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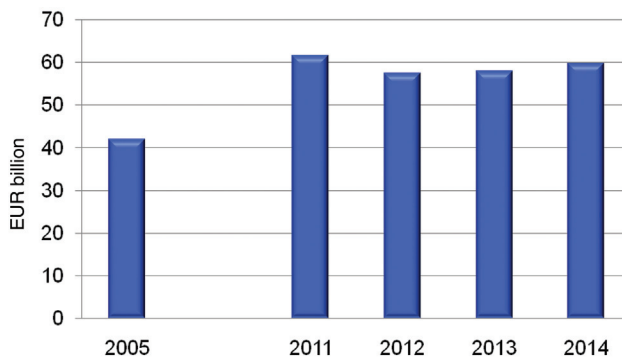
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European Photonics Industry Back to Growth in 2014

The European photonics industry reassumed growth in 2014. The demand for photonics-based industrial equipment increased, while the contraction of the European photovoltaic industry slowed down.

DOI 10.1515/aot-2015-0002

Photonics production in Europe in 2014 reached a volume of EUR 60 billion. According to a preliminary analysis of 2014 data by Optech Consulting that figure is up 3% from the EUR 58 billion reached in 2013 (Figure 1). The growth of European photonics production in 2014 was mainly due to an increase in the industrial segment. Also the production volume of the health care and life science segment increased moderately as well as the optical components and systems segment. The industrial segment, with a share of 39% of the total for 2014, makes up for the largest part of the European photonics production (Figure 2). This includes lasers and laser systems for materials processing and microlithography as well as components and systems for image processing, sensing, measurement and analysis.



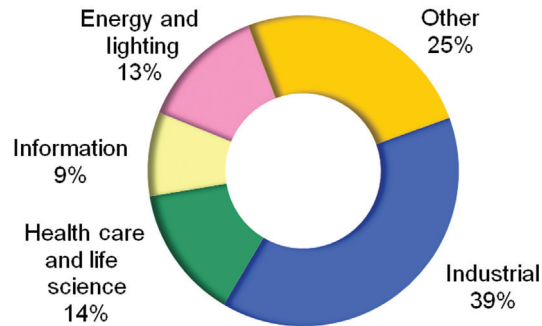
Source: OPTTECH CONSULTING - December 2014

Figure 1 European photonics production volume.

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Source: OPTTECH CONSULTING - December 2014

Figure 2 European photonics production volume 2014, by product segment.

The health care and life science segment makes up a 14% share, while the energy and lighting segment accounts for 13%, and optical information and communication products account for 9%. The balance of 25% is made up by optical and opto-electronic components and systems.

The EUR 60 billion European photonics production volume for 2014 is the second largest ever achieved. The largest volume of EUR 62 billion was recorded for the year 2011. The decrease since 2011 was mainly caused by the meltdown of the European photovoltaics industry, which suffered from price pressure caused by an over-supply and fierce competition from producers in Asia. Also the information technology and flat panel display segment, which has been a weak area of the European photonics industry for a long time, contracted further. In contrast, the European photonics industry has performed well since 2011 in its areas of strength, including the industrial segment, the health care and life science segment, as well as the segment of optical components and systems. By geography, Germany is the largest producer of photonic products in Europe, besides the Netherlands, the UK, France, Italy, and Switzerland. Although its share decreased during the last years due to the contraction of its photovoltaic industry, Germany still accounts for more than 40% of the European photonics production.

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