



THE LATEST AUTOMATION STATISTICS, TRENDS & KEY MARKET DRIVERS

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Association for Advancing Automation (A3)*



Inspiring Informative Amazing





**A Moment
to Celebrate**

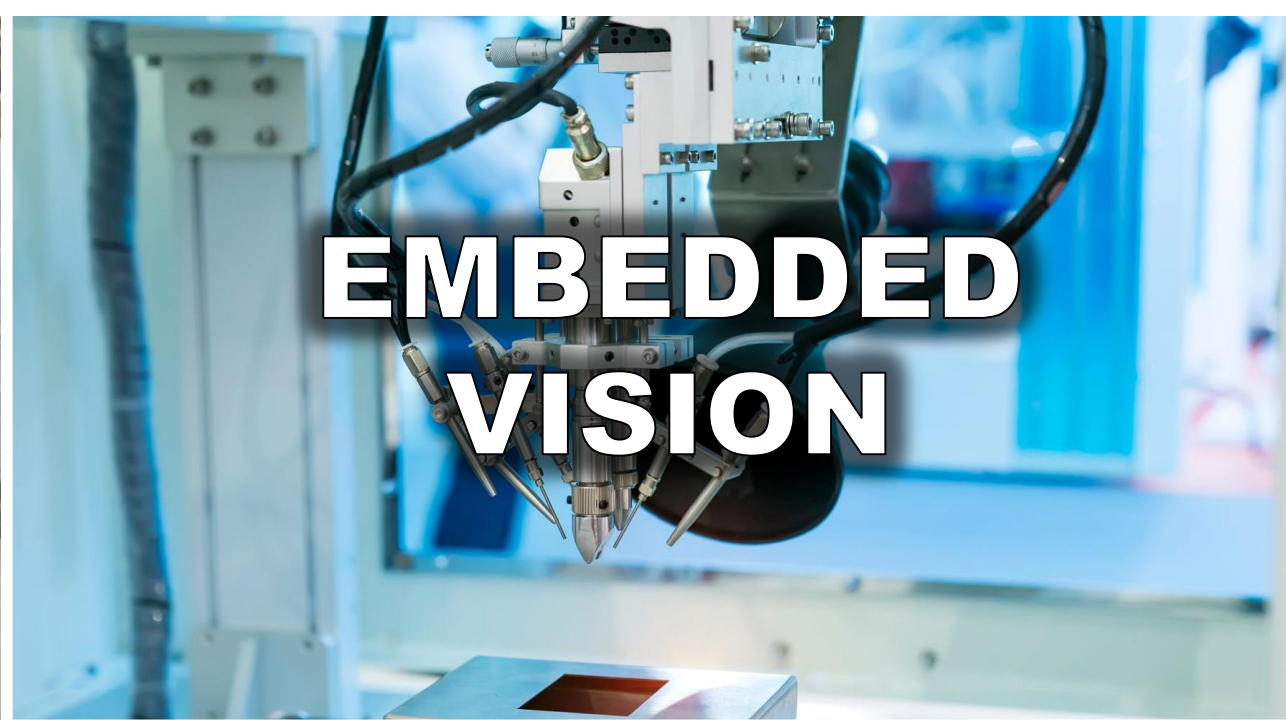
A Record Year

For Your Association

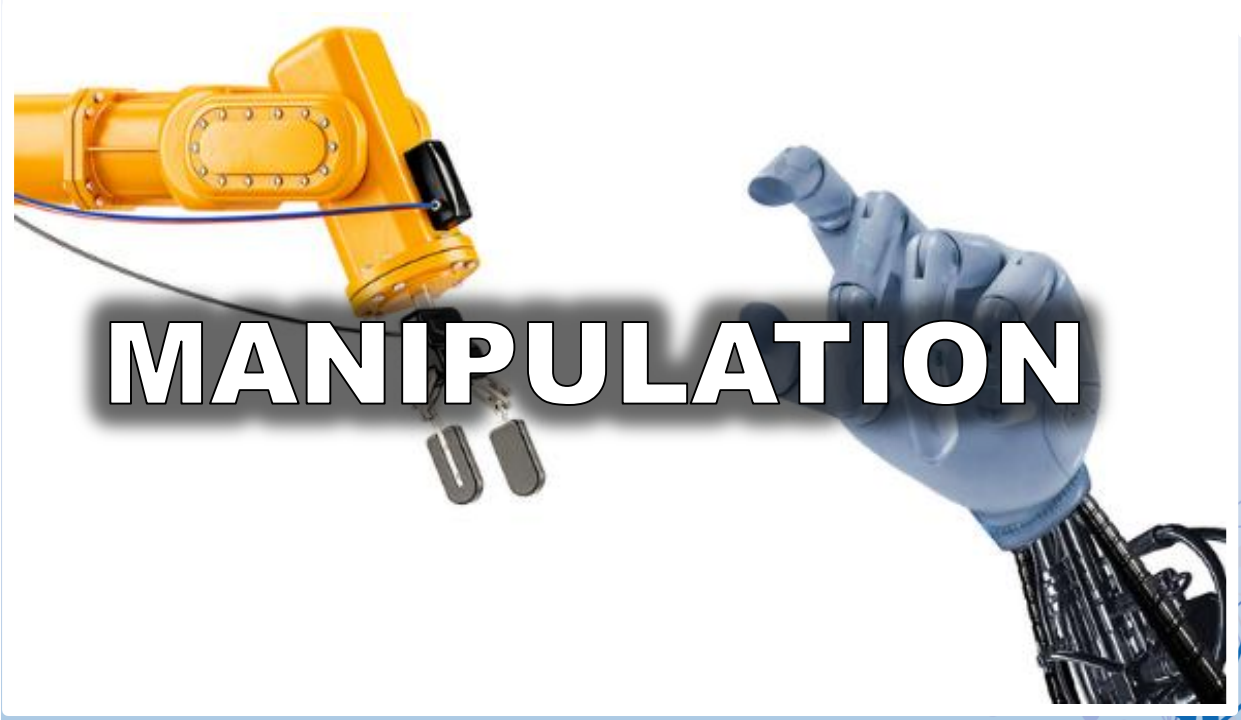
And Our Industries



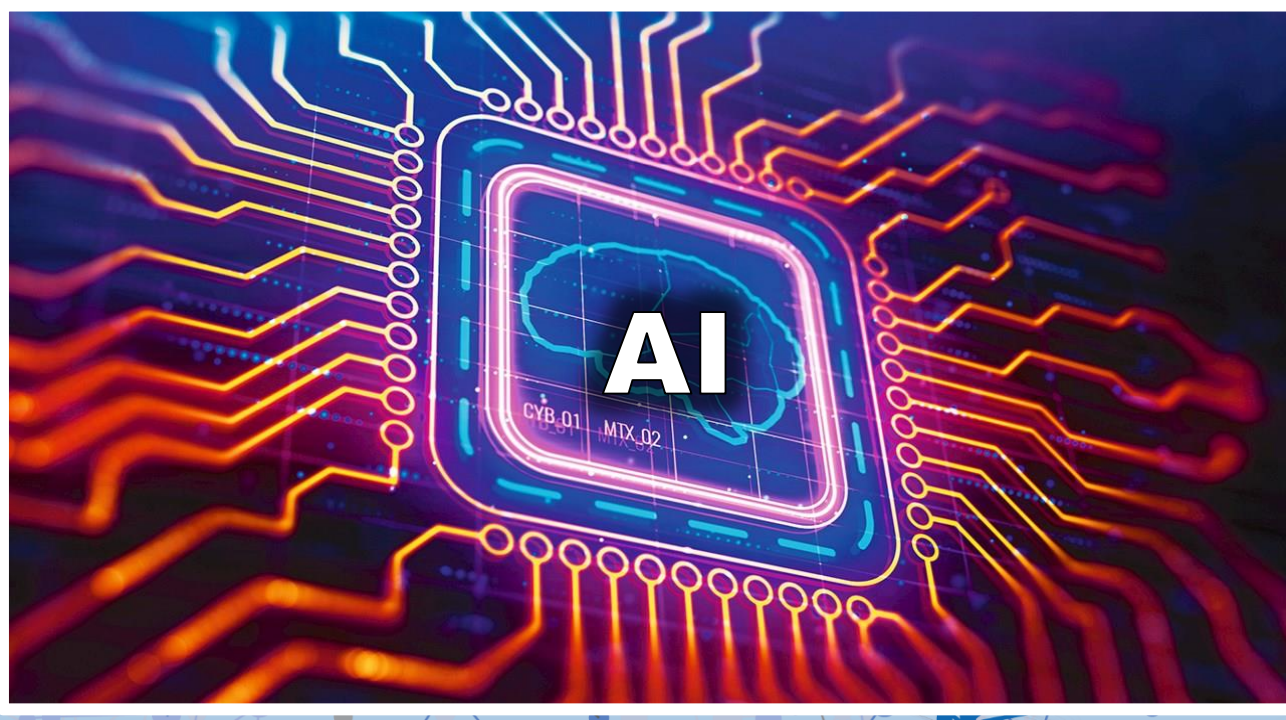
MOBILITY



**EMBEDDED
VISION**

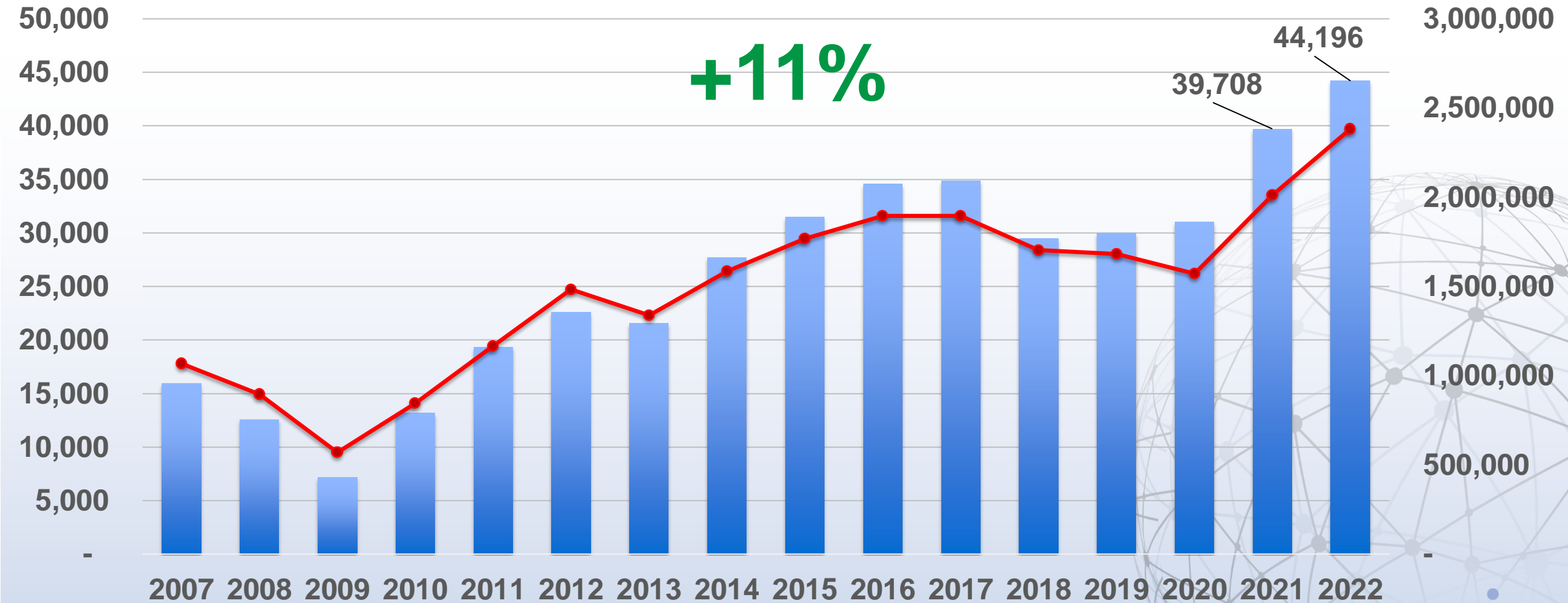


MANIPULATION



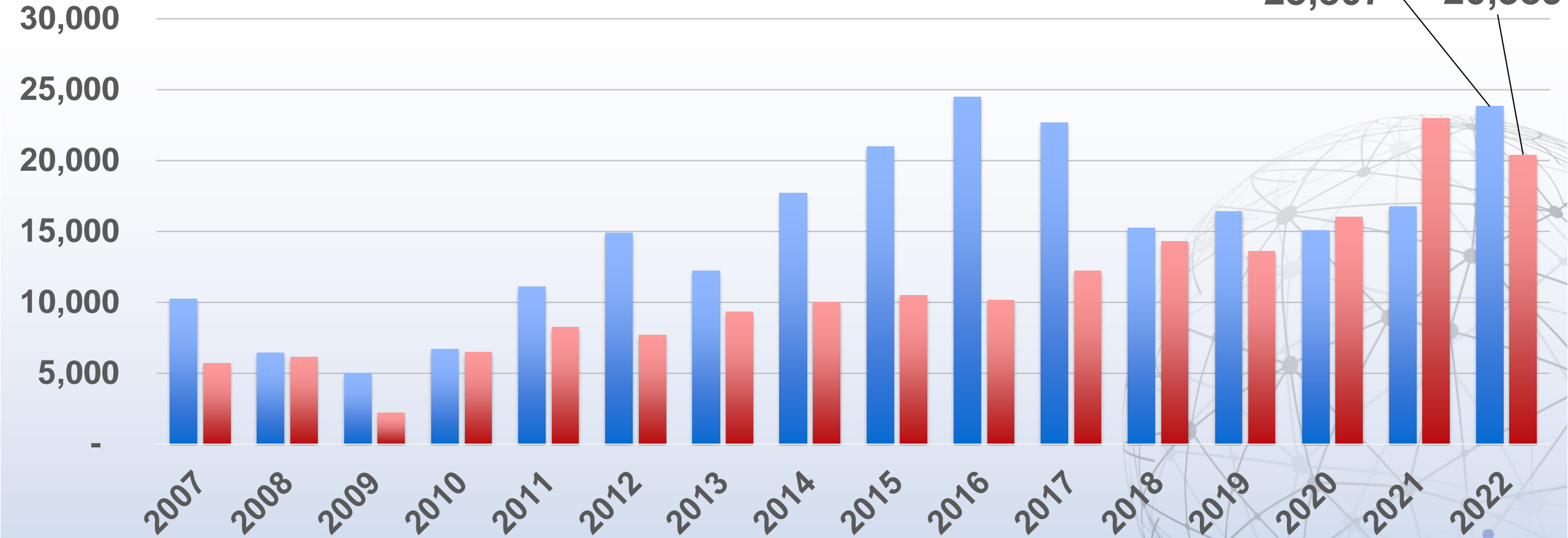
AI

Annual Robotics Orders (N.A.)

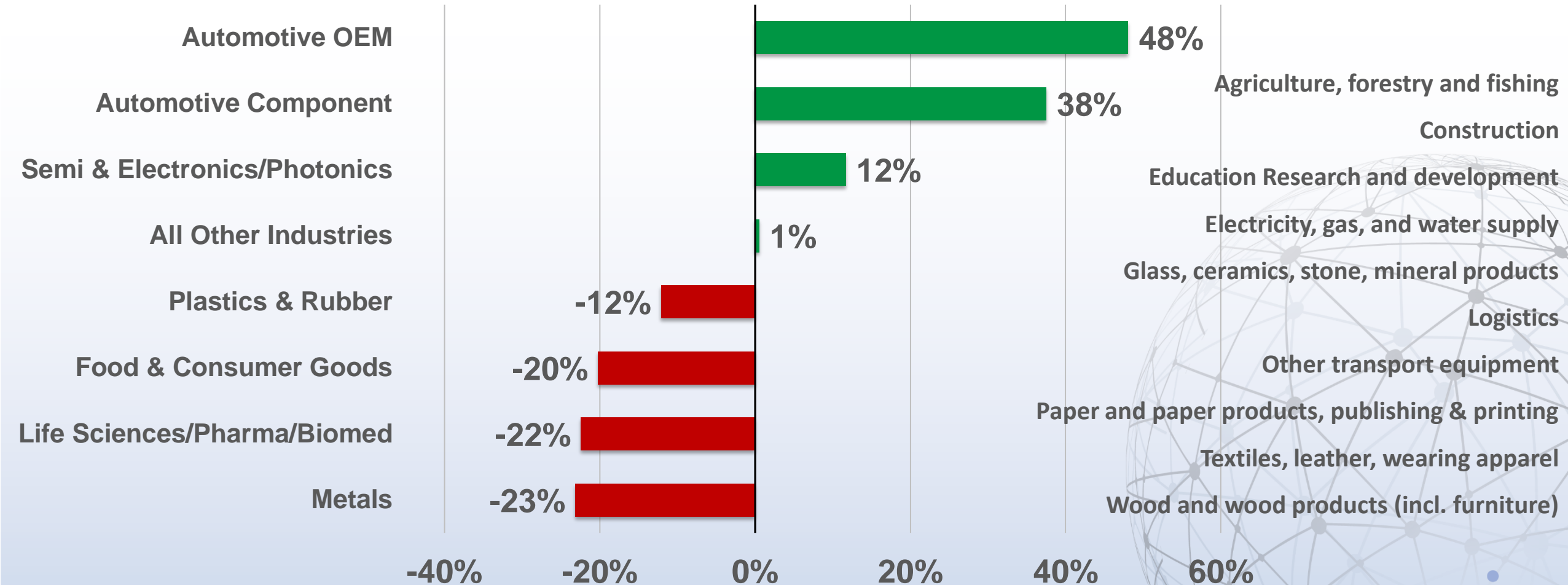


Auto vs. Non-Auto (Annual, N.A.)

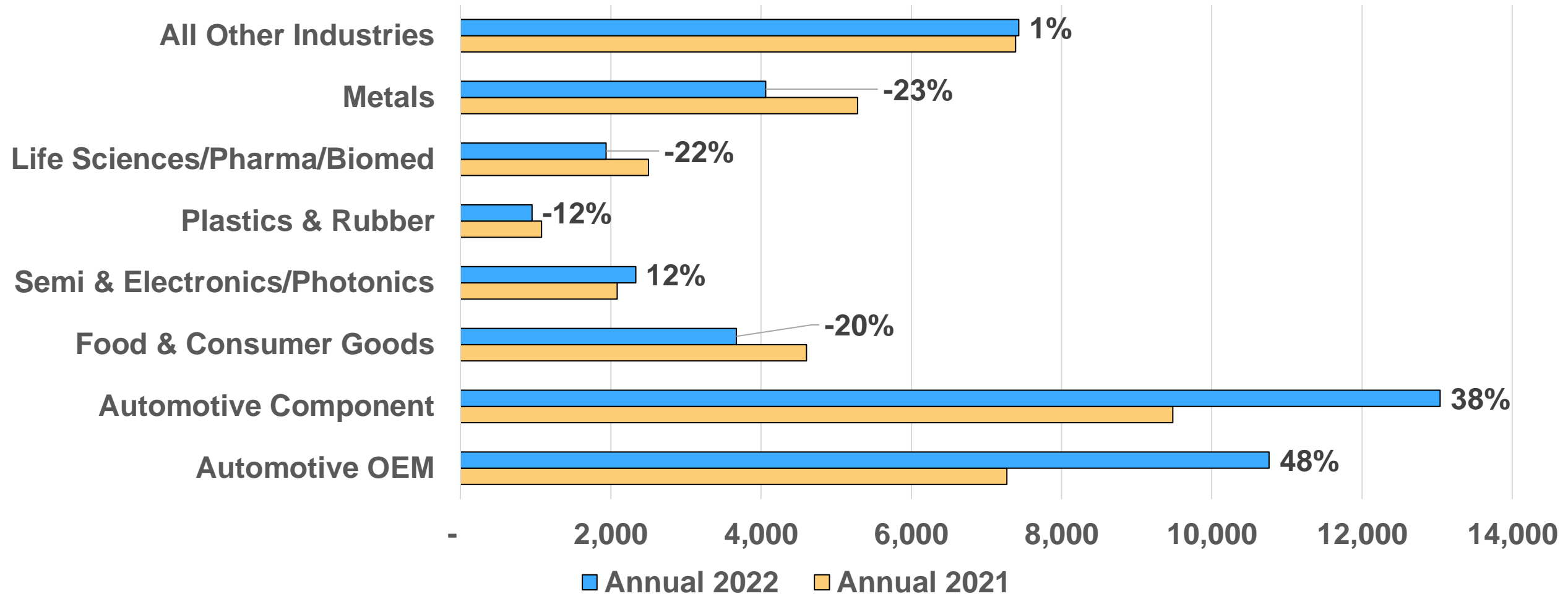
■ Auto ■ Non-Auto



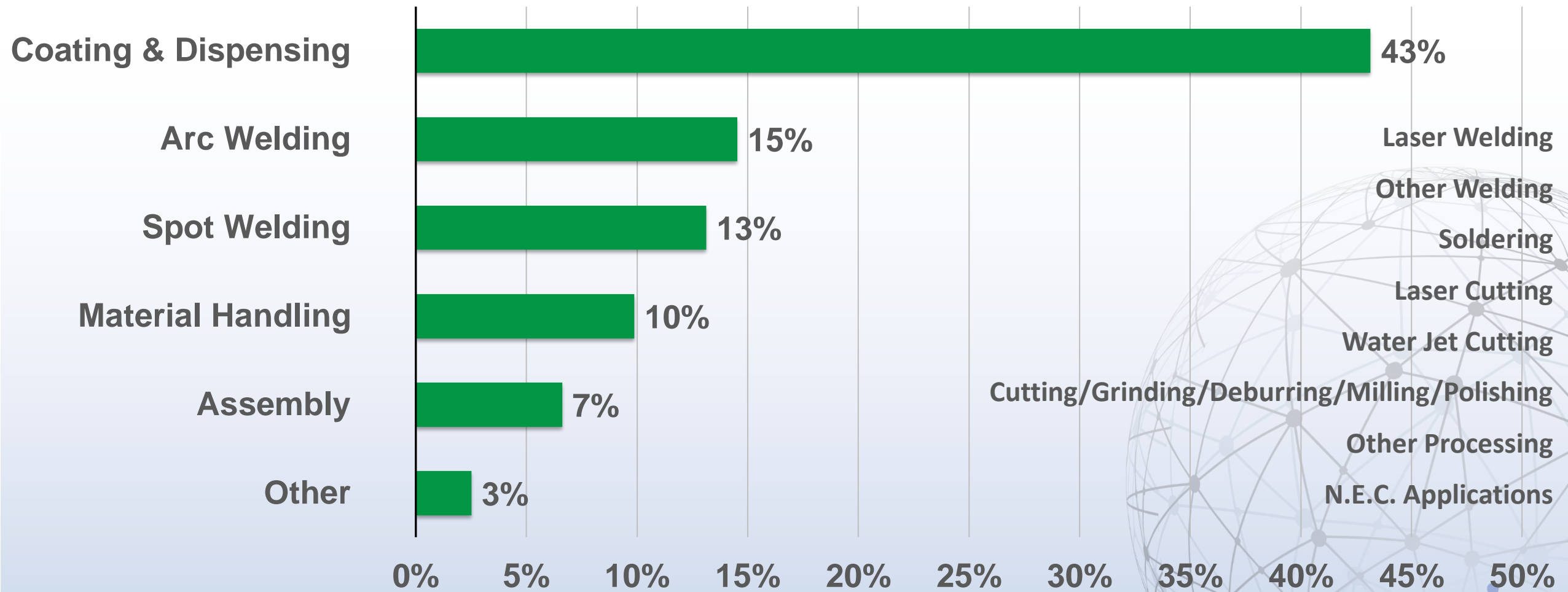
Annual Robotics Industry Growth (N.A.)



Annual Robotics Industry Growth (N.A.)



Annual Robotics Application Growth (N.A.)

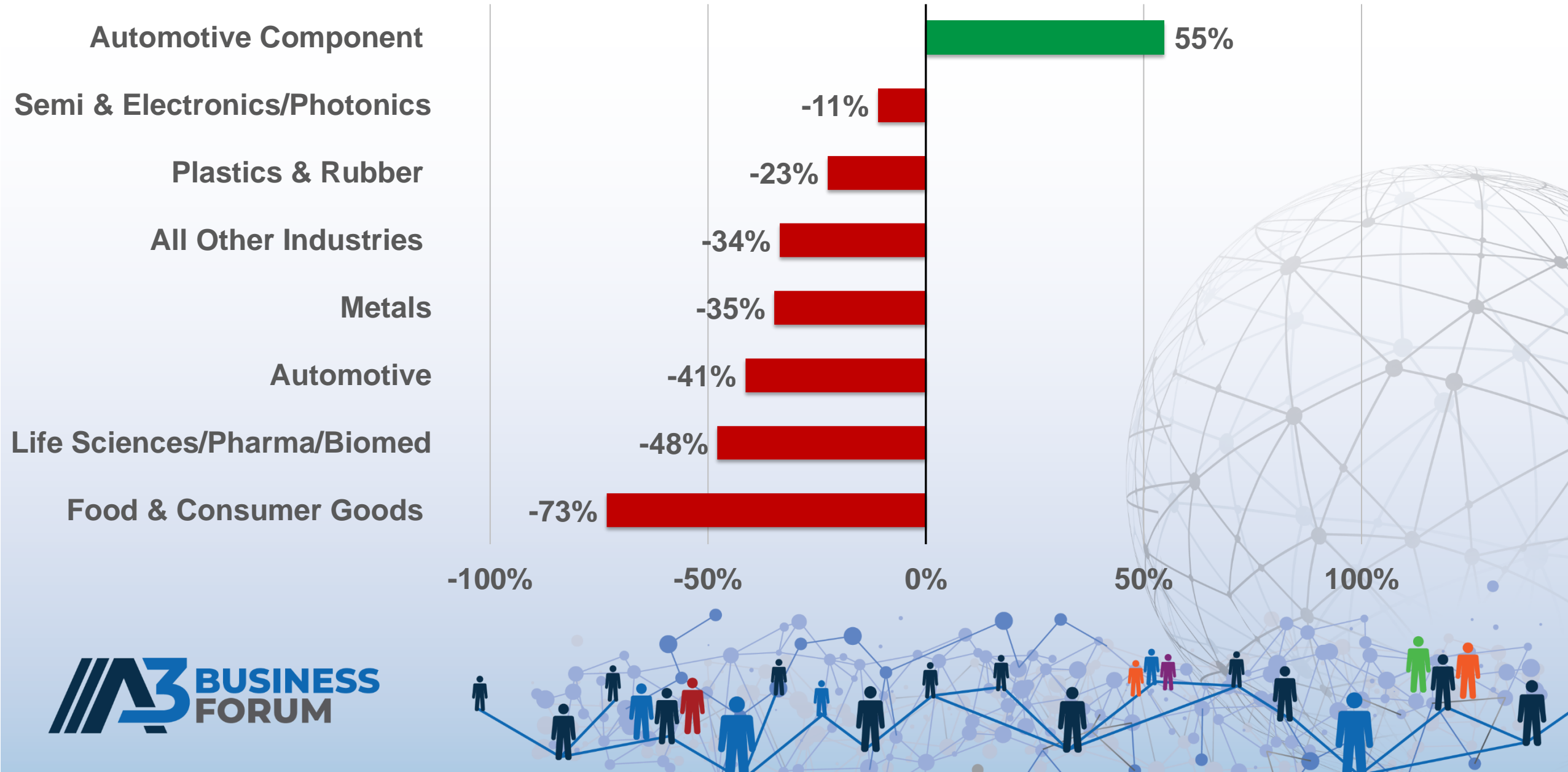


Q4 2022 Robotics Results (N.A.)

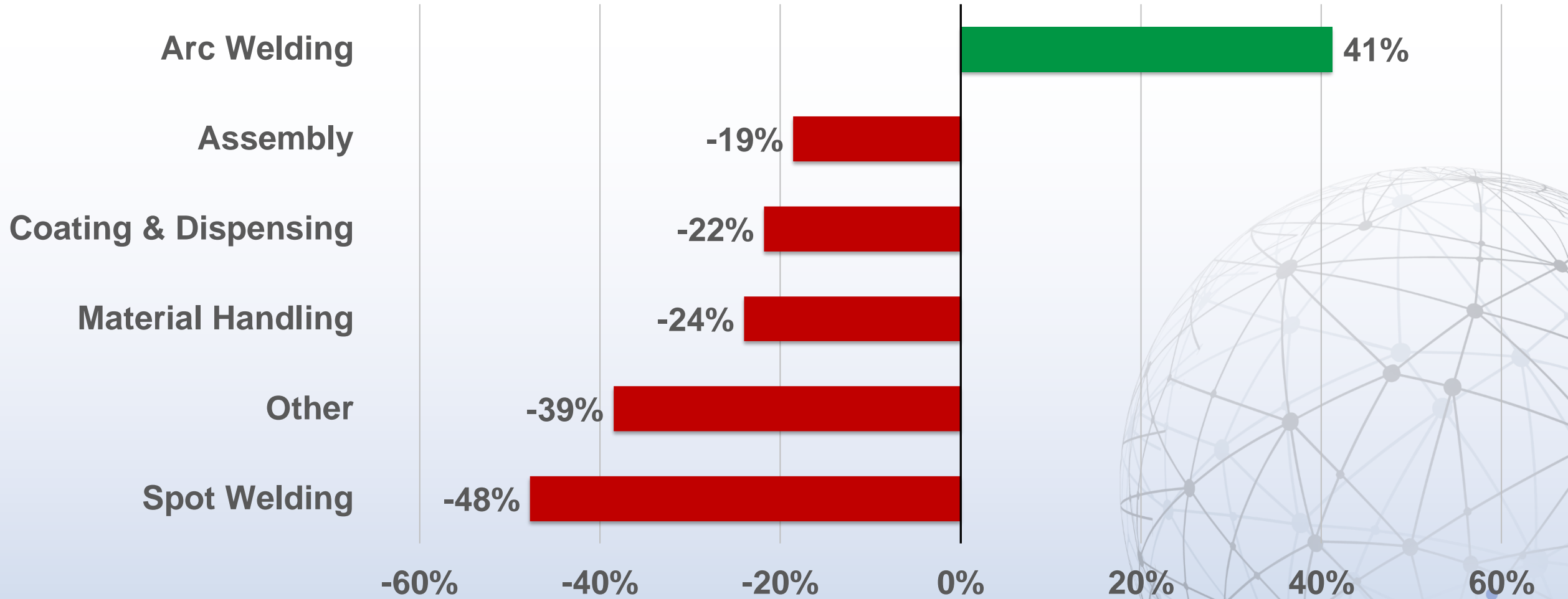
Quarterly Order Summary (North America)



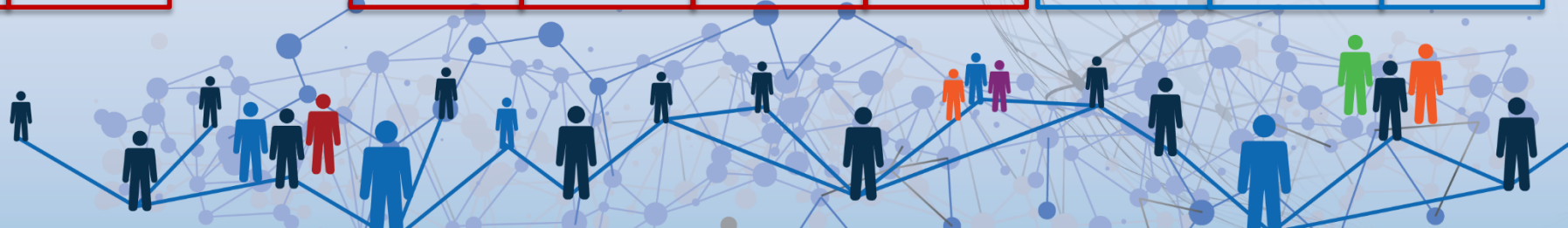
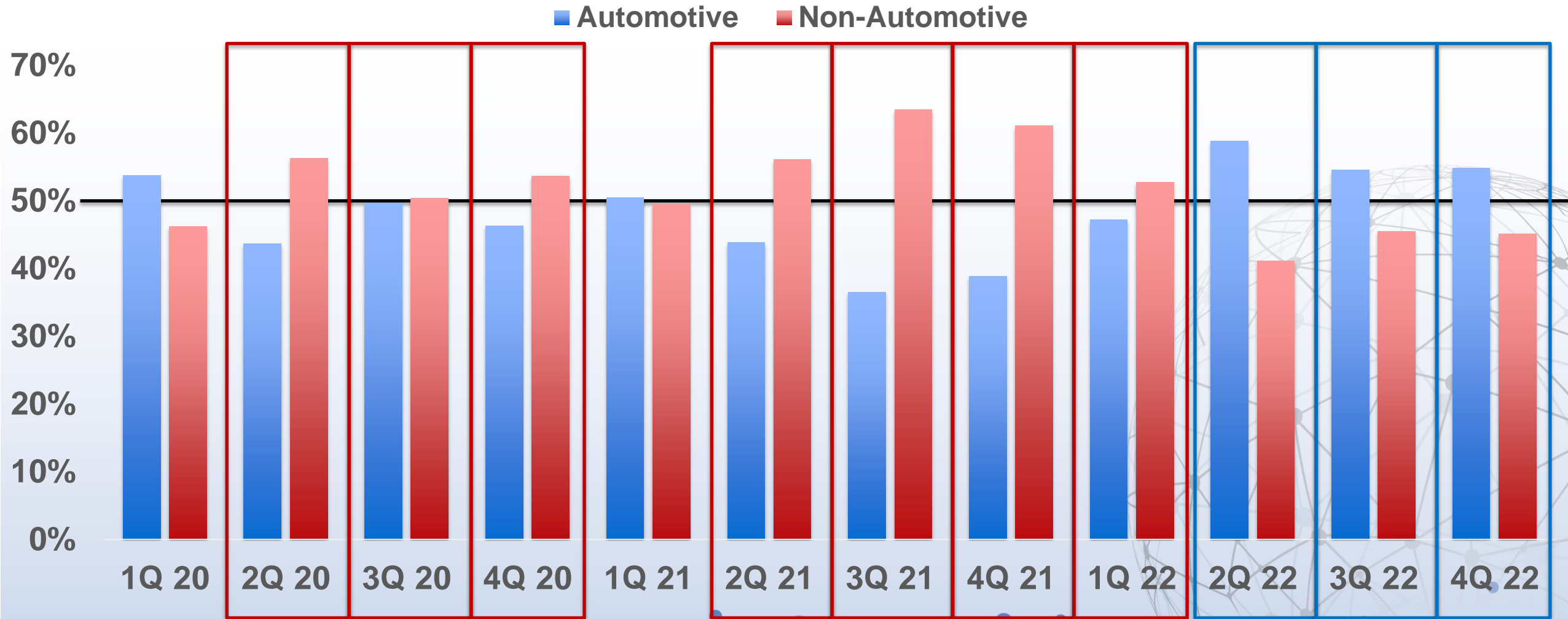
Q4 2022 Robotics Industry Growth (N.A.)



Q4 2022 Robotics Application Growth (N.A.)



Auto vs. Non-Auto (Quarterly, N.A.)

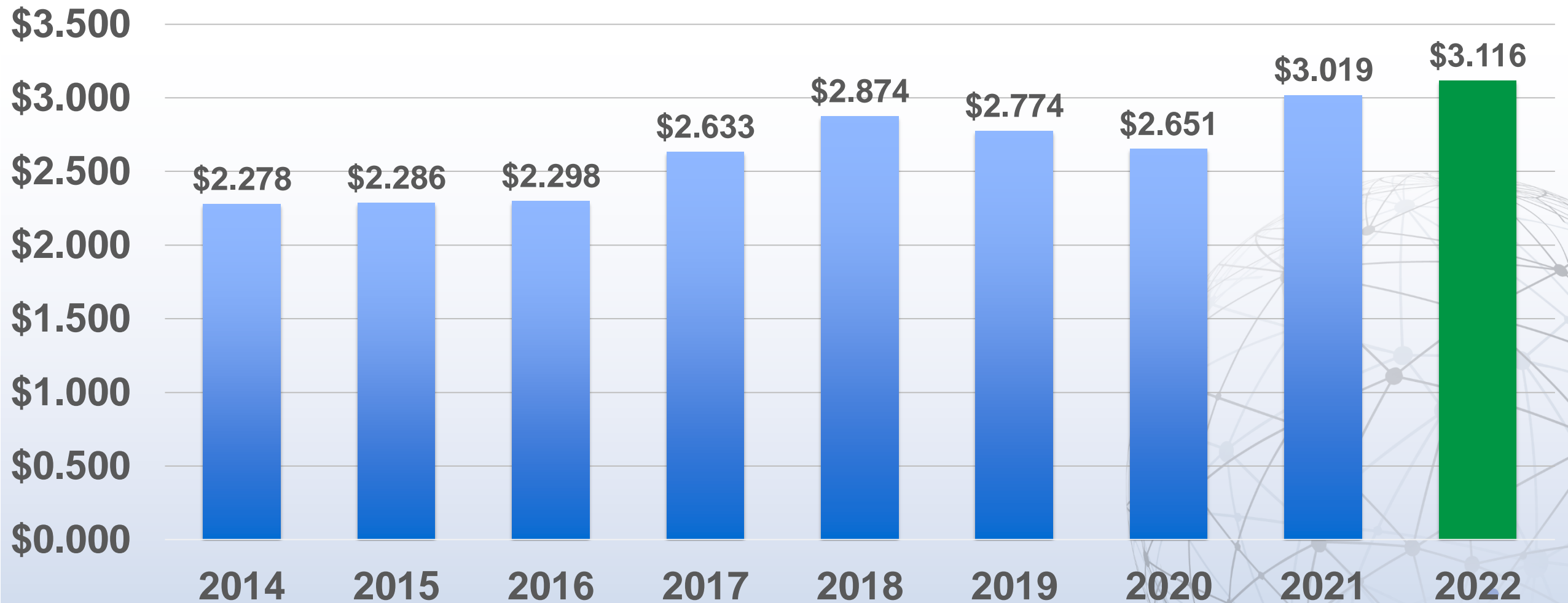


NORTH AMERICAN MACHINE VISION MARKET

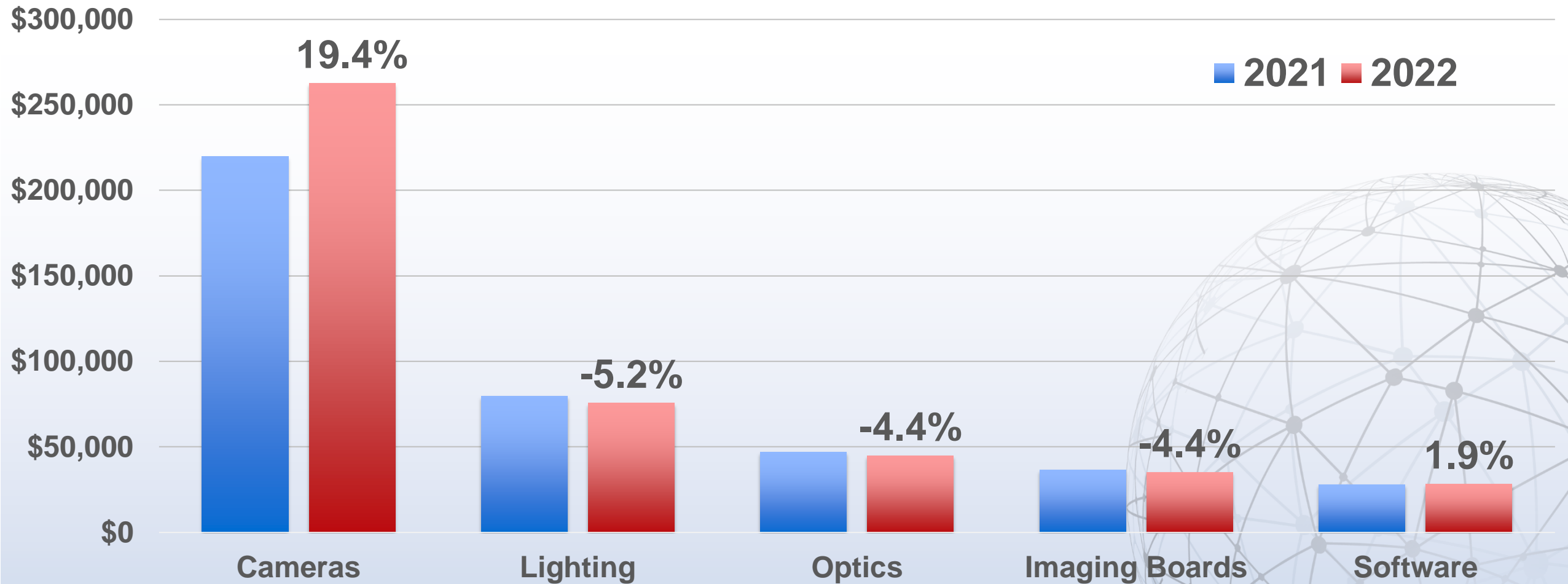


Machine Vision Market (N.A.)

+3%



Machine Vision Components (N.A.)



Machine Vision Systems (N.A.)

\$2,500,000

\$2,000,000

\$1,500,000

\$1,000,000

\$500,000

\$0

■ 2021 ■ 2022

-1.1%

15.2%

ASMV

Smart Cameras




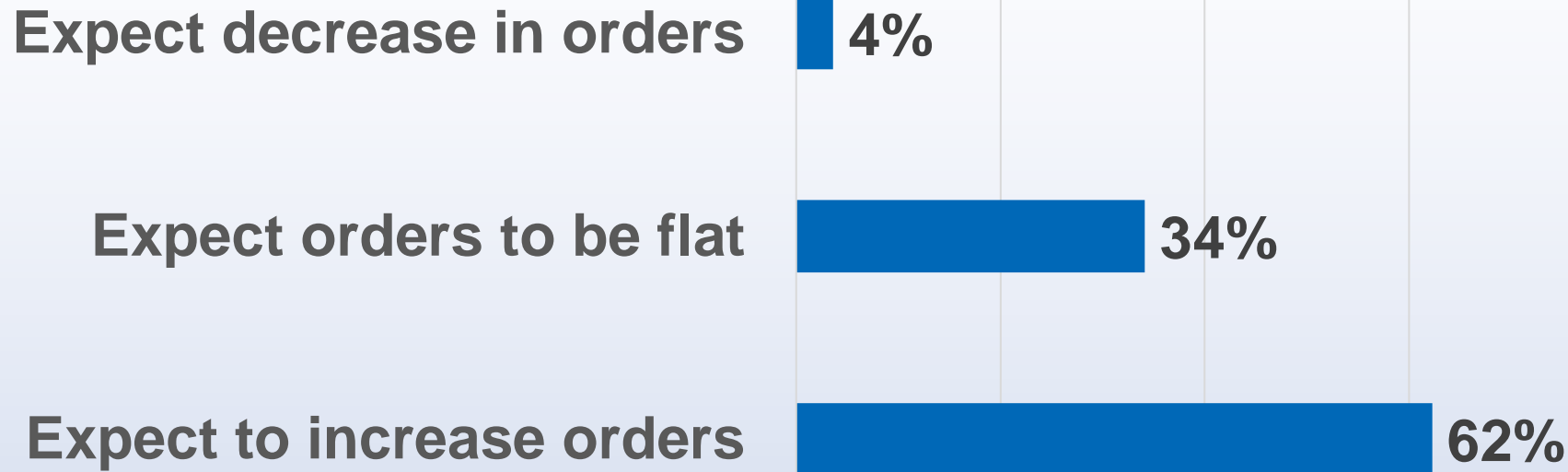
Machine Vision Market Sentiment

Markets	3rd Quarter 2022 (Jul 1 - Sep 30)			4th Quarter 2022 (Oct 1 - Dec 31)		
	UP	DOWN	FLAT	UP	DOWN	FLAT
MACHINE VISION COMPONENTS						
Cameras	4%	24%	73%	39%	27%	34%
Lighting	18%	20%	62%	41%	19%	40%
Optics	32%	3%	65%	33%	18%	49%
Imaging Boards	27%	60%	13%	16%	61%	23%
Software	81%	5%	14%	89%	4%	8%
Total Machine Vision Components	15%	23%	62%	40%	26%	34%
MACHINE VISION SYSTEMS						
ASMV Systems	13%	43%	44%	13%	33%	53%
Smart Cameras	10%	38%	52%	21%	7%	72%
Total Machine Vision Systems	13%	42%	46%	15%	27%	58%
OTHER MV (includes Integrator, Distributor and Sales not Identifiable by Market)						
Total Other Machine Vision Sales	23%	35%	41%	31%	37%	32%
TOTAL MACHINE VISION FINANCIAL TRANSACTIONS						
(Total Components + Total MV Systems + Other MV)	13%	39%	49%	19%	27%	54%



VSD+A3 Survey Results

Compared with the past 12 months, how do you expect your purchases of vision/imaging products to change over the next 12 months?



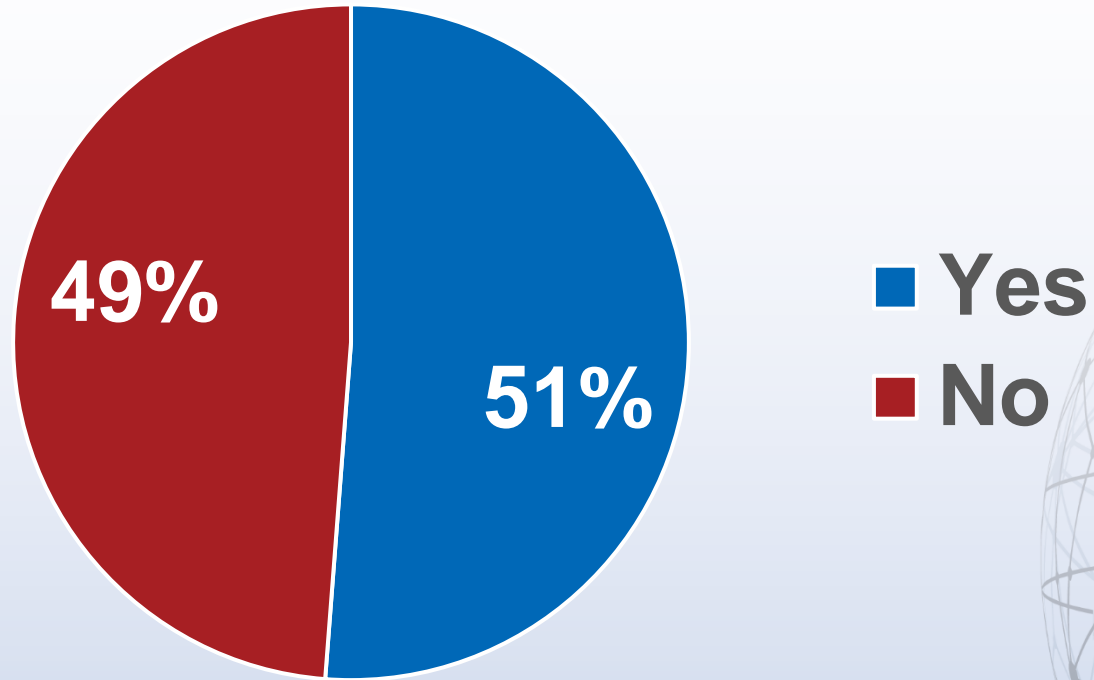
17.37% expect to increase over 20%
24.55% expect to increase 10% - 20%
20.36% expect to increase 10% or less

* 404 total survey respondents



VSD+A3 Survey Results

Is economic uncertainty impacting what vision/imaging products you specify for systems you design?

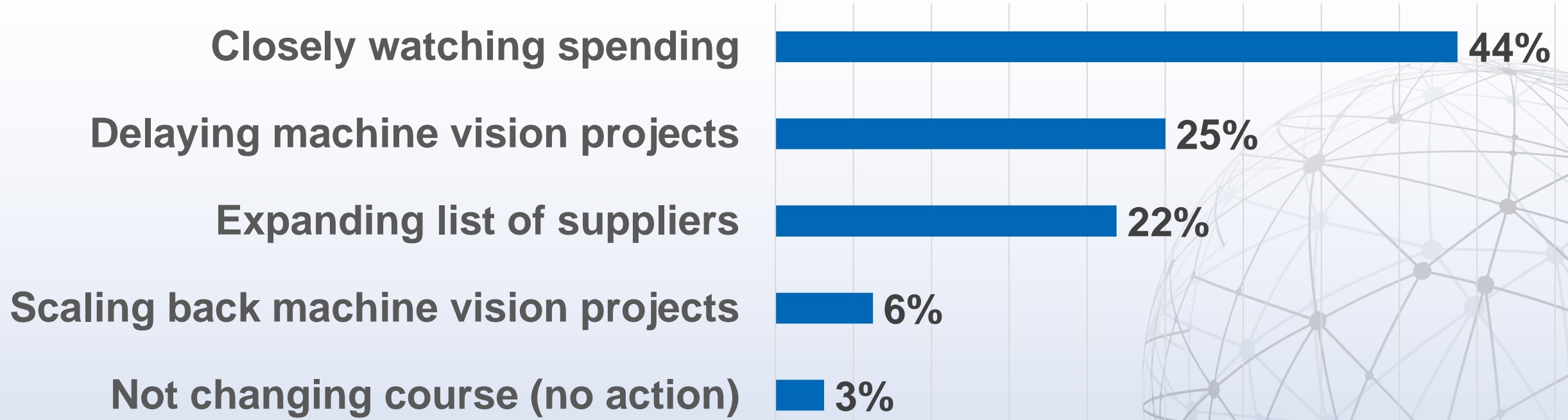


* 404 total survey respondents



VSD+A3 Survey Results

What actions will your organization take as a result of economic uncertainty?



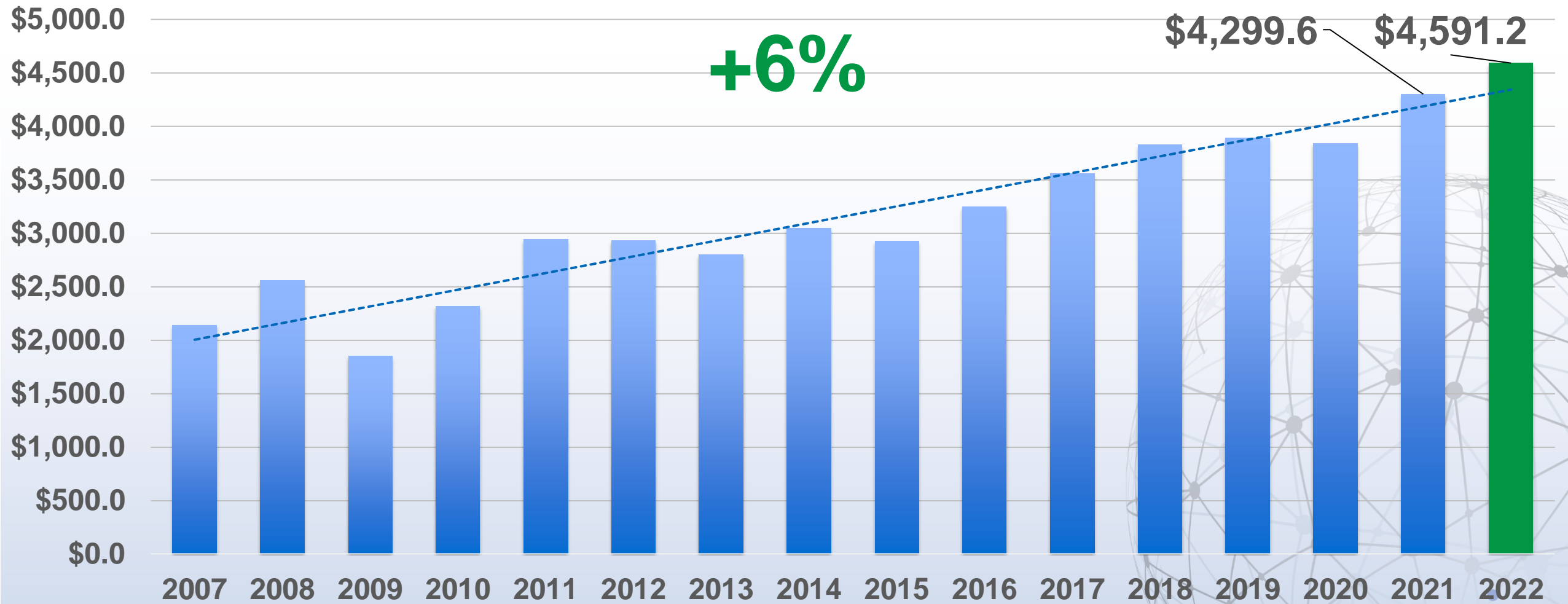
* 404 total survey respondents



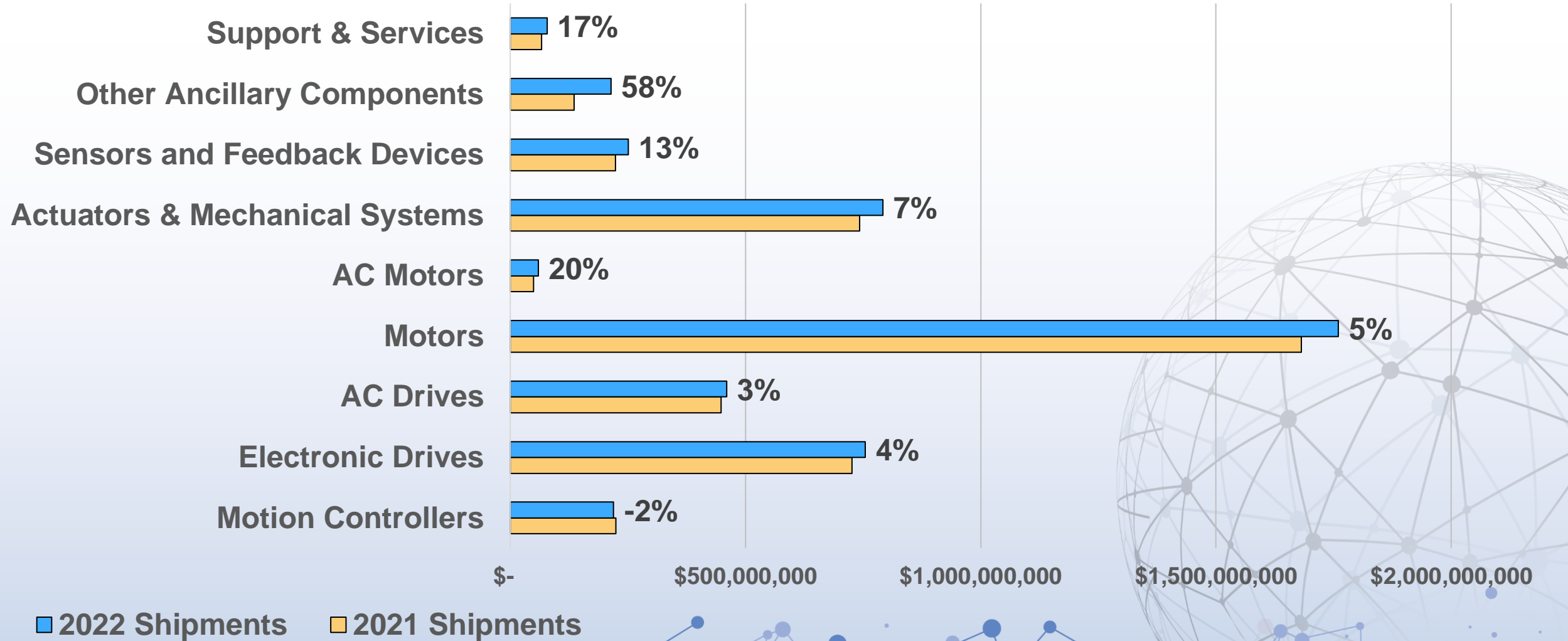
MOTION CONTROL & MOTOR MARKETS



Motion Control & Motor Shipments



Motion Control & Motor Shipments



■ 2022 Shipments ■ 2021 Shipments



Thank you!

A3

THE TIME IS NOW

Exclusive
A3 Members-Only
BENEFIT!



Inspiring
intelligent insight

Quarterly Sentiment Survey

*Scan the QR code to
take the survey now!*



Visit our website

*to learn more and access
these benefits today:*



FREE A3 MEMBER SERVICES

Industrial Automation Product Tracker (Bronze Members Edition)

- **FREE** to A3 Bronze members
- Quarterly updated
- Annual market sizes & forecasts to 2026 for “primary” automation products*
- Americas data only

Industrial Automation Product Tracker (Silver/Gold/Platinum Members Edition)

- **FREE** to A3 Silver/Gold/Platinum members
- Quarterly updated
- Annual market sizes & forecasts to 2026 for “primary” automation products*
- Americas / EMEA / APAC data

DISCOUNTED A3 MEMBER SERVICES

Industrial Automation Product Tracker (Premium Edition)

- \$4K annual subscription
- Quarterly updated
- Annual market sizes & forecasts to 2026 for “primary” automation products and “deeper” sub-segmentations*
- Americas / EMEA / APAC data

Sentiment Surveys

- **FREE** to ALL A3 Members
 - Quarterly updated
 - Considering pricing trends, lead-time status, short-term outlook, book-to-bill ratios, plus more
 - Identifies the short-term sentiment of the market from quick member surveys

Manufacturing Industry Output (MIO) Tracker (Summary Report)

- **FREE** to ALL A3 Members
 - Quarterly updated
 - Summary report provides insight into the global outlook for manufacturing and machinery production at a macro-level with long-term forecasts to 2026

MIO Tracker (Full Report) + Core Reports + Topical Reports

- Offered at substantial discounts to all A3 members
- Annually updated
- Provides highly-granular market sizes & forecasts for automation products with “tertiary-level” data by industry and country to 2026



Thank you!

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