

## Press Release



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## Machine Vision

### **VDMA Machine Vision: Recovery across the board**

#### **Forecast for 2010 raised from plus five to plus ten percent**

Tübingen, 7 July 2010: "Strong growth impulses in the first half of 2010 mark the beginning of a recovery for machine vision right across the board. We are leaving the crisis year of 2009 behind us", explained Dr. Olaf Munkelt, Chairman of VDMA Machine Vision, during the VISION 2010 specialist press conference on Tuesday in Tübingen. Last year, the German machine vision industry was faced, for the first time in its young history, with a drop in turnover. Results in from the current VDMA Machine Vision market survey show that machine vision turnover fell by 21 percent in 2009 in Germany. A drop of 30 percent had been expected.

#### **Non-industrial applications stable**

The crisis year of 2009 had a stabilising effect on the dynamic growth of non-industrial applications, involving sectors such as security technology, medicine, traffic, microscopy, agriculture, sport and entertainment. Despite the crisis, there was almost 25 percent more turnover recorded with machine vision systems in these sectors, increasing the percentage of non-industrial sectors from ten to 16 percent. For the classic industrial production applications, however, there was a drop of 28 percent in turnover for machine vision systems. Worst affected was the automotive sector, still generating the highest percentage of turnover from machine vision systems. Turnover nose-dived here by 44 percent. As the only industrial application, semiconductor production was actually able to increase sales during this time. Turnover in this customer industry shot up by 88 percent in 2009. Contributing significantly to this was the turnover generated by the solar industry, with machine vision technology here playing a particularly important role in the optimisation of production for photovoltaic products.

### **Machine vision industry overcomes crisis year**

With 84 percent, companies (or machine vision departments) with up to 50 employees prevailed. Despite the low average of 32 employees and the steady growth up until 2008, the machine vision companies weathered the market slump of 2009 superbly. Through the introduction of reduced working hours and other measures, staff redundancies were largely avoided. The 6,300 qualified employees (2008: 6.500) now constitute the basis for successfully regaining the record turnover figures previously enjoyed.

### **Forecast for 2010 raised from plus five to plus ten percent**

"The incoming orders in the first half of 2010, particularly in the area of machine vision components, came at such a pace that it is now slowly getting out of hand for the supply chains. The sudden accelerated demand is not so quickly satisfied and delivery times can often be decidedly longer", says Munkelt. Overall, however, VDMA Machine Vision is anticipating a major improvement in growth prospects and is raising the chances of an increase in German machine vision industry turnover from five to ten percent.

The current revival of the machine vision market is based on two effects. On the one hand, projects which were put on hold have been reactivated and end customers are making investments again, as well as increasing their production. On the other hand, stock was drastically reduced in 2009. The delivery times now demanded are thus threatening to cause dangerous restrictions. Many customers are reacting to this by increasing stock and thus driving forward incoming orders. Furthermore, it is to be expected that the heavy demand for components in the first half of the year will have a positive effect on the turnover for entire systems in the coming months. Time offsets of several months are generally the rule here. There are, however, also risks: Both the increase of stock and the reactivation of deferred projects may noticeably slow down in the second half of the year.

### **Technological advance benefitting machine vision application**

There are opportunities for further growth in the medium- and long-term through technological development and an increase in standardisation. This is making the use of machine vision a cost-effective option in an increasing number of application fields. Cameras, for example, will be increasingly smaller, boast higher performance and be available at a lower cost. Standardised interfaces will make the integration in applications easier, leading to a growing number of markets for cameras. Other machine vision components, such as optics and illumination, will benefit here too. In the area of system integration, the wide spectrum of high-performance standard components will allow for

several users to build up their own machine vision competency in-house. For system integrators, there will be new opportunities in the form of product-accompanying services, such as, for example, teleservices. Collaboration with the customer will thus stretch across the entire life-cycle of the delivered solution.

## **VISION 2010**

VDMA Machine Vision, as conceptual and professional supporter of VISION, is also predicting a positive outlook for the leading international trade fair for machine vision technology in 2010. VDMA will be present at the trade fair as a partner and is organising the three-day programme of talks "Industrial VISION Days" - a programme of events which will be showcasing the wide spectrum of machine vision technology and application themes. With 44 speakers representing 12 nations, "Industrial VISION Days 2009" was *the* leading international presentation event for machine vision. More than 2,500 visitors are expected to attend the event this year.

**Do have further questions? Patrick Schwarzkopf is happy to help.**

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