

Market Update Robotics and Automation

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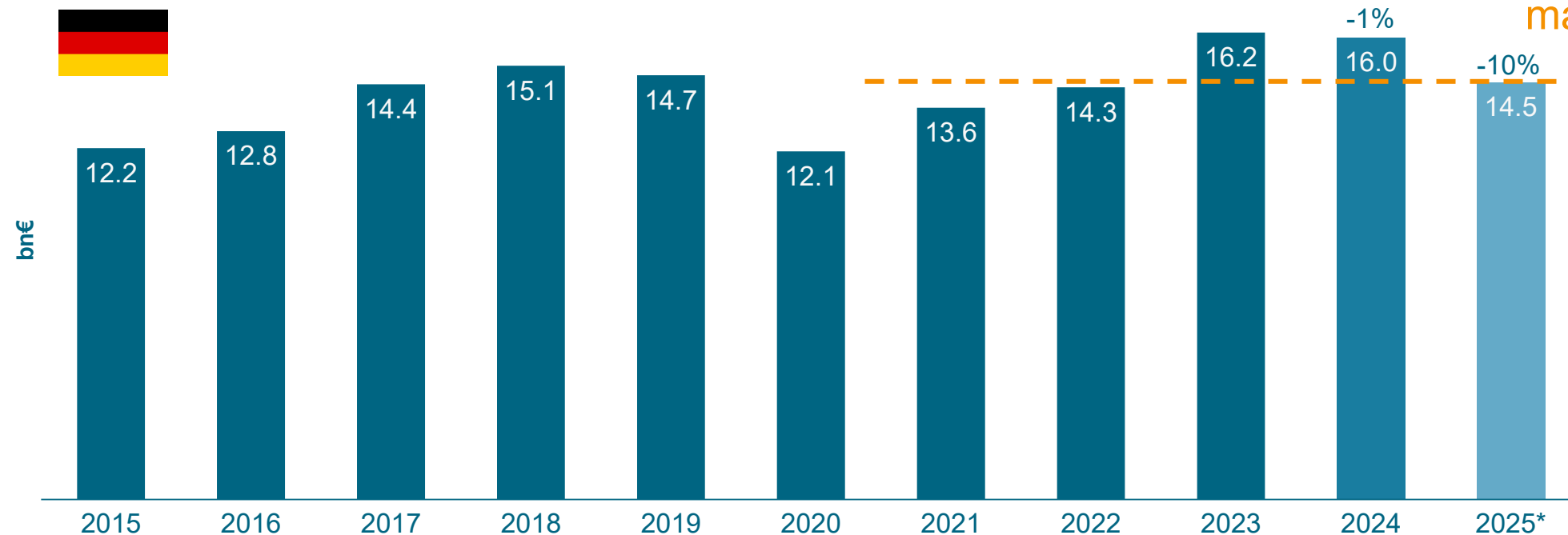
Chairman

VDMA Robotics + Automation Association

Robotics + Automation Sector from GERMANY

(Robotics, Machine Vision, Assembly Technology)

German Robotics and Automation global turnover (in billions of Euro) 2015-2025*



Outlook 2025:
Turnover
expected to
match 2022
level

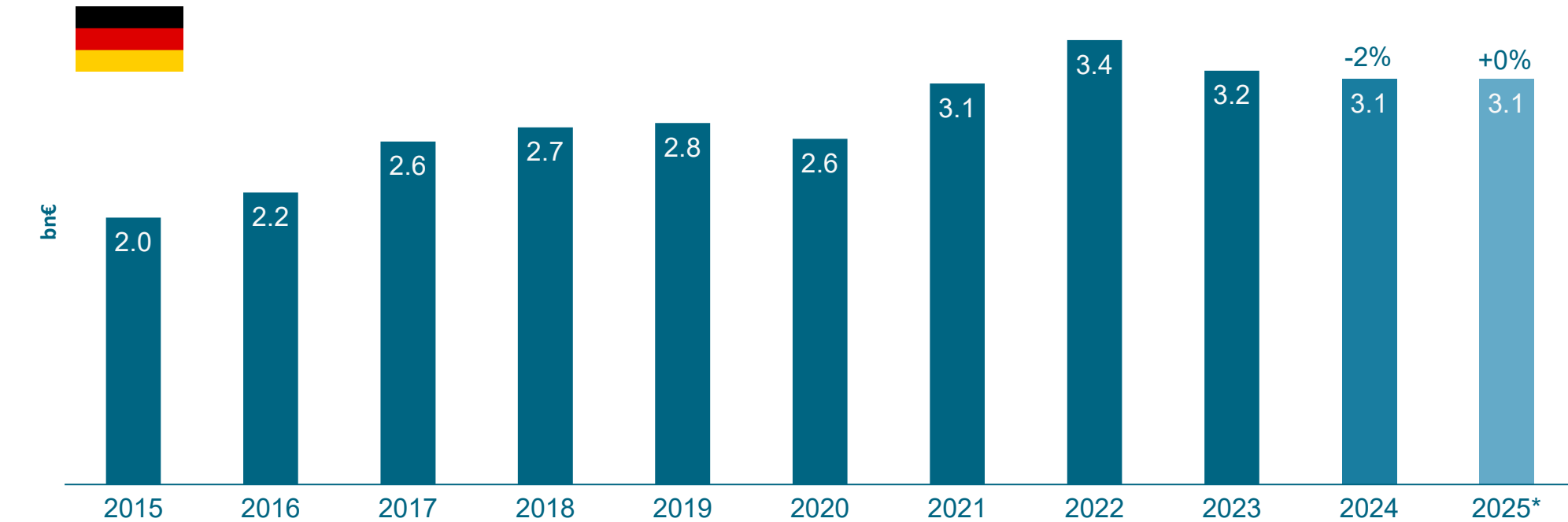
*forecast

Source: VDMA Robotics + Automation

Results 2024 and outlook 2025

Machine Vision

German Machine Vision global turnover (in billions of Euro) 2015 - 2025*



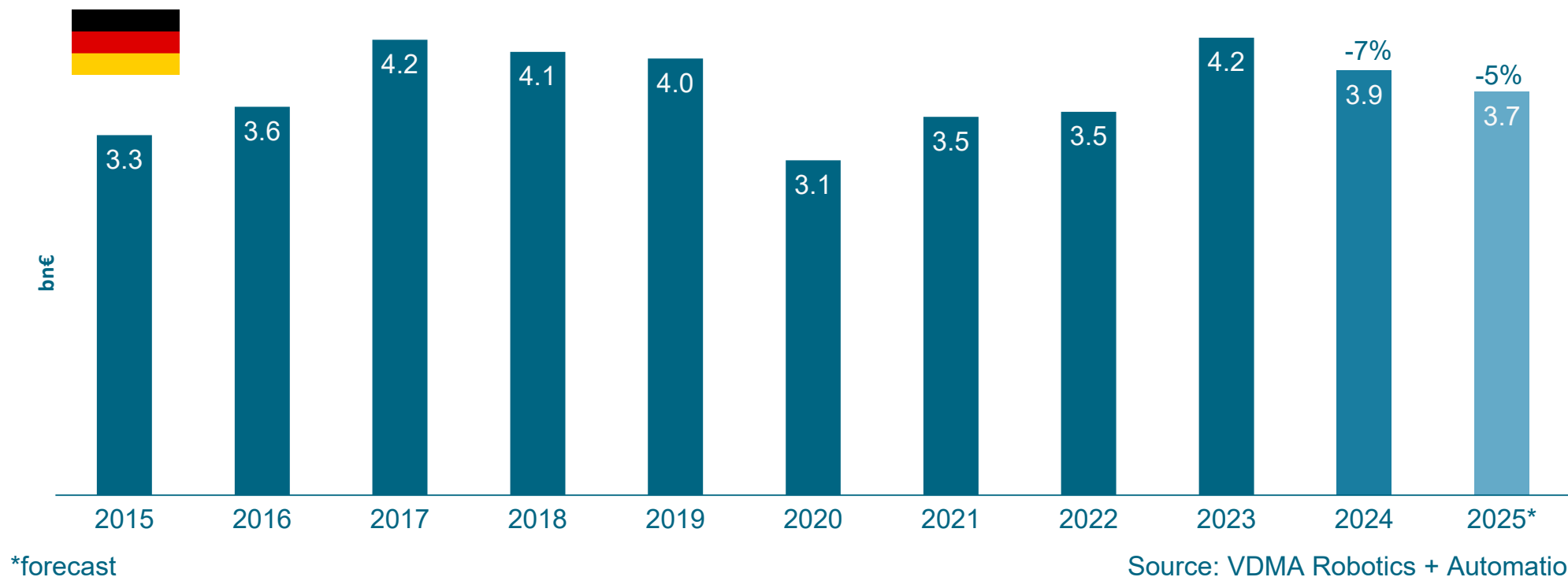
*forecast

Source: VDMA Robotics + Automation

Results 2024 and outlook 2025

Robotics

German Robotics Global Turnover (in billions of Euro) 2015-2025*

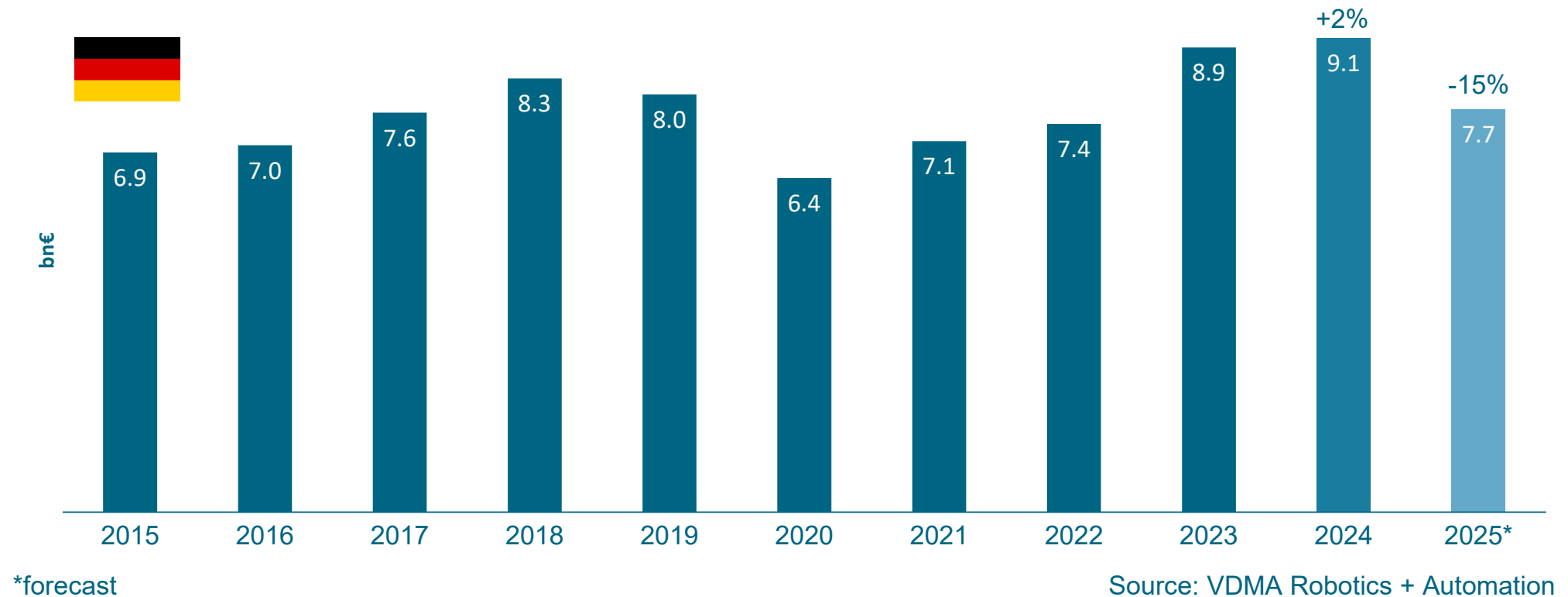


Source: VDMA Robotics + Automation

Results 2024 and outlook 2025

Automated Solutions

German Automated Solutions global turnover (in billions of Euro) 2015-2025*

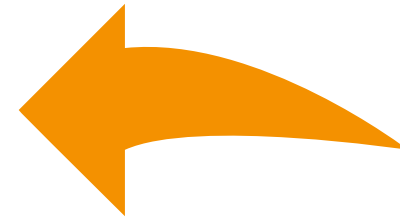


VDMA Action Plan Robotics for Europe



- » Concerted action of policymakers and industry needed
- » Mobilize more venture capital for start-ups and scale-ups
- » Create roadmap for competitiveness
- » Focus on scaling innovation
- » Swift implementation of incentives for investment necessary

Download our Action Plan here



or: www.vdma.org/robstrat

Conclusions

- » Macro-environment: Postponed investments due to geopolitical uncertainties
- » Increasing competitive pressure from Asian rivals
- » Latest market data from the Americas and Asia suggest that market share of European robotics and automation industry might be shrinking
- » Need to raise competitiveness of German and European robotics and automation sector
- » Stimulus expected from automatica 2025

Thank you
Thank you
for your attention!

