

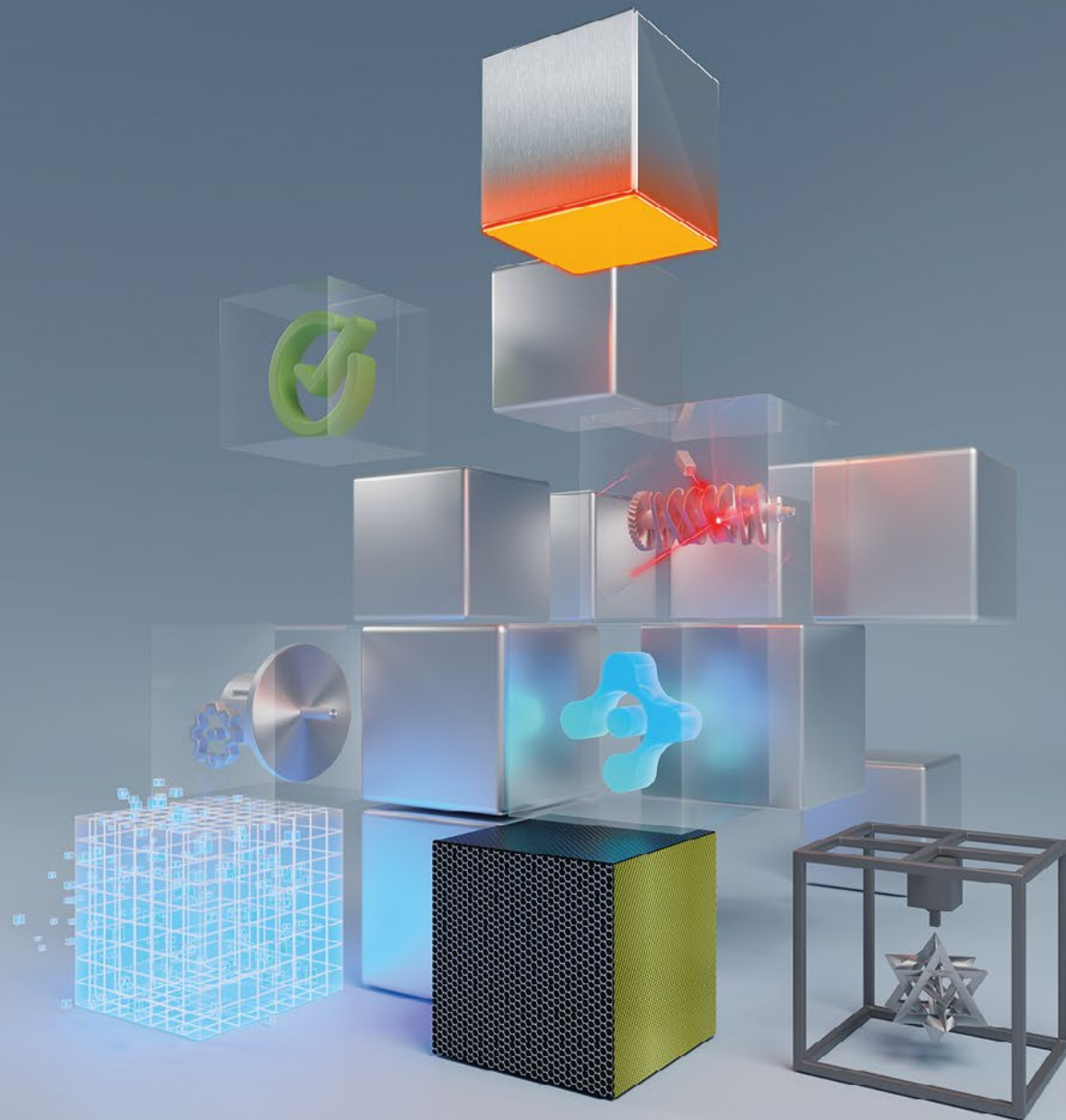


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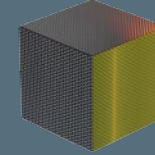
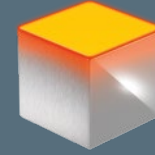
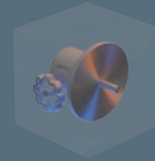
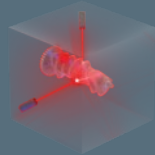
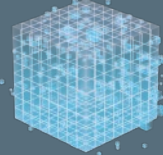
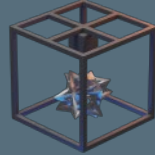
ROBOTICS MARKET EVOLUTION: GLOBAL TRENDS AND EUROPEAN PERSPECTIVES

INTERNATIONAL FEDERATION OF ROBOTICS
MARKET PRESENTATION AND EXECUTIVE
ROUNDTABLE



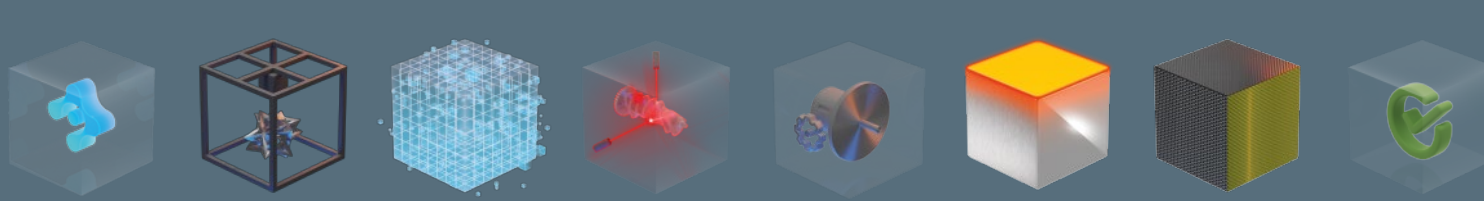
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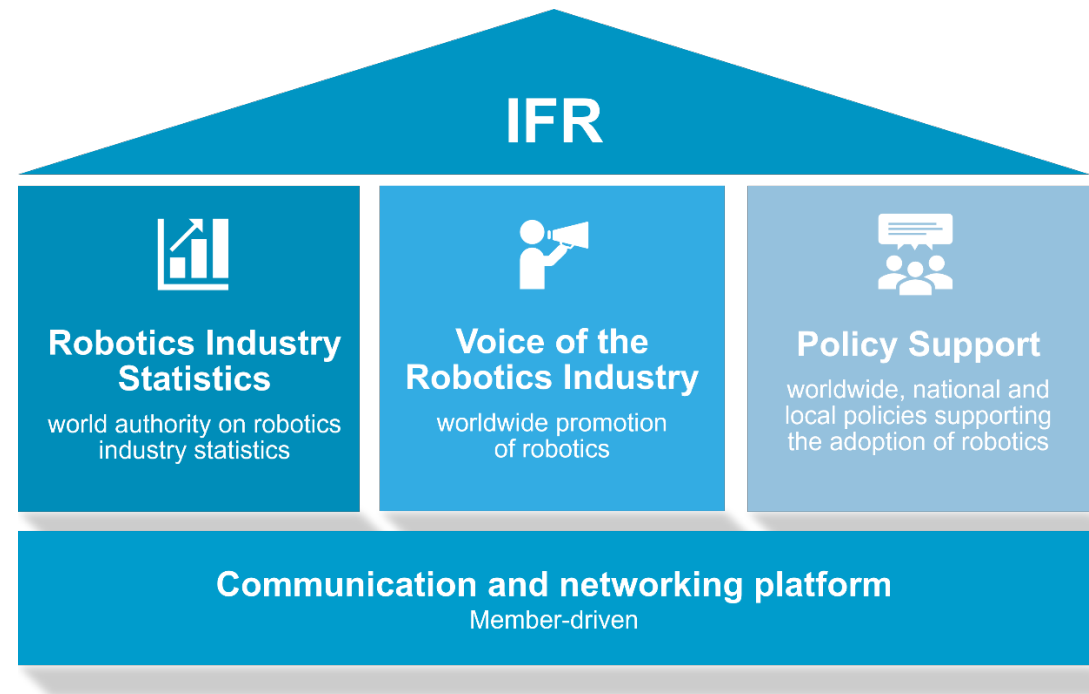
Schedule

- Welcoming and presentation of the participants of the Executive Round Table
Dr. Susanne Bieller, IFR General Secretary
- **Results of World Robotics 2024**
Takayuki Ito, IFR President
- Discussion on “**Robotics market evolution: Global trends and European perspectives**”
- Q&A and personal interviews with the participants



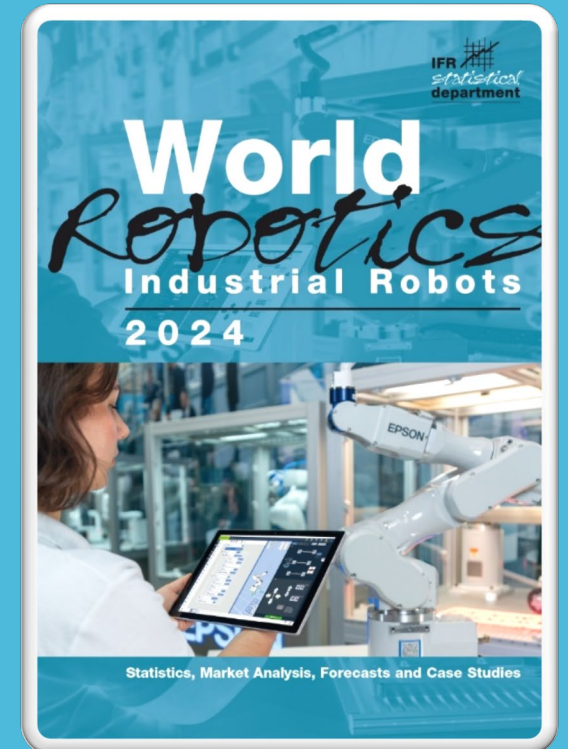
International Federation of Robotics

- Professional **non-profit organization**
- **Established in 1987**
- Over **3000 organizations** represented
- **About 90 members**
 - National **robotics associations, R&D institutes, robot suppliers, integrators**
- **Communication and networking platform**

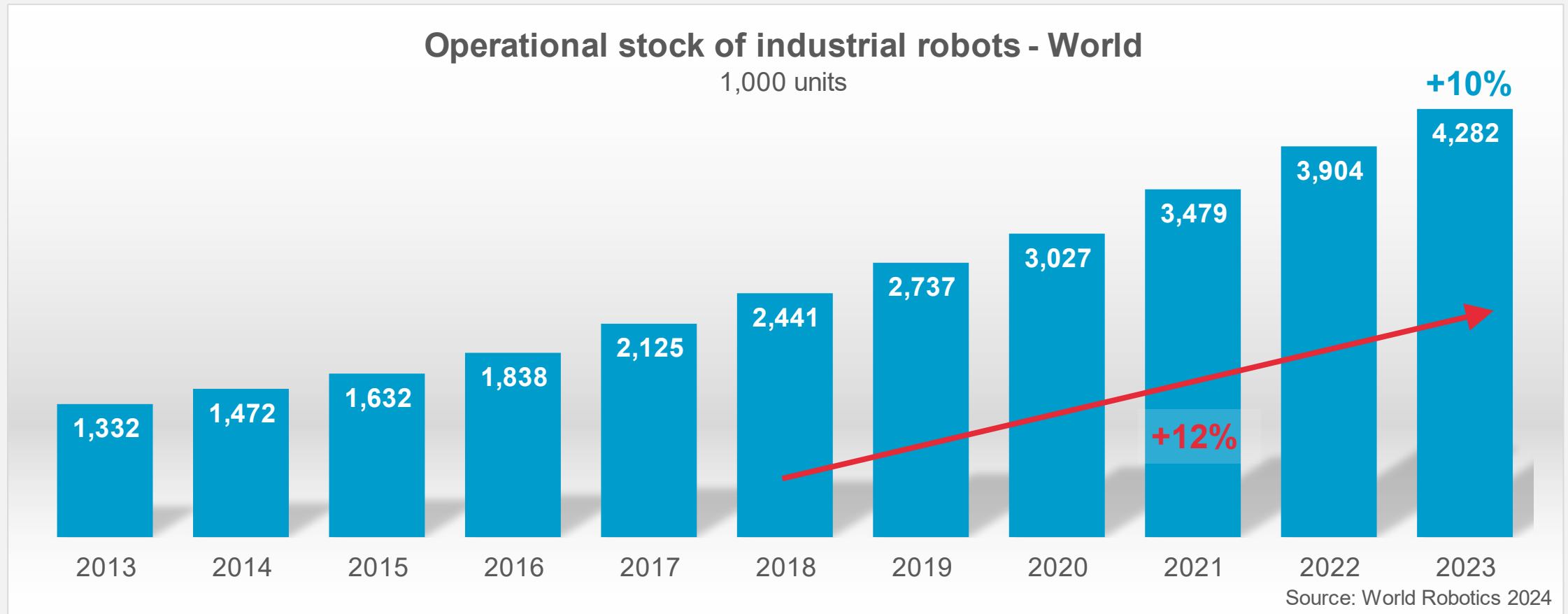


Presentation of **World Robotics 2024**

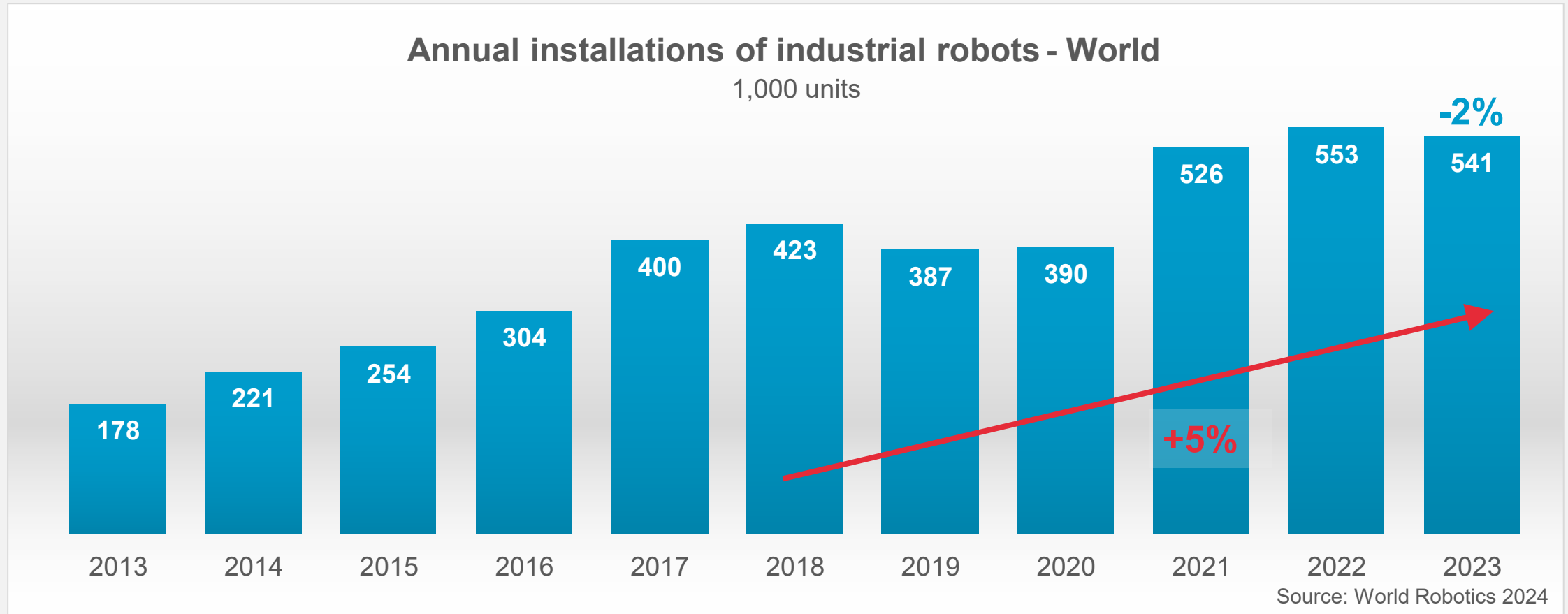
By Takayuki Ito, IFR President



More than 4 million industrial robots operating around the world



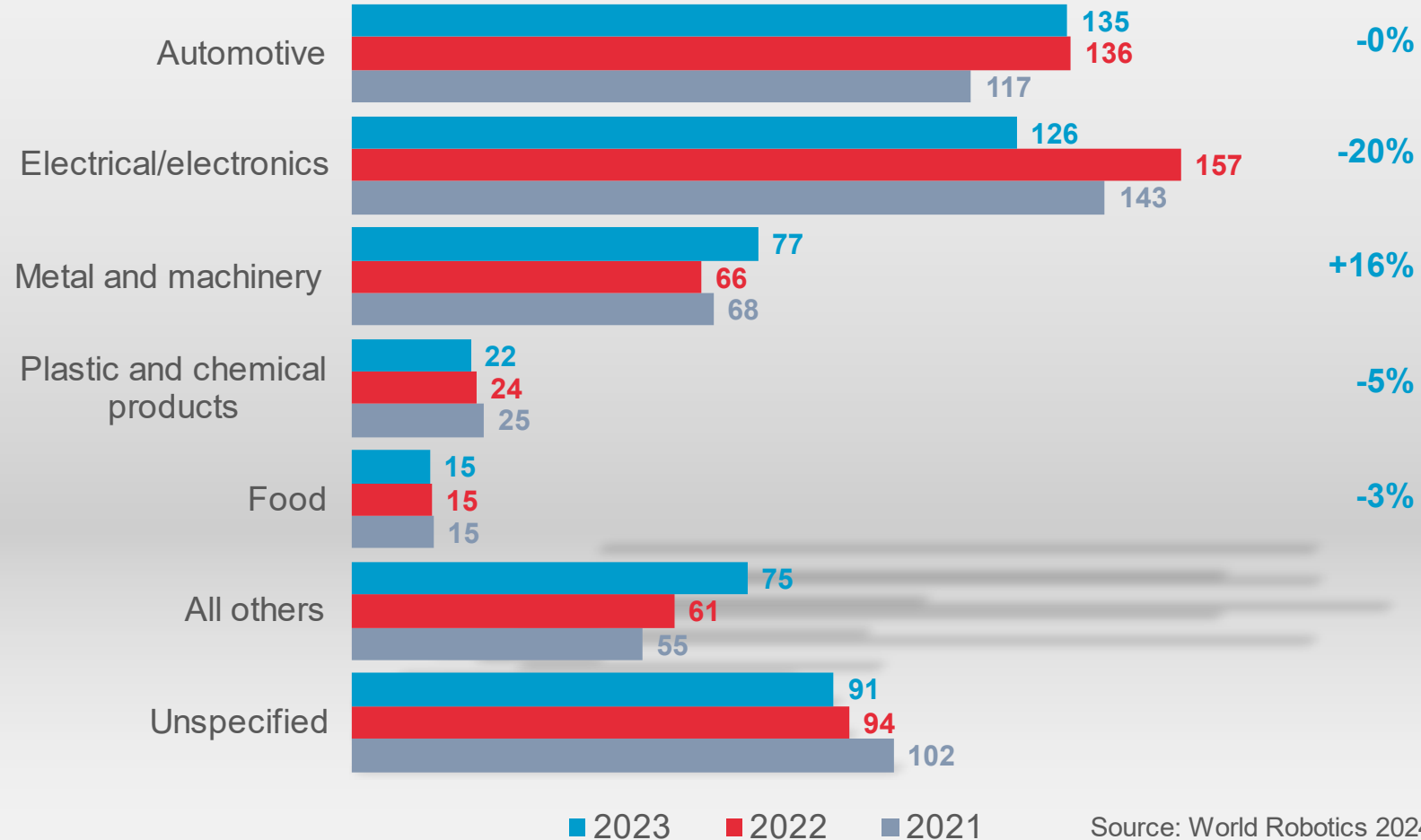
Annual installations exceeded 500,000 units for the third consecutive year



Automotive main customer due to weak demand from electronics

Annual installations of industrial robots by customer industry- World

1,000 units

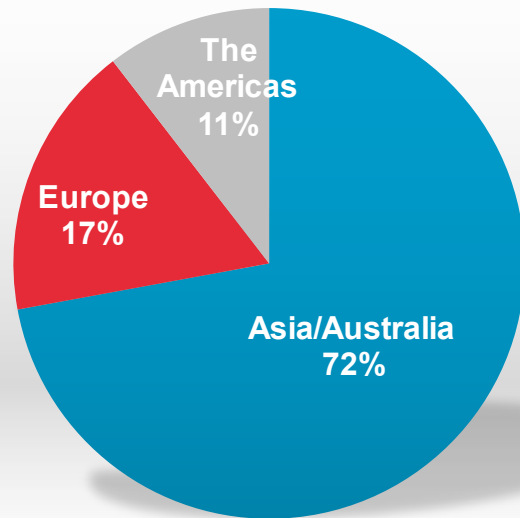


Source: World Robotics 2024

Growth in Europe

Shares of regions

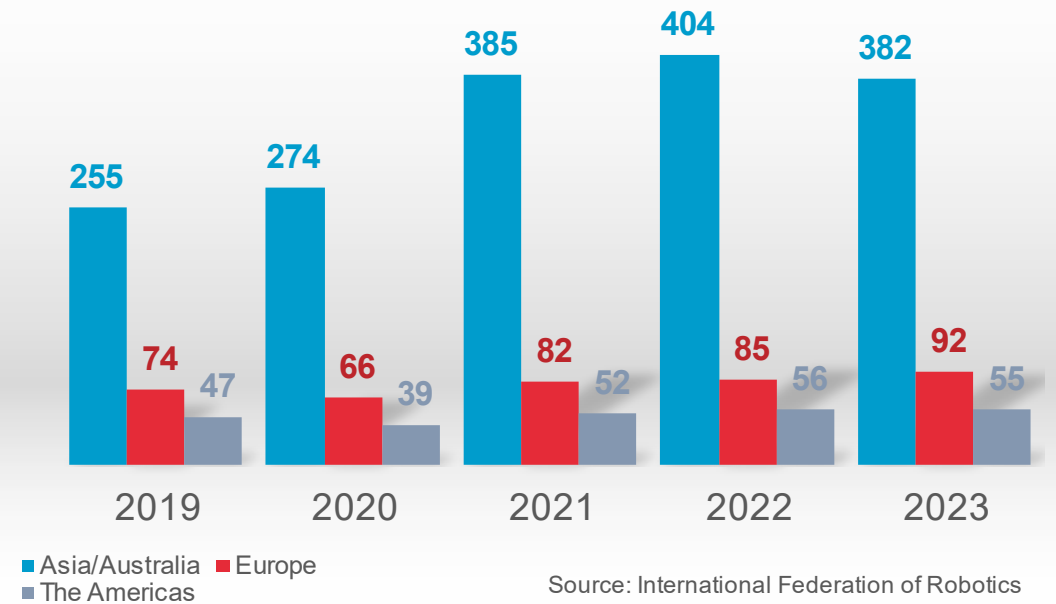
Annual installations of industrial robots - 2023
(^{'000} of units)



Source: International Federation of Robotics

Annual installations per region

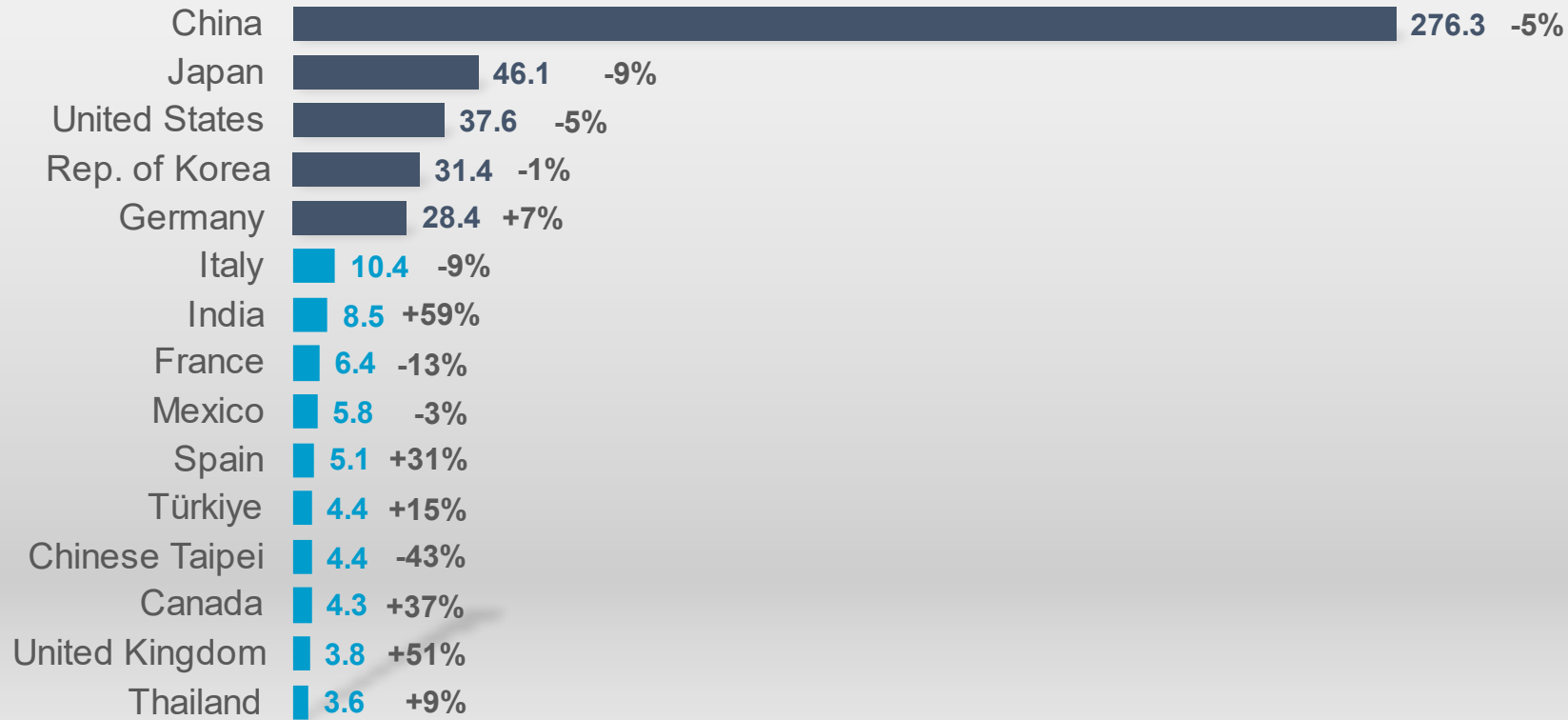
Annual installations of industrial robots
(^{'000} of units)



Source: International Federation of Robotics

China installs every other robot

Annual installations of industrial robots 15 largest markets 2023



51% in China

79% in the
top 5 markets

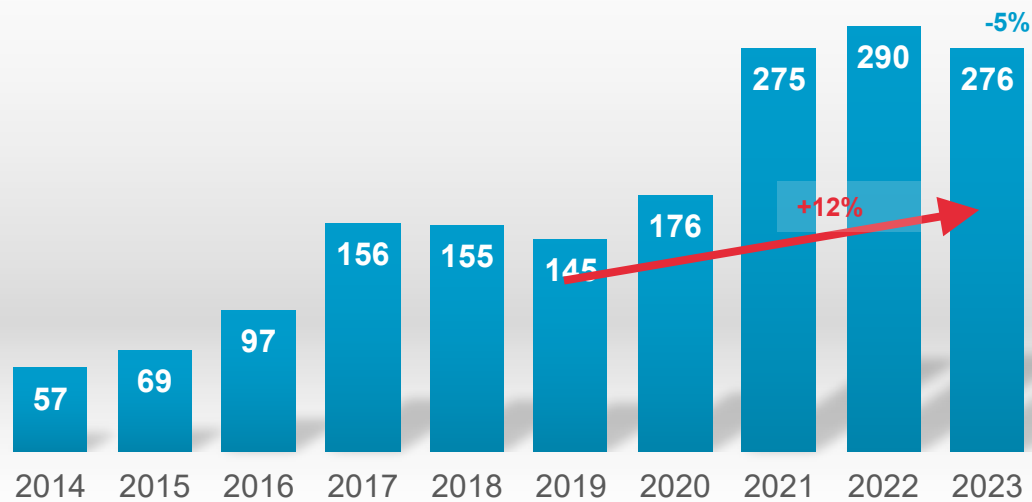
'000 of units

Source: World Robotics 2024

Growth in China comparable to global growth

Second highest level ever recorded

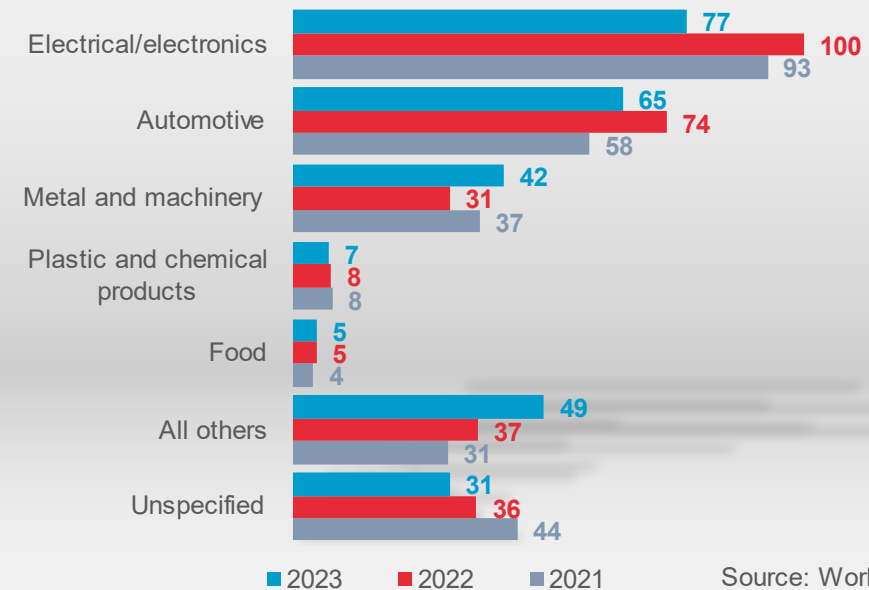
Annual installations of industrial robots - China
1,000 units



Source: World Robotics 2024

Electronics main customer industry in China

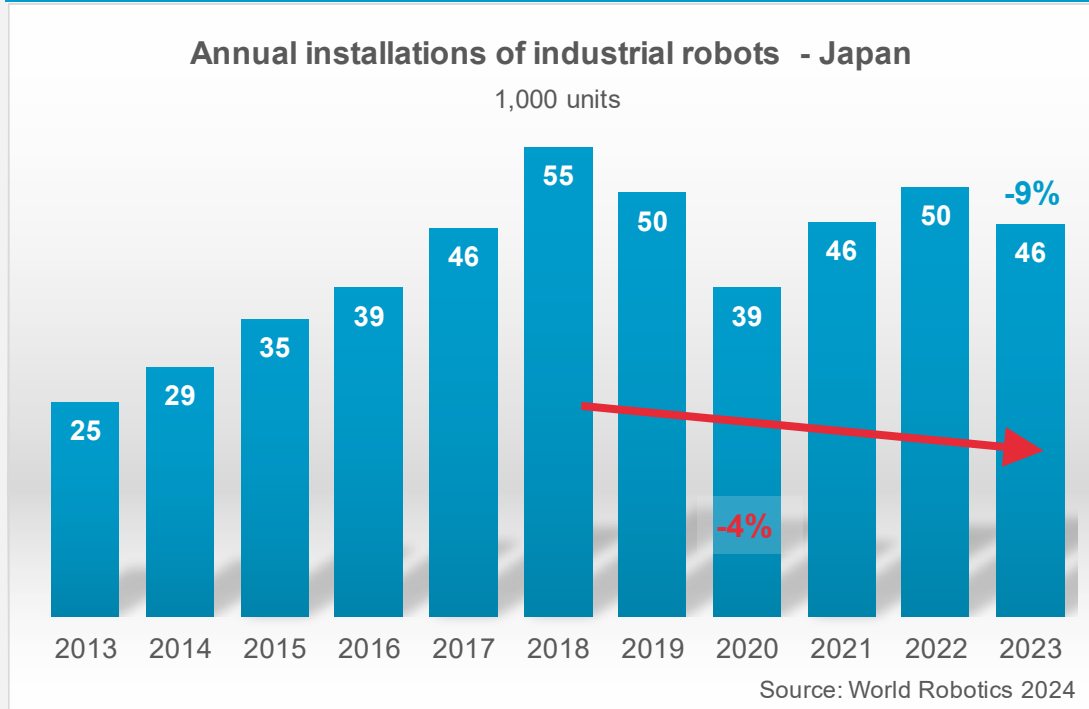
Annual installations of industrial robots by customer industry - China
1,000 units



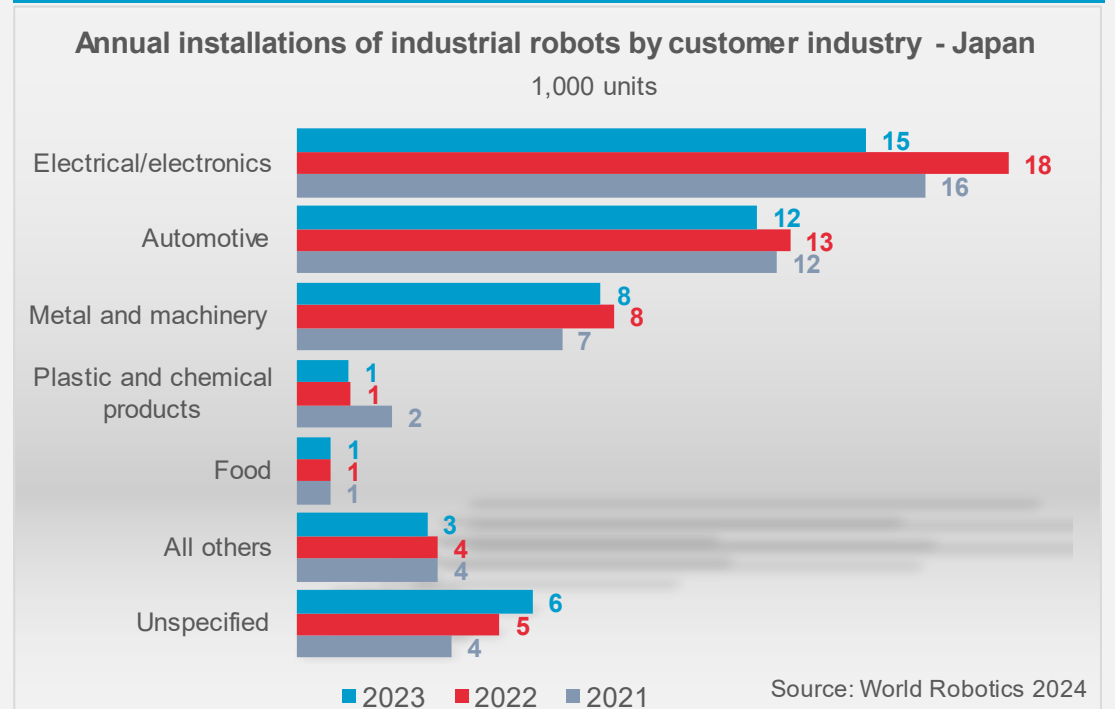
Source: World Robotics 2024

Japan seeking new impetus

Installations level out at 46 thousand units



Electronics and automotive industry decline

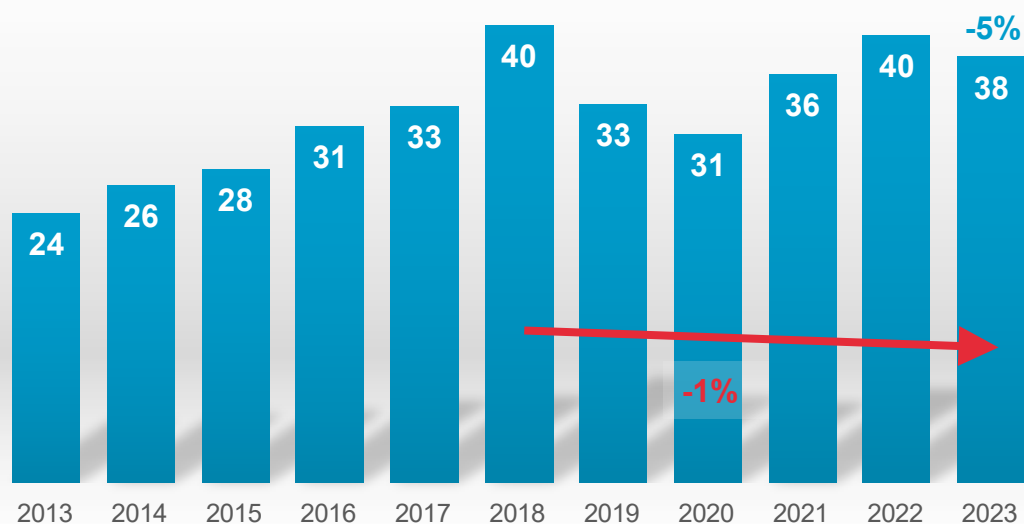


US installations remain high

United States: Third highest level ever recorded

Annual installations of industrial robots - United States

1,000 units

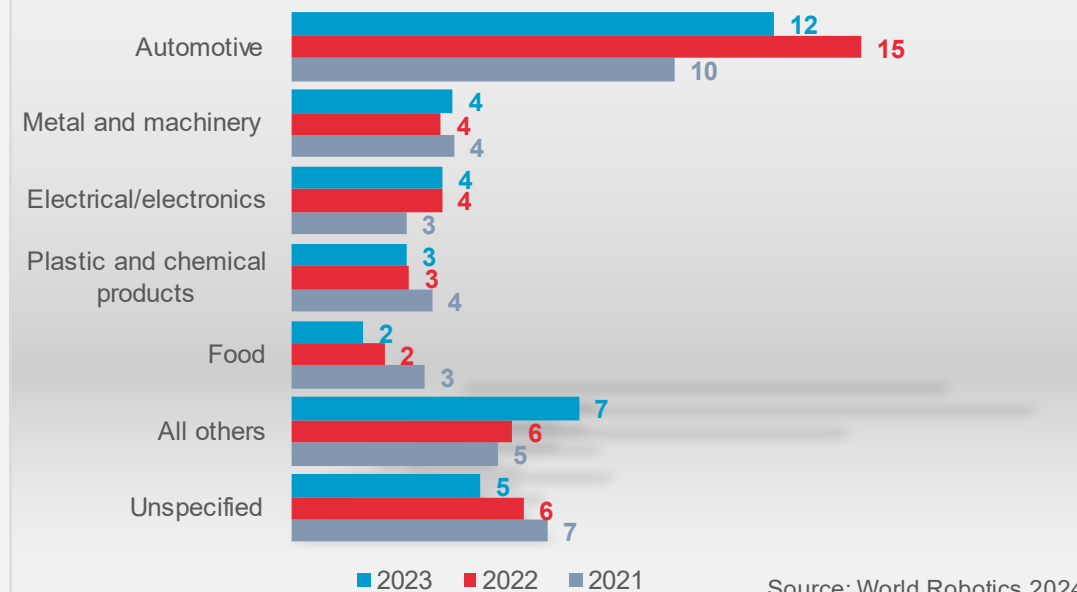


Source: World Robotics 2024

US Automotive Industry installs fewer robots

Annual installations of industrial robots by customer industry United States

1,000 units



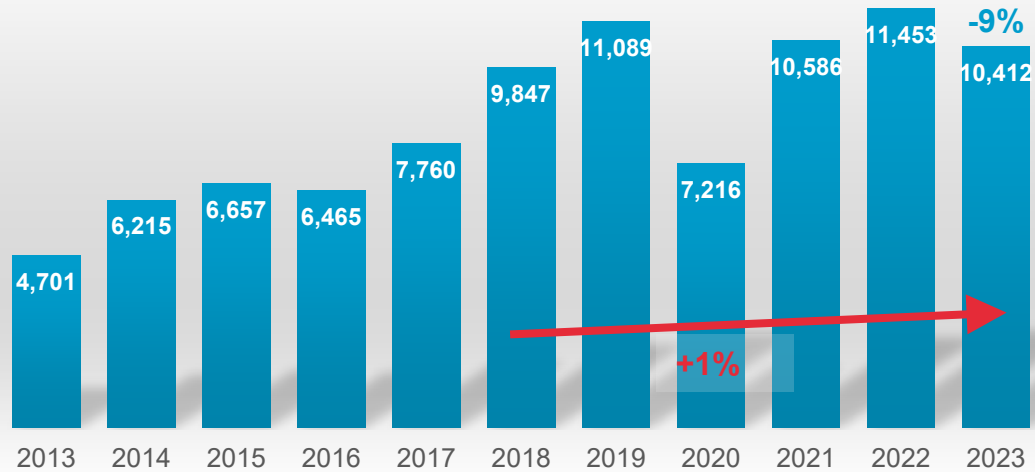
Source: World Robotics 2024

Italy: Down 9% from record level

Early investments in 2022 due to lower tax credits in 2023

Annual installations of industrial robots - Italy

units

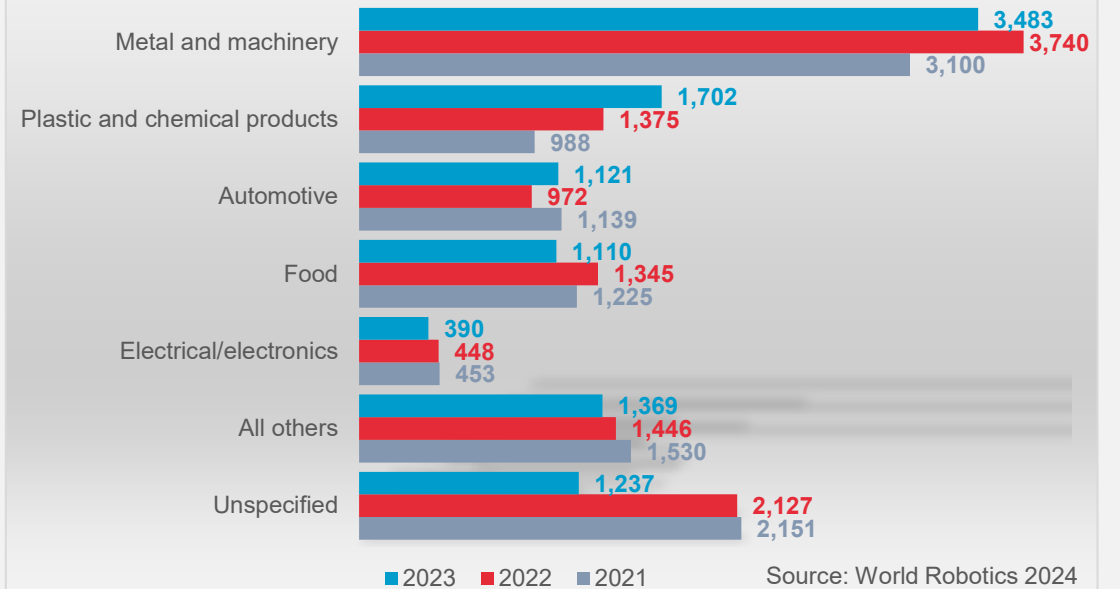


Source: World Robotics 2024

Metal and machinery accounting for 1/3 of demand

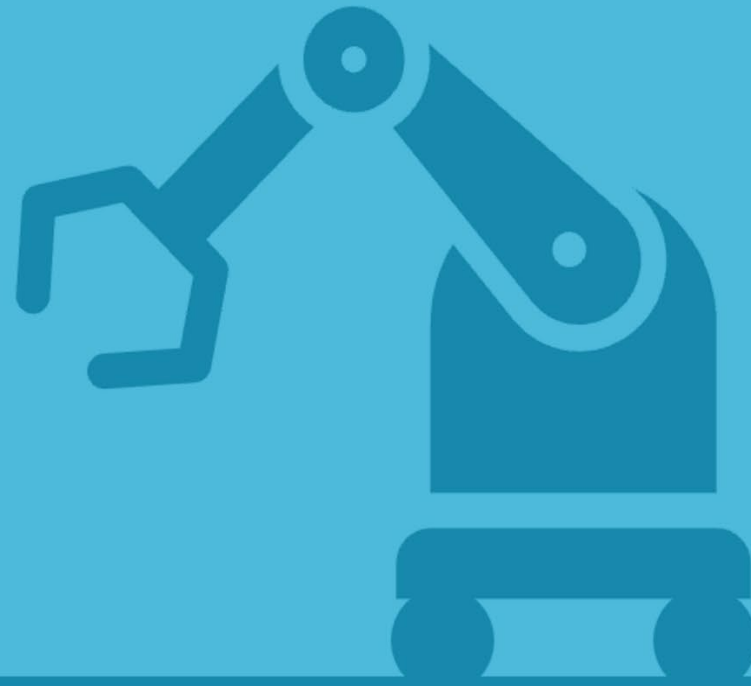
Annual installations of industrial robots by customer industry - Italy

units



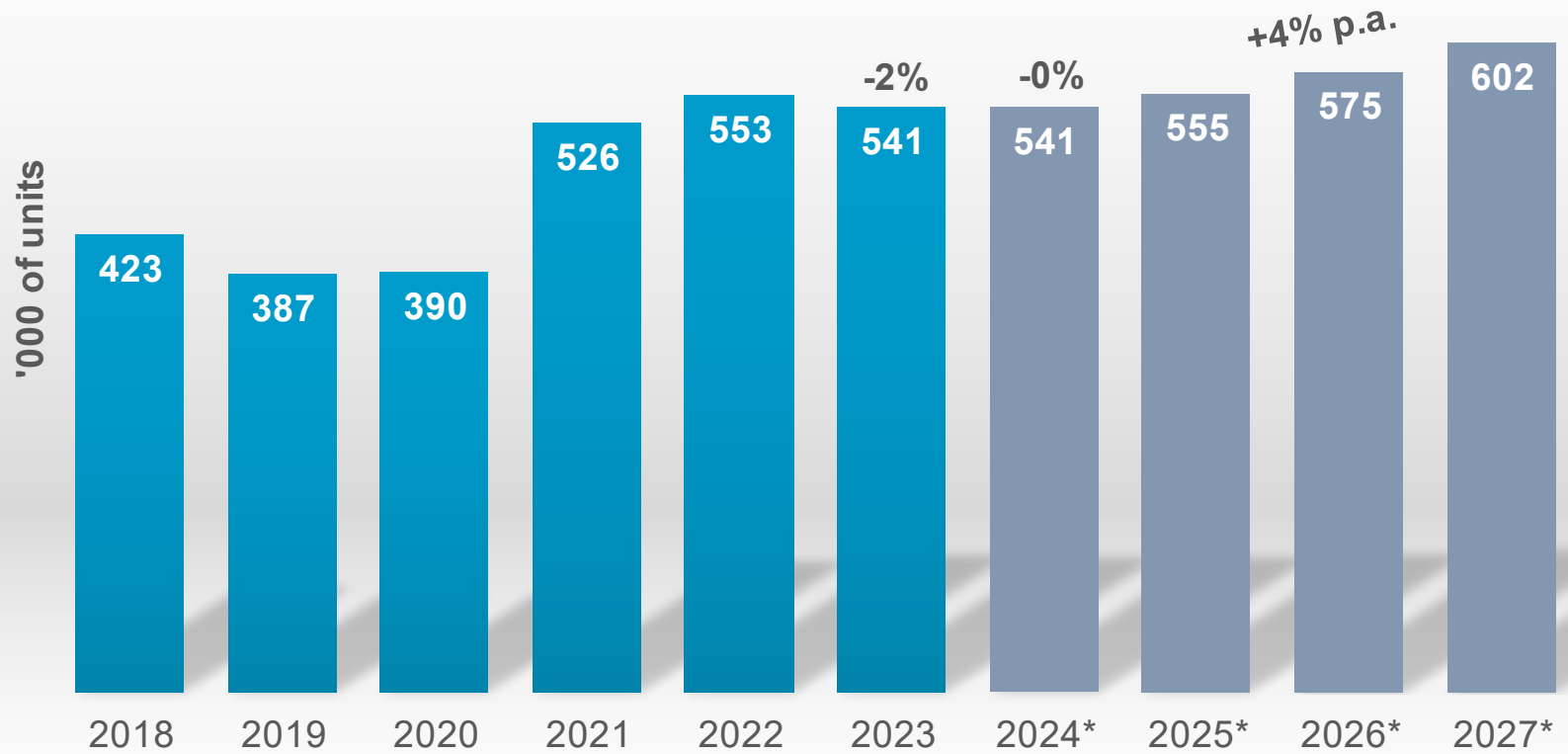
Source: World Robotics 2024

Trends and Forecast



Sideways movement for 2024 expected

Annual installations of industrial robots 2018 -2023 and 2024*-2027*

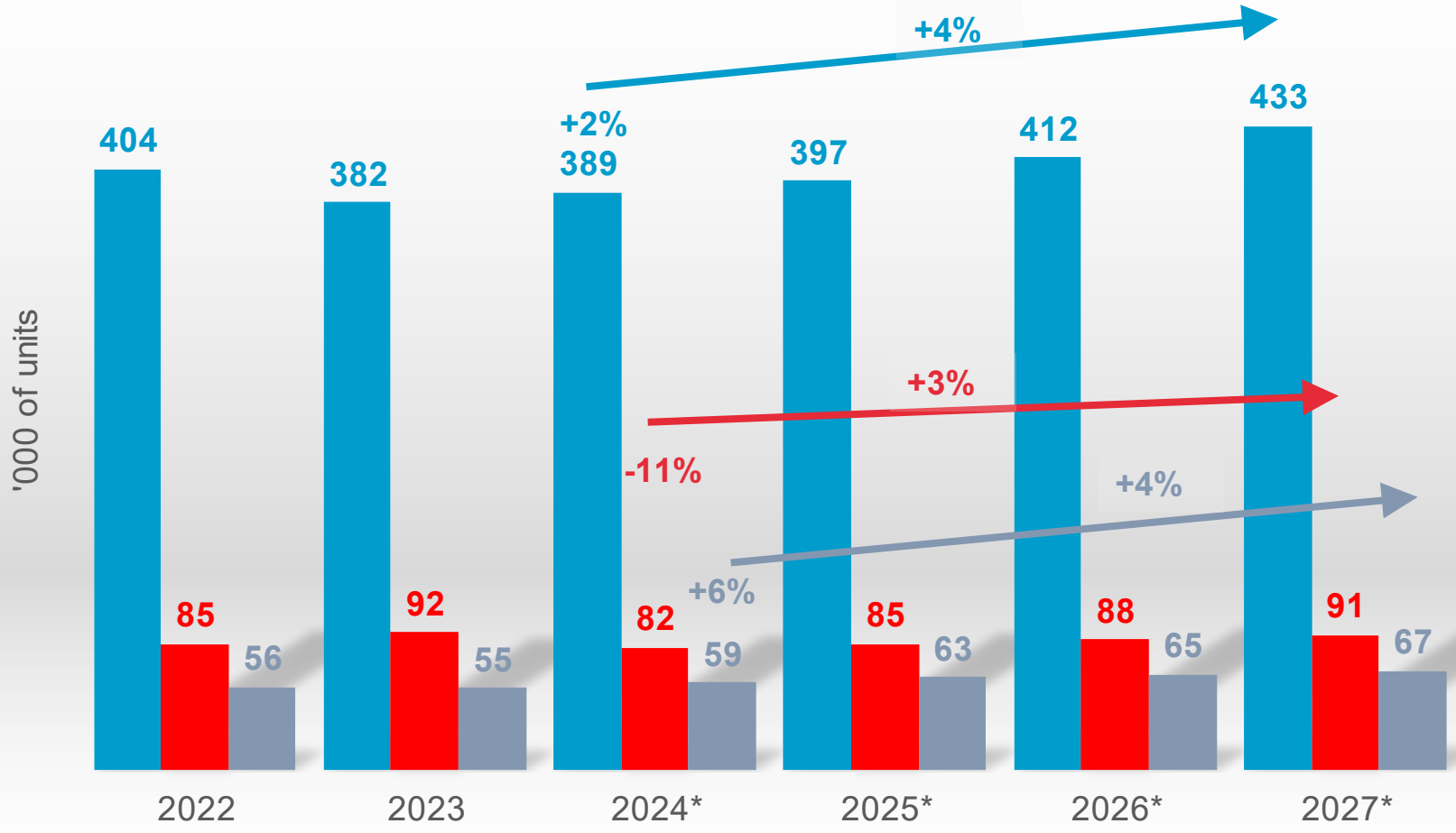


*forecast

Source: World Robotics 2024

Forecast

Annual installations of industrial robots 2022 -2023 and 2024*-2027*



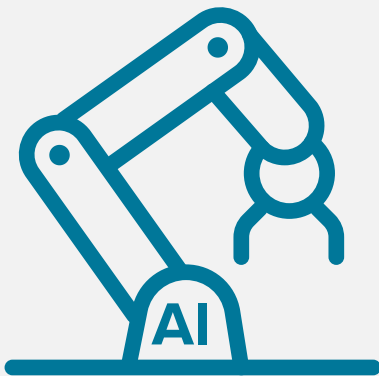
*forecast

■ Asia/Australia ■ Europe ■ The Americas

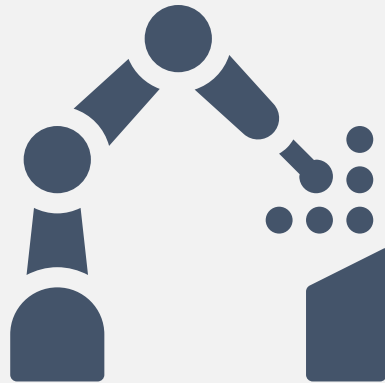
Source: World Robotics 2024

TOP 5 Global Robotics Trends in 2024

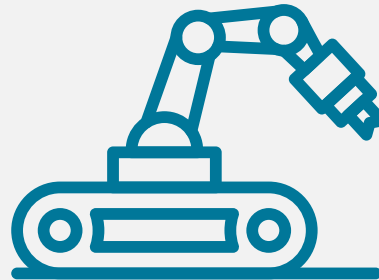
AI AND MACHINE LEARNING



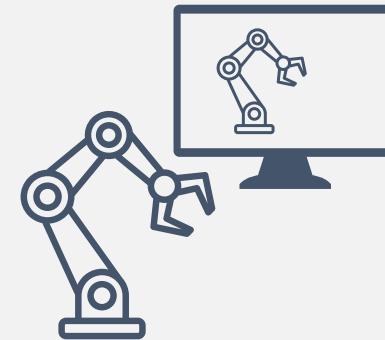
COBOTS IN NEW APPLICATIONS



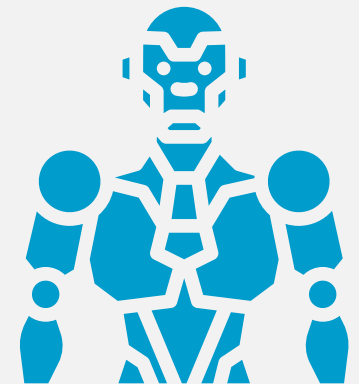
MOBILE MANIPULATORS



DIGITAL TWIN

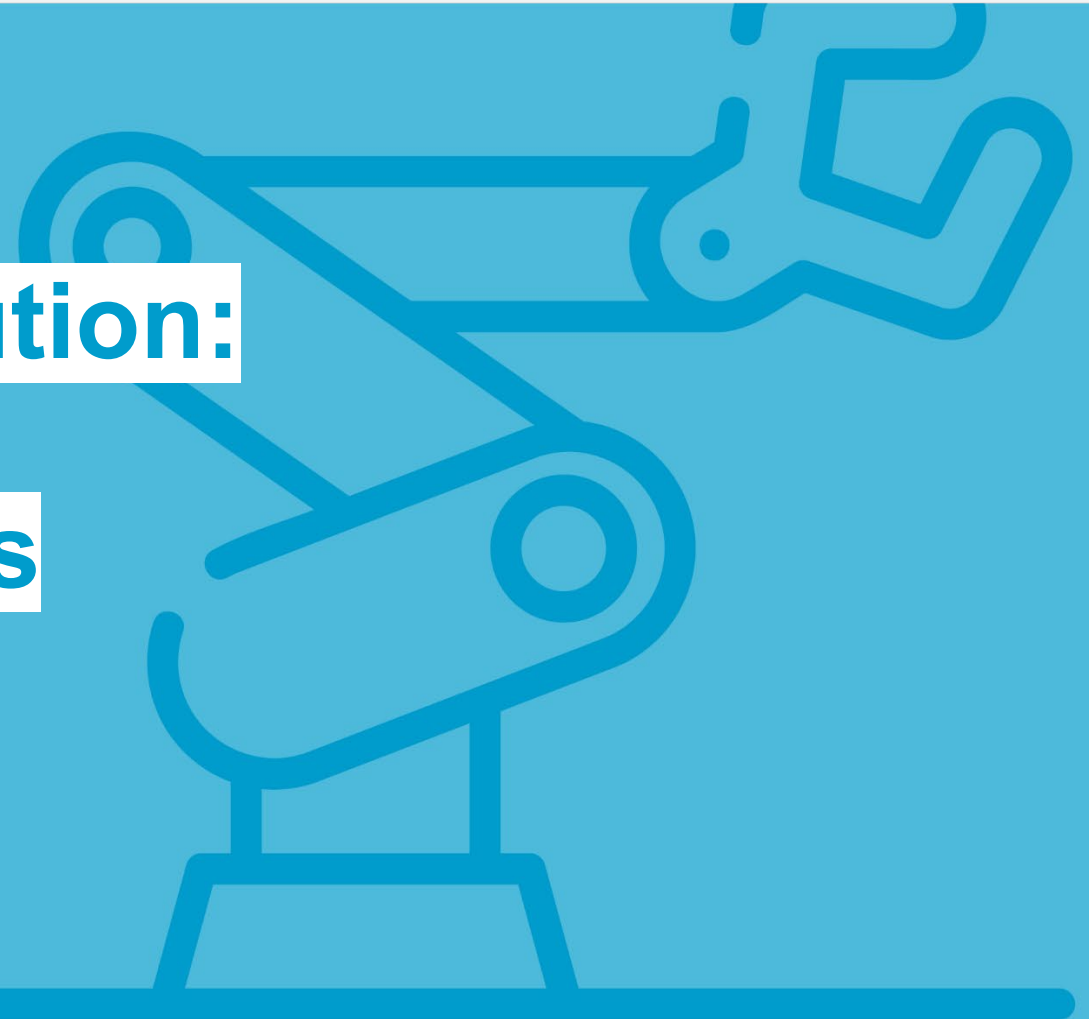


HUMANOIDS



IFR Executive Roundtable on 11 Oct 2024

Robotics market evolution: Global trends and European perspectives



Your panelists today

Domenico Appendino
President
SIRI



Stefania Ferrero
CMO
COMAU



Marina Bill
Global Head Marketing & Sales,
ABB Robotics, past IFR President



You Wei
Chairman and CEO
EFORT Intelligent Equipment



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



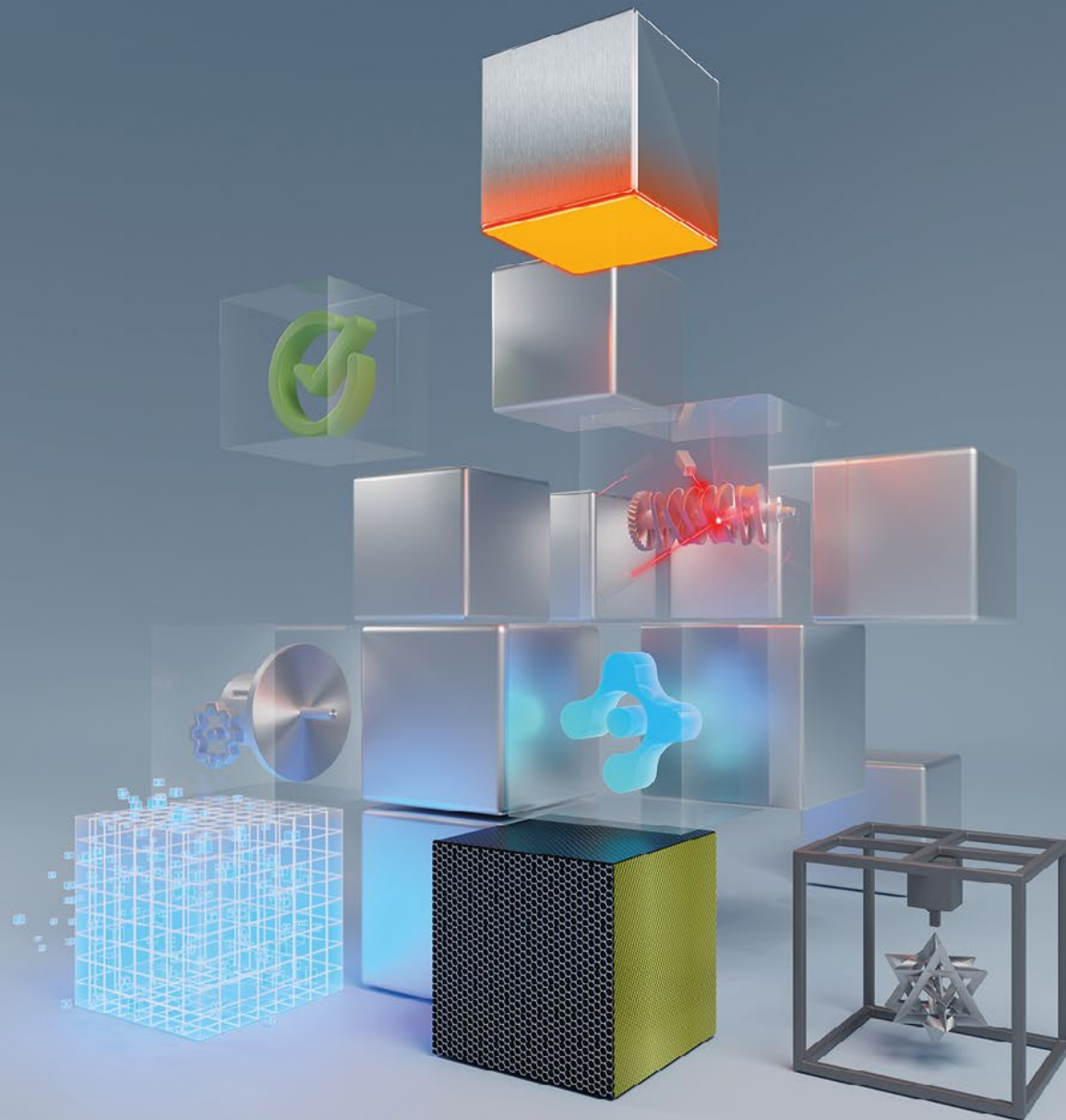


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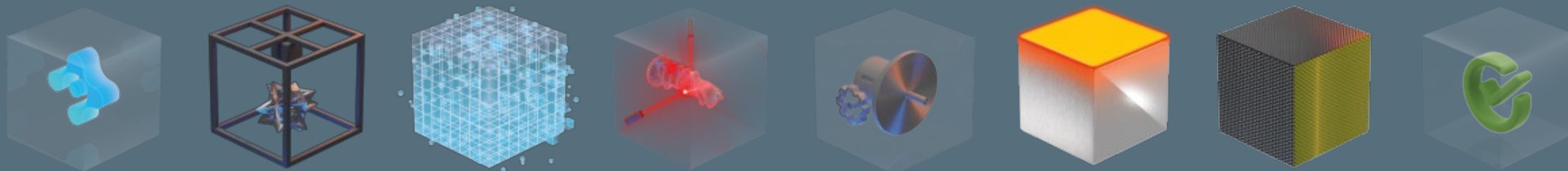
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THANK YOU

