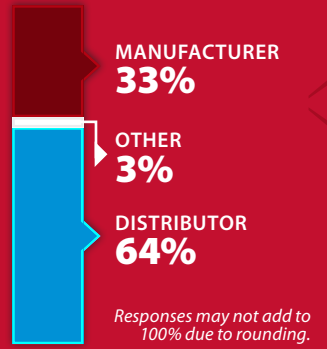




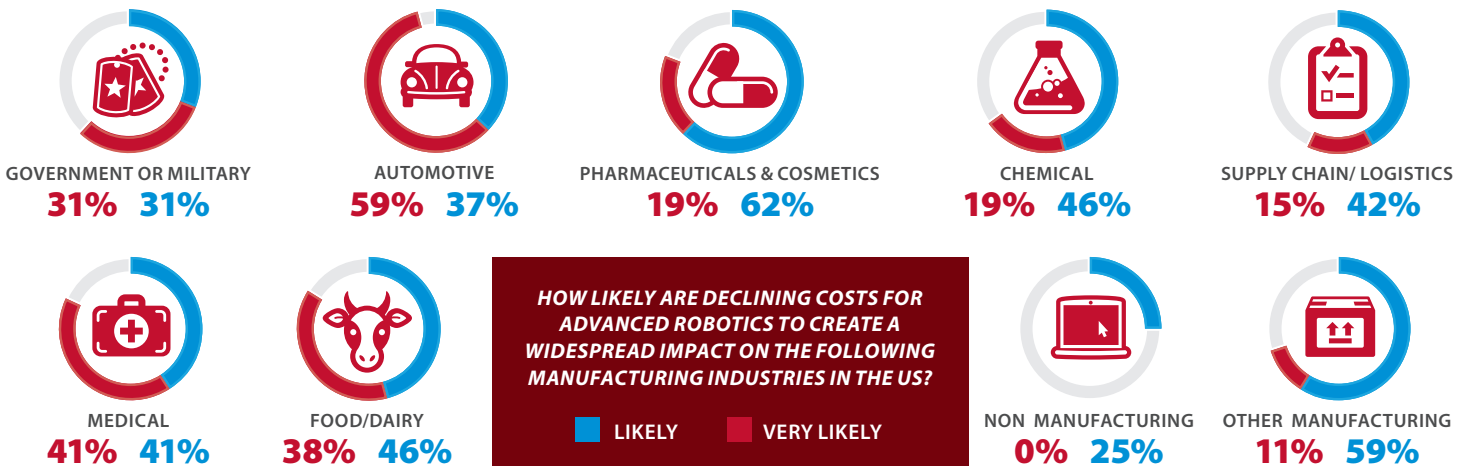
## NATIONAL ASSOCIATION OF ELECTRICAL DISTRIBUTORS

The NAED's Channel Advantage Partnership (CAP) Council funded primary and secondary research as a basis for this study. NAED fielded an online survey of electrical distributors and manufacturers in the winter of 2014. The limited response to this survey resulted in a very small sample size of less than 40 participants; therefore the results cannot be projected. Nevertheless, it provides an interesting snapshot of what is taking place in the electrical distribution industry.

### WHO PARTICIPATED?



### LIKELIHOOD OF ROBOTICS TO IMPACT U.S.



### EXPERTS WEIGH IN

#### REASONS TO BE HOPEFUL

“ Robots will change how we think about manufacturing. They will have intelligence and awareness. They will be teachable, safe, and affordable. They will make us productive in ways we never imagined. Robots will reinvigorate industry and inject new life into the economy... making businesses more competitive... keeping jobs from moving overseas... demonstrating the power of American ingenuity.”<sup>3</sup>

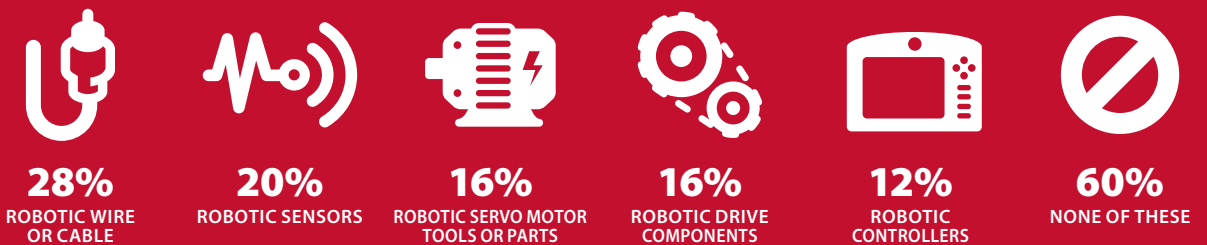
- Rodney Brooks, Co-Founder, iRobot; Founder, Rethink Robotics

#### REASONS FOR CONCERN

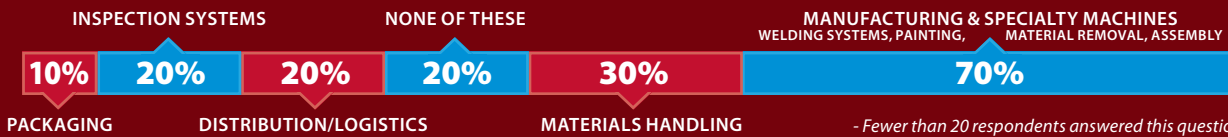
“ There will be disruption, as there has been, but new technologies will continue to create jobs and opportunities. Just where those jobs are located is a different question. The United States is not committed to sufficient education to continue to lead in technology sectors.”<sup>3</sup>

- A former chair of The Internet Engineering Task Force (IETF) working group

#### PRODUCTS SOLD BY NAED MEMBERS



#### ROBOTICS CUSTOMER SEGMENTS



### THE MARKET

#### MARKET OPPORTUNITIES

“ While the automotive industry remains the largest robotics user in North America, we're very encouraged by the strong growth in shipments to non-automotive markets in 2013. Overall shipments to non-automotive customers rose 31% while automotive related shipments were flat. The largest gains in non-automotive markets were in Life Sciences/Pharmaceutical/Biomedical (+142%), food & consumer goods (+61%) and plastics & rubber (+36%). Orders from non-automotive markets were up 22%, a very positive sign for the robotics industry moving forward.”<sup>1</sup>

- Jeff Burnstein, President, Robotic Industries Association USA

#### POTENTIAL MARKET SIZE

“ By 2025 advanced robotics could have a worldwide economic impact of \$1.7 trillion to \$4.5 trillion annually across multiple applications.”<sup>2</sup>

- James Manyika, Director of Business and Economic Research, McKinsey Global Institute



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 1. International Federation of Robotics. IFR: All-time-high for industrial robots in 2013. February 20, 2014. <http://www.ifr.org/news/ifr-press-release/ifr-all-time-high-for-industrial-robots-in-2013-601/> (accessed April 14, 2014).  
 2. Manyika, James. Disruptive Technologies. San Francisco: McKinsey Global Institute, 2013.  
 3. Mass Technology Leadership Council. The Massachusetts Robotics Revolution. Burlington: Mass Technology Leadership Council, 2011.