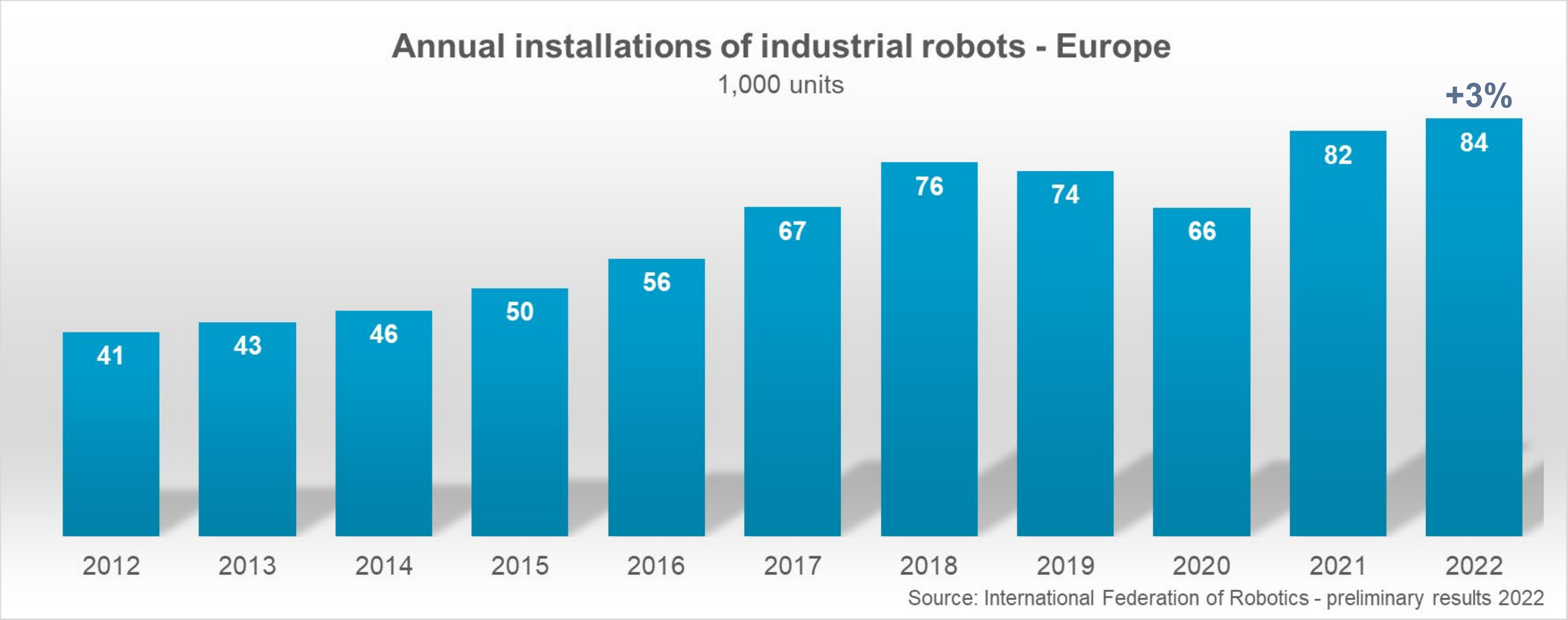

Metal/machinery meets automotive

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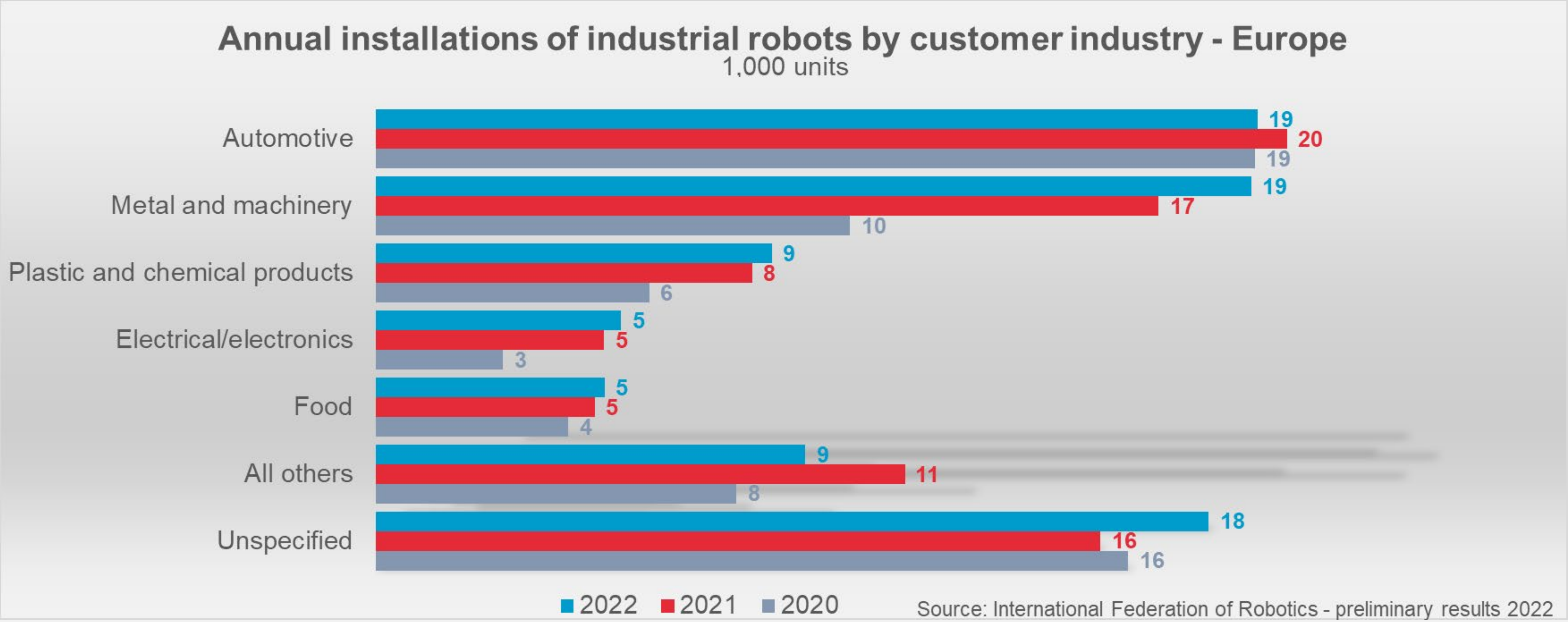
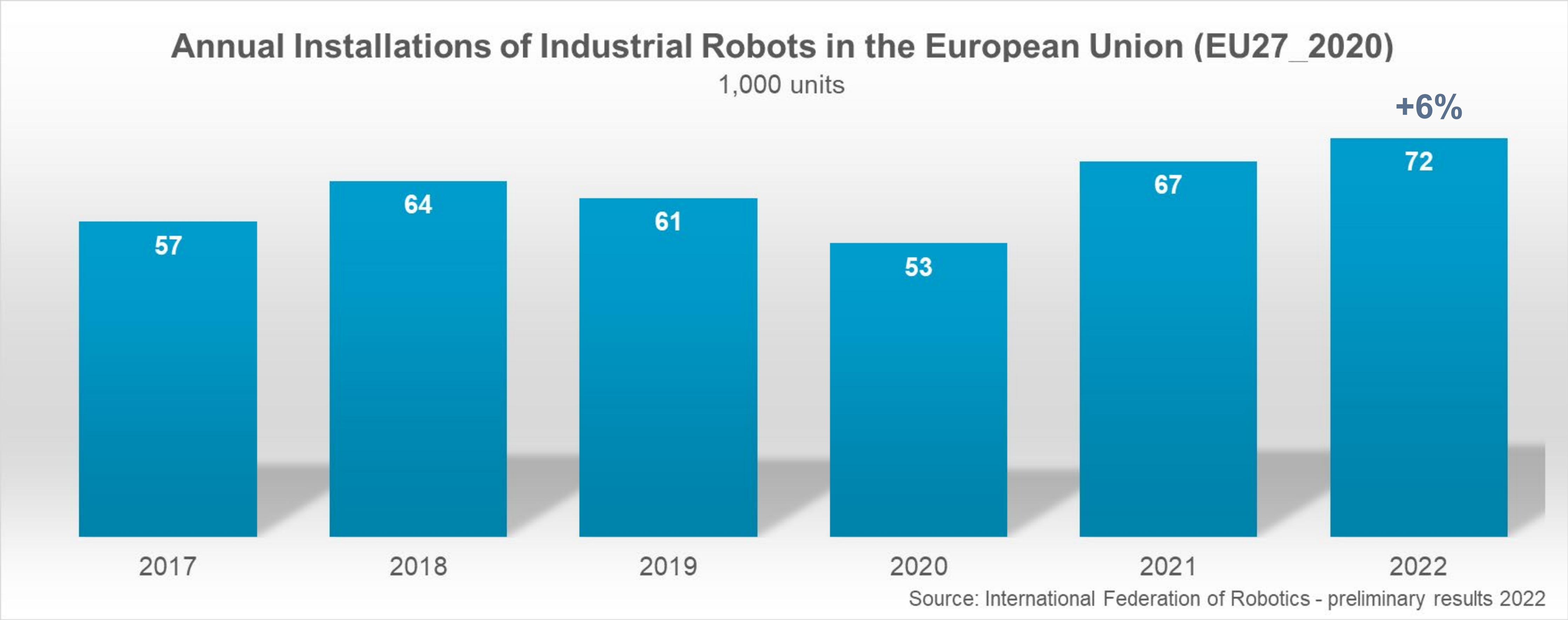
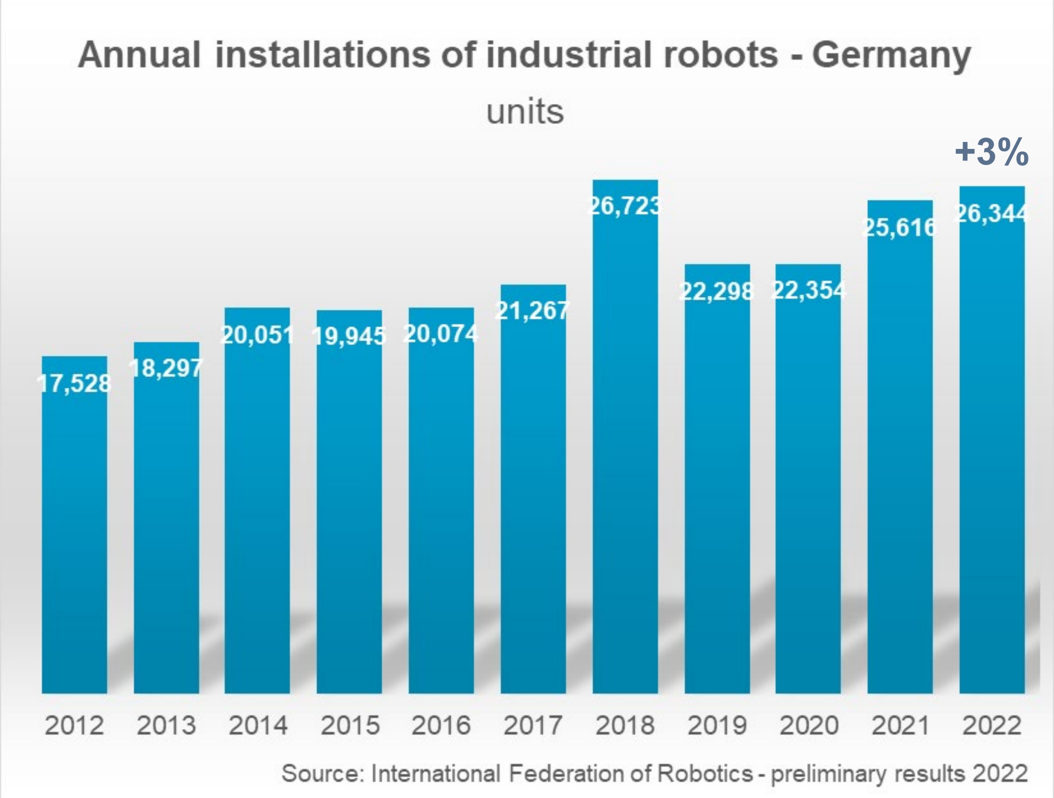


European Union accounting for 85% of European Installations

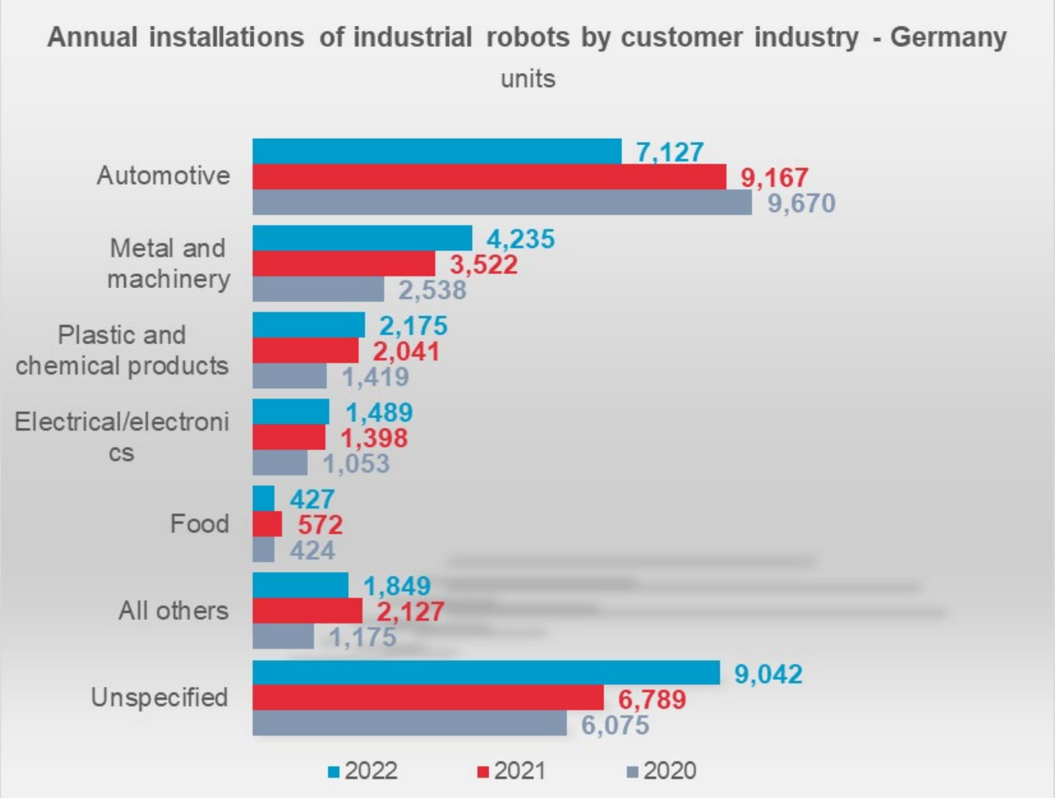


Germany: Largest European market

Long-term growth

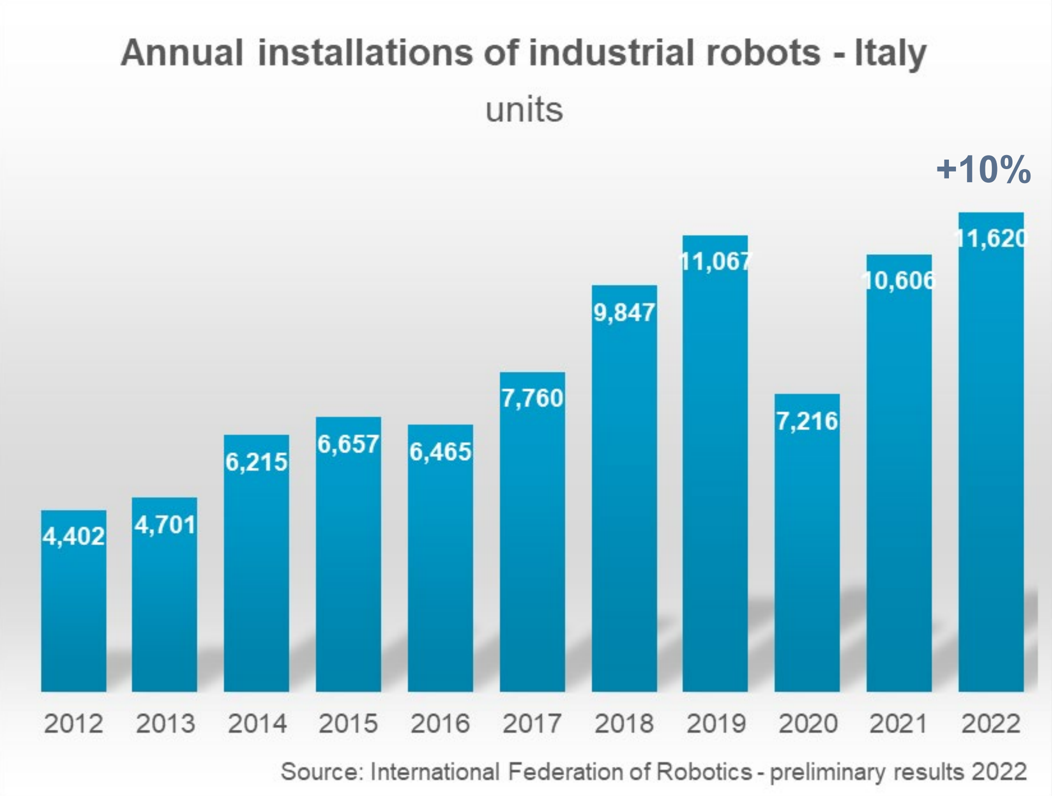


Automotive down - general industry remains strong

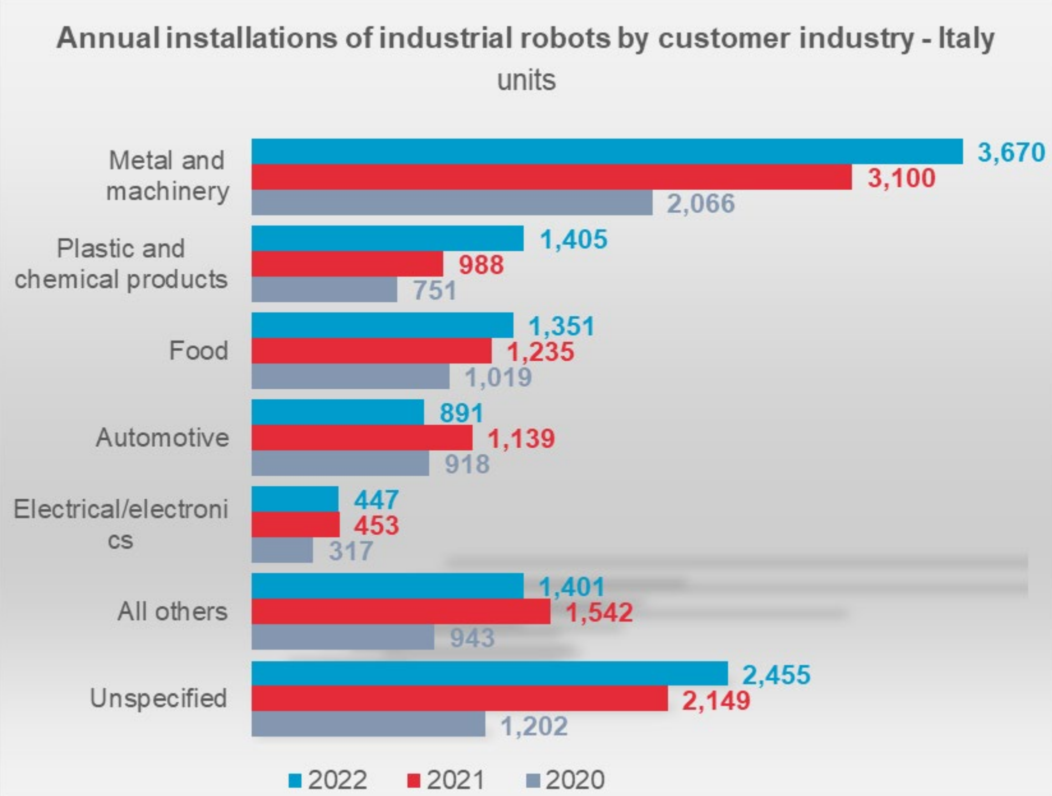


Italy: Second largest European market

+10%, new record level



Growth driver: general industry



France: Third largest European market

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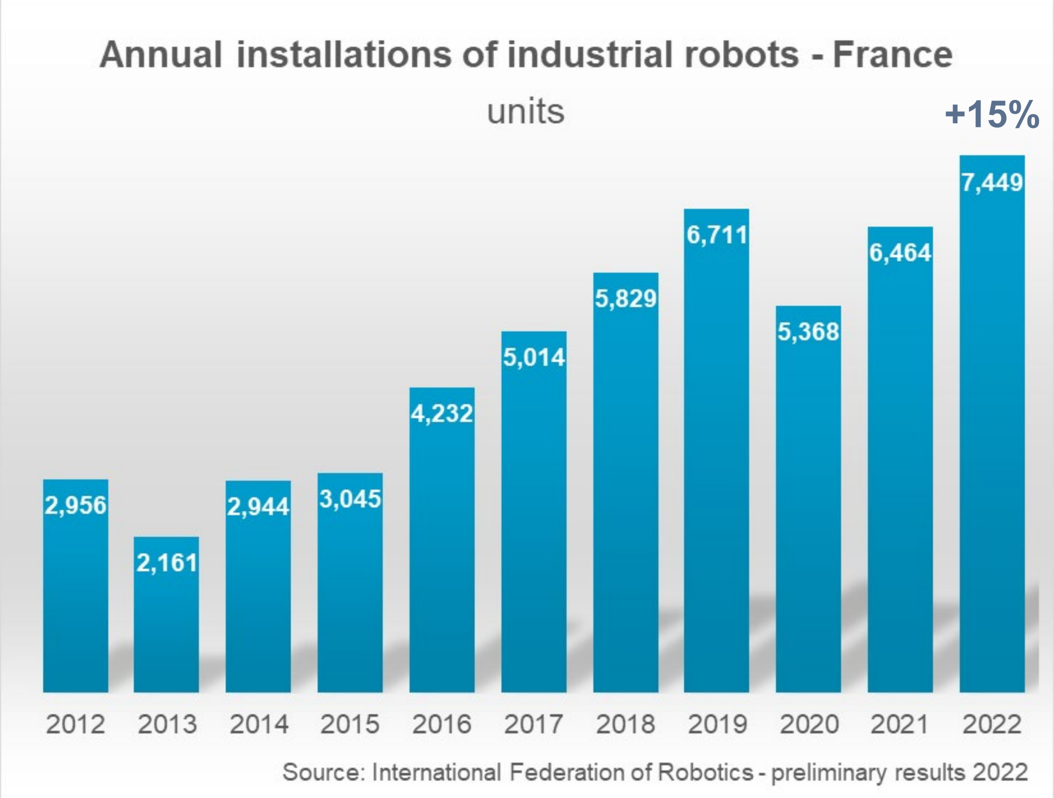
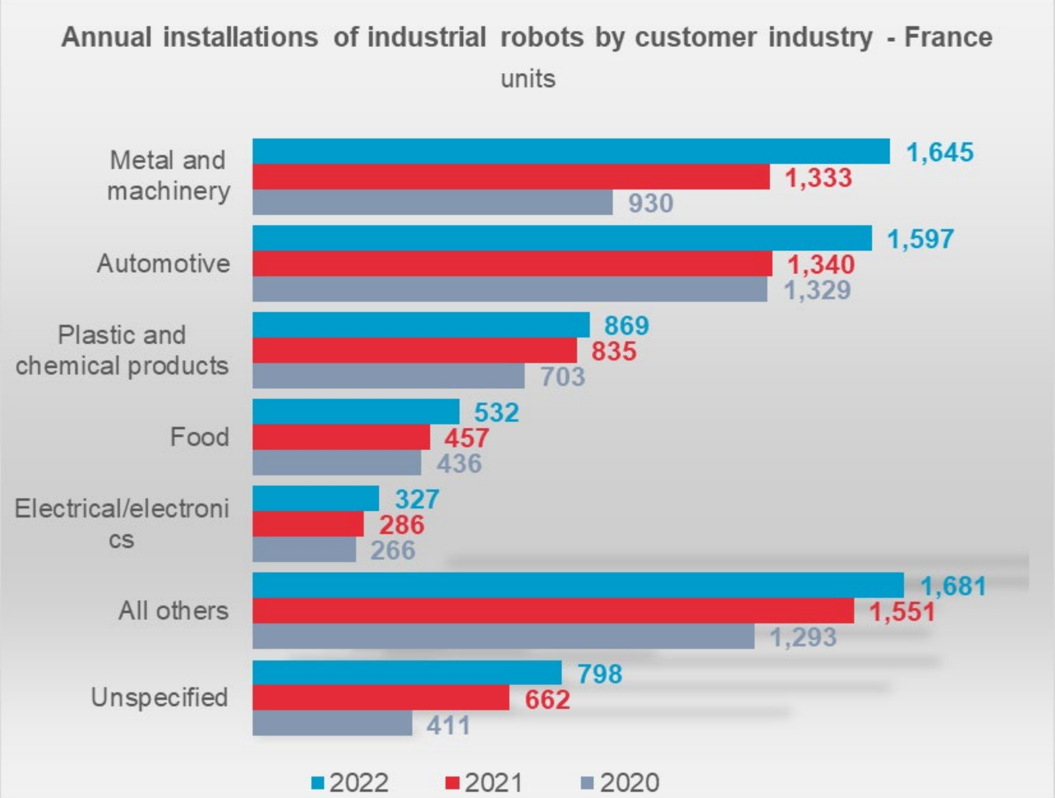
New record level



Growth driver: general industry



Spain: fourth largest European market

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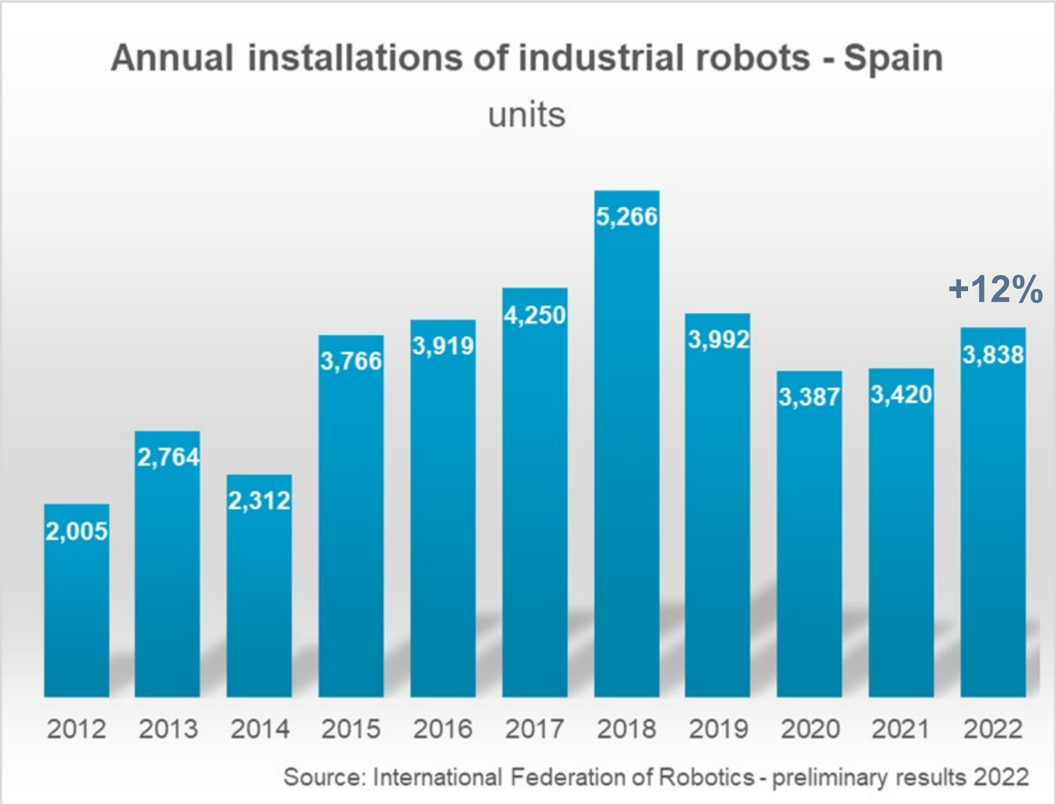
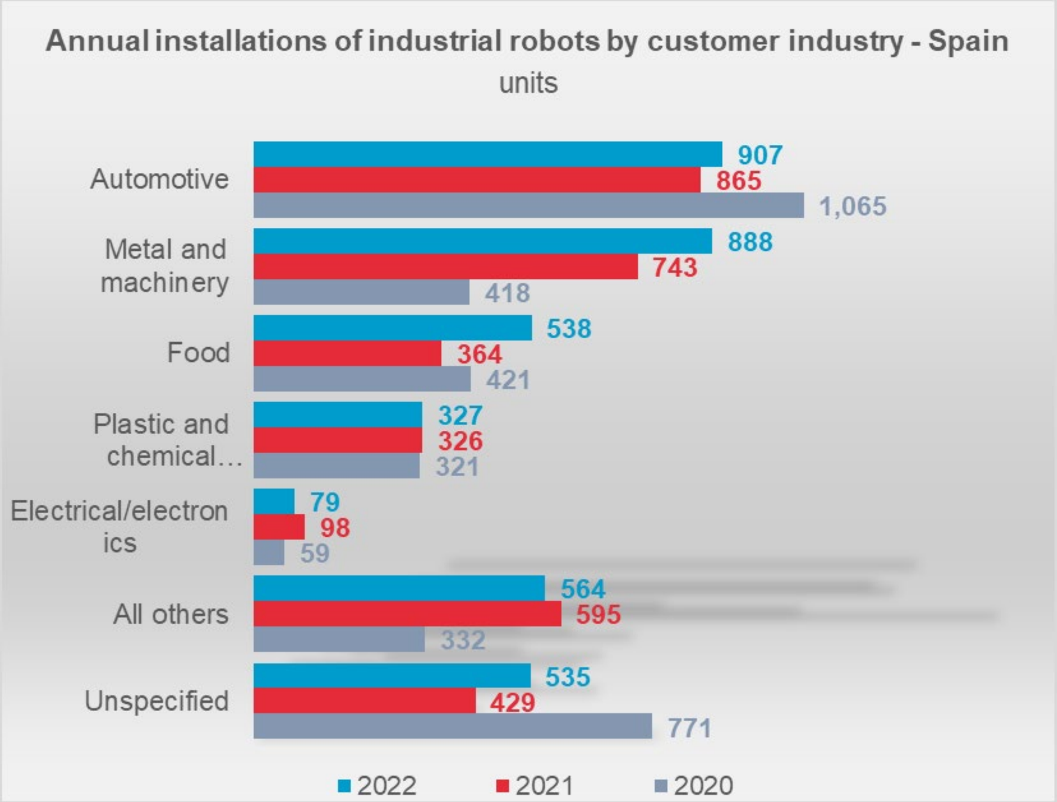
12% growth but still shy off the pre-pandemic level



Growth driver: general industry



Poland: Fifth largest market in the EU

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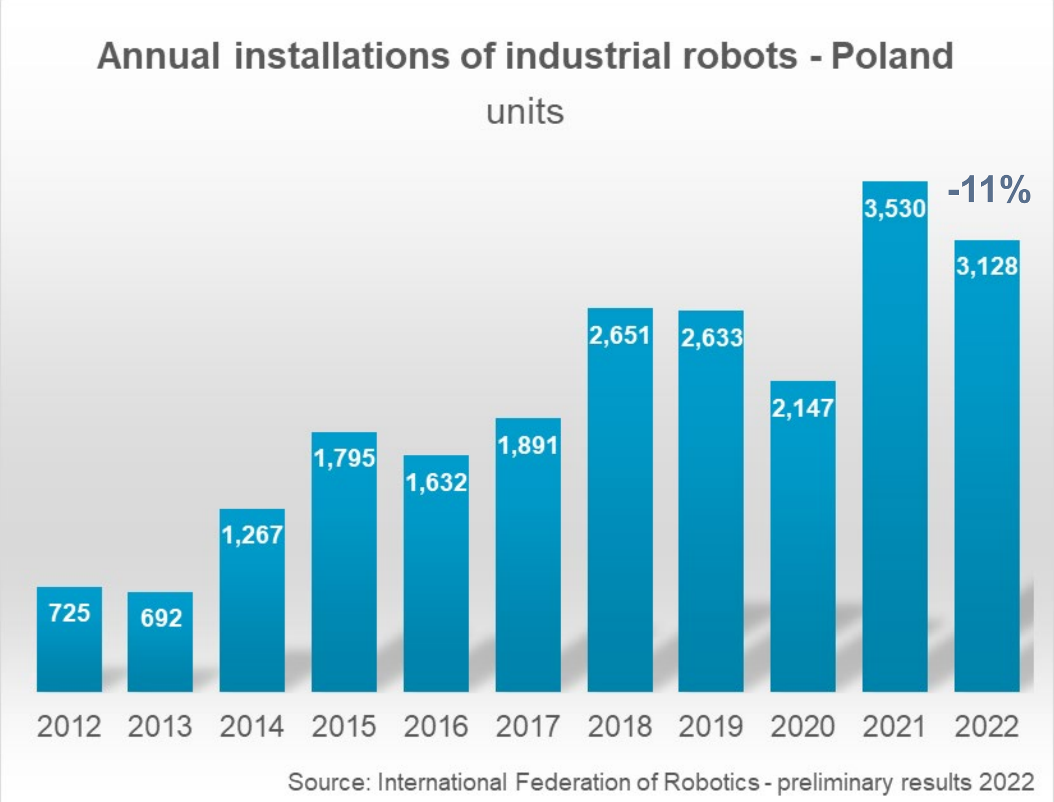
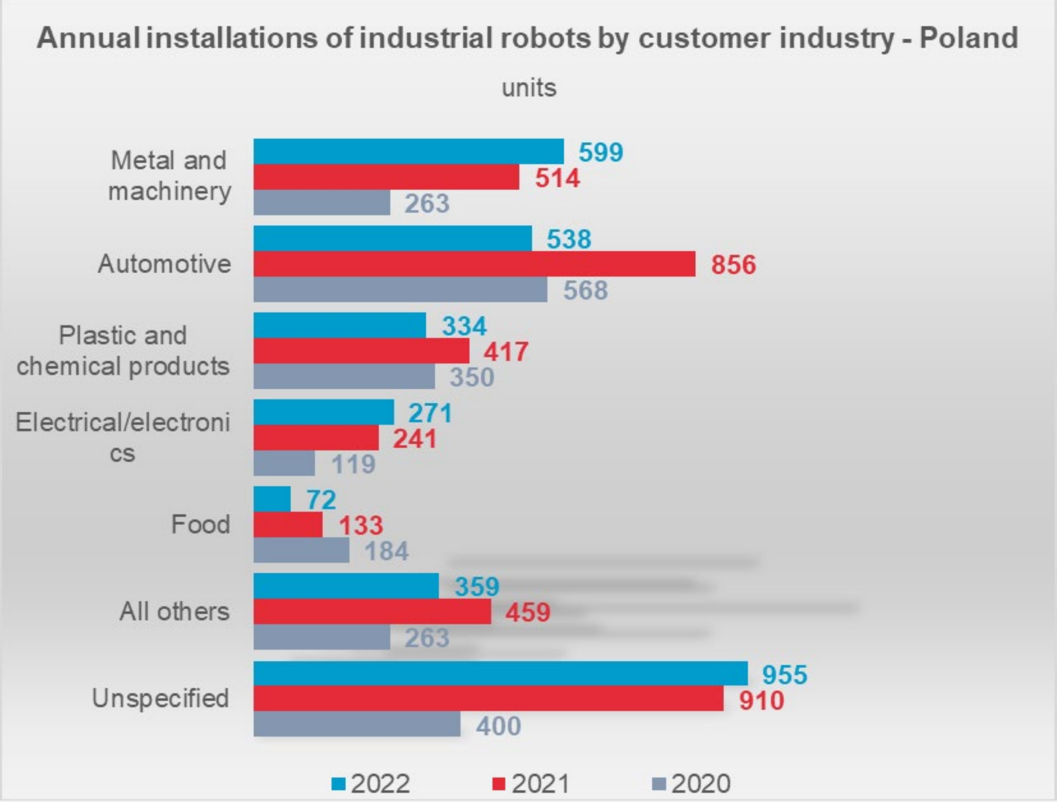
Second strongest year ever



Strong demand for low-cost robots



Outlook

„Boom after crisis“ decelerating

- **Turnover in Europe was still growing strongly in Q1/2023 ***
- **Order intake in Q1/2023 slightly down (0% to -5% yoy) ***

Sources:
** IFR Quarterly Survey*

Outlook

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- **Global trends:**
  - **Uncertainty factors weigh on willingness to invest**
  - Central bank policy in the US and in the Euro Area burden investments
  - Chinese economy softer *
  - Political tensions
- **Outlook for Europe**
  - Order backlog in German mechanical engineering continues at a high level (almost 1 year)+
  - Tight labor markets driving demand for automation in many countries

*Source: * VDMA Machinery & Equipment in China Q1/2023*
+ VDMA Incoming Order and Turnover Statistics