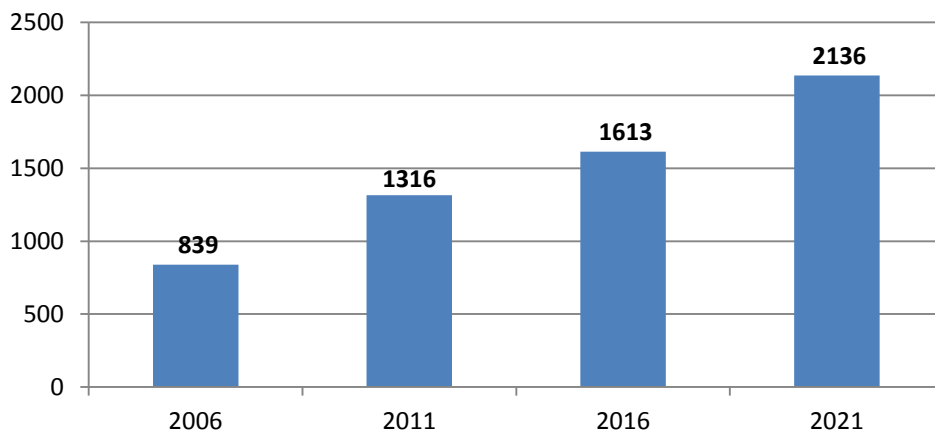




Germany is the largest market for robots in Europe and the fifth largest in the world. Despite the already high level of robot density in Germany the market has been growing by an average of 9% yearly (CAGR) between 2010 and 2014. The automotive industry is the main driver with the highest demand for **industrial robots** resulting in an expected revenue of 1.6 billion Euro in 2016 which is projected to grow further to more than 2.1 billion Euro in 2021.

In addition to the **automotive** area also the sectors **metal and machinery, food and beverages, as well as electronics** offer potential for industrial robots. Apart from these also **service robots** in commercial environments such as logistics or agricultural sector and robots for cleaning or **entertainment** in private households have experienced growing revenue as well as numbers sold. 3 million service robots have been sold 2014 which is an increase of 28% in comparison to 2013.

Demand of industrial robots in Germany in million Euro



Demand of industrial robots in Germany in million Euros. Source: Statista,

The ongoing trends in the robotics focus on three main sub-markets:

Future market for private household and service robots

The main driver for the success of service robots are machines that relieve people of monotonous and boring tasks. Helpers for house and garden are in high demand and between 2015 and 2018 the expected demand is 35 million units. 25 million are service robots and 9 million are entertainment and leisure robots. A huge future market in the private sector will be the area of assistive robots especially for senior citizens of the ageing population.

High demand for service robots in commercial environments

The amount of robots in commercial environments has grown from 21.700 to 24.200 units between 2013 and 2014. The largest share with 45% for service robots is the defence sector followed by agricultural uses. 15% of the robot suppliers are start-ups and have been on the market for less than 5 years.

Collaborative robots in industry

Germany is the largest market for industrial robots in Europe and through the advances in Industry 4.0 and digitization projects collaborative robots will become reality and create a completely new market.

In summary

Changes in technology and population will open and create new markets for robots for established companies as well as start-ups. Denmark is the world's best test market and Danish companies can use this advantage to develop and sell robots, services and technologies for these new and evolving markets in Germany.