



2019 Deloitte and MAPI Smart Factory Study

Regional Statistics

October, 2019

Overall survey methodology and regional distribution*

Study Components

- **Executive survey** with 600+ total respondents
- **Executive interviews** with more than a dozen manufacturers
- **Focus groups** with finance and operations leaders
- **Economic forecast and modeling**



*Manufacturers who have a production facility or factory in US were the target group for the study. For the regional distribution, we have tagged the respondent to the region with the maximum factories

Navigating this presentation

What do the numbers represent?

Current smart factory transformation status

Current status of manufacturers' surveyed in terms of smart factory transformation



Share of factories in the region that have a smart production line

Current and near term approaches to smart factory



Brownfield vs Greenfield - Type of smart factory initiatives the manufacturers' surveyed are implementing or planning during the next 24 months

Share of factory budget being applied toward smart factory initiative

Percent of the current fiscal year's overall factory budget being applied toward smart factory initiatives

Benefits observed from smart factory initiatives during last 3 years

Average 3-year gains from smart factory initiatives for the manufacturers' surveyed during the past 3 years on the three key metrics

Top 3 smart factory implementation challenges

Challenges that manufacturers' surveyed are facing in launch and/or execution of their smart factory initiatives

Smart Factory Cohorts

Classification of manufacturers' surveyed into three groups – Trailblazers, Explorers, and Followers

Top 3 Use cases in action

Top 3 smart factory use cases currently in use among the manufacturers' surveyed. They were presented with a list of twelve use cases

Top 5 advanced technologies in use

Top 5 advanced manufacturing technologies currently in use among the manufacturers' surveyed to support their smart factory initiatives. They were presented with a list of fifteen technologies

Smart Factory Region Profile - EMEA

Current smart factory transformation status



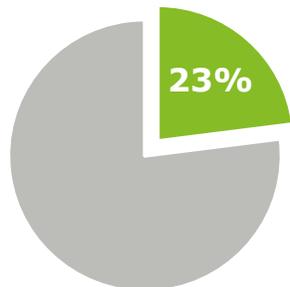
 **25% of factories in the region have a smart production line**

Current and near term approaches to smart factory

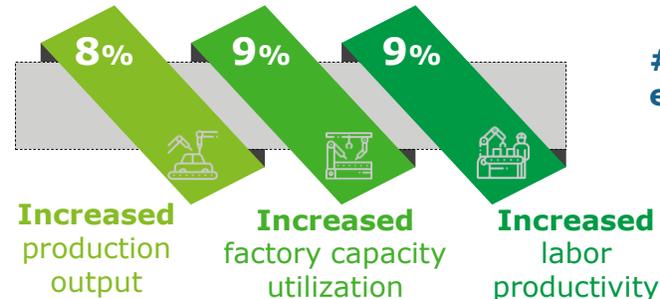


*remaining 1% indicated Don't know

Share of factory budget being applied toward smart factory initiative



Benefits observed from smart factory initiatives during last 3 years



Top 3 smart factory implementation challenges

- #1 Lack of experience
- #2 Insufficient funding
- #3 Lack of IT infrastructure

EMEA Smart Factory Cohorts



Trailblazers
5%

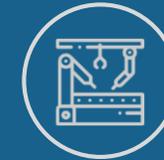


Explorers
71%



Followers
23%

Top 3 Use cases in action



Quality sensing and detecting



Plant consumption and energy management



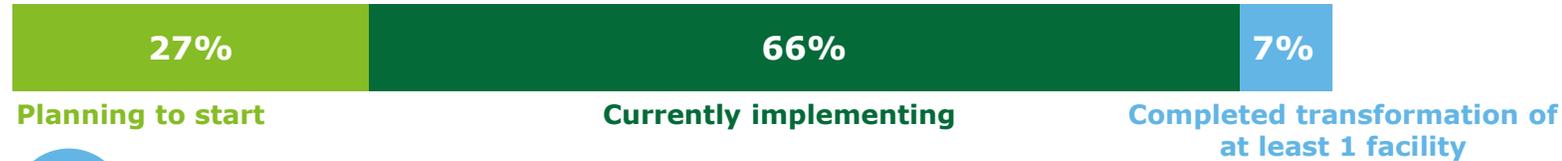
Advanced manufacturing, 3D printing

Top 5 advanced technologies in use

- Data analytics
- Robotics
- Factory automation hardware
- Cloud networking
- Vision systems

Smart Factory Region Profile - EMEA

Current smart factory transformation status



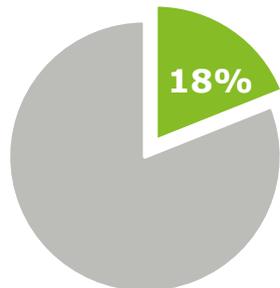
 **28% of factories in the region have a smart production line**

Current and near term approaches to smart factory

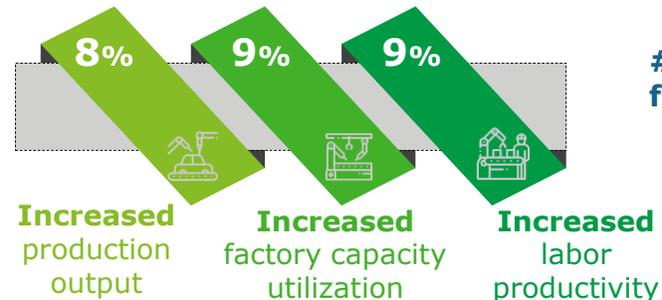


*remaining 1% indicated Don't know

Share of factory budget being applied toward smart factory initiative



Benefits observed from smart factory initiatives during last 3 years



Top 3 smart factory implementation challenges

- #1 Insufficient funding
- #2 Lack of IT infrastructure
- #3 Difficulty in modifying business processes

EMEA Smart Factory Cohorts



Trailblazers
6%



Explorers
61%



Followers
33%

Top 3 Use cases in action



Quality sensing and detecting



Plant consumption and energy management



Smart conveyance

Top 5 advanced technologies in use

- Factory automation hardware
- Data analytics
- Robotics
- Active sensors
- Cloud networking



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