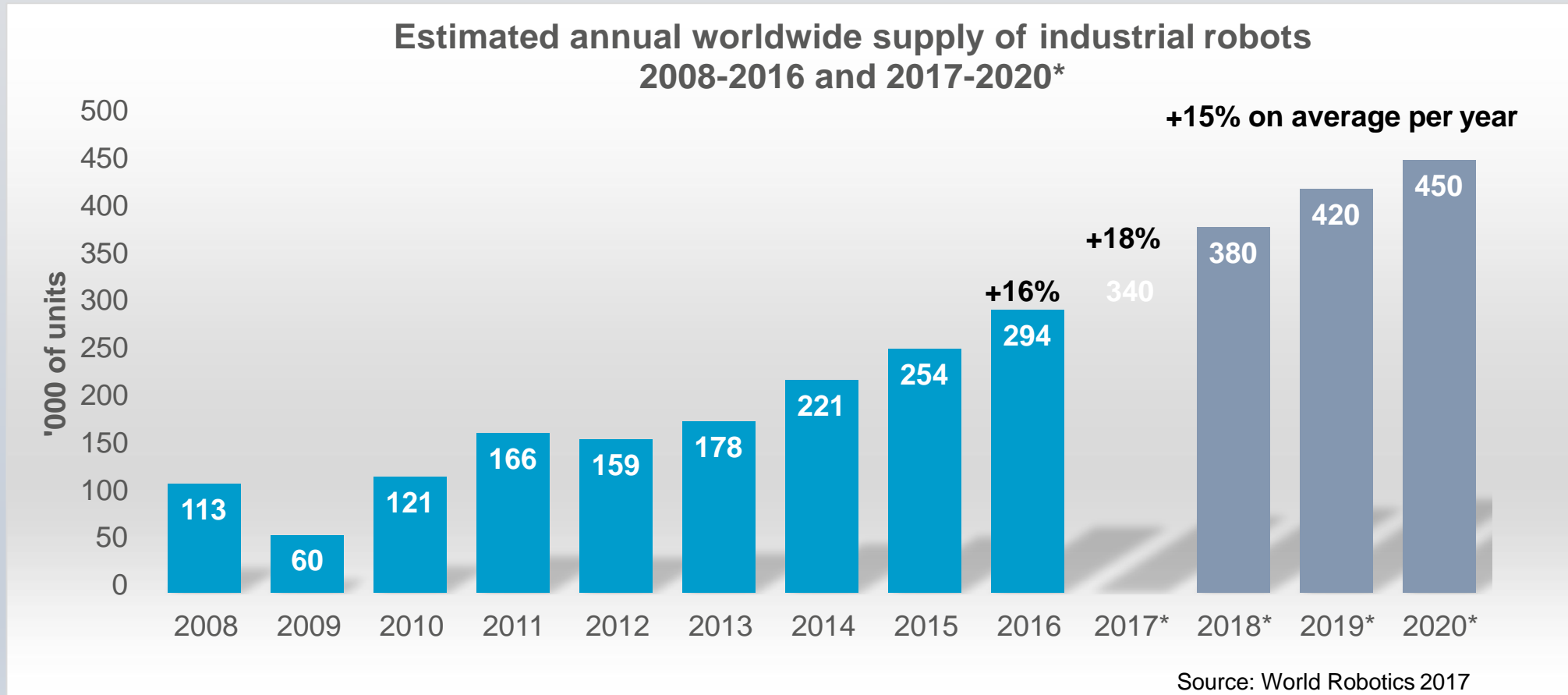
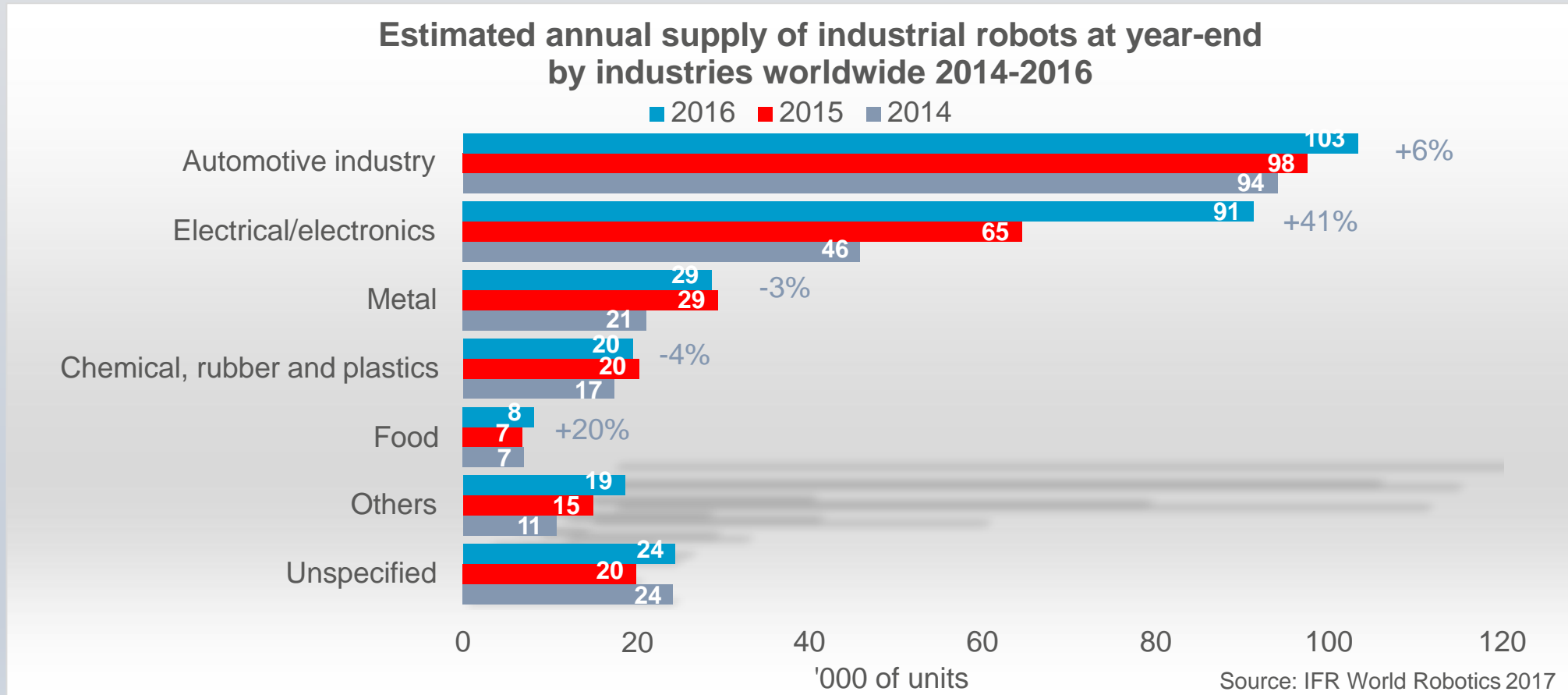


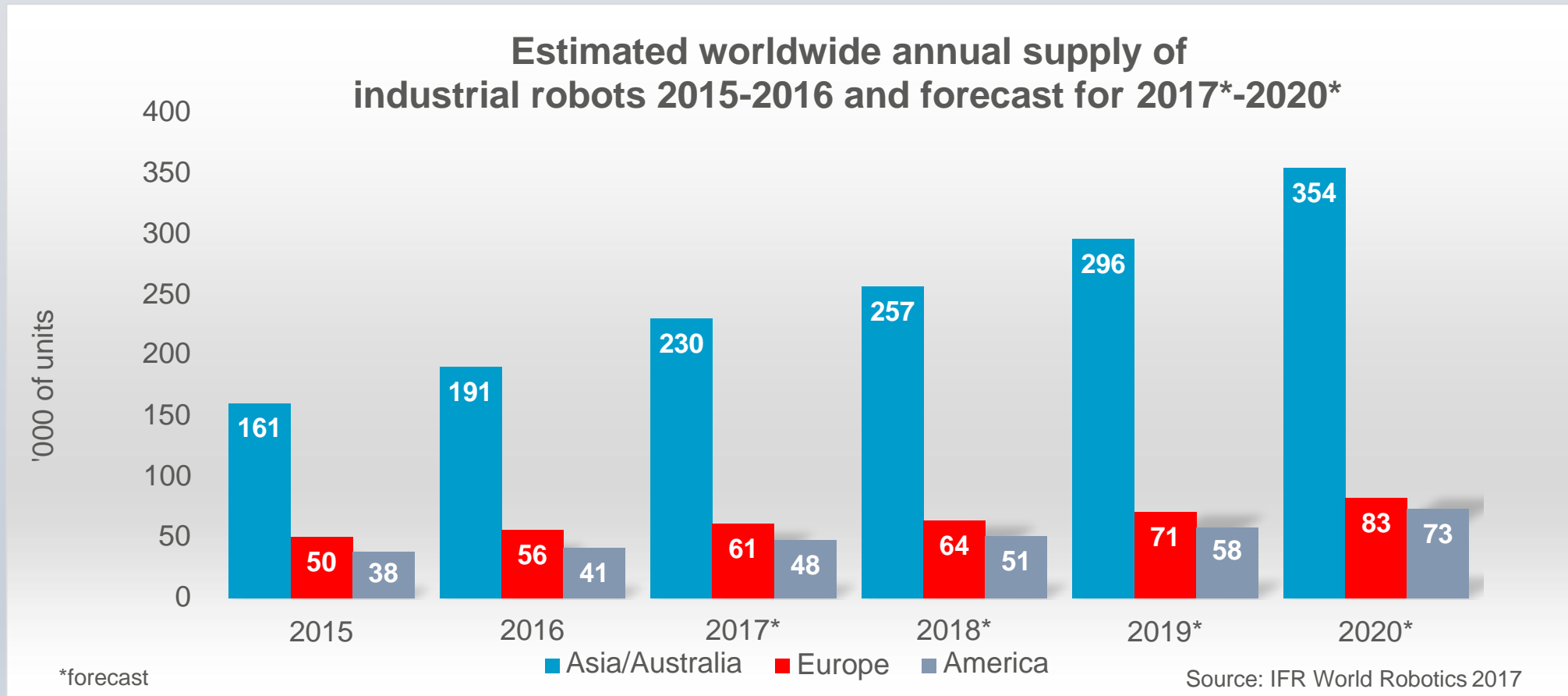
# Global robot installations: high double digit growth rates



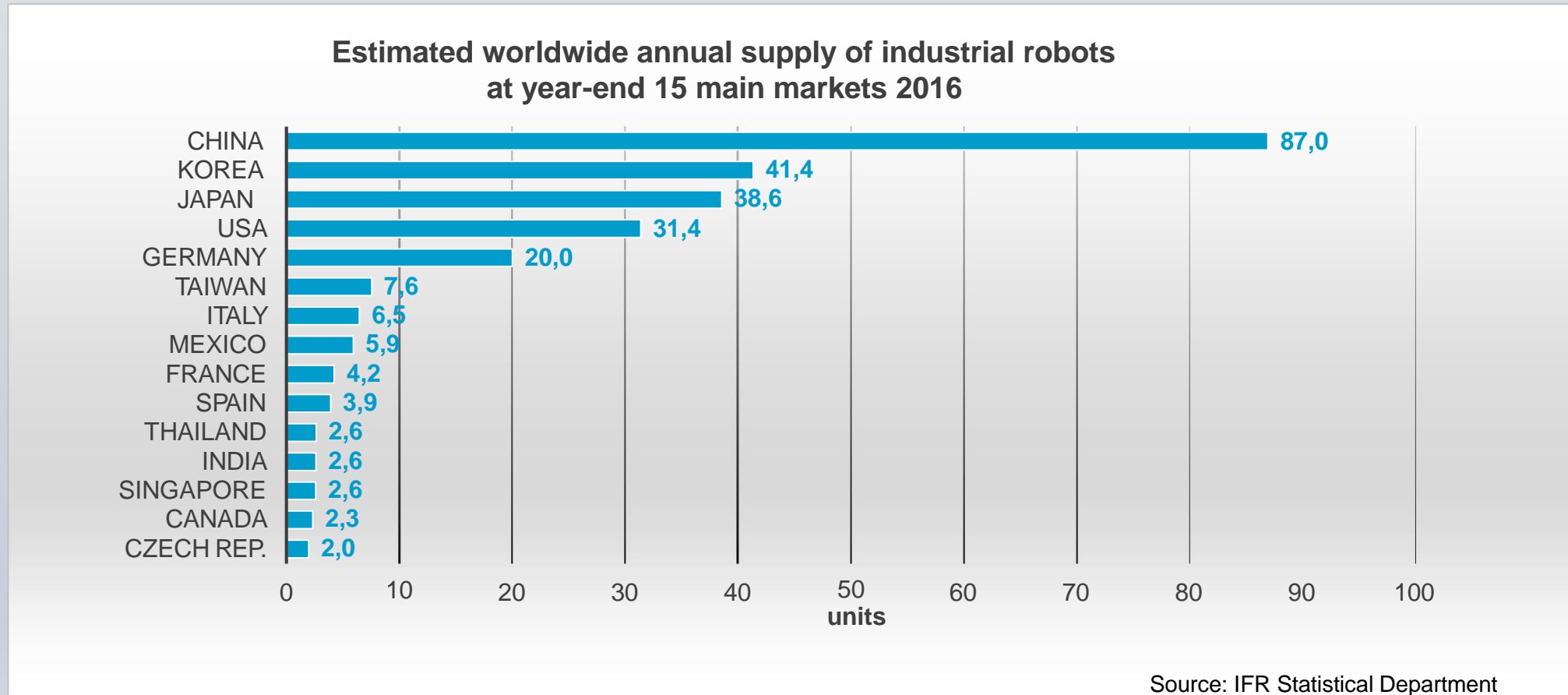
# Electronics industry has become the main driver of the growth



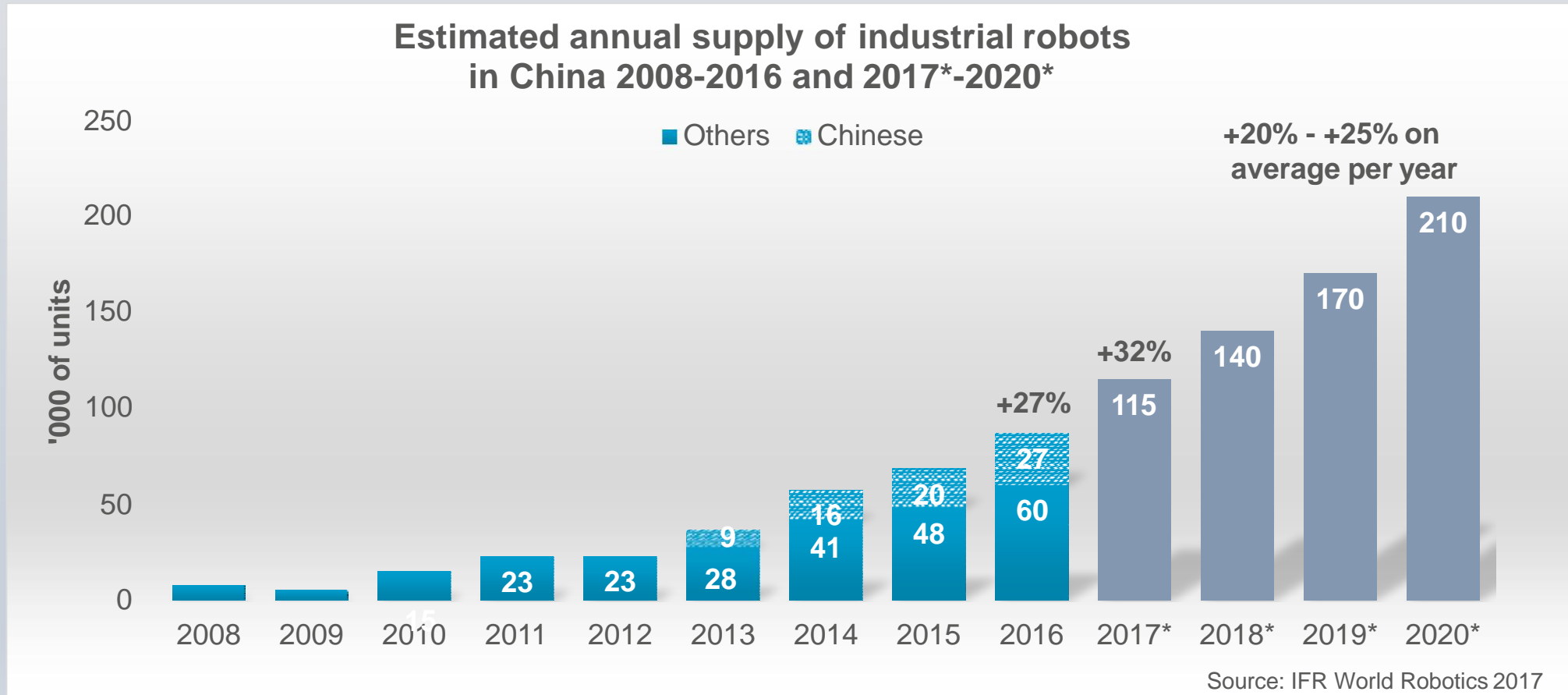
# Main driver of the growth: Asia



# 2016: 5 markets account for 74% of total supply

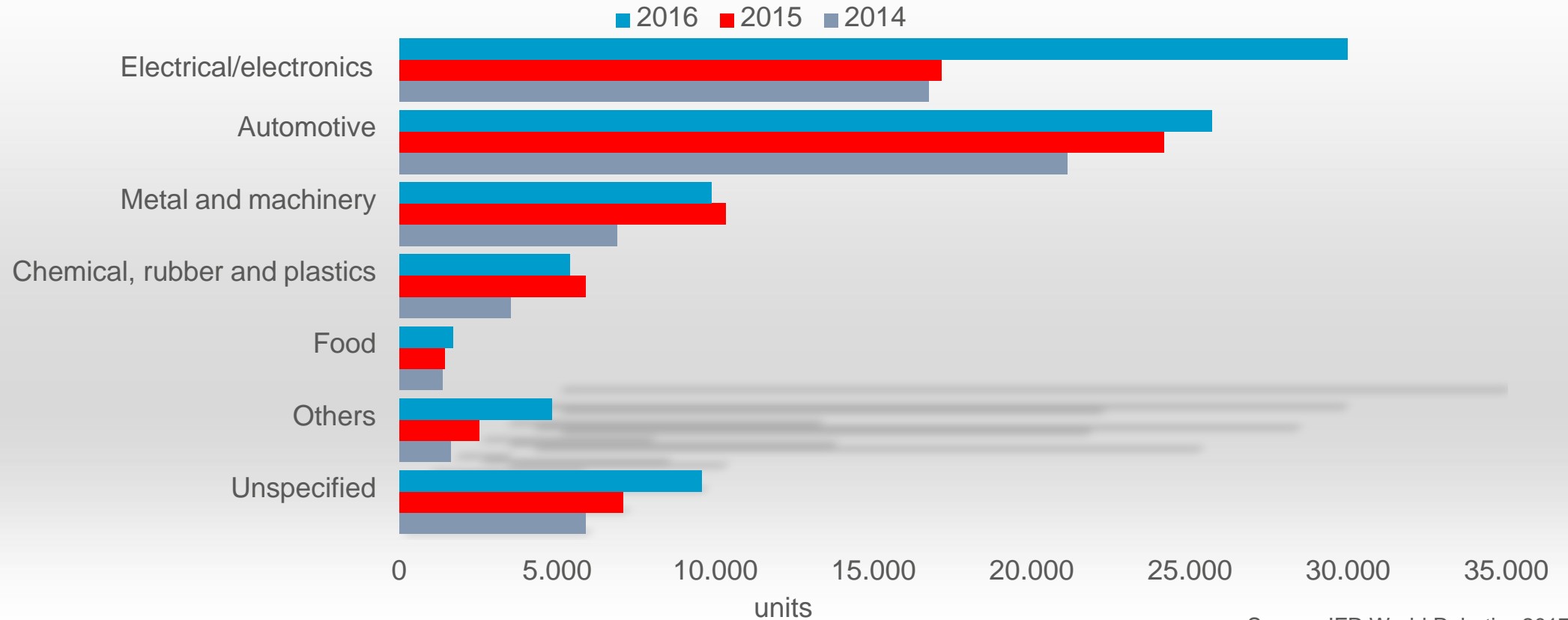


# China: 40% of the global supply by 2020

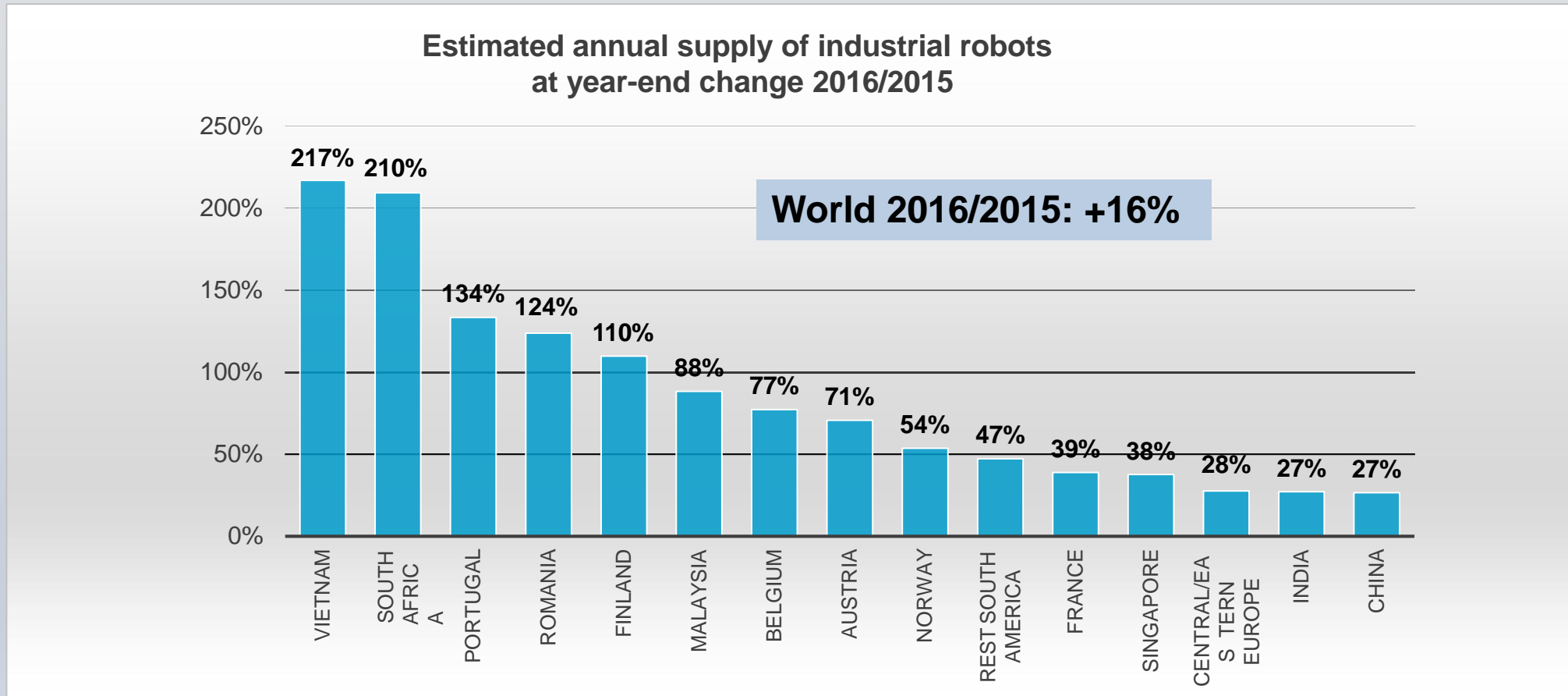


# China: Electronics industry became the most important customer and growth driver

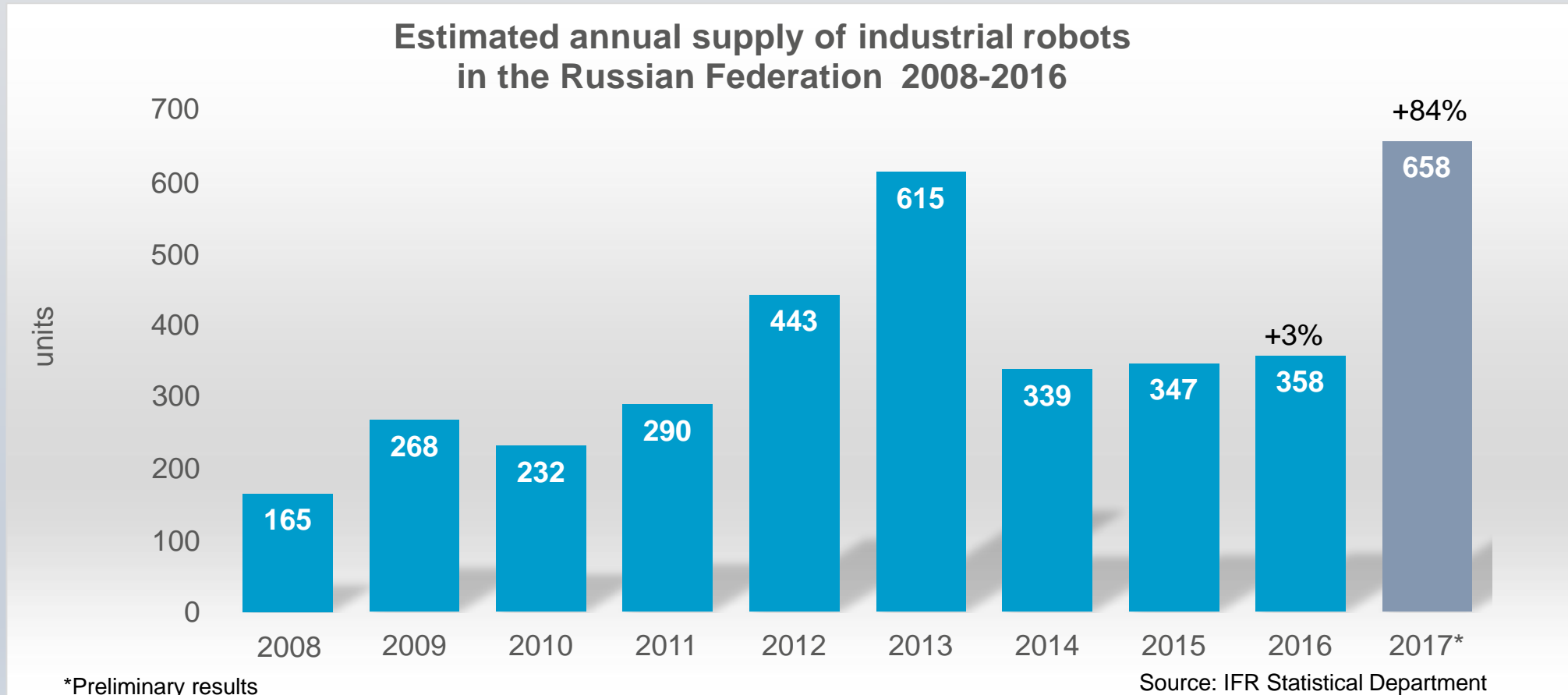
Estimated annual supply of industrial robots at year-end in China by industries 2014-2016



# Highest growth rates in 2016

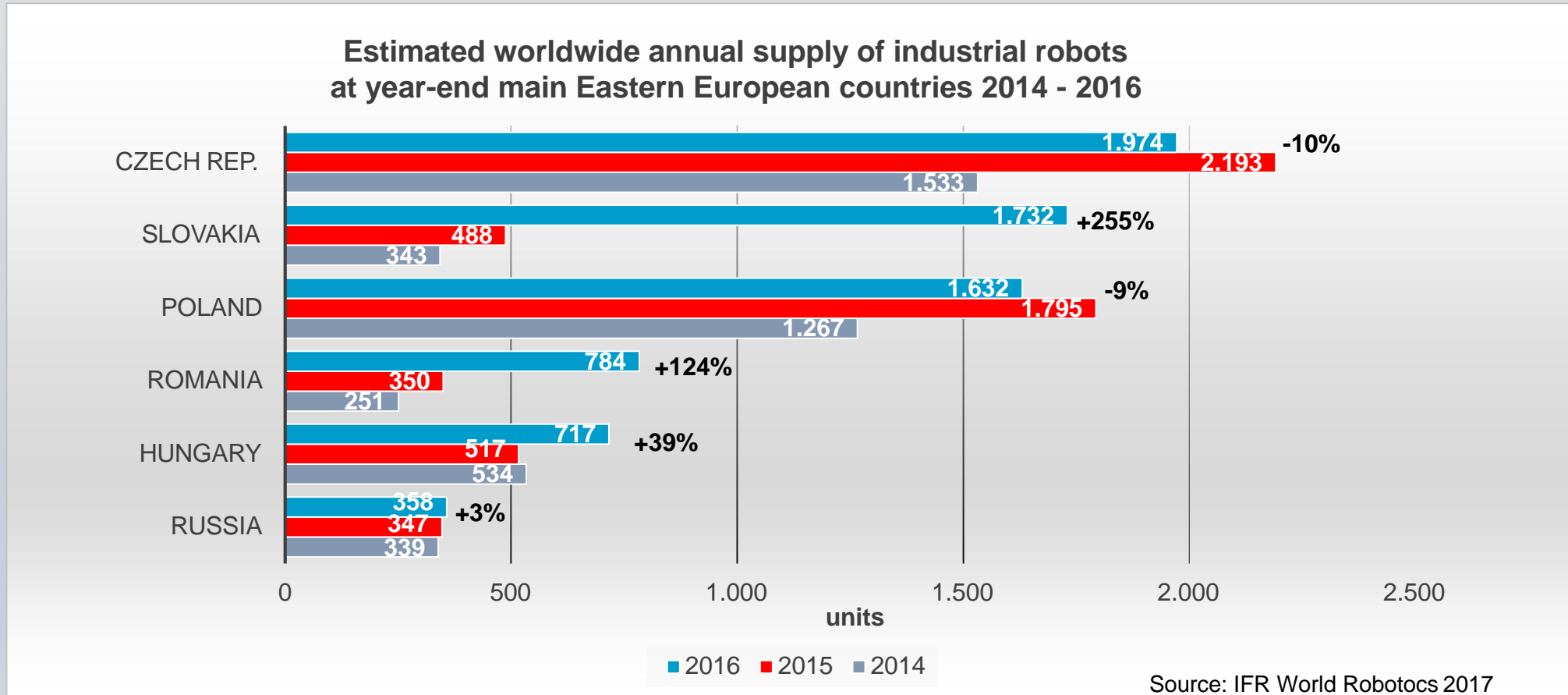


# Russian Federation: significant increase in 2017 but still comparable low number of installations

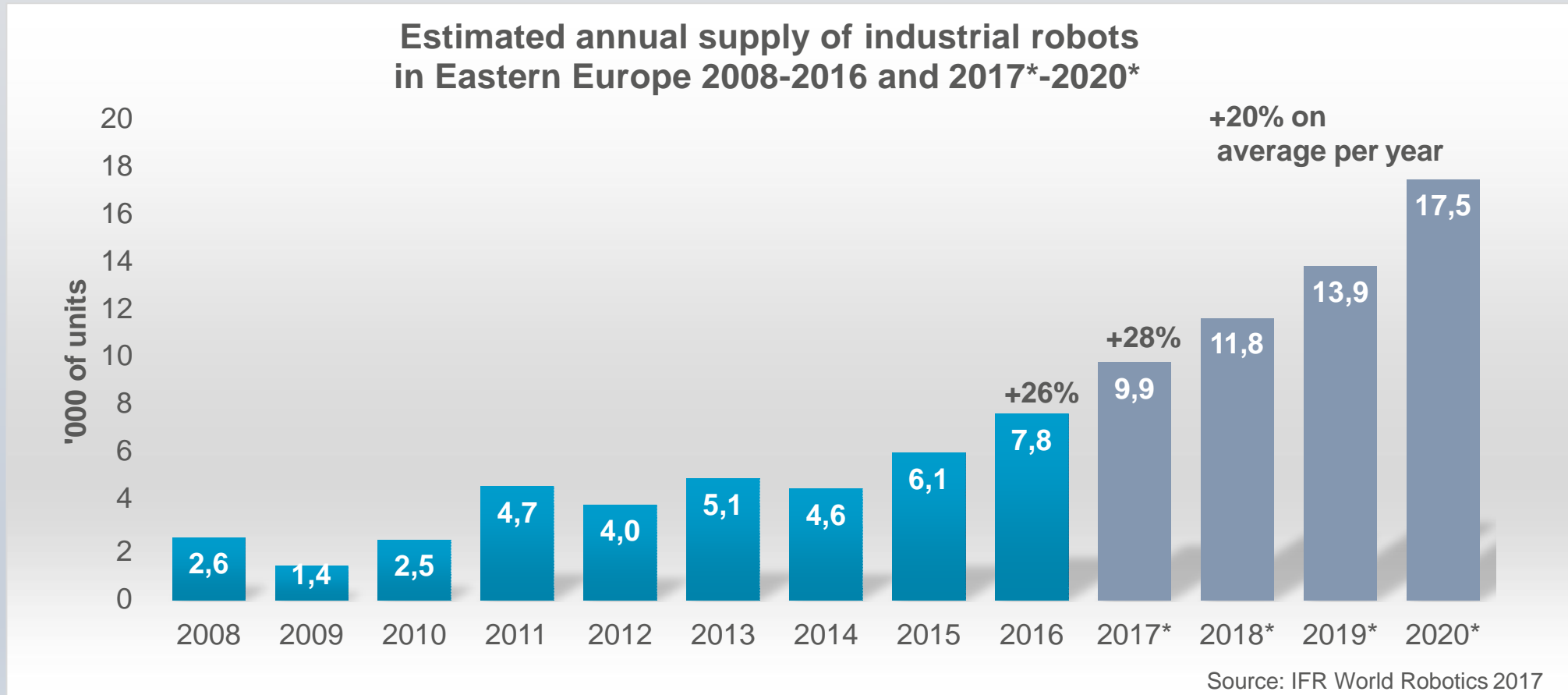




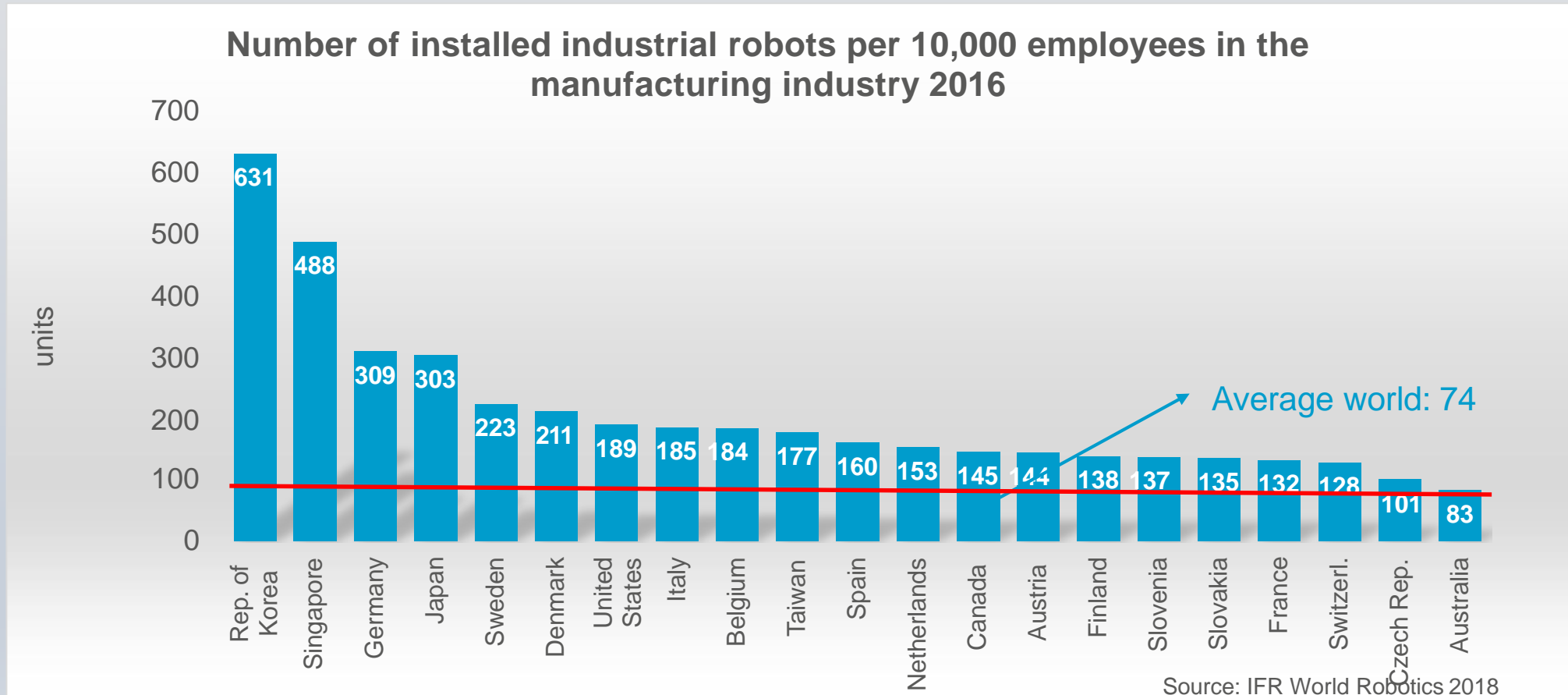
# Considerable higher volumes in other Eastern European countries



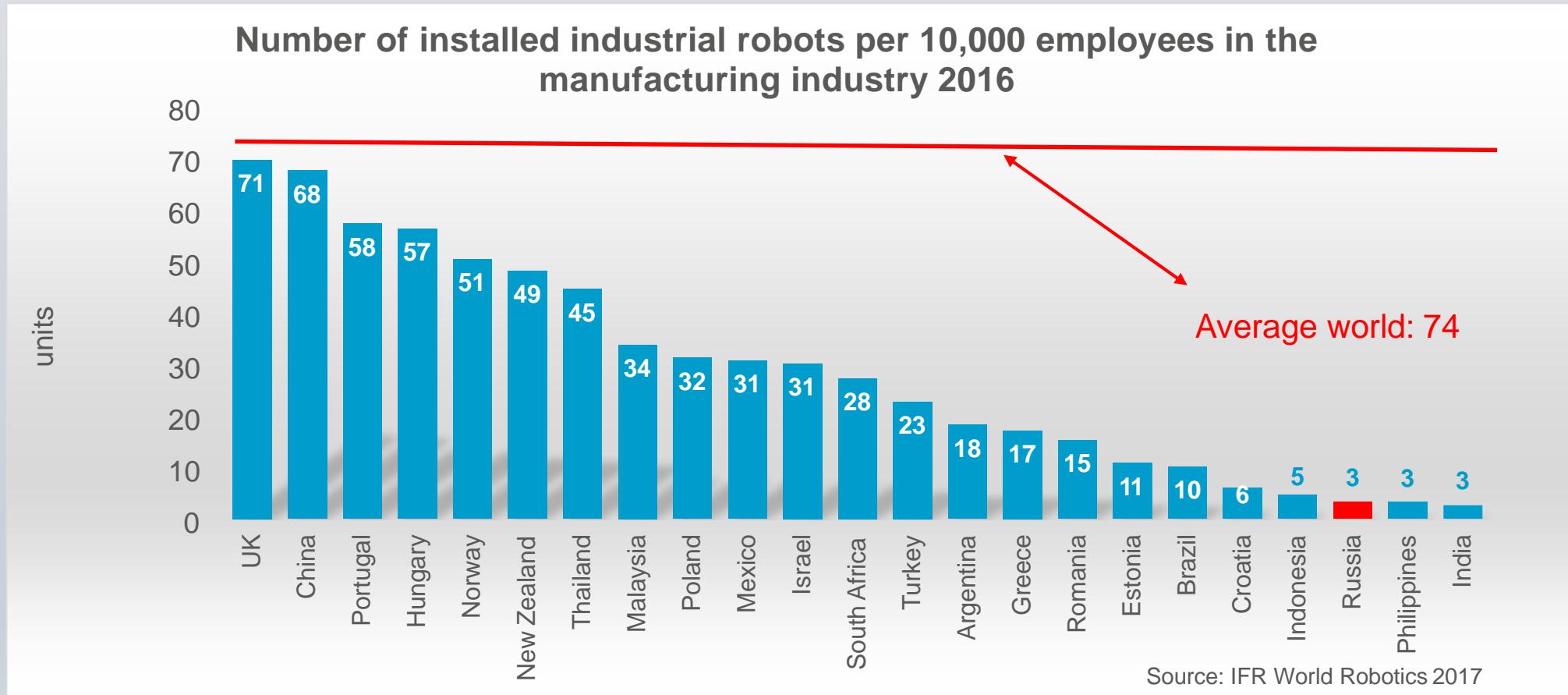
# Continued considerable increase in Eastern European countries expected



# Rep. of Korea: by far the highest robot density



# High potential for robot installations in the Russian Federation



# Incentives for robot installations in the Russian Federation

- **Large and growing domestic market for consumer products**
- **High demand for modernization of production facilities and new production facilities:**
  - Major investments of the aluminium industry
  - The aviation and aerospace industry is investing in engine construction
  - Petrochemical industry
  - Energy industry
- **Foreign investments in new production facilities, e.g. the automotive industry**