



# IVAM Micro, Nano & Materials Survey 2009



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- Annual survey of the IVAM Microtechnology Network regarding the economic situation of the micro and nanotechnology and materials industries
- Investigate the disposition of these industries and current application and market trends
- 2009: special focus on the financial and economic crisis
- Larger target group, including non-members throughout Europe



# Recipients and responses



- Time of survey: January/February 2009
- Recipients of the questionnaire:
  - **2,300 European SME and R&D institutes dealing with microtechnology, nanotechnology and/or advanced materials throughout Europe**
  - **+ IVAM Members from outside Europe**
- Number of addressees: 2,300
- Number of responses: 290
- Return rate 12.6 %

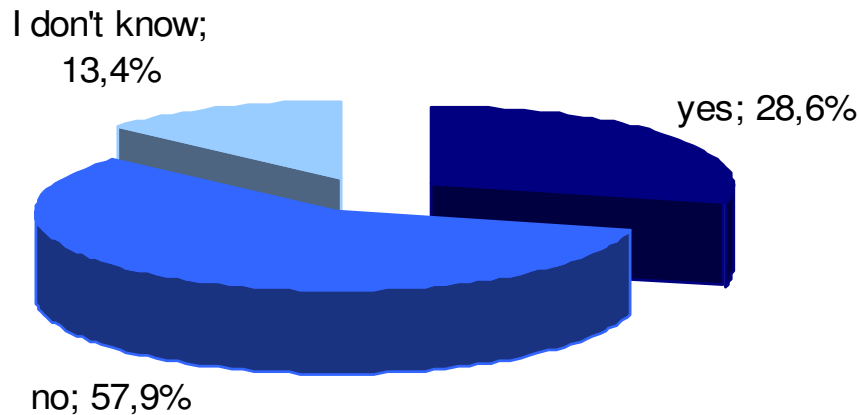


# IVAM Membership



28.6 % of the respondents are members of IVAM.

## Is your company/institute a member of the IVAM Microtechnology Network?



32.3 % of the addressed members have responded to the survey.

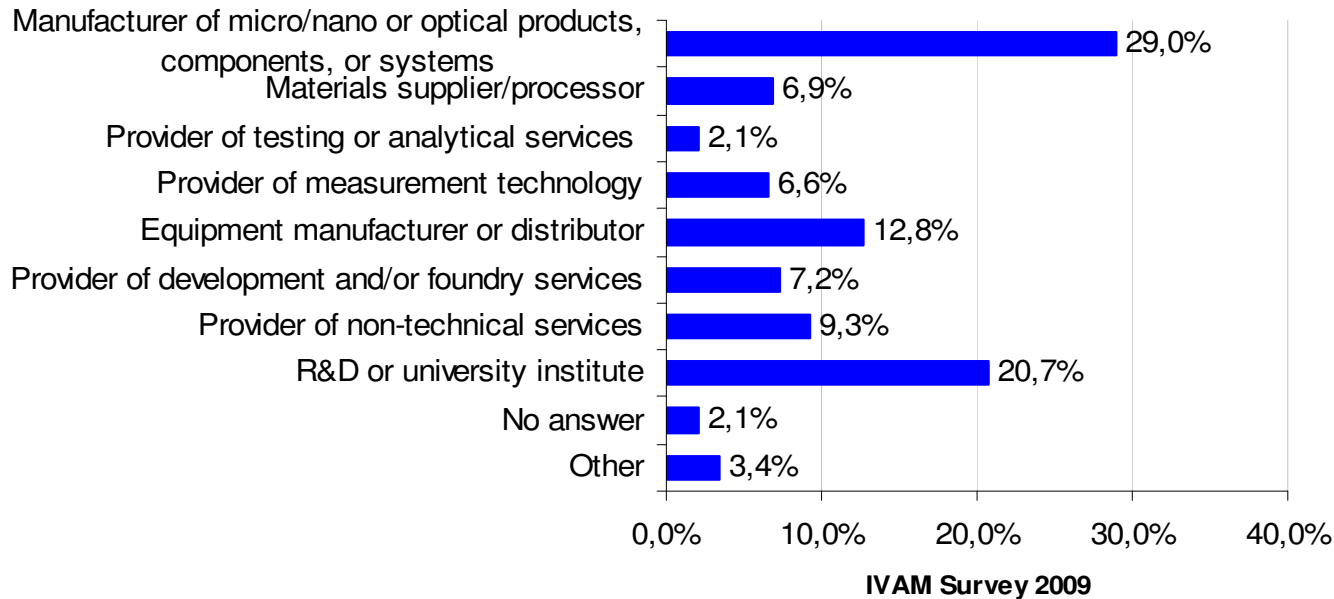


# Categories of respondents



More than two thirds of the respondents are industry enterprises; 20.7 % are R&D or university institutes.

**Please classify your company/institute into one of the following categories**



A large proportion of the responding enterprises manufacture micro/nano components or systems.

Others:  
software,  
trade company

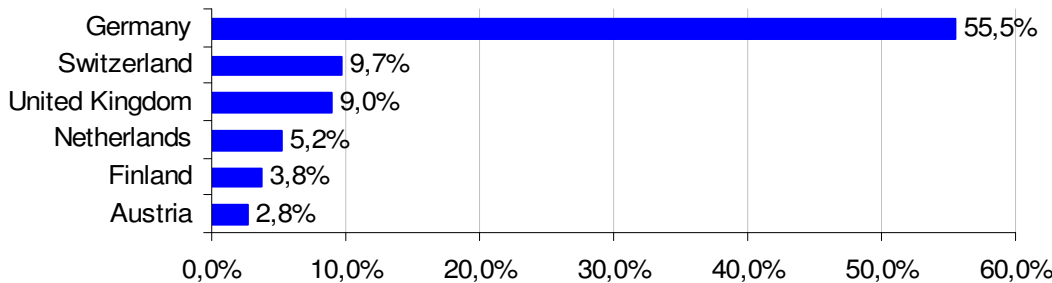
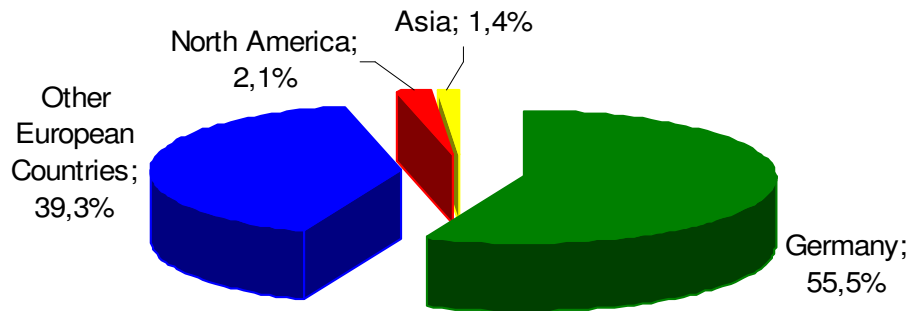


# Nationality of the respondents



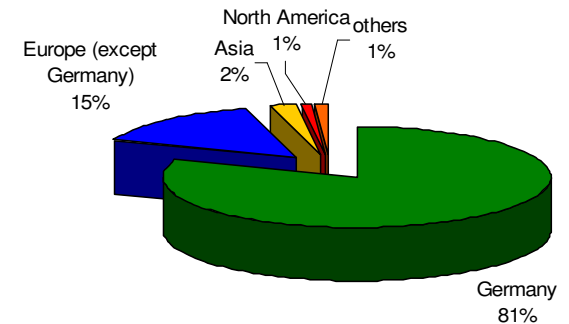
55.5 % of the respondents are based in Germany.

Where are the headquarters of your company/institute located?



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2008:  
Where are the headquarters of your company/institute located?



Compared to 2008, the proportion of respondents from other European countries has more than doubled.

Results are representative for all of Europe.

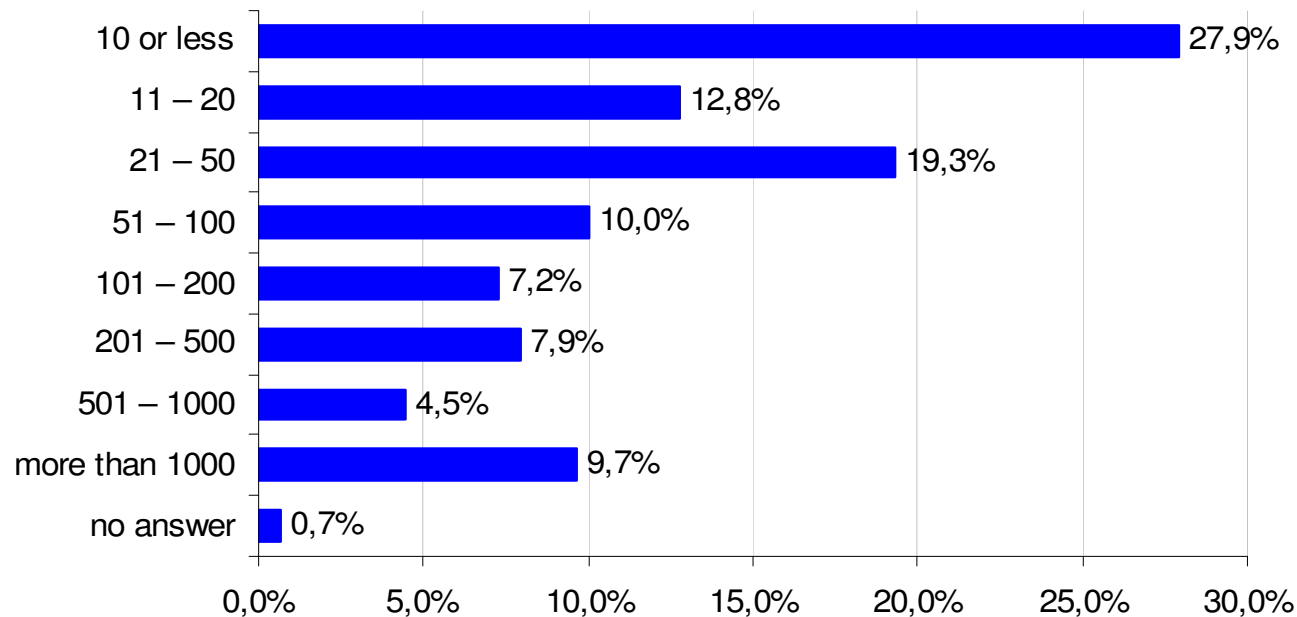


# Staff numbers



More than a quarter of the respondents are very small companies/institutes with 10 or less employees.

**How many people are employed by your company/institute?**



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# Staff development in 2008

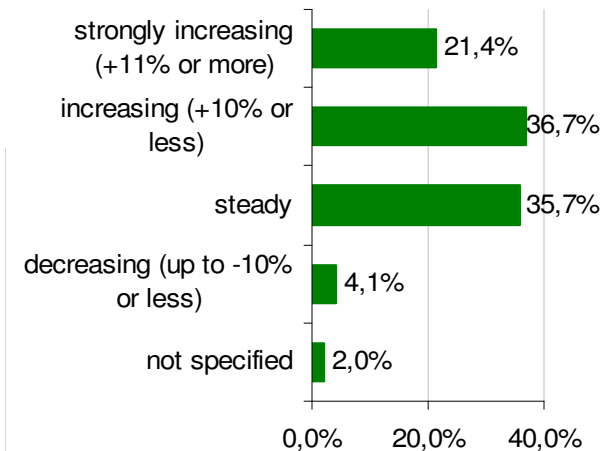
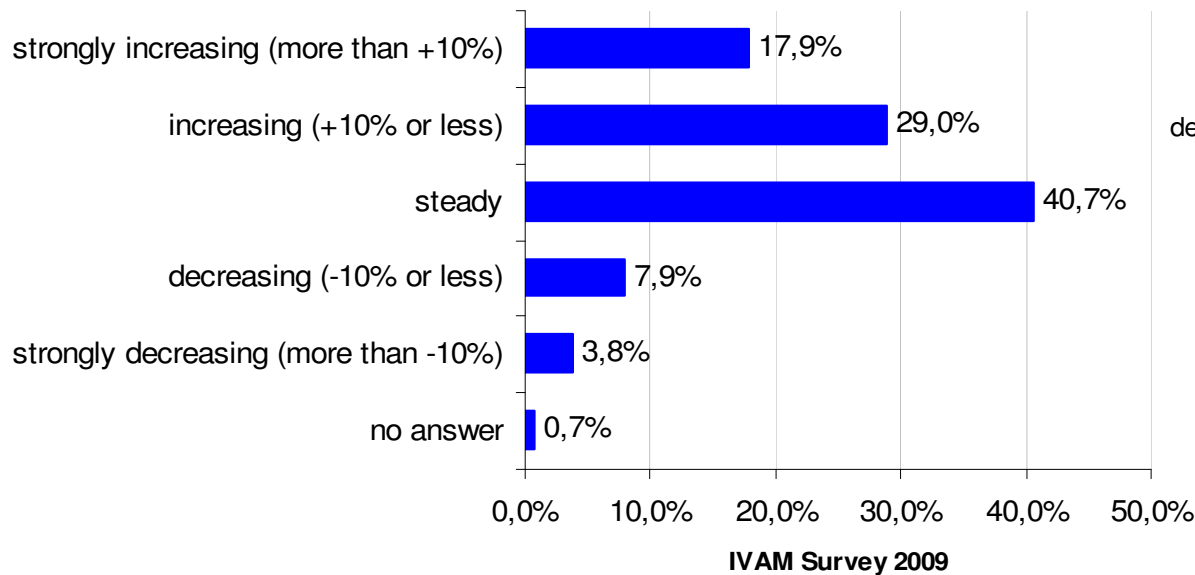


Staff numbers have been increasing or steady in the majority of the companies/institutes in 2008.

2007:

How has the number of your employees developed in 2007 as compared to 2006?

How has the number of employees developed during the year 2008?

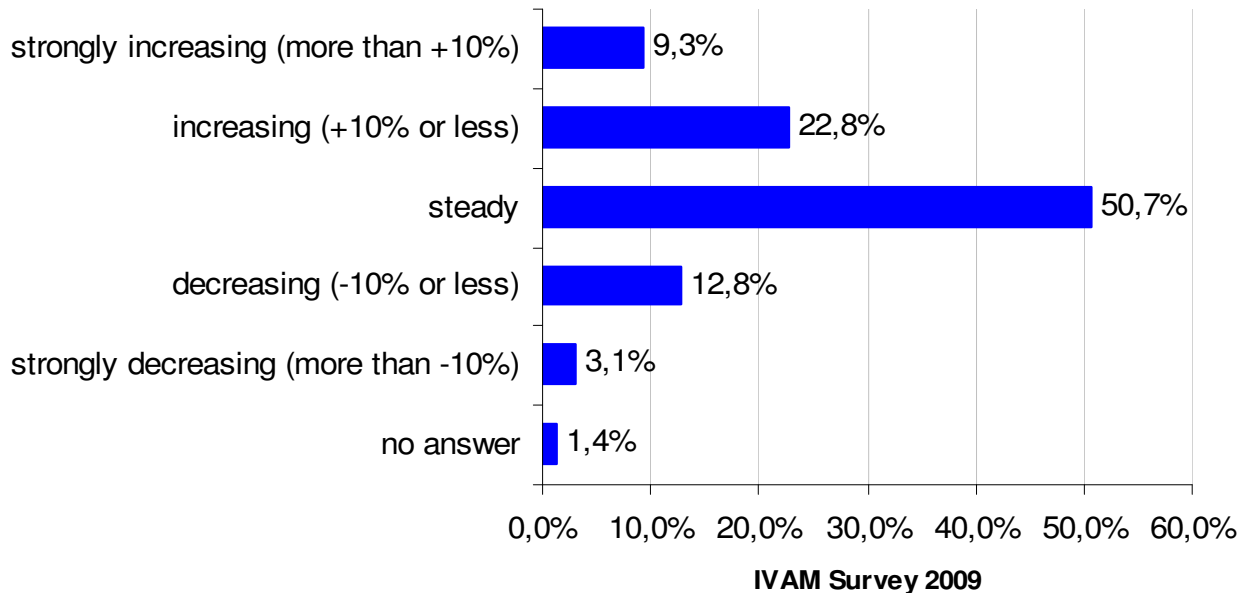


# Estimated staff development



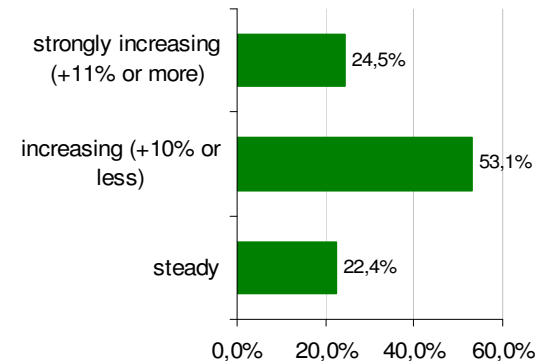
Forecasts of staff development are less optimistic than they used to be.

**How do you think the number of your employees will develop during 2009?**



2008:

**How do you estimate the number of employees will develop in the next 3 to 5 years?**



Still, half of the respondents expect to keep staff numbers steady.

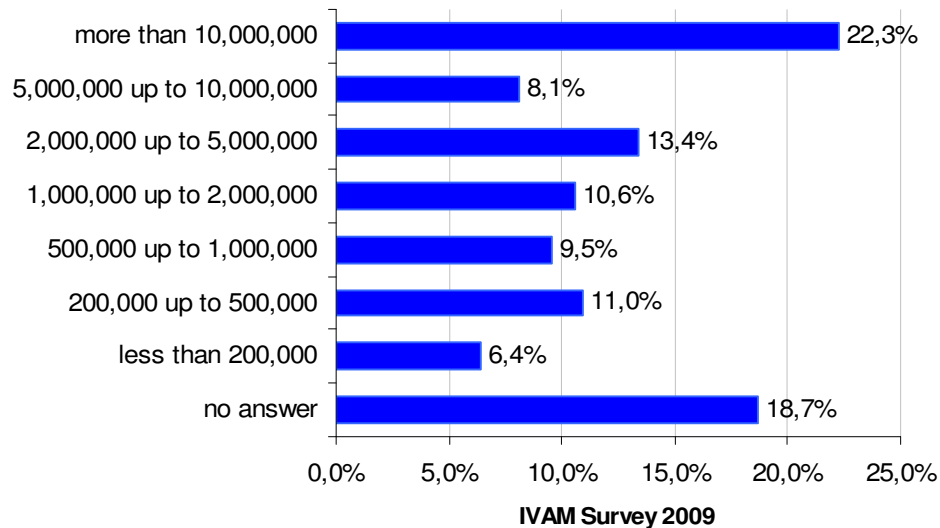


# Annual sales

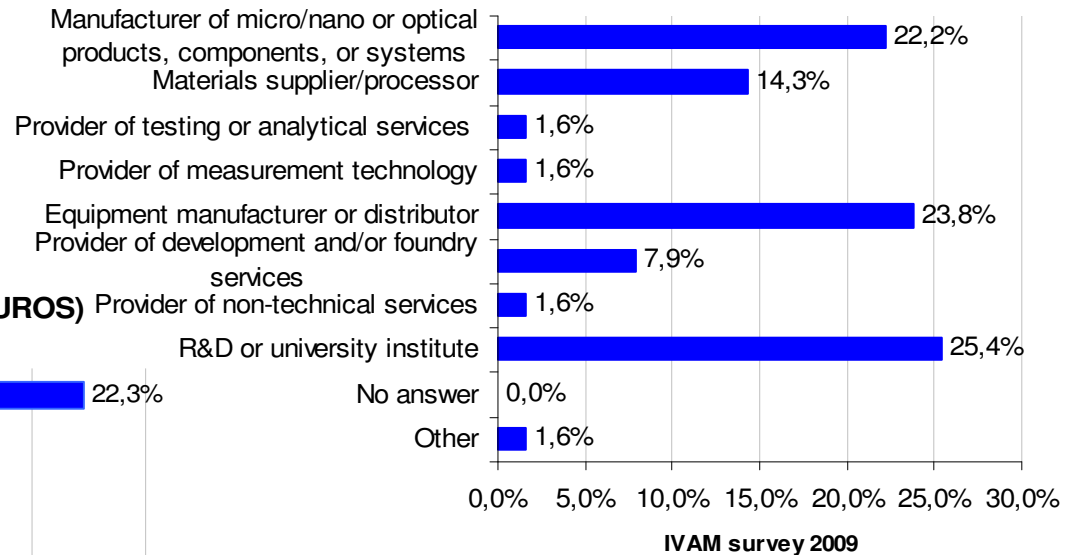


22.3 % of the respondents have annual sales > 10 Mio Euros.

Please indicate your annual sales for 2008 (in EUROS)



Respondents with annual sales > 10 Mio Euros



A large proportion of the respondents with annual sales > 10 Mio Euros are R&D institutions, equipment manufacturers or manufacturers of components or systems.

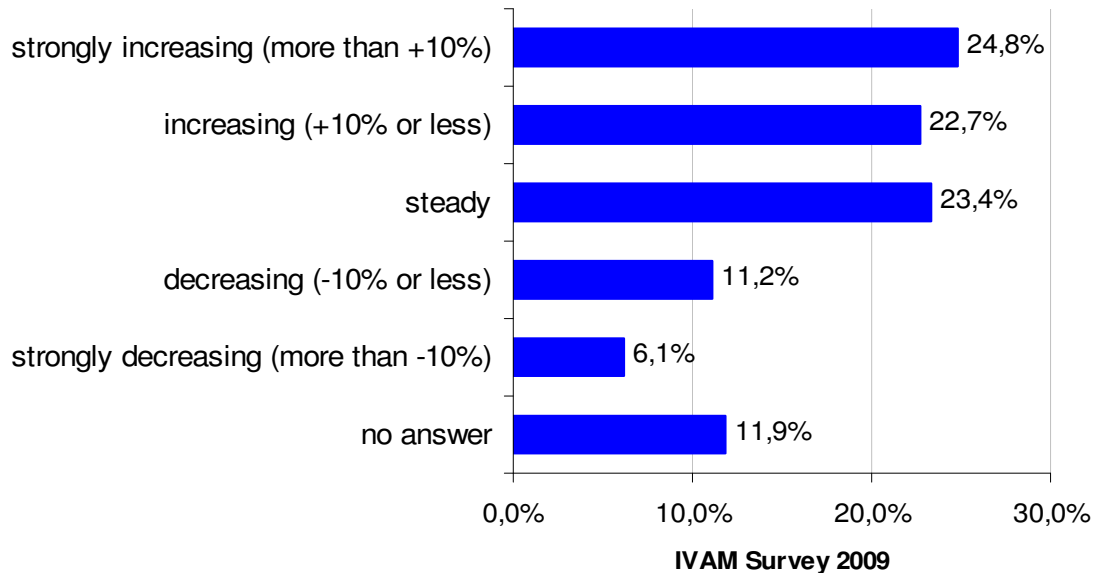


# Sales development in 2008

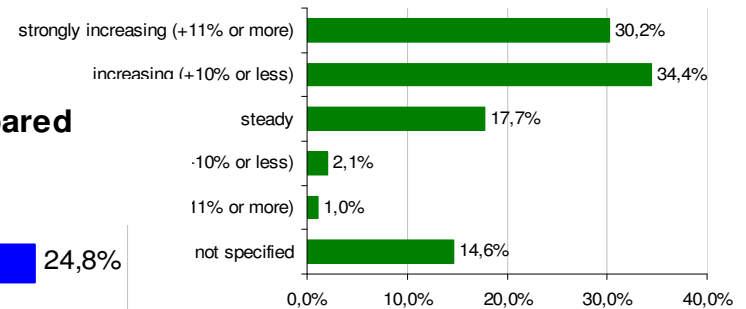


In 2008, annual sales have increased less than in 2007.

**How have your annual sales developed in 2008 compared to 2007?**



**How have your annual sales developed in 2007 as compared to 2006?**

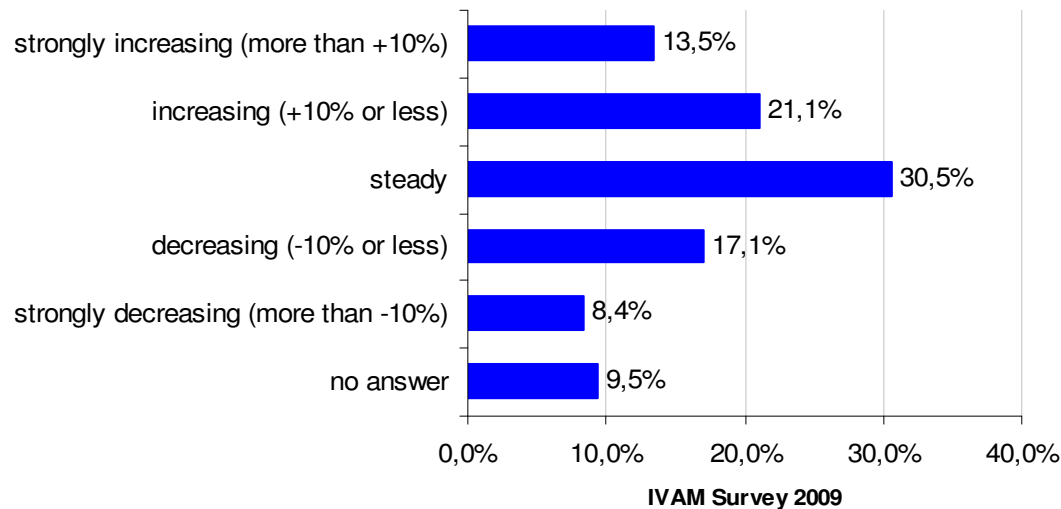


# Expected sales development

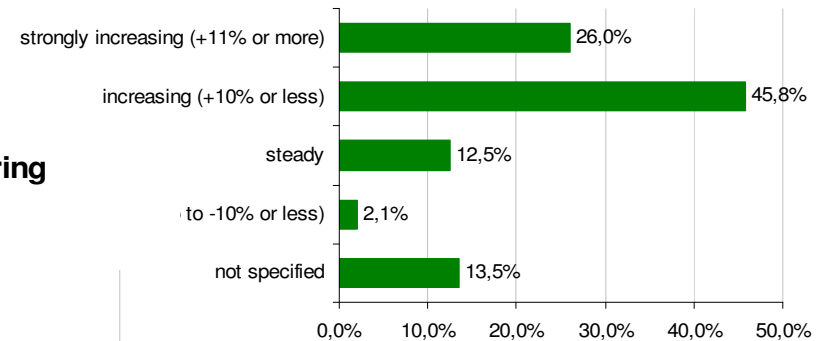


Expectations of growth are not as high as they were in the past years.

**How do you estimate your annual sales will develop during 2009?**



**How do you estimate your annual sales will develop in the next 3 to 5 years?**



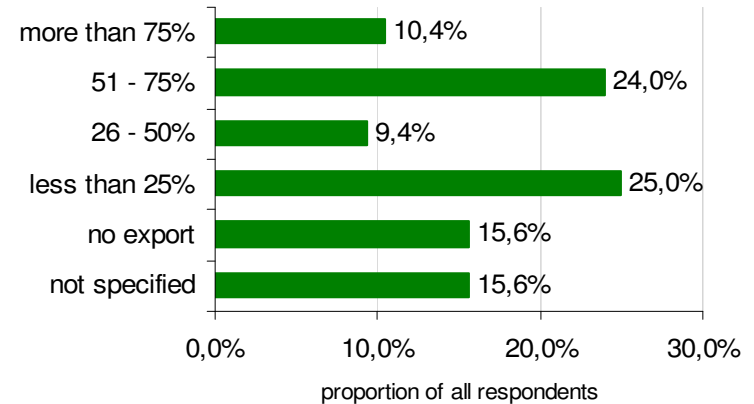
# Export share



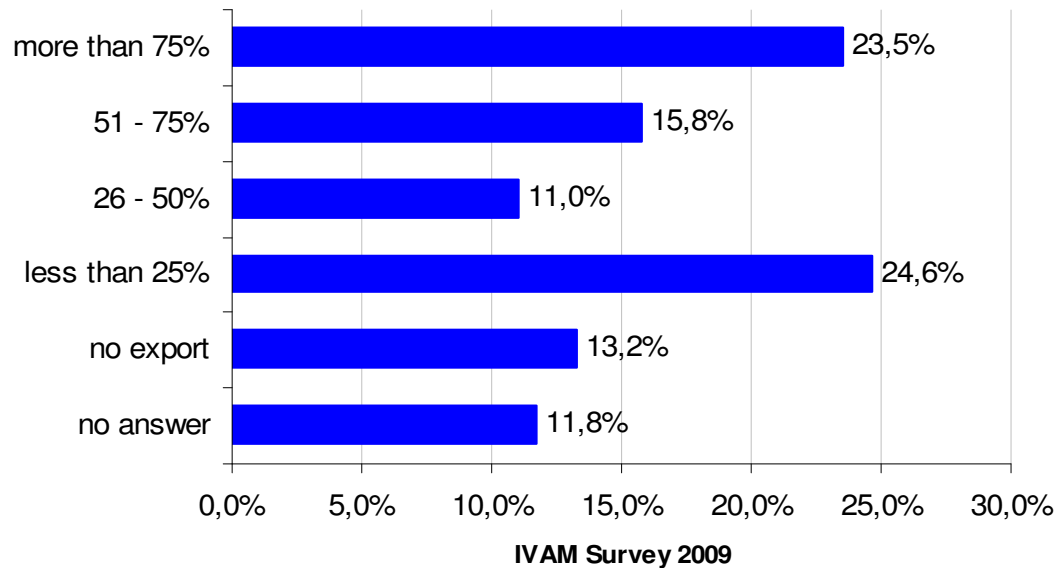
The export share has increased compared to the year before:  
More than twice as many respondents earn more than 75 %  
of their annual sales through export.

2008:

What proportion of your annual turnover does export account for?



What proportion of your annual sales does export account for?



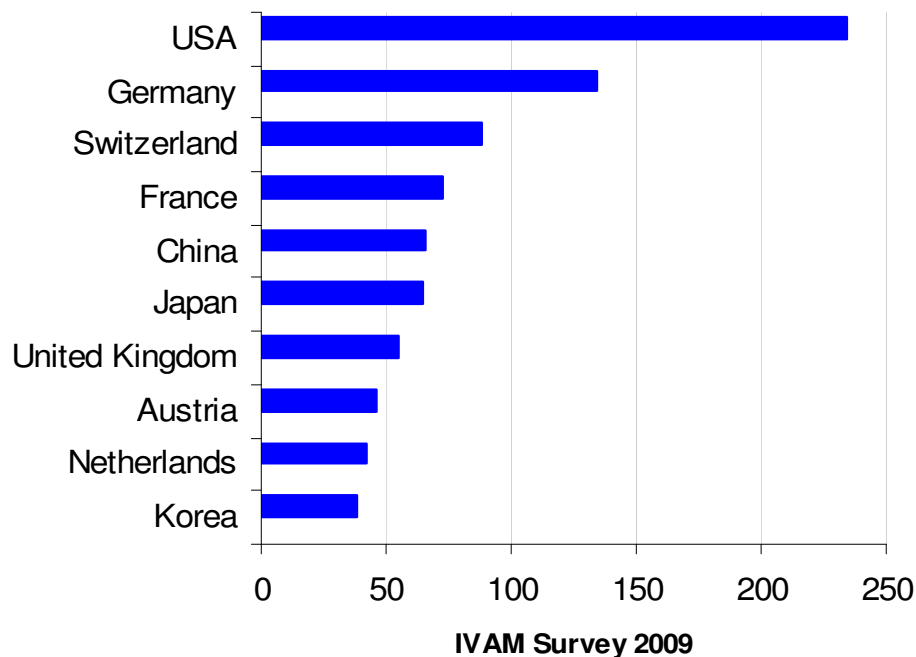
# Export countries



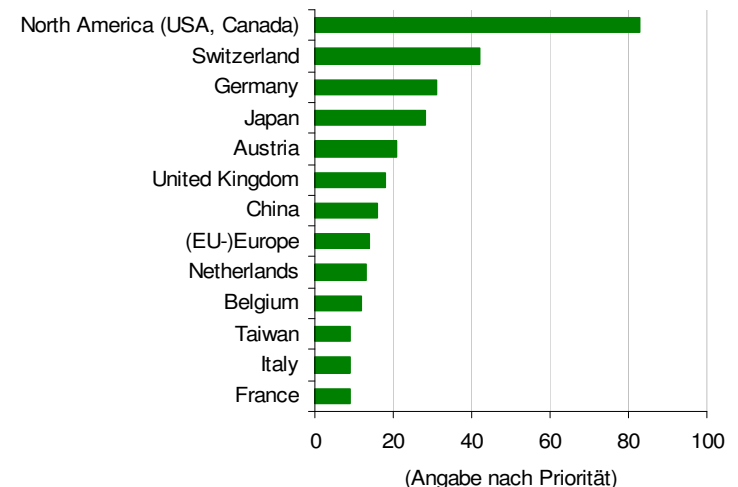
The USA, Germany and Switzerland are the most important export countries.

2008:

**Please indicate your three most important export countries.**



**Please indicate your three most important export countries**

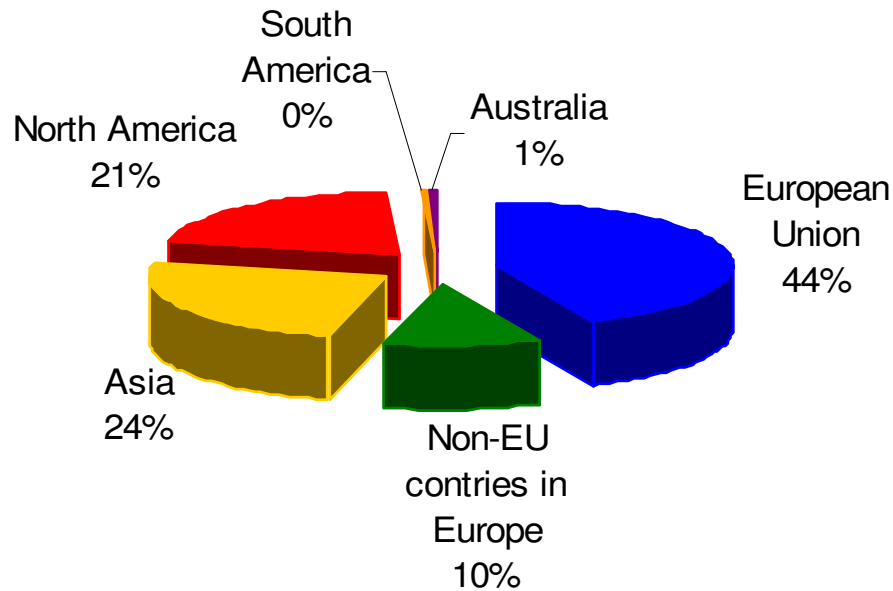


# Export regions



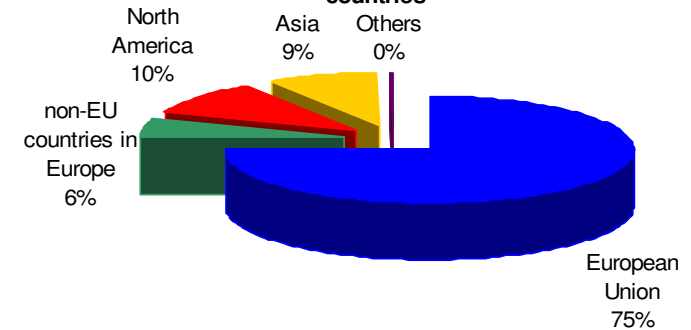
The European Union seems to be losing importance as export region, while countries in Asia become more important.

**Please indicate your three most important export countries.**



2008:

**Please indicate your three most important export countries**



The shift may be due to the smaller proportion of respondents from Germany.

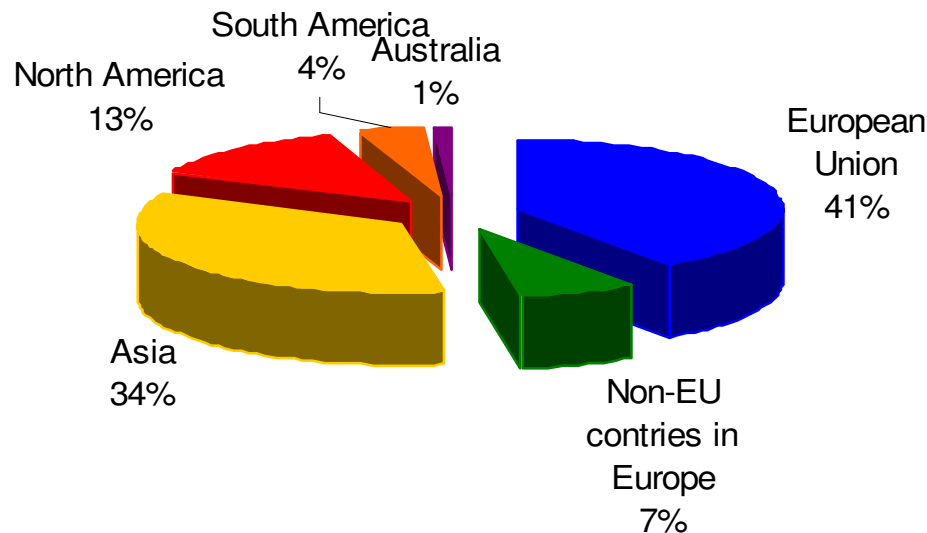


# Projected international activities



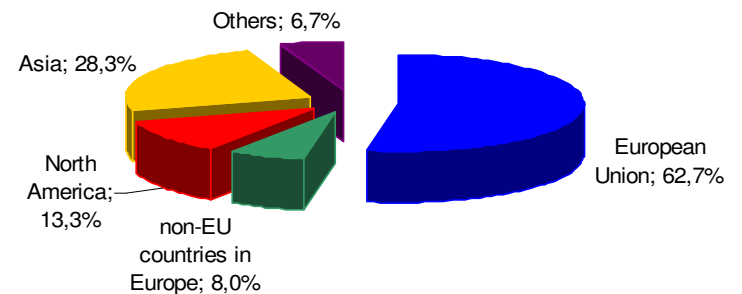
The companies intend to address the Asian market more strongly.

**In what countries would you like to take up business in the near future?**



2008:

**In what countries would you like to take up business in the near future?**

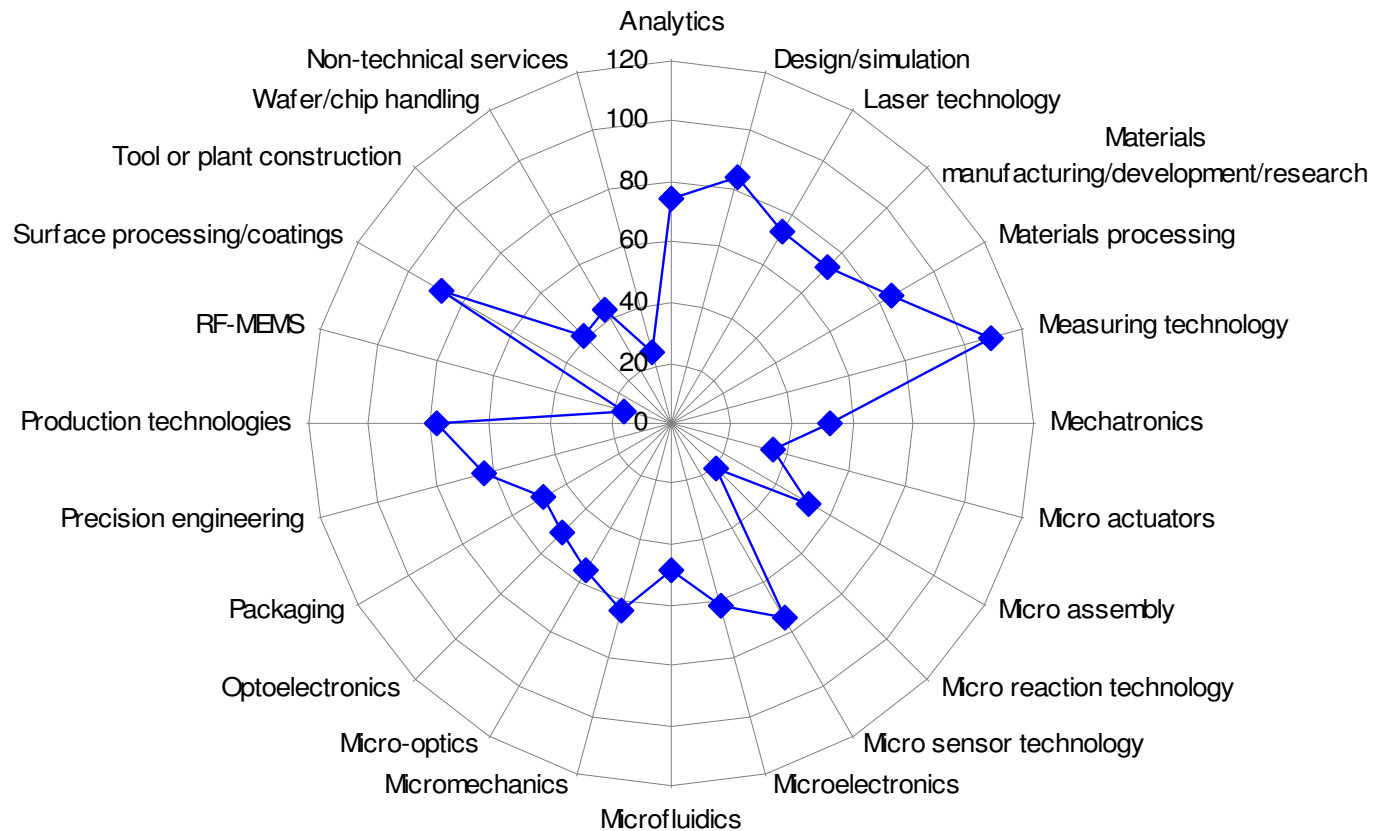


# Applied technologies



Measuring technology and surface processing/coating technology are the primary technologies of the European companies and institutes.

**Which technologies does your company/institute apply presently?**

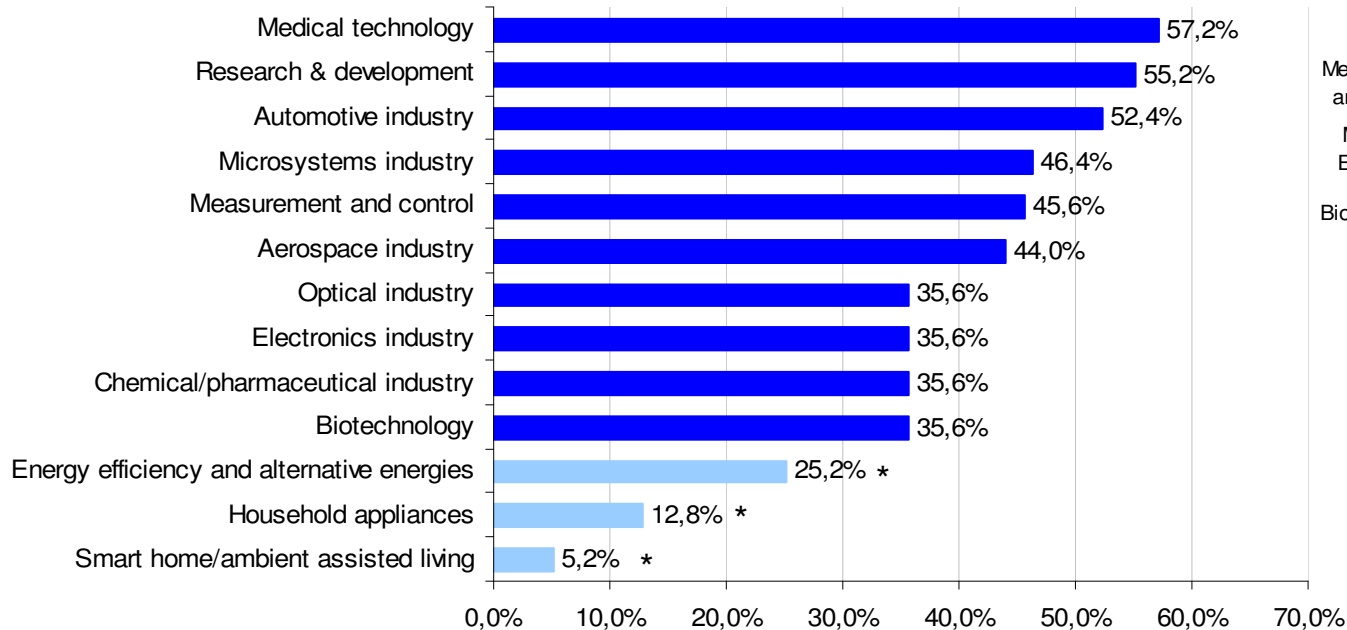


# Target markets



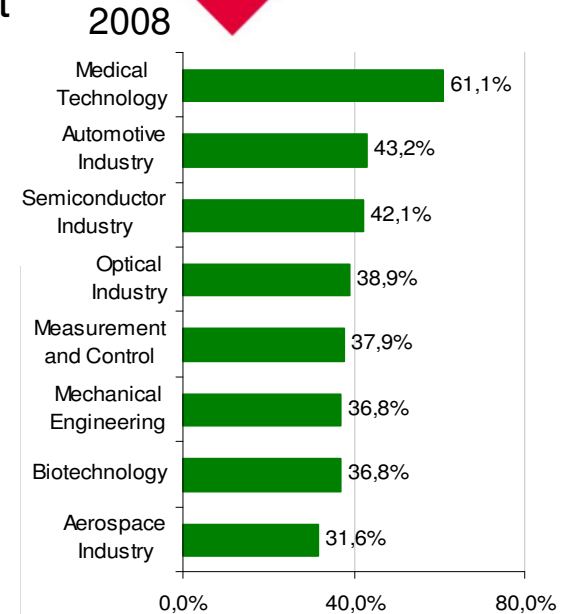
Medical technology continues to be the most important market of the companies and institutes.

**In which of the following industries are your products and technologies applied?**



\* See following slides

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Energy applications are addressed by a quarter of the respondents;

only 5% address smart home applications

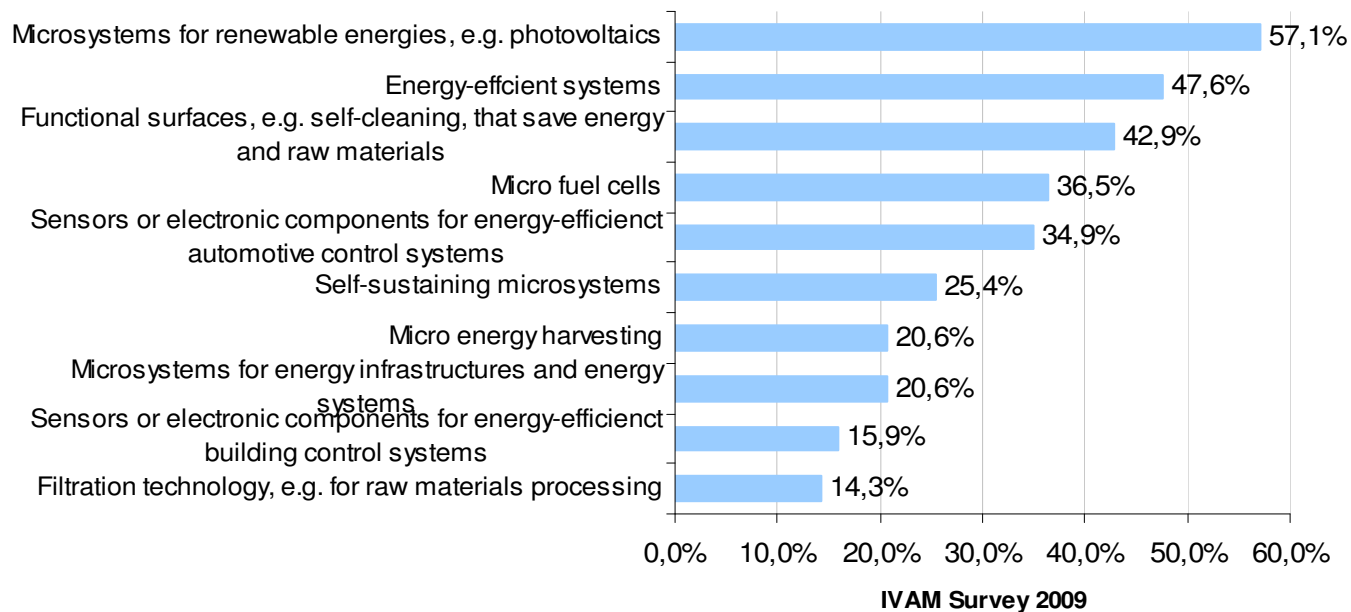


# Application trends - energy efficiency and alternative energies



Renewable energies, energy-efficient systems and functional surfaces are the most relevant application trends for the energy industry suppliers.

**Which applications in the field of energy efficiency or alternative energies will be specifically interesting for your company/institute in the near future?**

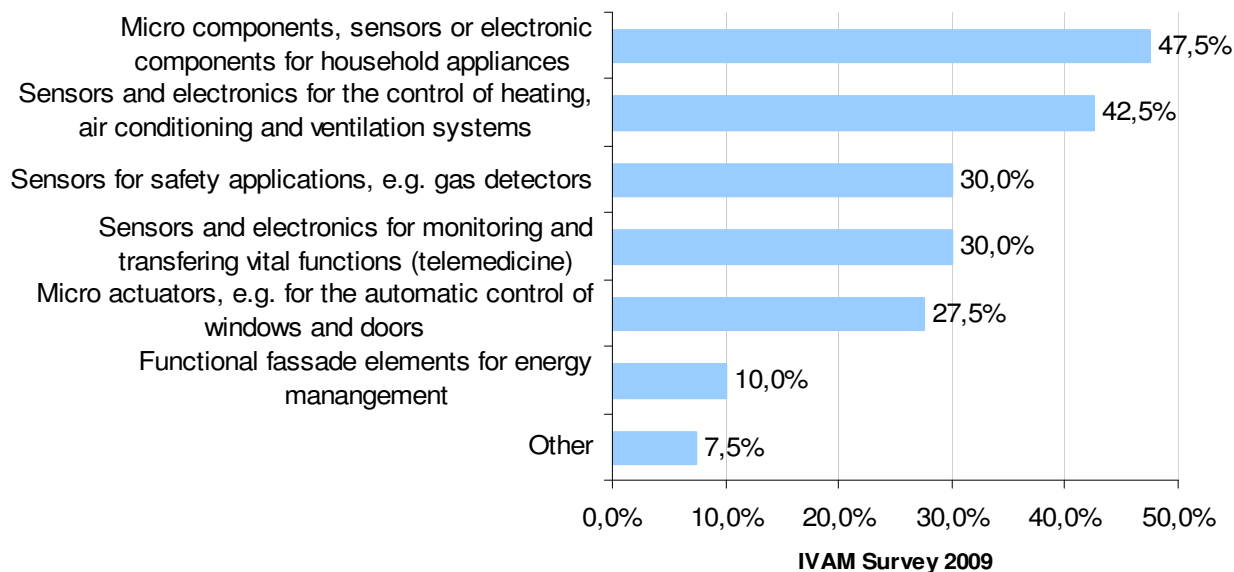


# Application trends – smart home and household appliances



Components for household appliances and heating/air conditioning/ventilation systems are the most relevant application trends for the smart home/AAL/household appliances suppliers.

**Which applications in the field of the intelligent house or household appliances will be specifically interesting for your company/institute in the near future?**



Others:  
Security and access control  
Stahl- und Chromoberflächen

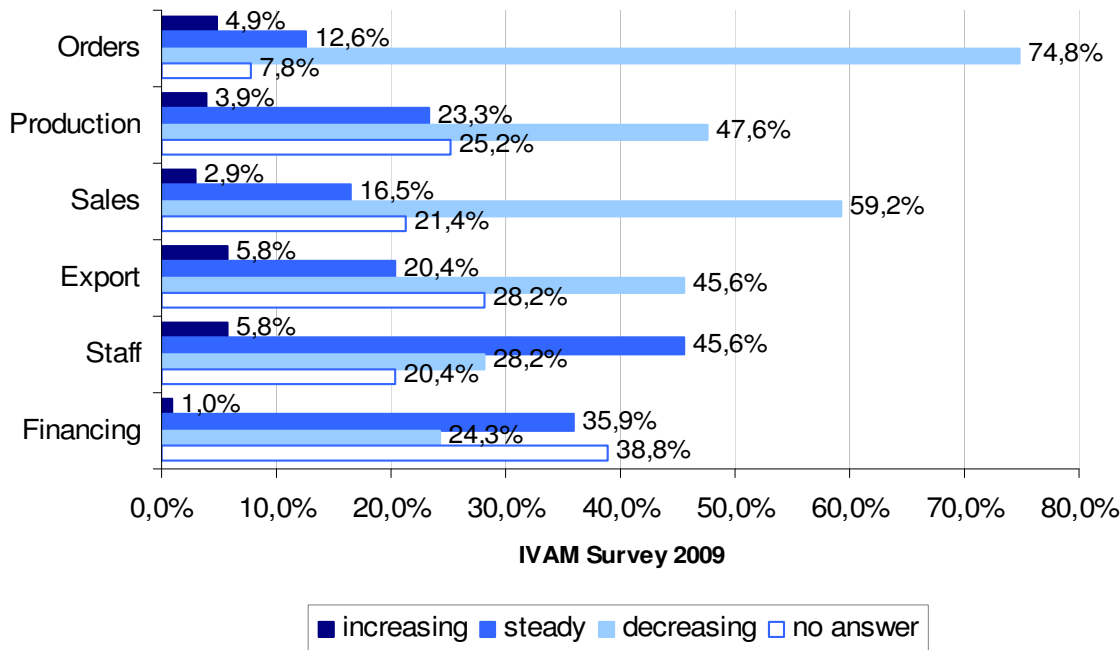


# Financial and economic crisis – effects in 2008

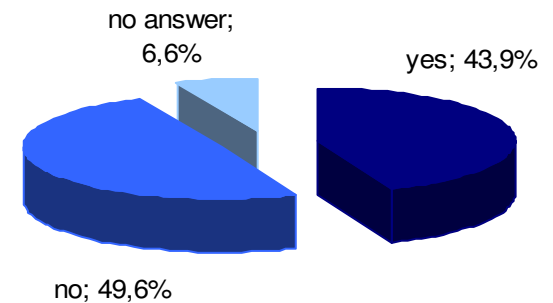


Almost half of the respondents have not been affected by the economic crisis in 2008.

**In what way has the financial and economic crisis affected your business in 2008?**



**Has the financial and economic crisis affected your business in 2008?**  
All respondents



Of those who were affected by the crisis, three quarters report decreasing orders.

Staff numbers were steady or increasing in half of the affected companies/institutes.

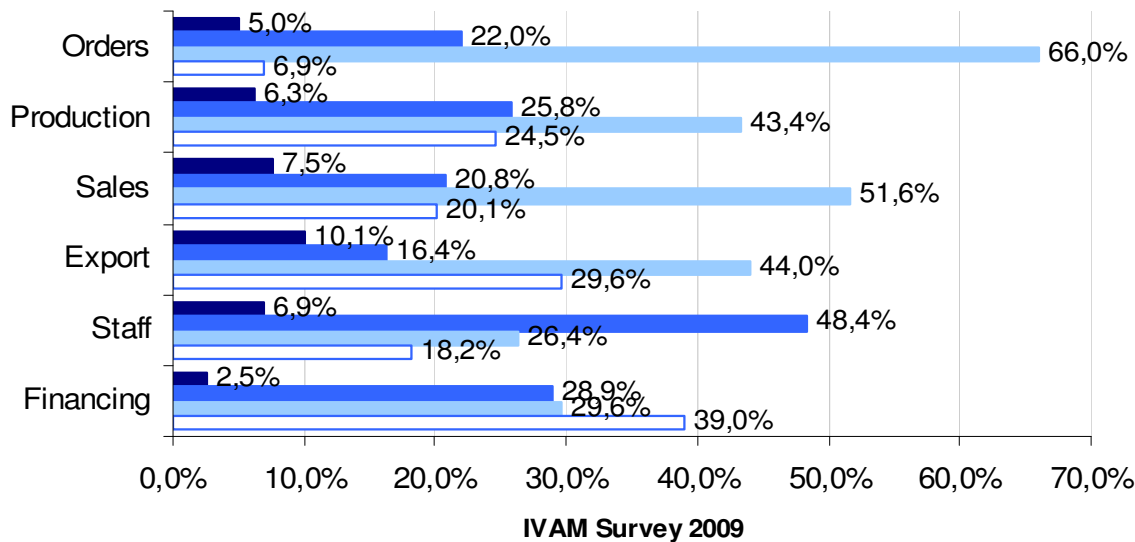


# Financial and economic crisis – effects in 2009



Many more respondents – almost 70 % – expect to be affected by the economic crisis in 2009.

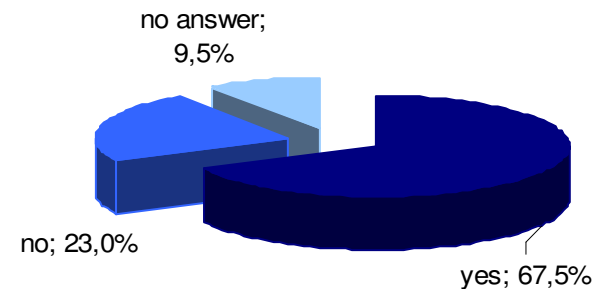
**In what way do you expect the financial and economic crisis to affect your business in 2009?**



■ increasing ■ steady ■ decreasing □ no answer

**Do you expect the financial and economic crisis to affect your business in 2009?**

All respondents



Two thirds are expecting a decrease in orders.

Again, more than half of the companies/institutes expect staff numbers to be steady or rising.

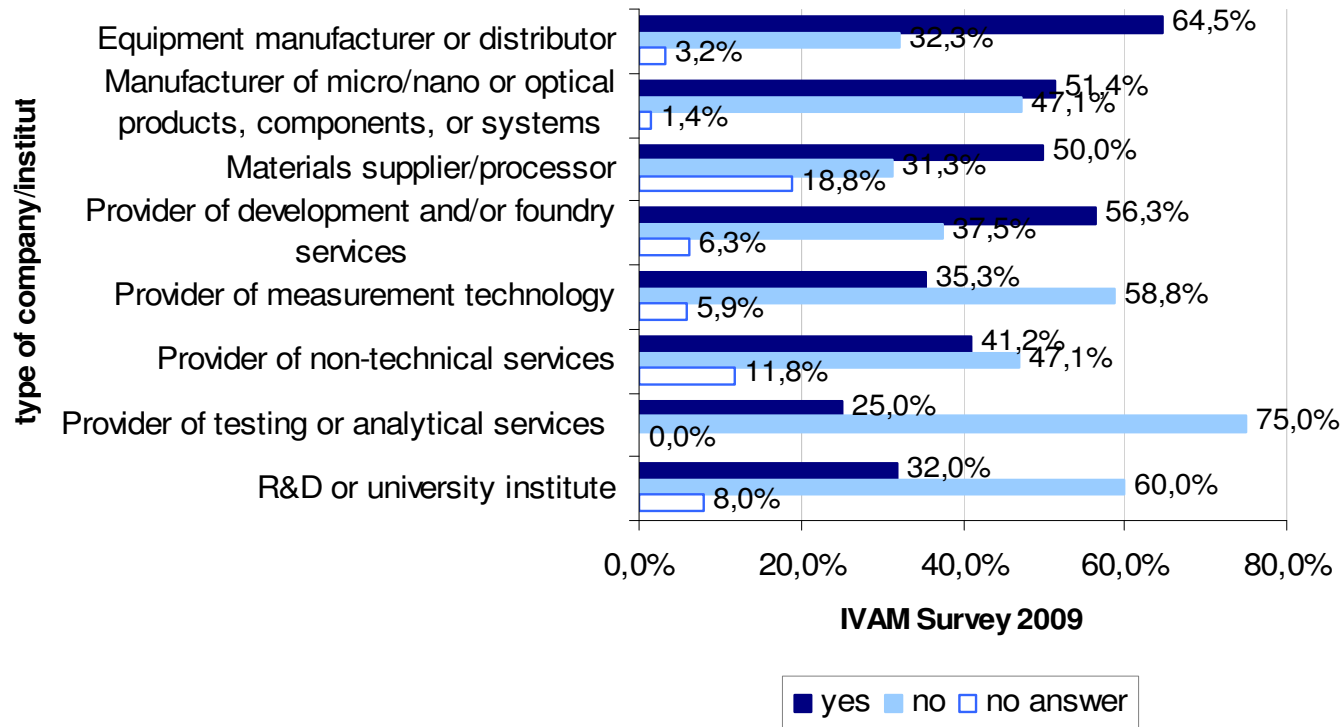


# Financial and economic crisis – category



Equipment manufacturers are more strongly affected by the financial and economic crisis than other company types

Effects of the financial crisis according to category

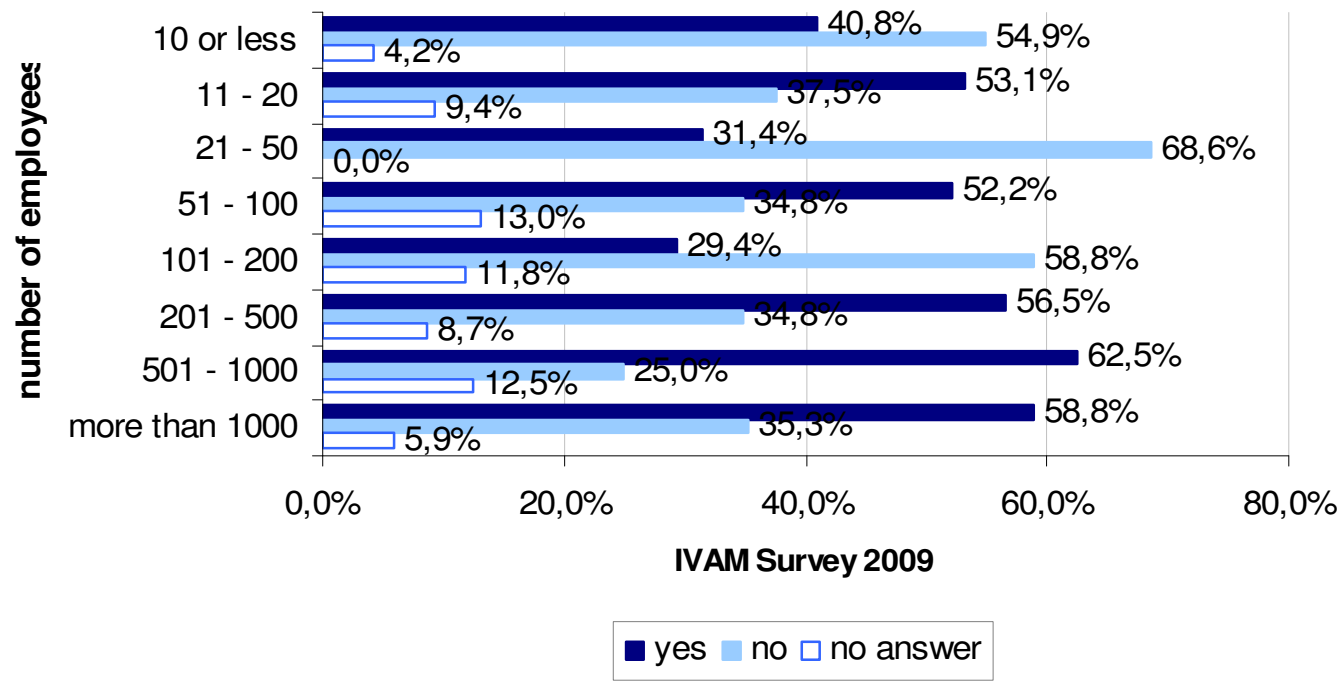


# Financial and economic crisis – company size



Larger enterprises and institutes are more strongly affected by the financial and economic crisis

## Effects of financial crisis on companies/institutes of different sizes



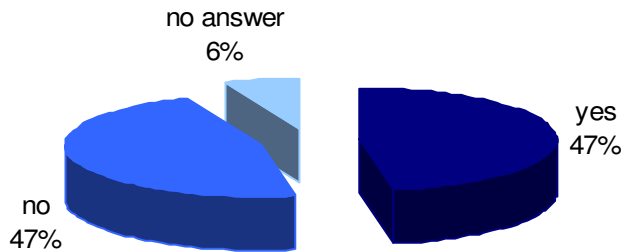
# Financial and economic crisis – automotive suppliers



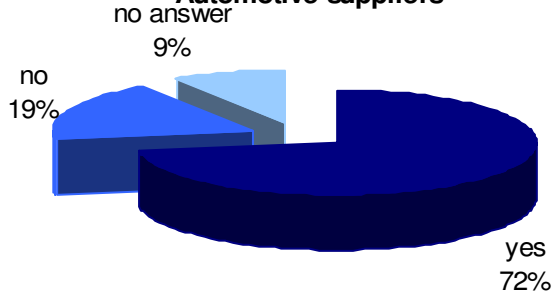
Automotive suppliers are/expect to be affected by the economic crisis only a little more than the average company/institute

Automotive suppliers

**Has the financial and economic crisis affected your business in 2008?**  
Automotive suppliers

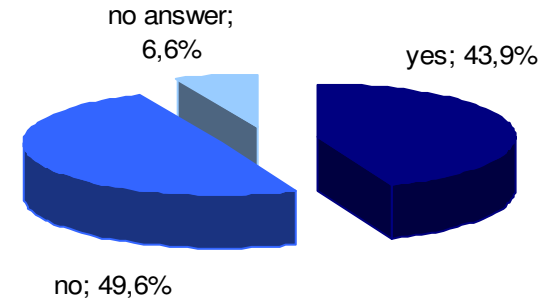


**Do you expect the financial and economic crisis to affect your business in 2009?**  
Automotive suppliers

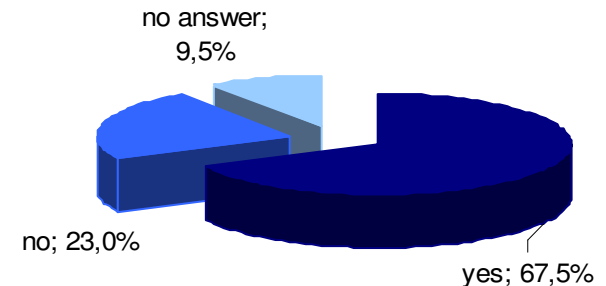


All respondents

**Has the financial and economic crisis affected your business in 2008?**  
All respondents



**Do you expect the financial and economic crisis to affect your business in 2009?**  
All respondents

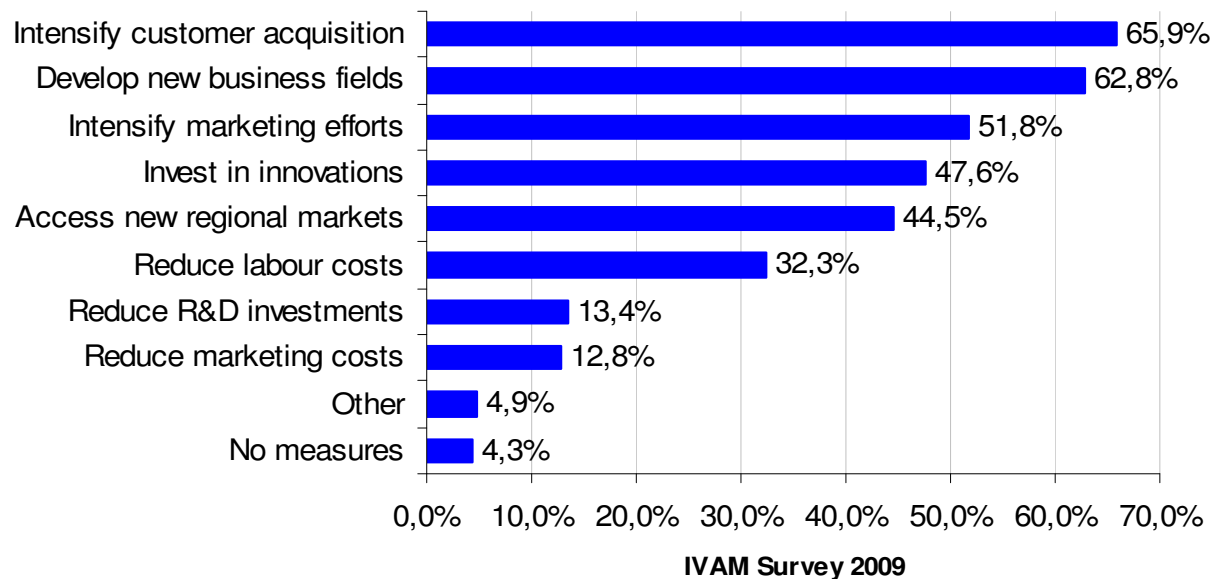


# Financial and economic crisis – measures



A large majority of the respondents would react to the crisis in a “positive” way – e.g. by intensifying acquisition and marketing efforts or addressing new business fields rather than reducing investments or costs.

## What measures would you consider taking in reaction to a negative business development?



Other:

Gehaltskürzungen

Intensify Customer

retention/verstärkte

Bestandskundenpflege

zusätzliche Dienstleistungen

verstärkte

Forschungstätigkeiten

increase use of networking

opportunities via Internet

Kostensenkung

vorsichtig Investieren



- **Would you like to make any comments or suggestions concerning this survey?**
- The University lost significant sums of money in the Icelandic Banks. Some of these Bankers should be put in Prison for what amounts to grand theft
- It is surprising to see companies in the UK & US increase marketing efforts & investment over the last six months.
- Die Krise hat derzeit keinen negativen Einfluss auf die Auftragslage, aber die Zahlungsmoral ist teilweise dramatisch verschlechtert!
- Die Auswirkungen der Krise sind bei uns spürbar, durch neu anlaufende Projekte wird das aber kompensiert. Dies ist aus den Antworten nicht ersichtlich.
- Finanzkrise 2008 noch nicht spürbar, für 2009 werden Einbrüche erwartet.



- **Would you like to make any comments or suggestions concerning this survey?**
- Für Forschungsinstitute nicht so relevant / Not very applicable for universities or research institutes as it is very focused on sales type data
- Ist so gut, leicht zu beantworten! / Easy to use
- Ausblick nach 2009? Bewertung von Branchen?
- Macht so eine Umfrage wirklich Sinn?
- Es fehlen offenen Fragen und Fragen, die den Bereich Organisationsänderungen und Marketing betreffen.
- Free comments useful: we got finally 3 years financing for expansion = explains some answers
- Ich möchte gerne über das Ergebnis der Umfrage informiert werden! Danke, und viel Erfolg beim Auswerten ;-)

