



ROBOTIK + AUTOMATION

GET TOGETHER FOR ROBOTICS

A State of the Union

of European Robotics Industry Competitiveness

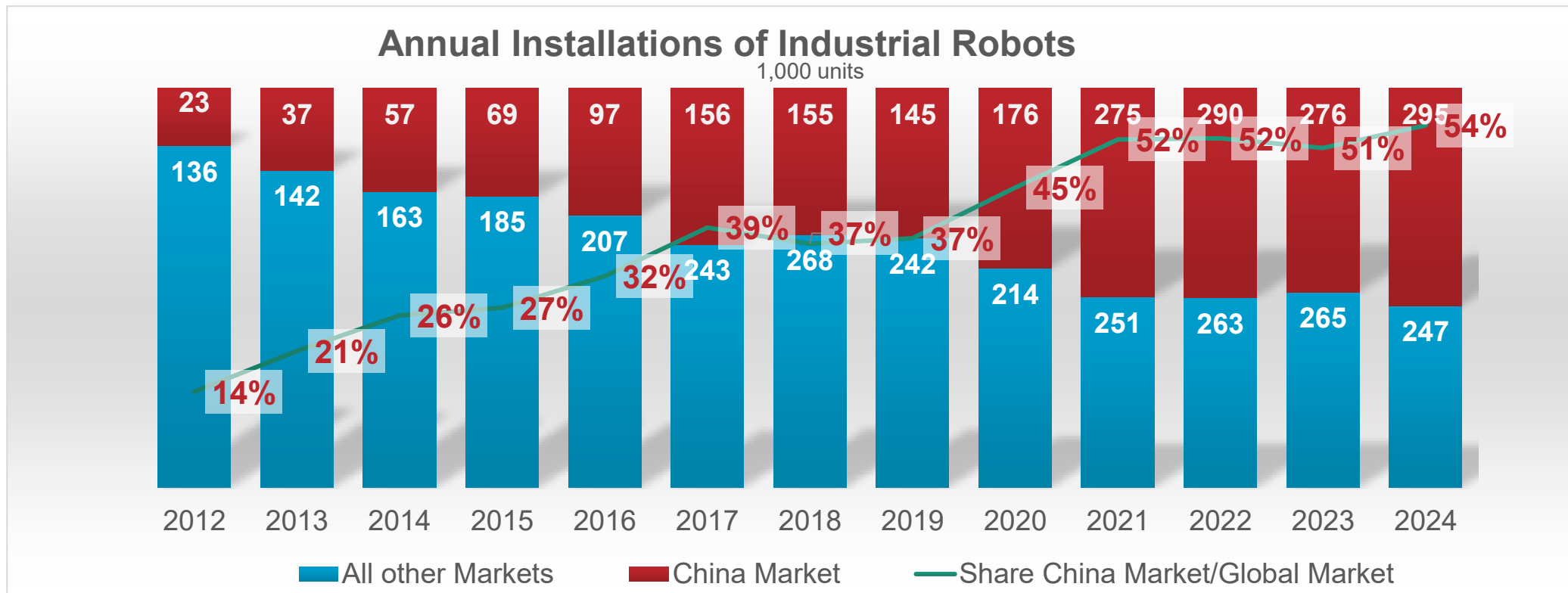
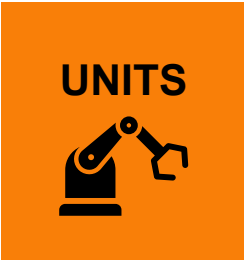
PATRICK SCHWARZKOPF
5 NOVEMBER 2025, ERLANGEN

ADVANCING EUROPE'S MACHINERY INDUSTRY



Global Share of China Market

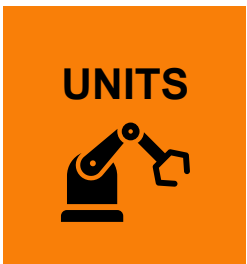
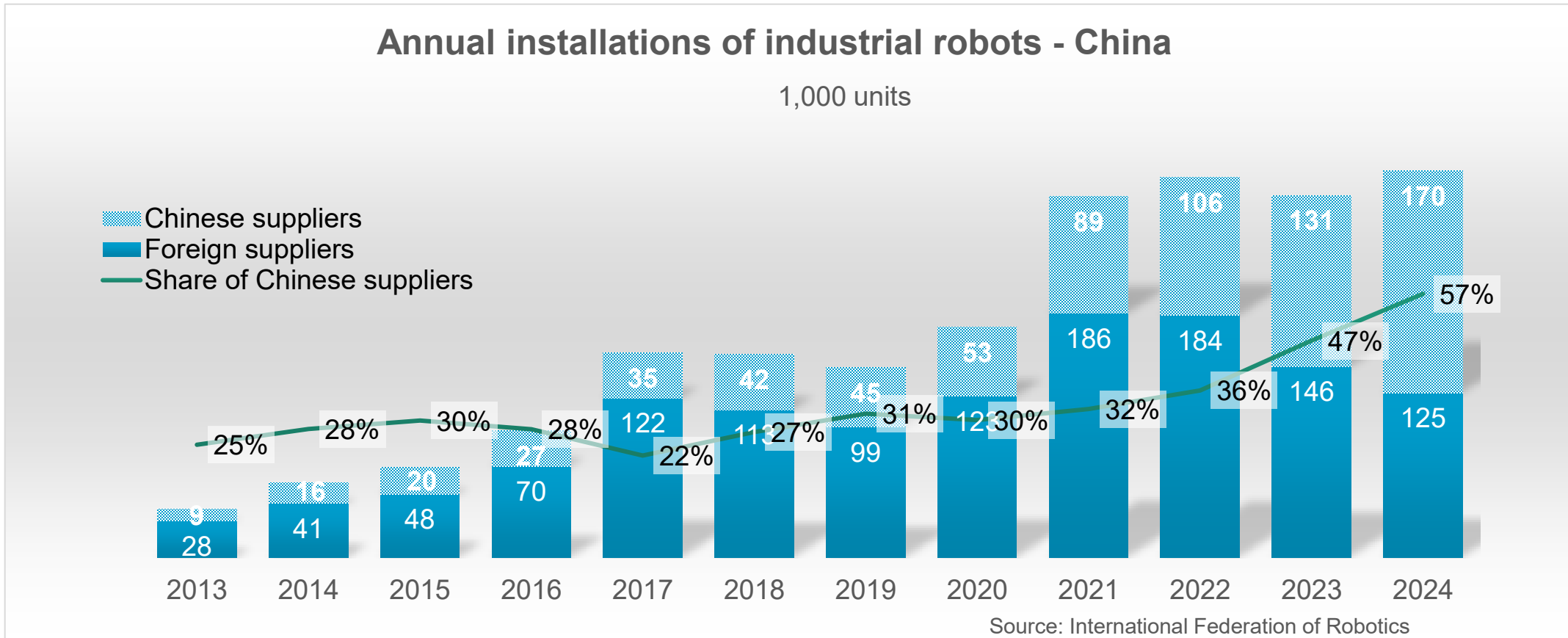
China 54%, all other countries combined 46%



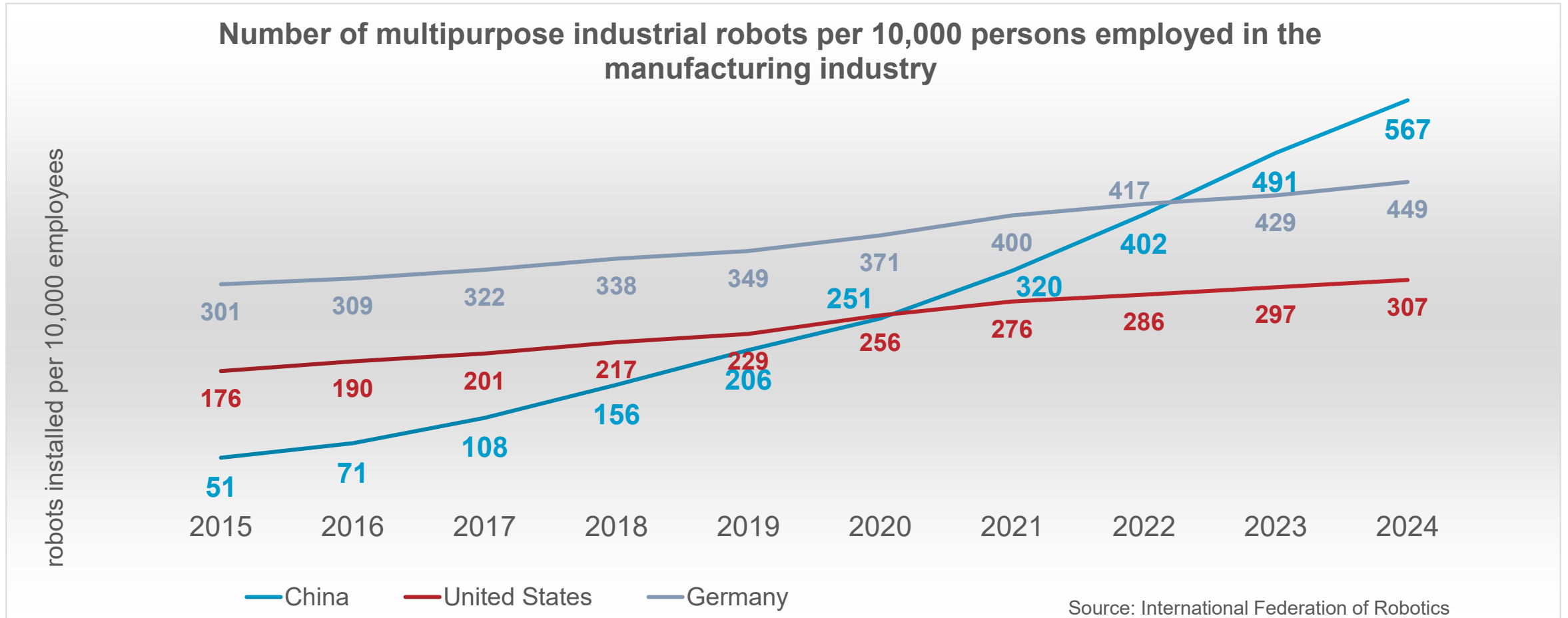
Source: International Federation of Robotics

China Market and Share of Domestic Suppliers

Most robots installed in China now from **domestic** brands

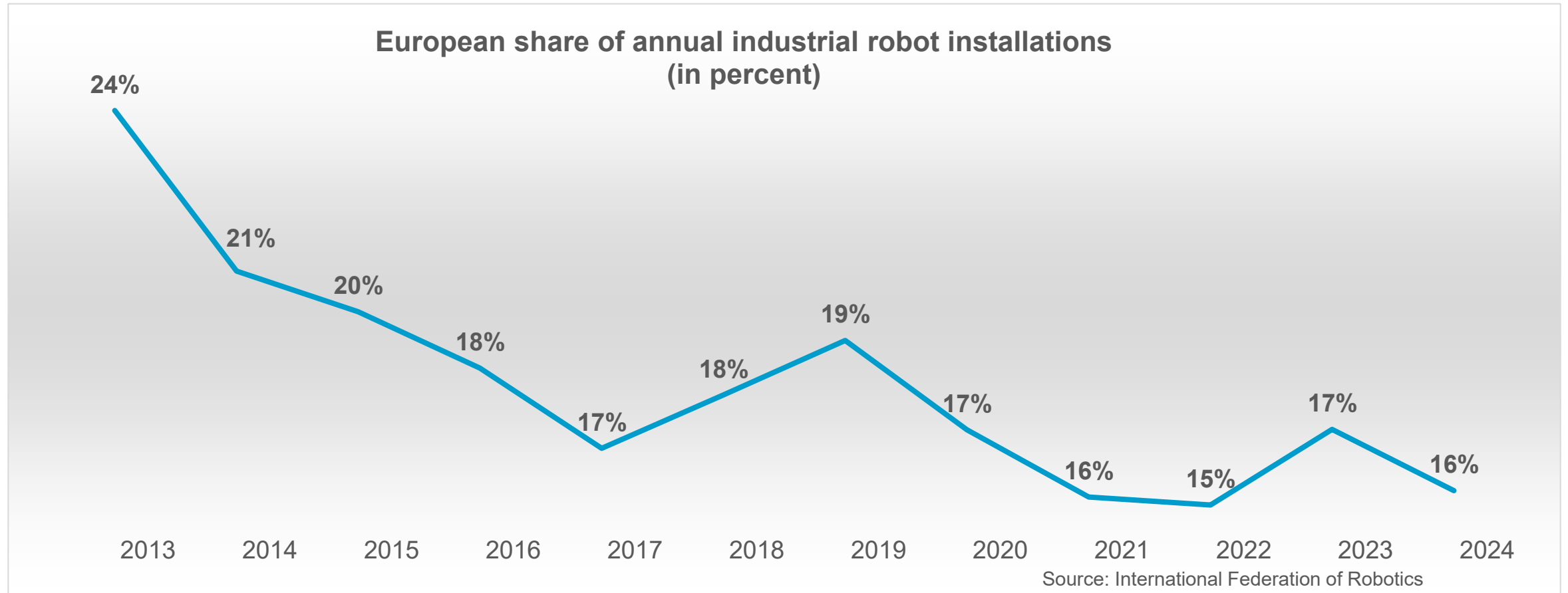


Robot density: the Chinese take-off!



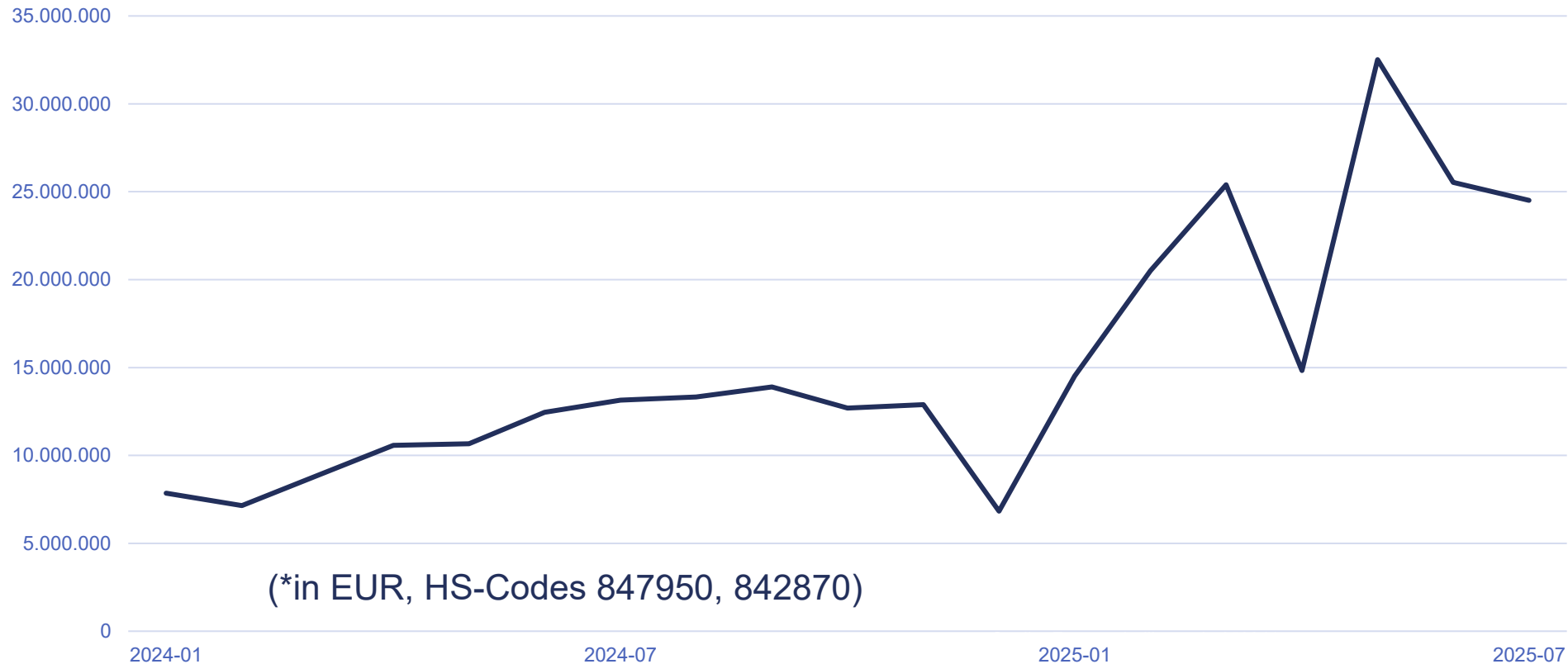
Source: International Federation of Robotics

Share of robot installations in Europe: in free fall?



Industrial Robot Imports* into the EU from China

Moderate volume, but a surge in the last 6 months



SALES
€

BORDER
CROSSING
→

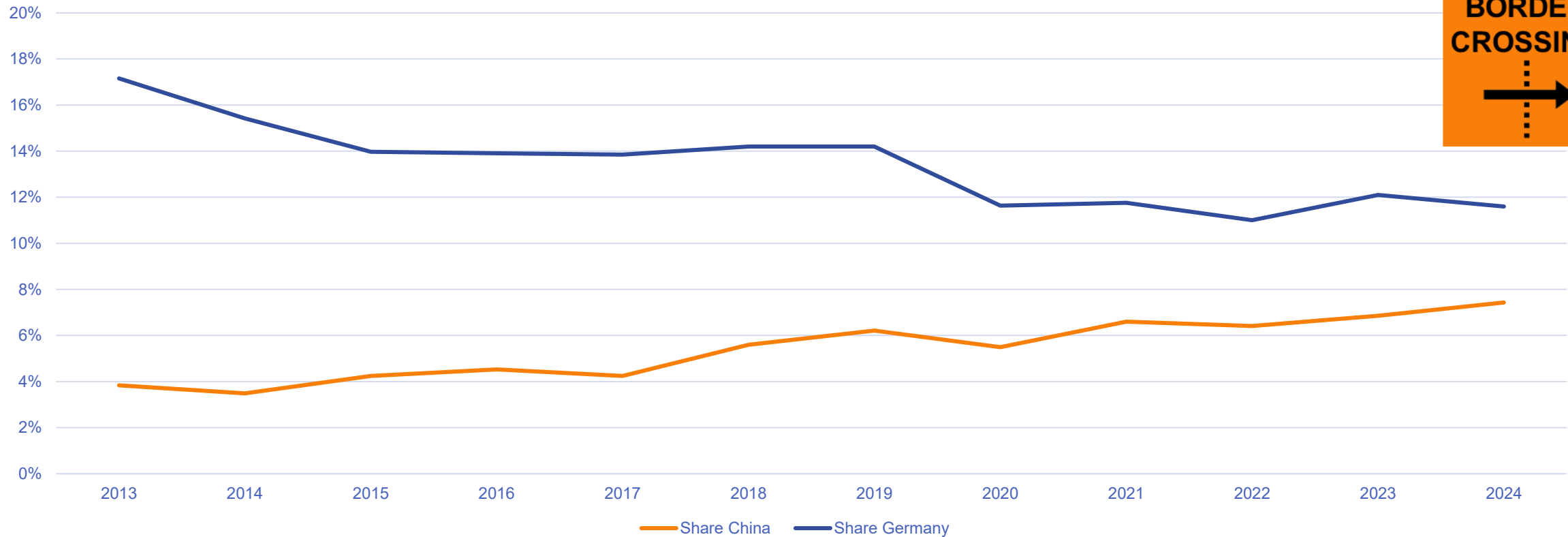
Export shares of international trade industrial robots*

Germany: decreasing share. China: increasing share.

SALES
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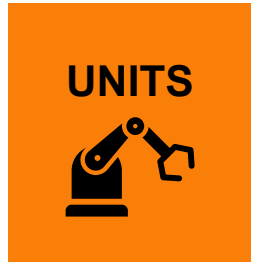
BORDER
CROSSING
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Export Shares of International Trade *HS Code 847950 (Industrial Robots)





In 2024, China replaced Japan as the largest robot producer.

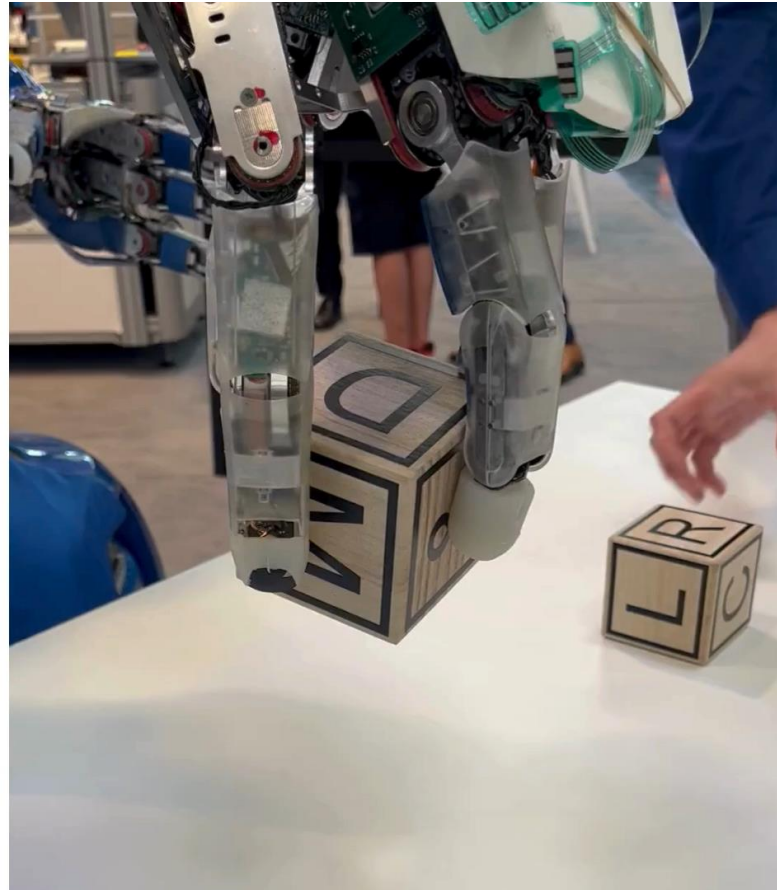


Source: IFR / World Robotics 2025



The new game: Physical AI.

From „deterministic“ to „non-deterministic“ systems



AND THE USA?

Case Study: Figure.ai

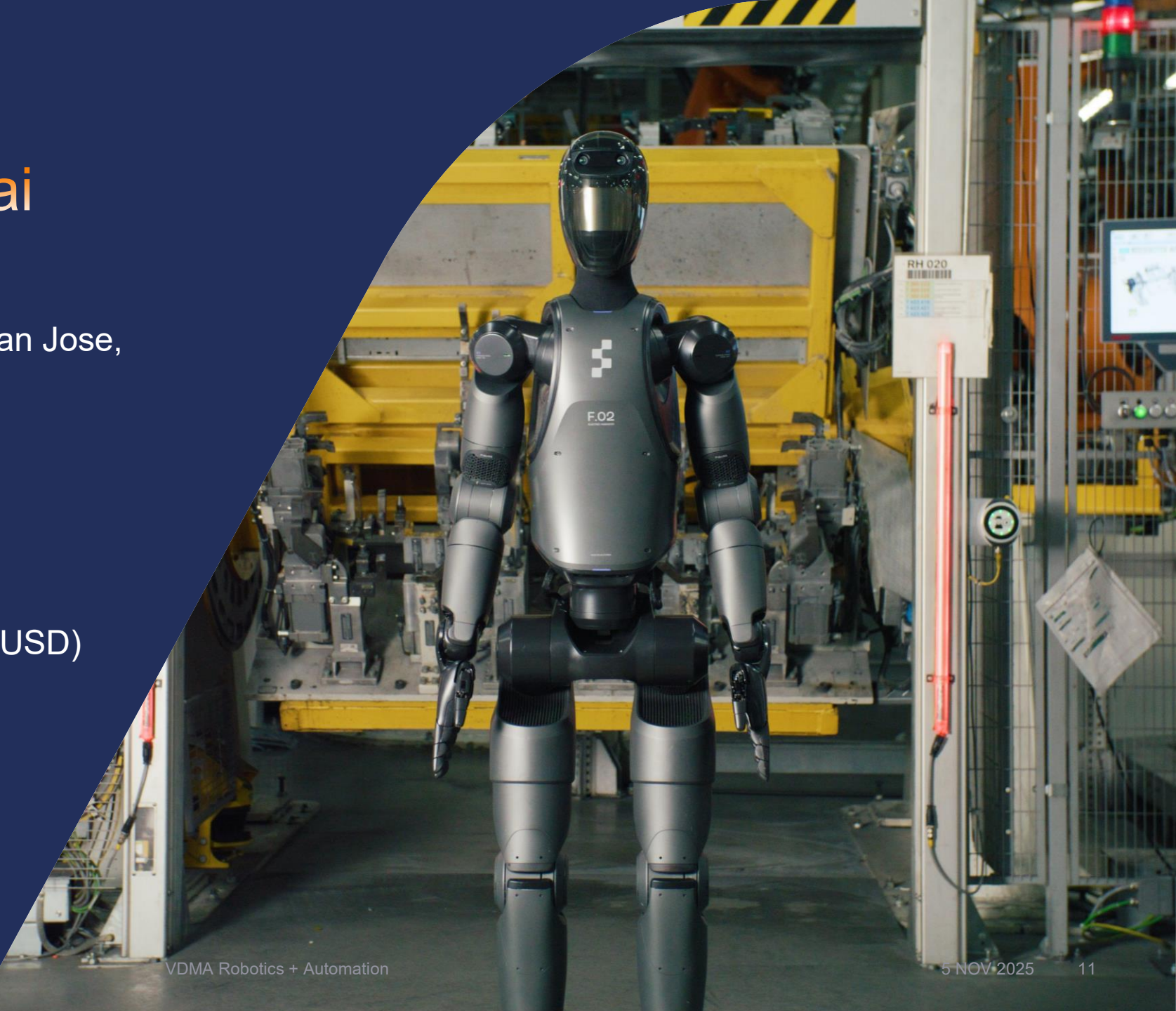
Founded „from scratch“ in 2022 in San Jose, California

Series A (May 2023): 70 mn USD

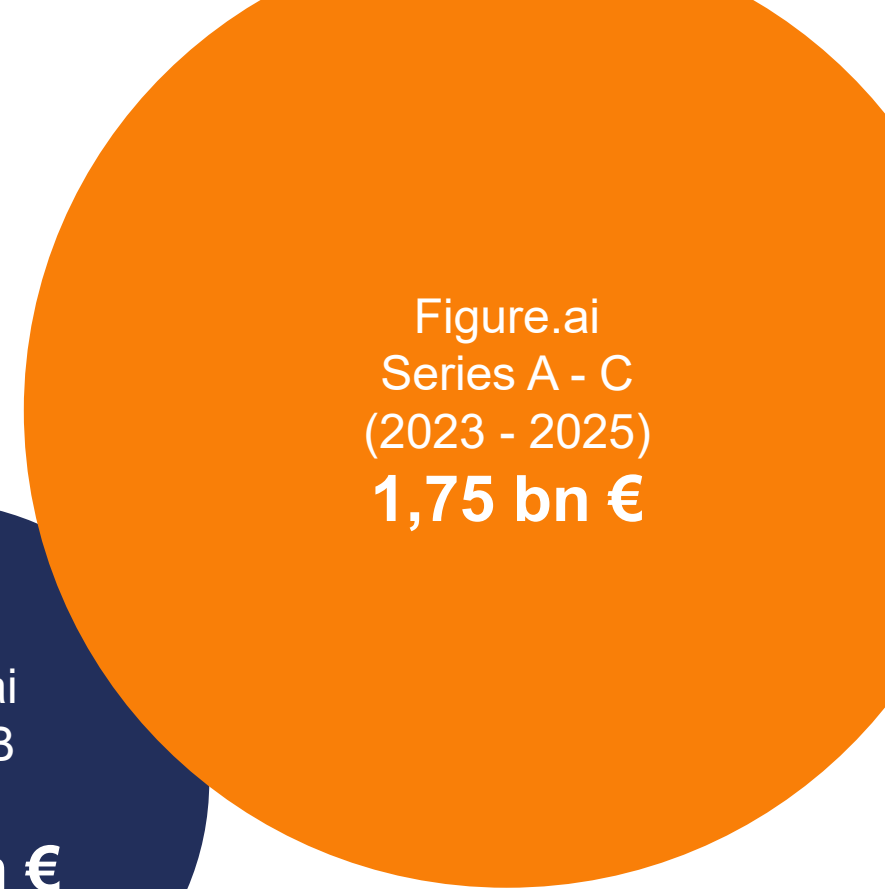
Series B (Feb 2024): 675 mn USD
(Unternehmensbewertung: 2,6 Mrd. USD)

Series C (Sep 2025): > 1 bn USD
(current valuation: 39 bn USD)

Image: BMW



Orders of magnitude by comparison



The EU's SPARC initiative was considered the largest civilian-funded robotics innovation program in the world. It comprised a funding volume by the EU of 700 mn euros over a 7-year period.

China scales + builds acceptance in the population





Take-aways

- Understand the sense of urgency: if Europe continues in this way, it will **lose ground**
- The focus on **cost-effectiveness, speed, economies of scale and customer-centricity** beats the focus on **quality and precision**
- **Physical AI** will transform automation, Europe needs to be in the lead or it will fall behind
- Europe needs to overcome fragmentation: a shared vision – **a master plan** - where it wants to be in 5 years' time is indispensable
- We need close collaboration **between industry, research and policymakers**
- **A change of mindset** is needed: towards boldness, innovation, risk-taking. We need to change the play from „defensive“ to „offensive“ mode
- **Europe has what it takes to win!**