

IFR Executive Roundtable on 28 June 2023

# Building Resilience for Europe through Automation





- 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

IFR 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



Adrien Brouillard Global Head of General Industry STÄUBLI INTERNATIONAL



Enrico Krog Iversen CEO OnRobot



Thomas Burger Managing Director SBS-Feintechnik



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





## IFR statistics 2022: preliminary results



# **Marina Bill IFR President**

#### Dr. Christopher Müller Director IFR Statistical Departmernt

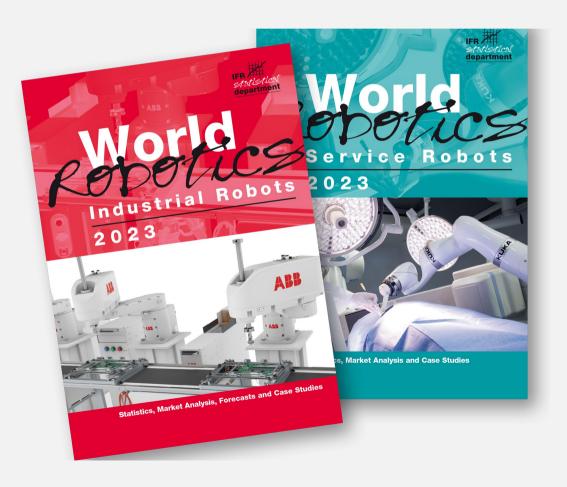


## IFR statistics and World Robotics

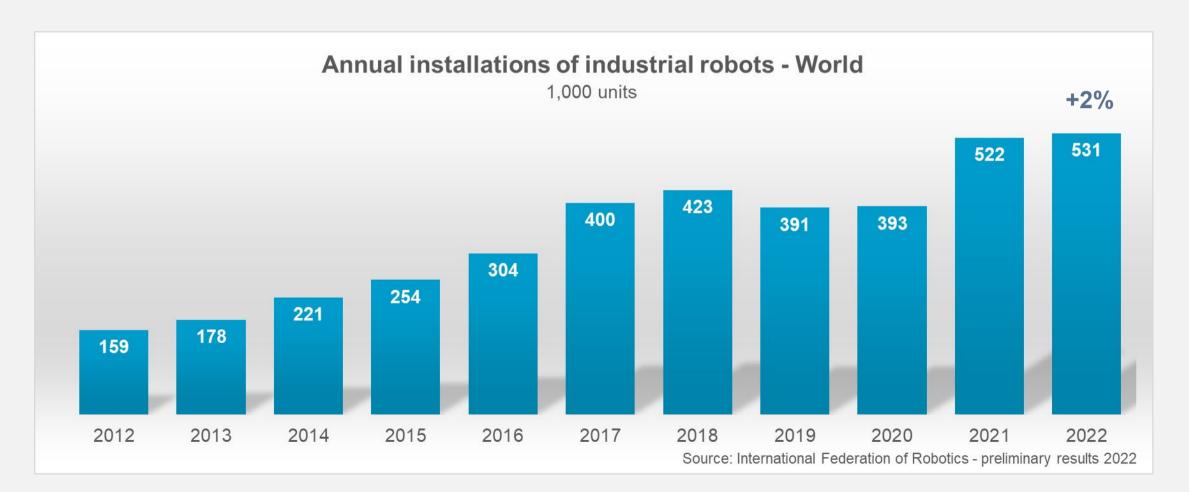


 Numbers presented here are preliminary as of May 2023

- 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%)

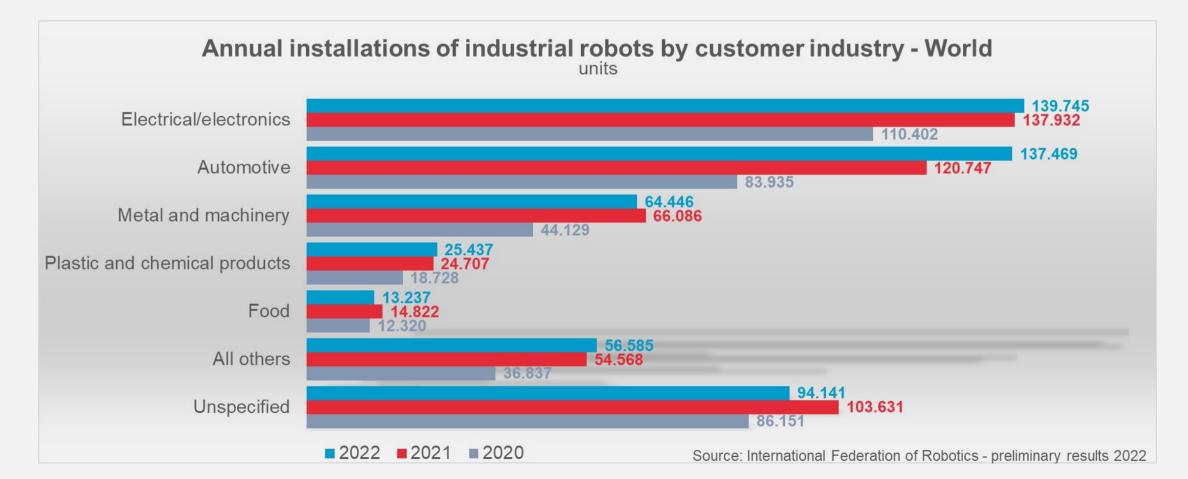


IFR

International Federation of *Robotics* 

## Automotive catching up – head to head with Electronics

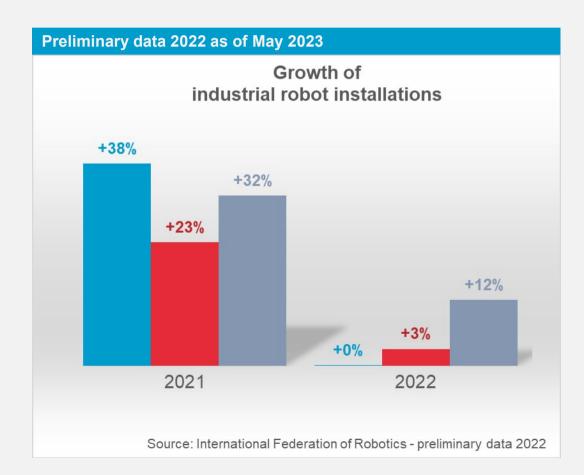




## Strong growth in all regions

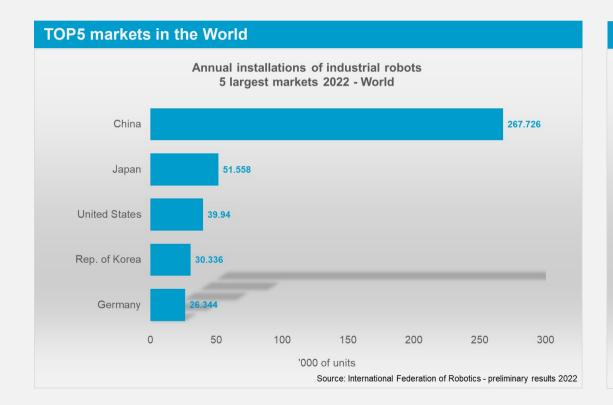


#### Note: Asia figures are very preliminary yet Annual installations of industrial robots ('000 of units) 382 382 84 82 57 51 2021 2022 Asia/Australia Europe The Americas

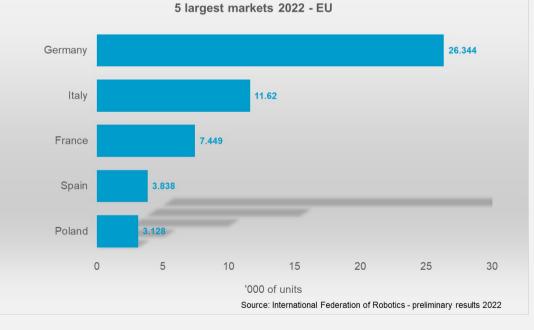


## Top 5 markets in the World and the EU



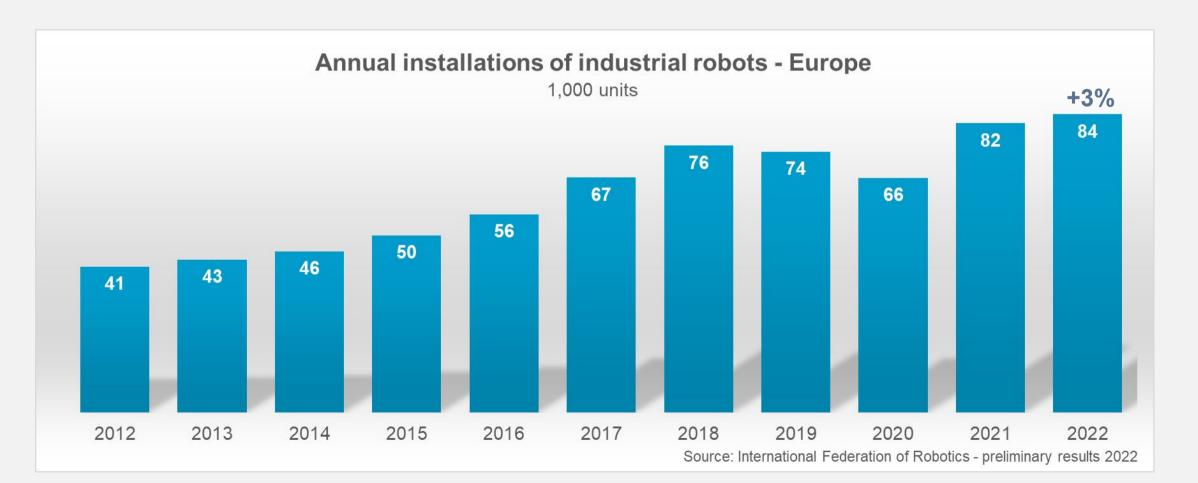


#### TOP5 markets in the EU Annual installations of industrial robots



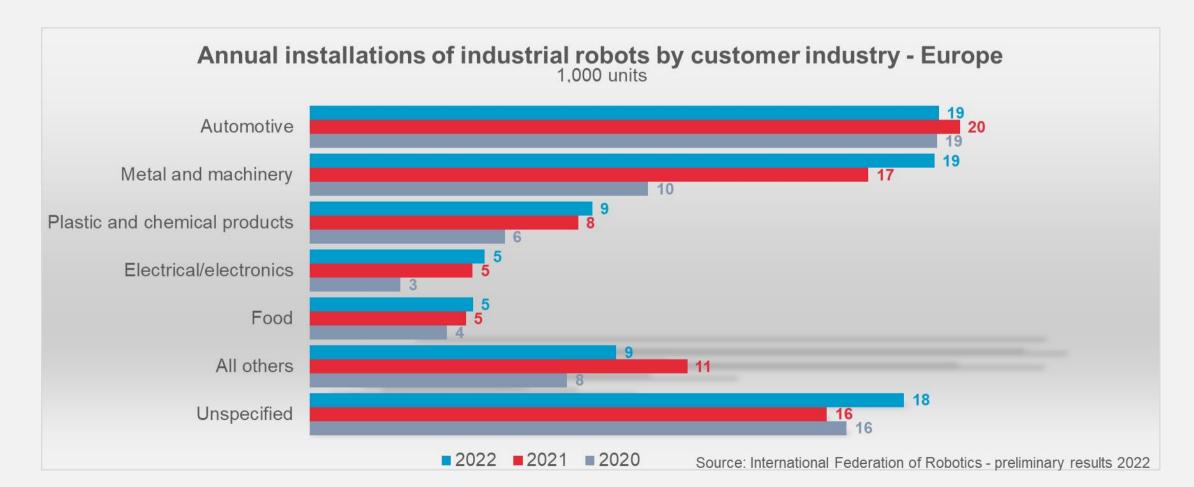
## Europe growing +3% on record level





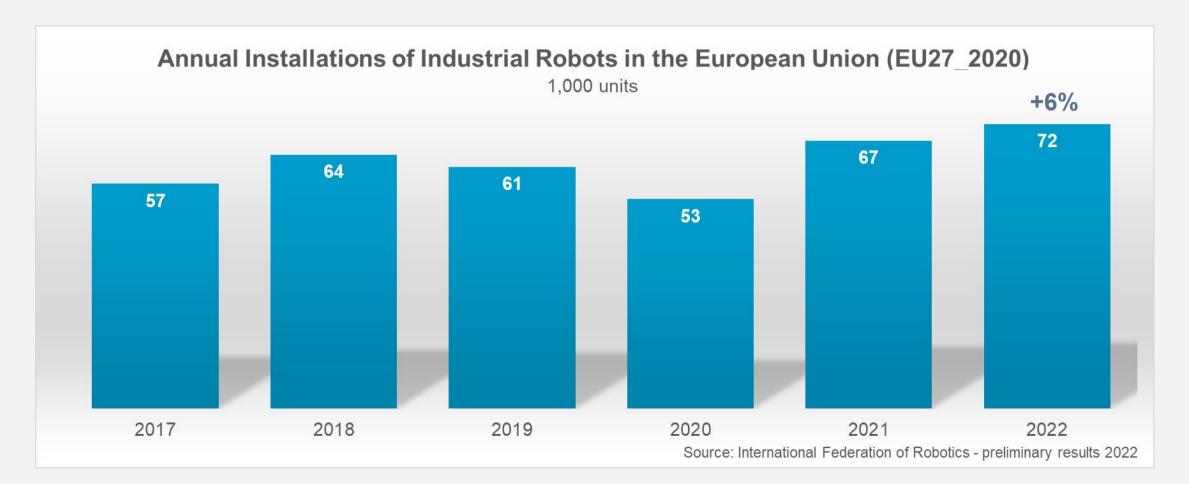
## Metal/machinery meets automotive





## European Union accounting for 85% of European Installations

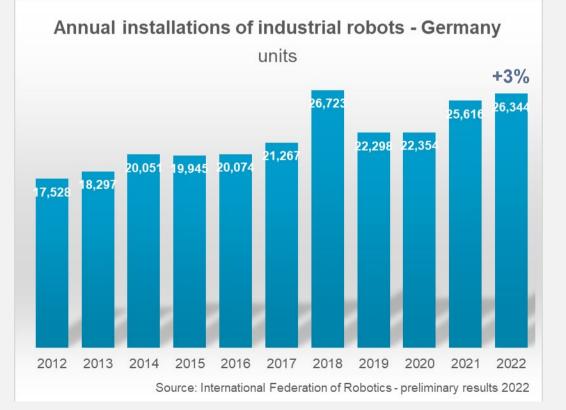




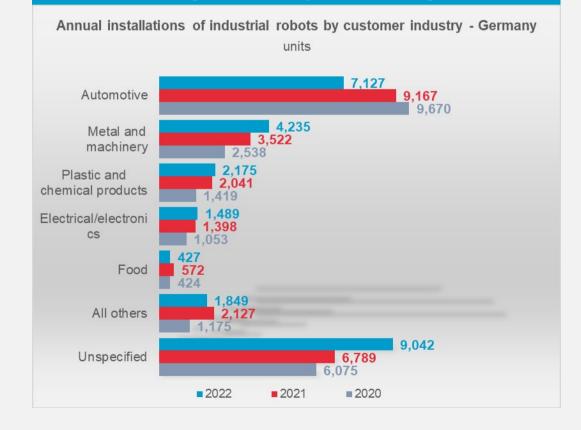
## Germany: Largest European market



#### Long-term growth



Automotive down - general industry remains strong



## Italy: Second largest European market

+10%

1.620

10,606



#### +10%, new record level Annual installations of industrial robots - Italy units 1.06 9.847 7.760 7,216 6,657 6,465 6.215 4,701 4,402

2016

2015

2017

2018

Source: International Federation of Robotics - preliminary results 2022

2019

2020

2021

2022

#### Growth driver: general industry Annual installations of industrial robots by customer industry - Italy units 3,670 Metal and 3,100 machinery 2,066 1,405 Plastic and 988 chemical products 751 1,351 Food 1.235 1.019 891 1,139 Automotive 918 447 Electrical/electroni 453 CS 317 1,401 All others 1.542 2.455 Unspecified 2,149 1.202 2020 2022 2021

2014

2012 2013

## France: Third largest European market



#### **New record level** Annual installations of industrial robots - France units +15% 7.449 6.711 6.464 5.829 5.368 5.014 4.232 3.045 2.956 2.944 2,161 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 Source: International Federation of Robotics - preliminary results 2022

#### Growth driver: general industry Annual installations of industrial robots by customer industry - France units 1,645 Metal and 1.333 machinery 930 1,597 Automotive 1,340 1.329 869 Plastic and 835 chemical products 703 532 Food 457 436 327 Electrical/electroni 286 CS 266 1,681 All others 1.551 798 Unspecified 662 2020 2022 2021

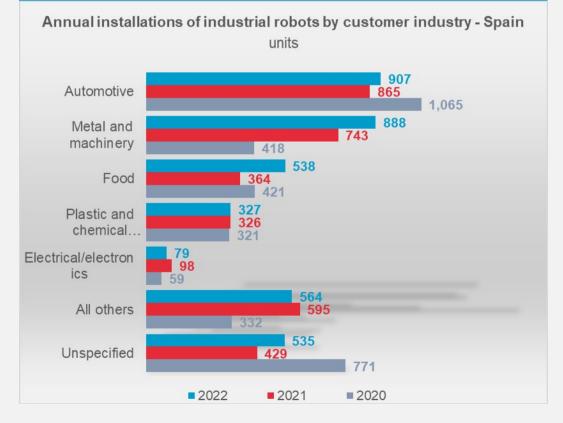
#### IFR Executive Roundtable - automatica 2023

## Spain: fourth largest European market



#### 12% growth but still shy off the pre-pandemic level Annual installations of industrial robots - Spain units 5.266 +12% 4,250 3.992 3,919 3,838 3.766 3,420 3.387 2.764 2,312 2.005 2012 2013 2019 2014 2015 2016 2017 2018 2020 2021 2022 Source: International Federation of Robotics - preliminary results 2022

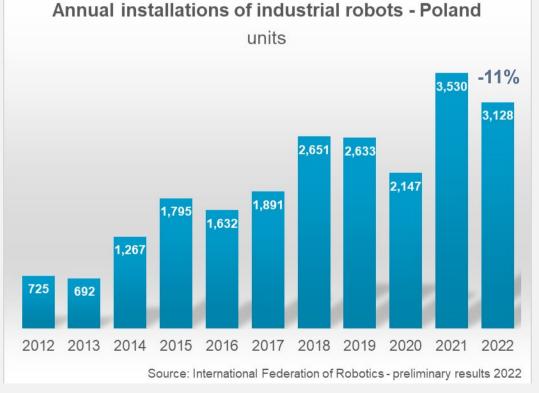
#### Growth driver: general industry



## Poland: Fifth largest market in the EU

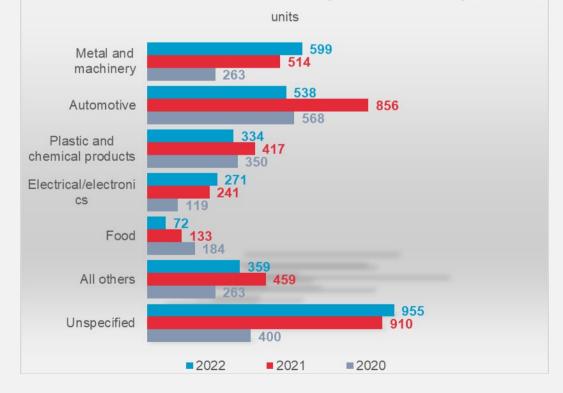


## Second strongest year ever



#### Strong demand for low-cost robots

Annual installations of industrial robots by customer industry - Poland







### "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





#### 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)<sup>+</sup>
- Tight labor markets driving demand for automation in many countries

Source: \* VDMA Machinery & Equipment in China Q1/2023 + VDMA Incoming Order and Turnover Statistics 20