CONTENTS

CONTENTS I

EDITORIAL:
Preserve, Protect, Prosper- Achieve Packaging Sustainability with flexible Automation V

EXECUTIVE SUMMARY IX

I INTRODUCTION 1

I.1 Sources and methods 1
I.1.1 Coverage 1
I.1.2 Data sources and reliability of data 1
I.1.3 Two types of stock data 2
I.1.4 Interpretation of the concepts of shipments, sales and yearly supply 3
I.1.5 Revision of time-series data on the robot stock 4
I.1.6 Data coverage and where to access data for previous years 4
I.2 Multipurpose manipulating industrial robots - definition and classification 6
I.2.1 Definition (ISO 8373) and delimitation 6
I.2.2 Classification by industrial branches 12
I.2.3 Classification by application areas 13
I.2.4 Classification by types of robots 14
I.3 Service robots: definition and classification 15
I.3.1 Provisional definition 15
I.3.2 Classification of service robots by application areas 15

II WORLDWIDE DISTRIBUTION OF INDUSTRIAL ROBOTS 19

II.1 Unit sales 19
II.2 Estimate of the worldwide operational stock of industrial robots 23
II.3 Estimate of the value of the world robot market in 2003 - 2008 27
II.4 Analysis of the effects of the business cycle on investments in industrial robots 32
II.5 Analysis of the development of robot density in selected countries 33
II.5.1 Definition of robot density 33
II.5.2 Measurements of robot density based on the total number of persons employed in the Manufacturing Industry 34
II.5.3 Measurements of robot density based on the total number of persons employed in the automotive industry and in all other branches 36
II.5.4 Estimate of robot density in all relevant markets 38
II.6 Analysis of the supply and stock of multipurpose industrial robots in 2003-2008 by major application areas 40
II.7 Analysis of the supply and stock of multipurpose industrial robots in 2003- 2008 by major industrial branches 48
II.8 Comparison between the motor vehicle industry and all other industrial branches 56
II.9 Supplies of multipurpose industrial robots in 2008 by Types of robots 65

III THE STRUCTURE OF THE DISTRIBUTION OF INDUSTRIAL ROBOTS IN INDIVIDUAL COUNTRIES 71

Introduction 71
Americas: 72
Brazil and Argentina 79
North America 86
All other American countries 97
Asia / Australia: 98
China 106
India 111
Indonesia 115
Japan 118
Republic of Korea 131
Malaysia 141
Singapore 144
Taiwan, Province of China 146
Thailand 151
All other Asian countries 154
Australia and New Zealand 155
Europe: 159
Austria 167
Belgium/Luxembourg and Netherlands 175
Czech Republic and Slovakia 185
Denmark 194
Finland 204
France 213
Germany 223
Hungary 236
Italy 241
Norway 251
Poland 260
Portugal 266
Russian Federation 271
Slovenia 274
Spain 279
Sweden 289
Switzerland 298
Turkey 304
United Kingdom 309
All other European Countries 319
Africa: 320
South Africa 320

IV FORECAST OF WORLDWIDE INVESTMENT IN INDUSTRIAL ROBOTS IN THE PERIOD 2009-2012 325

IV.1 International Business Outlook
IV.1.1 Situation 325
IV.1.2 Outlook 325
IV.2 Incentives to automate 326
IV.3 Technical robotics trends and customer trends 328
IV.4 Future development in the main markets 330
IV.5 Conclusion and forecast 2009 – 2012 333

V THE PROFITABILITY OF INDUSTRIAL ROBOTS: ANALYSIS OF CASE STUDIES 339

V.1 Introduction and conclusions 339
V.1.1 Introduction 339
V.1.2 Benefits of robot automation 339
V.1.3 Conclusions 340
Table V.1-1e Analysis of case studies – summary of profitability of robot investment 351

V.2 Case study 1:
Robot brings flexibility to laser welding
By: Katrin Stuber, KUKA Roboter GmbH, Germany 352

V.3 Case study 2:
Mirror, mirror…
By: Stefanie Senft, KUKA Roboter GmbH, Germany 354

V.4 Case study 3:
Reconstruction and full automation of the two 112 m long top coat painting lines at VW saxony
By: Harald Voigtländer, Dürr Systems GmbH, Germany 357

V.5 Case study 4:
Direct to the plaiting process
By: Walter Klaus, WITTMANN Robot Systeme, Germany 359

V.6 Case study 5:
Efficient pump motor saves 4500 manual lifts per day
By: Kajsa Pettersson, MOTOMAN robotec, Germany 362

V.7 Case study 6:
Robotic welding with 1,5 years payback time
By: Kajsa Pettersson, MOTOMAN robotec, Germany 364

V.8 Case study 7:
Robots reduce production costs for solar panel
By: Annelies Vander Hulst, FANUC Robotics, Benelux 366

VI SPECIAL FEATURES:

VI.1 Robotics Visions to 2020 and Beyond – The Strategic Research Agenda for Robotics in Europe
By: Anne Wendel, EUnited Robotics, Belgium 368

VI.2 Estimation of the future user potential of innovative robot technologies in SMEs – promising aspects
By: Dr. Steffen Kinkel and Ute Weißfloch, Fraunhofer-Institut für System- und Innovationsforschung ISI, Germany 376

Annex A Time series of yearly shipments, operational stock and accumulated sales of multipurpose industrial robots 382

Table A-1 Estimated yearly shipments of multipurpose industrial robots in selected countries. Number of units..... 382

Table A-2 Estimated yearly shipments of multipurpose industrial robots in selected countries. Annual percentage change 384

Table A-3 Estimated operational stock of multipurpose industrial robots in selected countries. Number of units..... 386

Table A-4 Estimated operational stock of multipurpose industrial robots in selected countries. Annual percentage change 388

Table A-5 Total accumulated yearly sales of multipurpose industrial robots in selected countries. Number of units..... 390

Table A-6 Total accumulated yearly sales of multipurpose industrial robots in selected countries. Annual percentage change 39