The European Machine Vision Market

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Industrial Vision Days 2012
November 07, 2012, VISION Stuttgart, Germany
European Vision Technology Market Statistics

- **Industry Report**: Worldwide turnover of all European/Europe-based machine vision companies.

- **Evaluation based on surveys by questionnaires, interviews and public data.**

- **Data from 247 mv companies; Germany-based participants: 57.25%, other Europe: 42.75%.**

- **89% vision manufacturers, 11% distributors.**

- **54% pure vision companies.**

- **Separate country reports for Germany, Italy, UK, France, and Benelux (and more to come).**
European Vision Technology Market Statistics

Some key numbers....
Machine vision facts and figures:  
Total turnover by products...

<table>
<thead>
<tr>
<th>Turnover of European Vision Product Suppliers*</th>
<th>Sales in 1.000 Euro</th>
<th>Shares of Total Turnover</th>
<th>Change 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Systems, application-specific or configurable</td>
<td>582.887</td>
<td>699.552</td>
<td>46,2%</td>
</tr>
<tr>
<td>Smart Cameras/Compact Systems, Vision Sensors</td>
<td>95.421</td>
<td>116.440</td>
<td>7,6%</td>
</tr>
<tr>
<td>Vision Systems</td>
<td>678.308</td>
<td>815.992</td>
<td>53,7%</td>
</tr>
<tr>
<td>Cameras</td>
<td>362.325</td>
<td>399.879</td>
<td>28,7%</td>
</tr>
<tr>
<td>Frame Grabbers</td>
<td>42.249</td>
<td>39.909</td>
<td>3,3%</td>
</tr>
<tr>
<td>Lighting</td>
<td>46.871</td>
<td>54.462</td>
<td>3,7%</td>
</tr>
<tr>
<td>Optics</td>
<td>59.624</td>
<td>70.391</td>
<td>4,7%</td>
</tr>
<tr>
<td>Vision Software</td>
<td>20.224</td>
<td>24.783</td>
<td>1,6%</td>
</tr>
<tr>
<td>Interfaces and Cables</td>
<td>7.920</td>
<td>10.860</td>
<td>0,6%</td>
</tr>
<tr>
<td>Vision Components</td>
<td>539.213</td>
<td>600.284</td>
<td>42,7%</td>
</tr>
<tr>
<td>Other Vision Accessories</td>
<td>45.430</td>
<td>34.266</td>
<td>3,6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1.262.951</strong></td>
<td><strong>1.450.542</strong></td>
<td><strong>100,0%</strong></td>
</tr>
</tbody>
</table>

* surveyed companies  
** revised data for 2010

Source: EMVA

Extrapolated turnover 2011 > 2 billion €
Sales development 2008 - 2011

Total Turnover* Machine Vision Technology 2008 - 2011
Europe - by Products

- Vison Systems
- Compact Systems
- Cameras
- Optics
- Lighting
- Frame Grabbers
- Vision Software
- Interfaces and Cables
- Other Vision Accessories

*surveyed companies

Source: EMVA
New Country Report 2012: BENELUX

• Almost 130 vision enterprises identified in the region.

• Home of leading component manufacturers (sensors, cameras).

• Strong interdependencies between industry and research.

• Total industry volume of close to €300 Mio.

• Technology affine region with very dense image processing competence!
But what about the future....
Global forecast map

Indicator:
Real GDP Growth [in %]

Years:
2013

Aggregates:
- Euroland
- EMEA
- Asia
- LatAm
- EM
- G7
- World

Legend:
- < -2.5 %
- -2.5 → 0 %
- -0 → 2.5 %
- 2.5 → 5 %
- 5 → 10 %
- > 10 %

Zoom area:
World complete
EMVA forecast 2010 - 2012

European Vision Companies' Changes in Sales by Region 2010, 2011 and Forecast 2012

- Europe: 2010/2009 = 27.5%, 2011/2010 = 15.9%, 2012/2011* = 5.7%

*Forecast

Source: EMVA
EMVA Quick Survey October 2012

How will total sales of machine vision out of Europe have developed by the end of 2012 compared to 2011?

- Increase of >5%: 14.67%
- Increase of <5%: 32.00%
- Flat: 34.67%
- Decrease: 18.67%

n=75

Source: EMVA
Compared to 2012, will total sales of machine vision in 2013 out of Europe be up, down or flat?

- Increase of >5%: 24.00%
- Increase of <5%: 29.33%
- Flat: 34.67%
- Decrease: 12.00%

Source: EMVA
EMVA Quick Survey October 2012

How will business develop 2013 in the following product categories? (Cameras)

- 53.33%
- 21.33%
- 18.67%
- 6.67%
- n=75

How will business develop 2013 in the following product categories? (Vision systems, application-specific or configurable)

- 64.00%
- 8.00%
- 8.00%
- 20.00%
- n=75

Source: EMVA
Your way to the EMVA-report

Find out more at:
www.emva.org
Thank you for your attention!

11th EMVA Business Conference 2013

6-8 June, 2013
Barcelona/Spain

Mark your calender!

Find out more at: www.emva.org