

INDUSTRIES ARE THE NEW SCENARIOS WHERE TRANSFORMATION HAPPENS. TEMPCO IS COMMITTED TO DEVELOP AND REALIZE SOLUTIONS FOR THERMAL ENERGY MANAGEMENT AND TEMPERATURE CONTROL WITHIN THE AUTOMATION OF PRODUCTION PROCESSES.

\$62,75 Bil

Global value of the robotics market, October 2020
(including hardware, software and services).

Average annual growth expected by **16,2%** between 2020 and 2027.

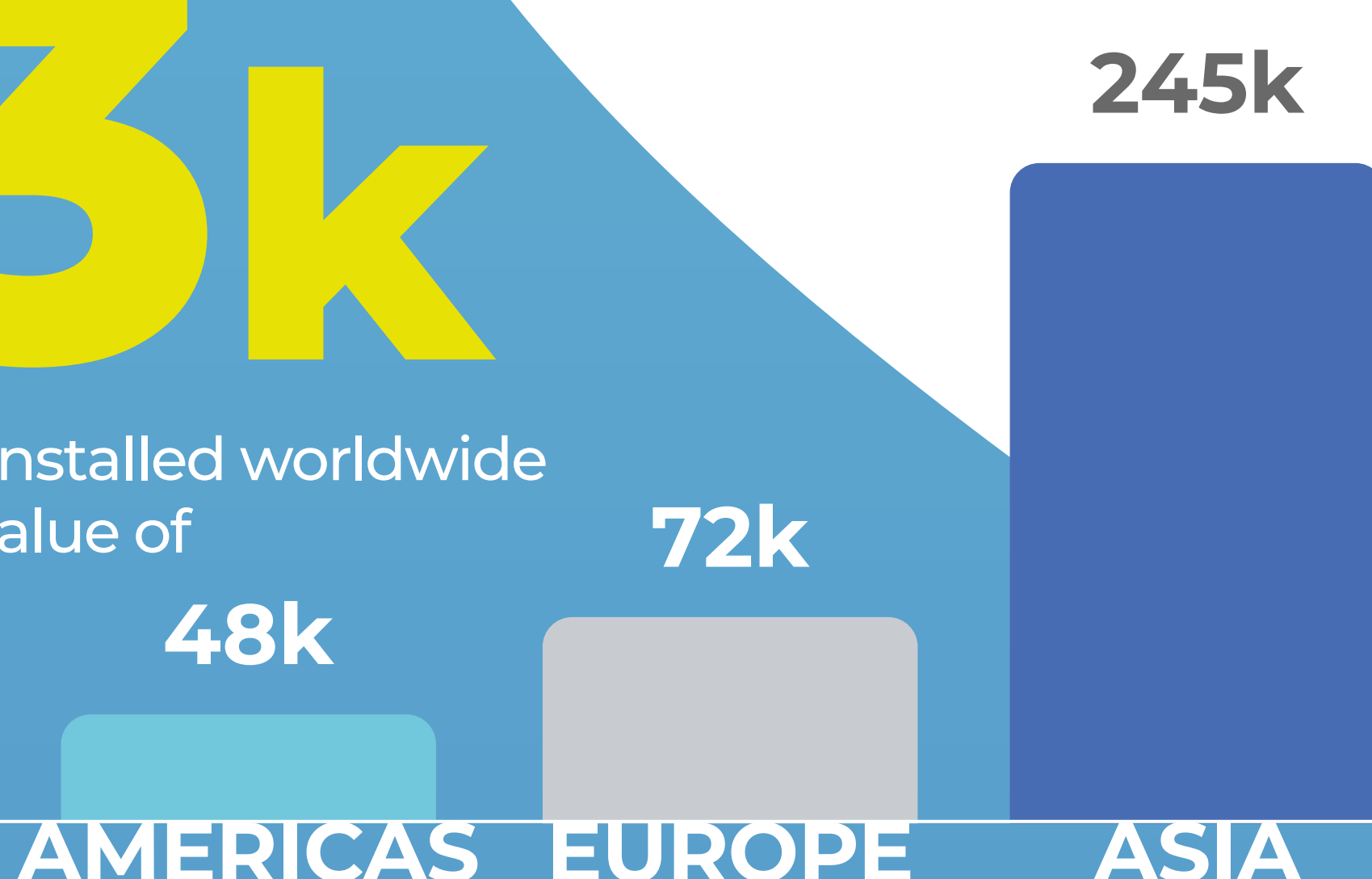
Units installed worldwide

2,7 Mil

2,7 millions of robots installed within the manufacturing sector by October 2020, with a growth rate by **85%** between 2014 and 2019.

373k

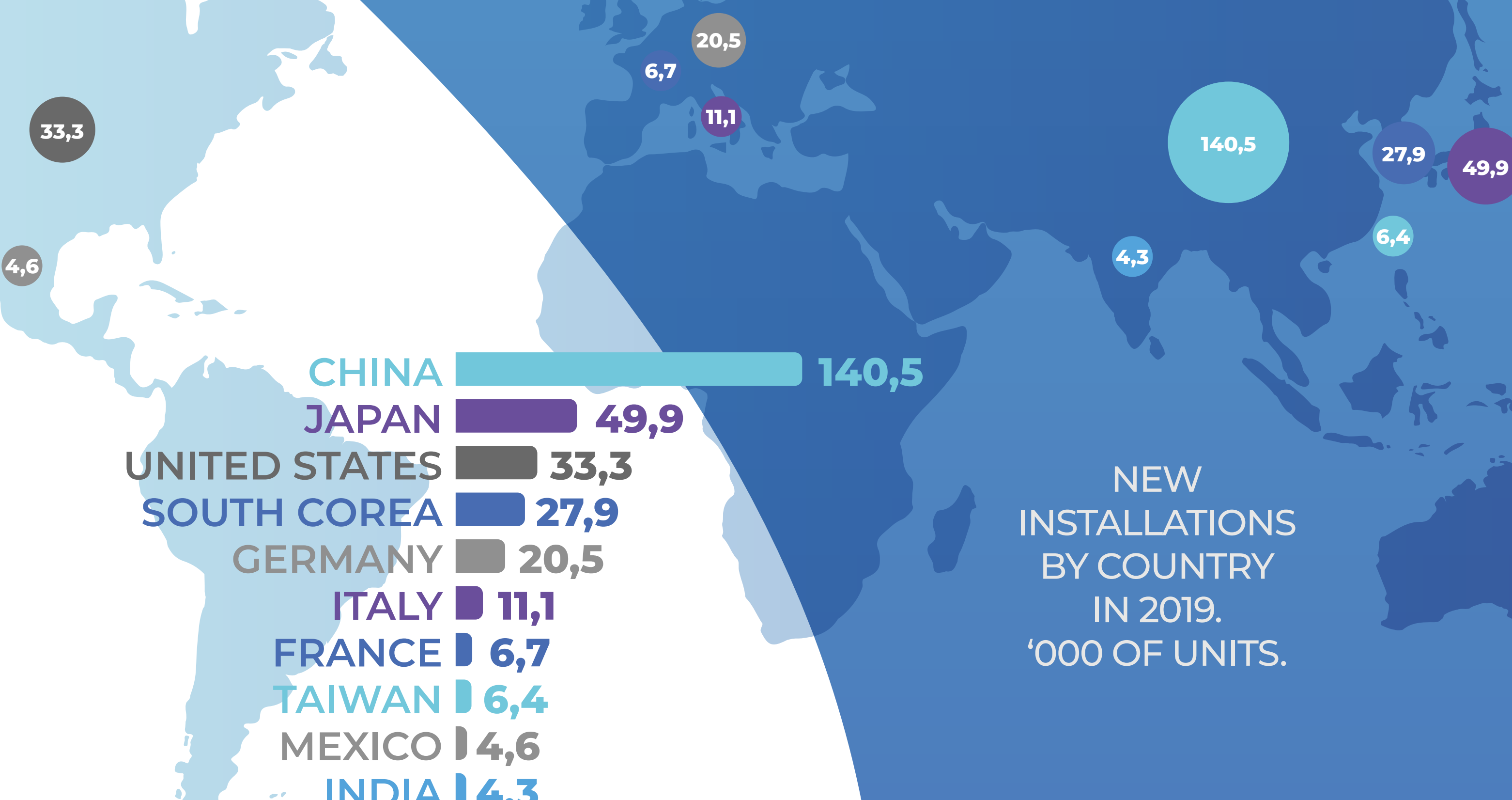
373 thousand of new units installed worldwide in 2019, corresponding to a value of **13,8 billion of dollars.**



Trend in sales of new robots, figures IFR.

The 373 thousand of new units installed in 2019 represents a **decrease by 12%** compared to 2018 (442 thousand new units installed) arresting a continued ongoing growth since 2012. The drop was mainly due to the contraction of the two biggest markets of Automotive and Electronics.

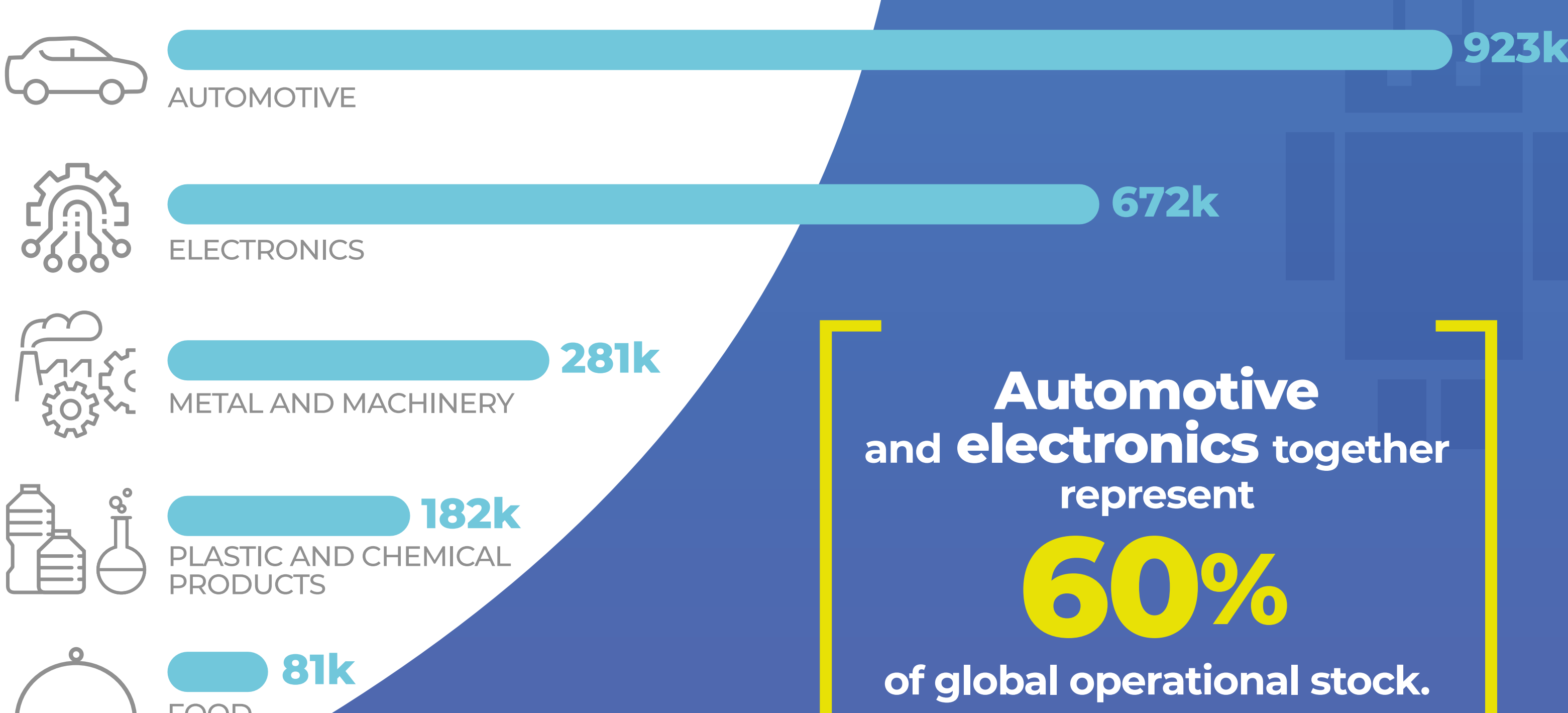
Top 10 New Installations



NEW INSTALLATIONS BY COUNTRY IN 2019. '000 OF UNITS.

Operational stock of industrial robots

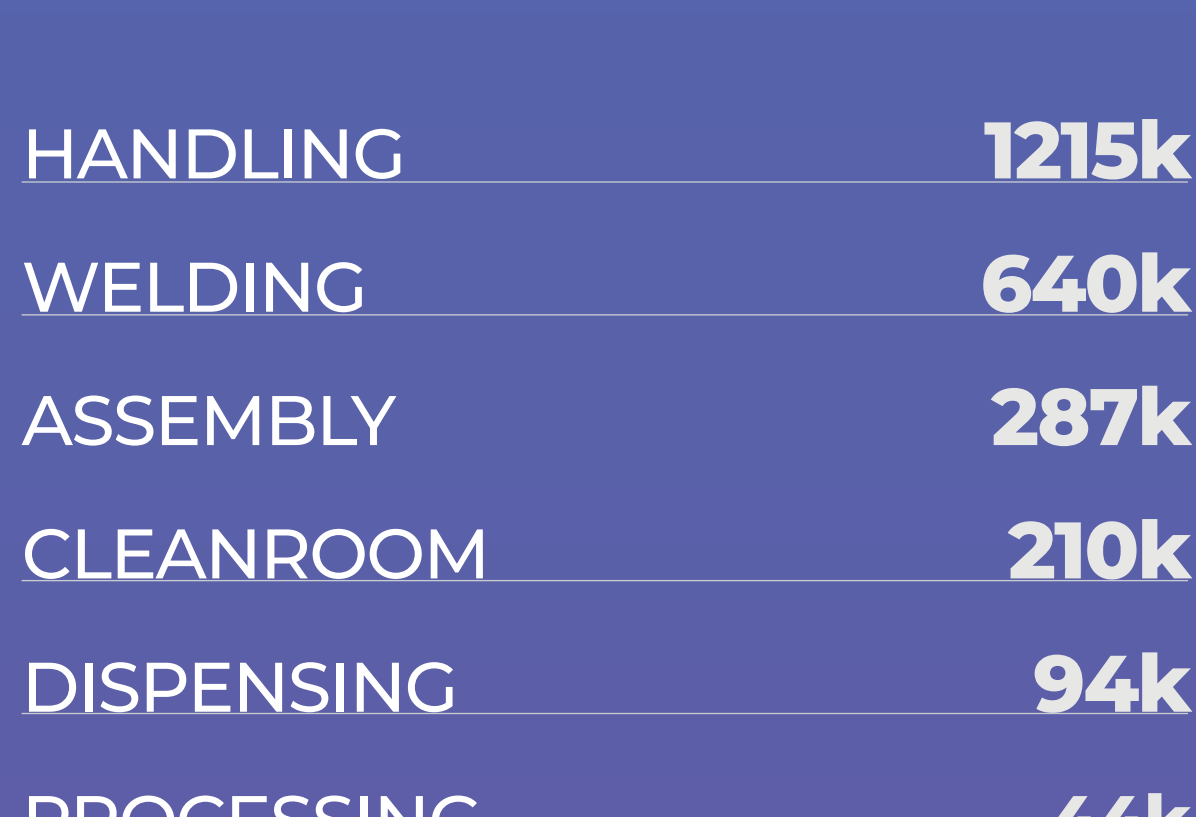
by industrial sector (year 2019)



Automotive and electronics together represent **60%** of global operational stock.

Operational stock of industrial robots

by application (year 2019)



Cobot

Cobots (collaborative robots) are a small incoming army. The cobots market represents only a 5% of the overall installed units in 2019, but in **countertrend** compared to industrial robots.

NEW UNITS INSTALLED

373k

18k

355k

-12,6%

406k

355k

2018

2019

+11%

16k

18k

2018

2019

NEW UNITS INSTALLED ('000 of units, year 2019)

Robot

Cobot

• Figures referred to the worldwide robots market: source **Allied Market Research** October 2020. Global robotics technology market, opportunities and forecast 2020-2027 www.alliedmarketresearch.com/robotics-technology-market.
• Other figures: **IFR** International Federation of Robotics, Report World Robotics 2020 - September 24, 2020 ifr.org/ifr-press-releases/news/record-2.7-million-robots-work-in-factories-around-the-globe