

VISION 2010 specialist press conference 07.07.2010, Tübingen, Germany

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Recovery across the board

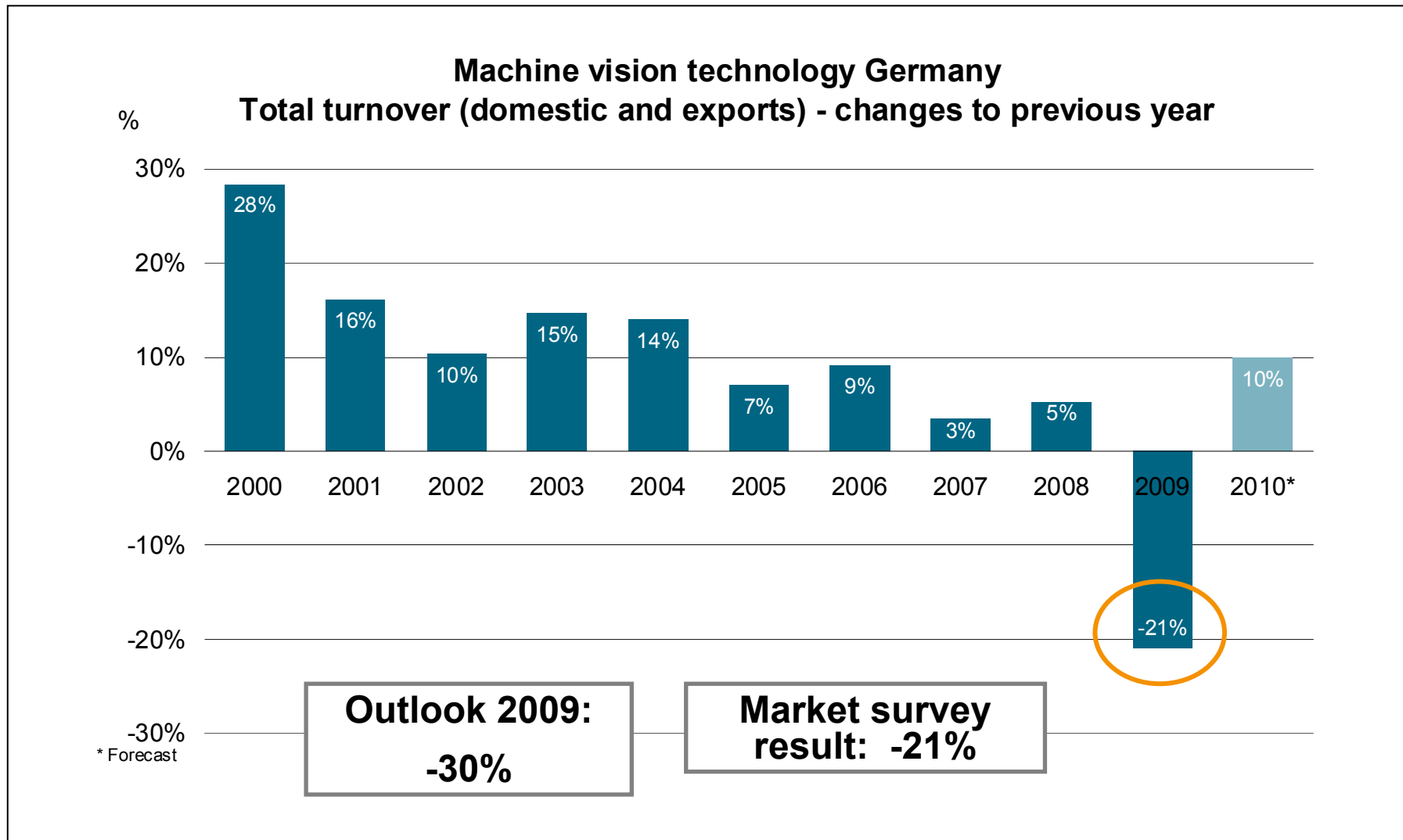


2010: Better than expected

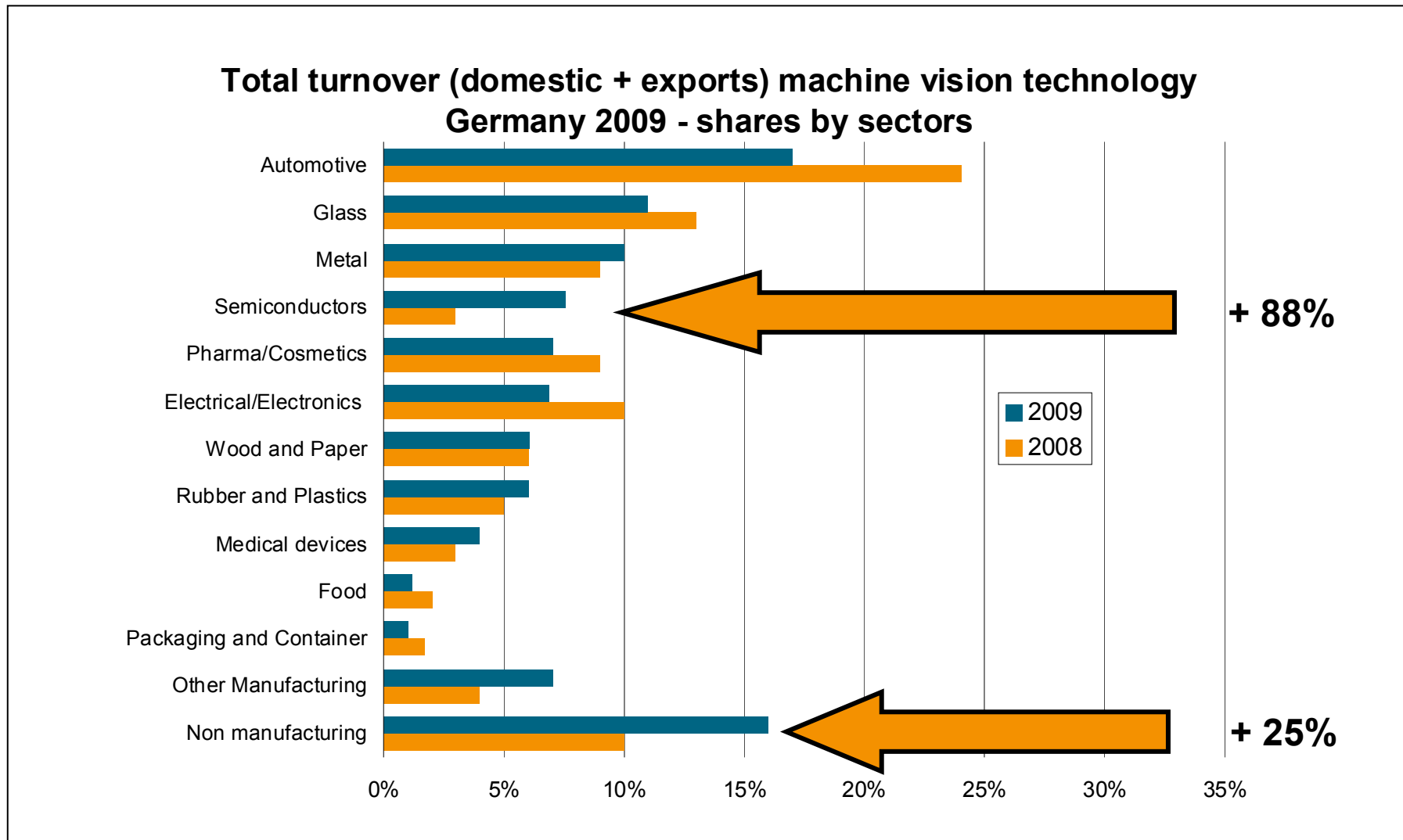
“Strong growth impulses in first half of 2010 mark the beginning of a recovery in the machine vision industry right across the board. We are leaving the crisis year of 2009 behind us.”



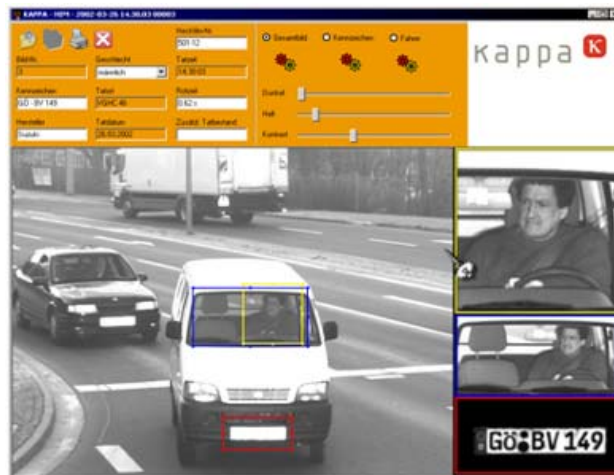
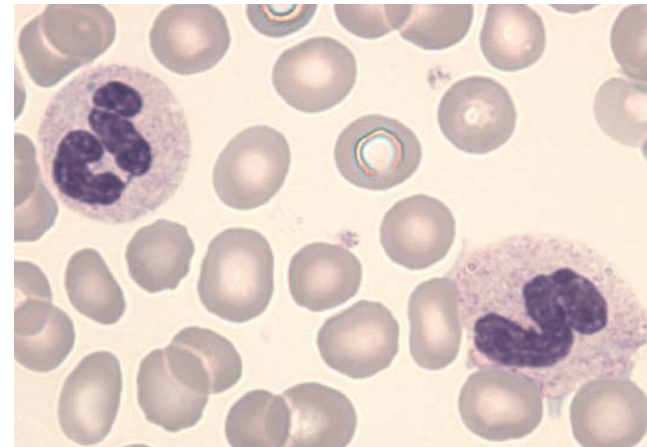
2009: Not as bad as expected



Growth even in crisis year: non-industrial applications and photovoltaics



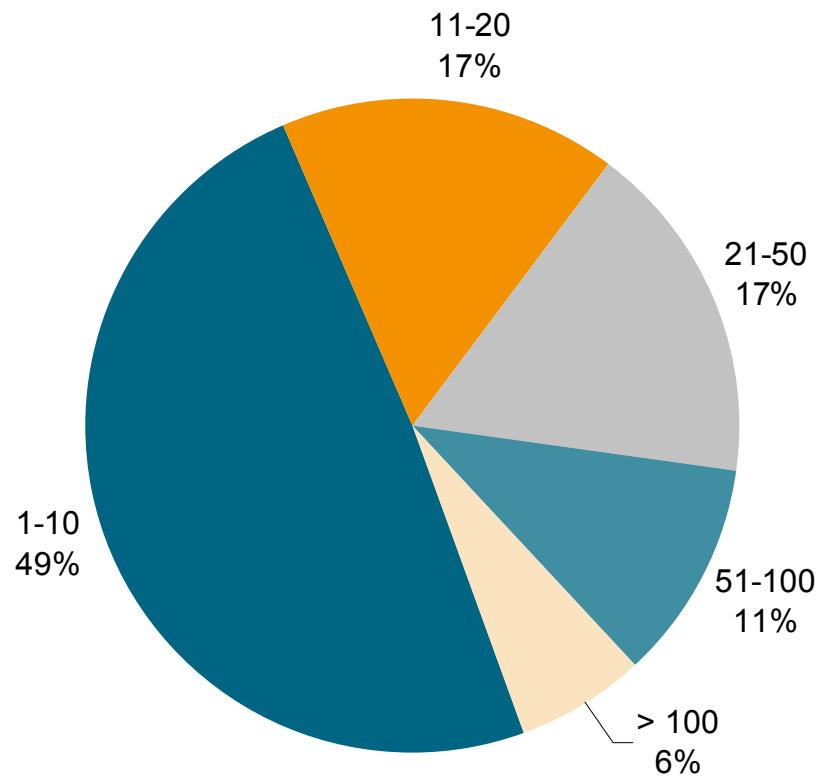
Non-industrial applications: sport, traffic, safety, etc.



Despite the crisis: Highly qualified personnel kept on

Structure of machine vision companies in Germany 2009
Shares of companies by employees in the machine vision sector

Average number of employees: 32



Source: VDMA

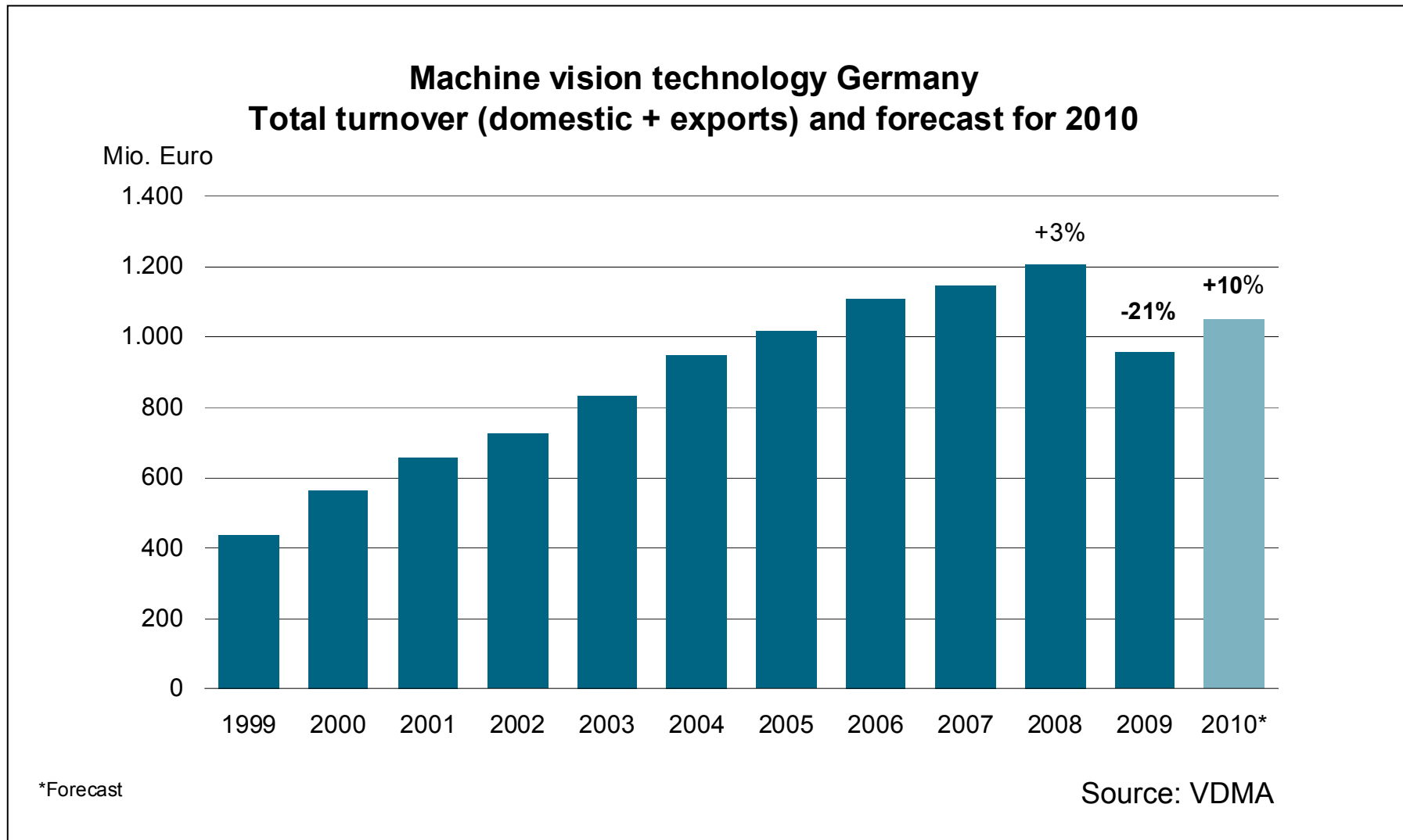


Acceleration: Supply chains left behind

- **Very high level of incoming orders in first half of 2010**
- **First with components, then systems**
- **End customers increase production**
- **Higher level of investment activity**
- **Knock-on effect - Filling empty warehouses**
- **Delivery times currently mounting**



Forecast for 2010: Increase from +5% to +10%





Trends: Technological advance accelerates use of machine vision

- **Compact products can be integrated without loss of space**
- **Intuitive operation and “configuration instead of programming”**
- **Interface standards simplify integration**
- **Increase of performance through multi-core processor technology**
- **Numerous advances made in sensor and camera technology**
- **Standard software libraries are used more**
- **Numerous new application fields**
- **Machine vision becomes three-dimensional**
- **Robot vision on the advance**
- **In-sourcing of machine vision solutions**
- **New opportunities thanks to after-sales services**

VISION 2010
9 - 11 November 2010

Industrial Vision Days



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Thank you for listening.

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