

Automotive

A Key Segment for Industrial Robots

Automotive Industry

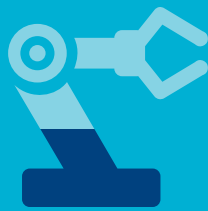
accounted for **11.3%**
of global manufacturing production
in **2017**



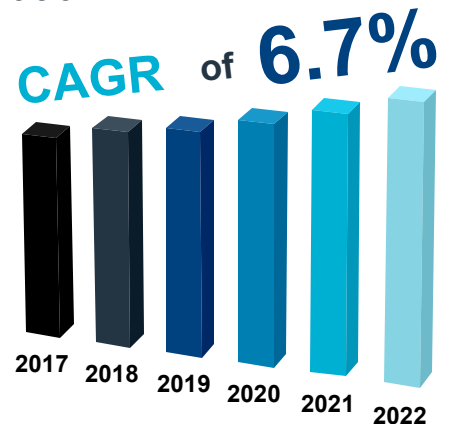
forecast to grow with a **CAGR**
of **5.5%**
to **2022**



38.6% of Industrial Robot
revenues in **2017**
came from the
Automotive Sector
= \$3.85 Bn



Industrial Robots used in
Automotive are forecast to
grow at a



China generated
over
1/4
of industrial robot
revenues sold to the
automotive market
in 2017

2017-2022

China
CAGR



12.4%

Fastest Regional Growth

Six-Axis Articulated Industrial Robots
with
Large Payloads
accounted for over **90%**
of revenues in the
Automotive industry



TOP 4 ROBOT APPLICATIONS IN AUTOMOTIVE

Spot Welding

70%

Arc Welding

Painting

Materials
Handling

ABB KUKA
DAIHEN FANUC
YASKAWA
PANASONIC
NACHI-FUJIKOSHI

KAWASAKI

Others

Hyundai Robotics

Top 5 Vendors'

Revenues and Shipments accounted for

60%

of GLOBAL market

80%

of US & JAPAN market

