



## 2019 Deloitte and MAPI Smart Factory Study

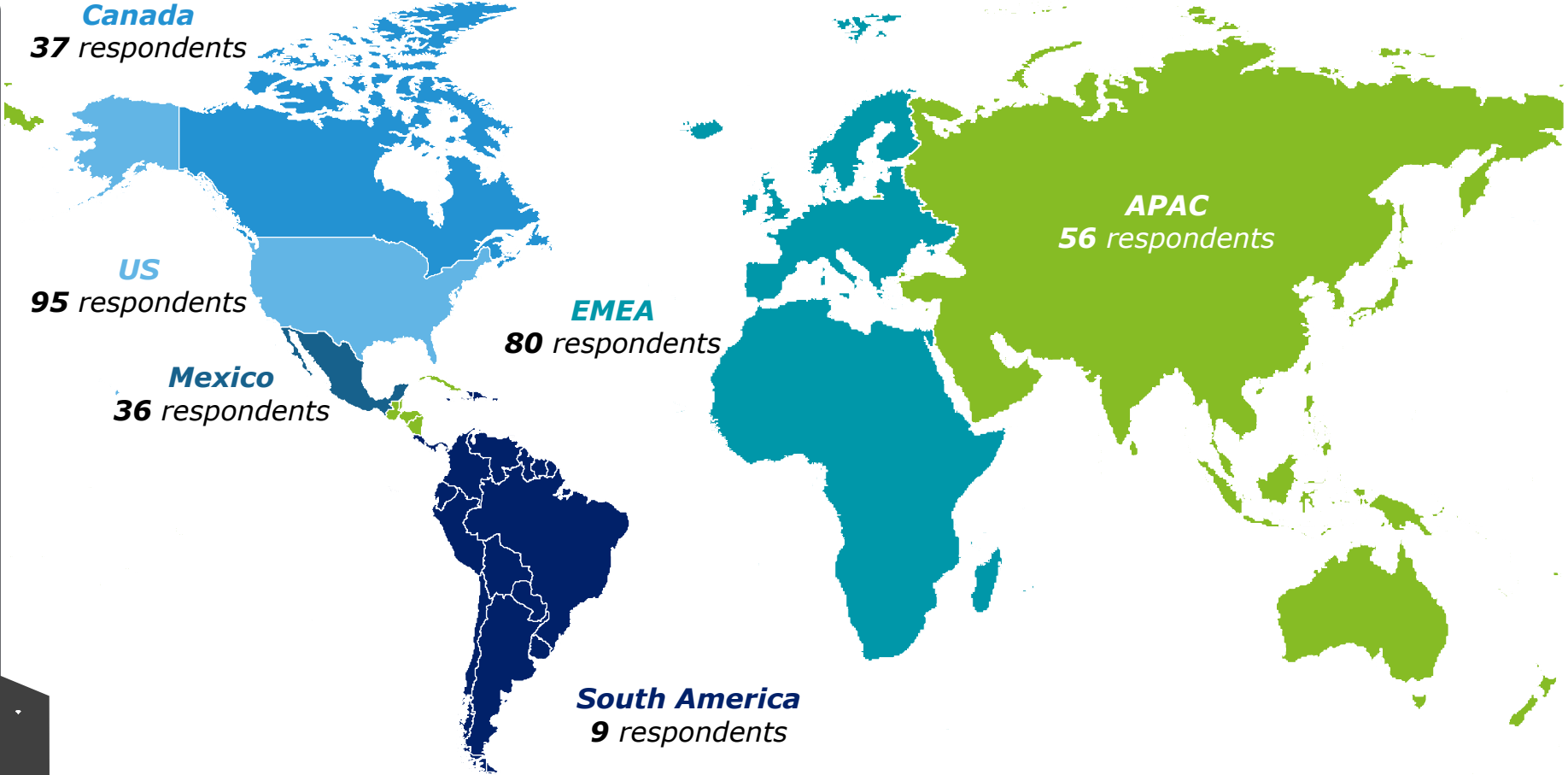
Regional Statistics

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



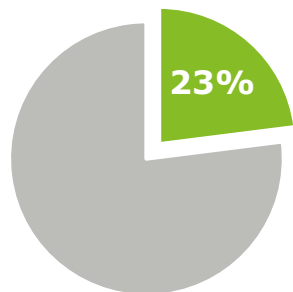
 **25% of factories in the region have a smart production line**

## Current and near term approaches to smart factory

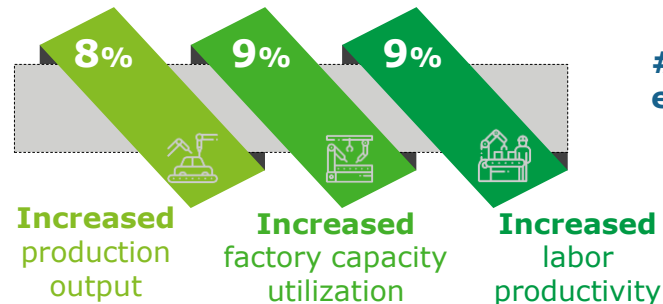


\*remaining 1% indicated Don't know

### 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



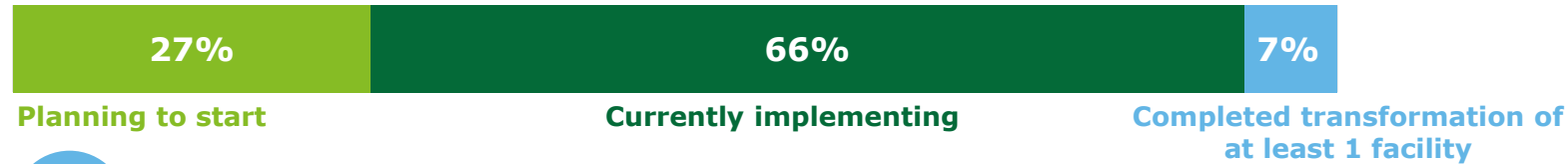
Advanced manufacturing, 3D printing

## 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



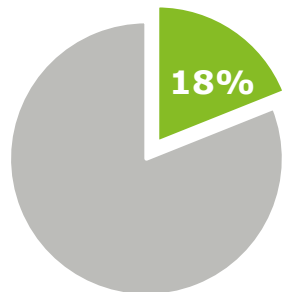
 **28% of factories in the region have a smart production line**

## Current and near term approaches to smart factory

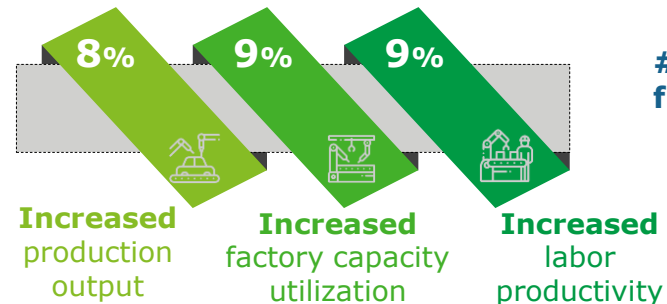


\*remaining 1% indicated Don't know

### 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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