



The Competence Network
for Optical Technologies in Baden-Württemberg

photonicsBW

**Welcome to Baden-Württemberg –
The Leading Photonics Location in Germany!**

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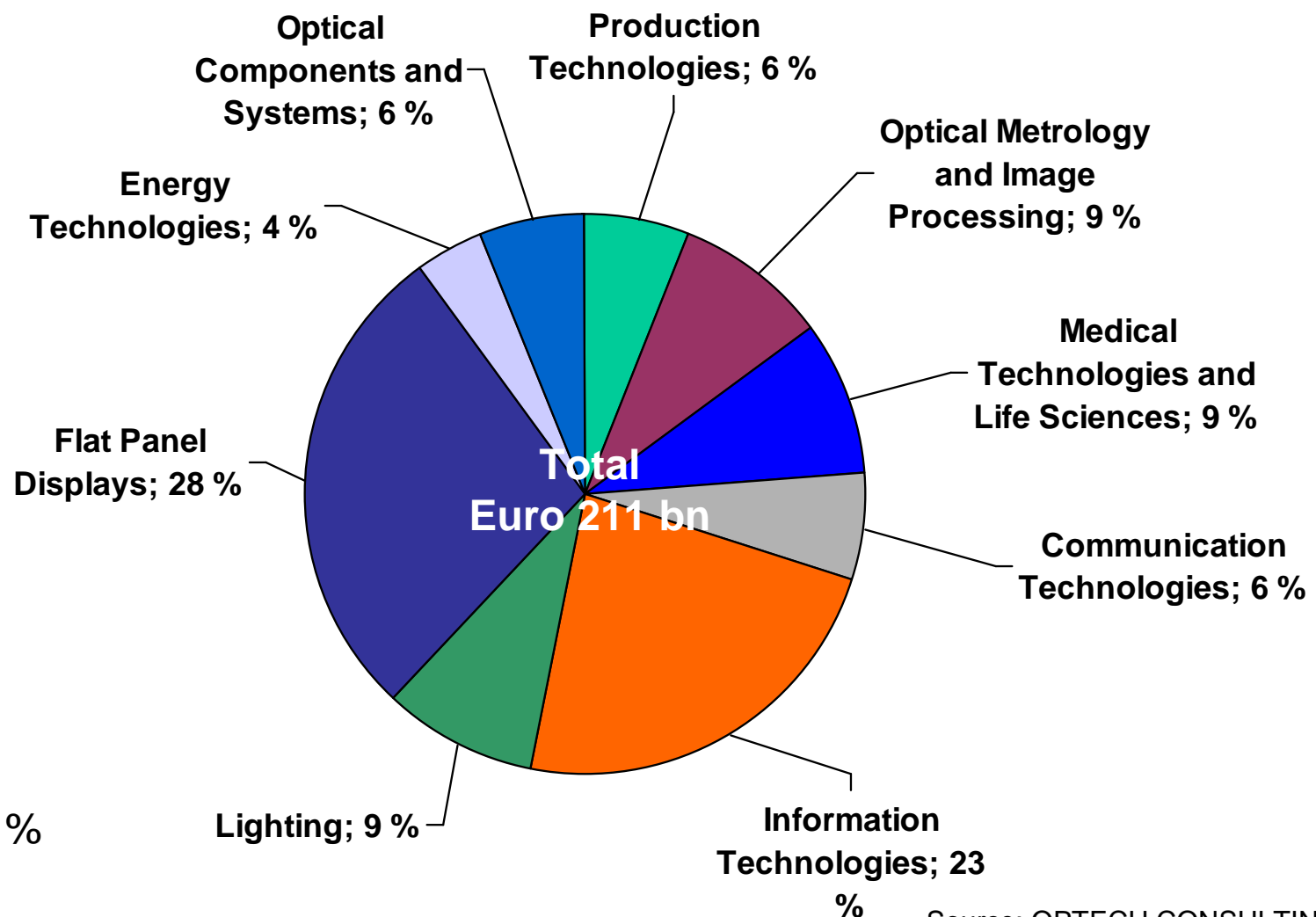


Member of



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Optical Technologies Worldwide in 2005



Shares

Germany: 8 %
 Taiwan: 12 %
 South Korea: 13 %
 Japan: 34 %
 Other: 33 %

Source: OPTECH CONSULTING AG

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Optical Technologies in Europe – Facts and Figures:

The sales revenue of the European photonics industry **grew by 12 % to Euro 49 billion** in 2006.

Photonics employs **246.000 people** in Europe, not including subcontractors. Well over **5,000 companies** are involved in manufacturing of photonics, most of them small and medium sized enterprises.

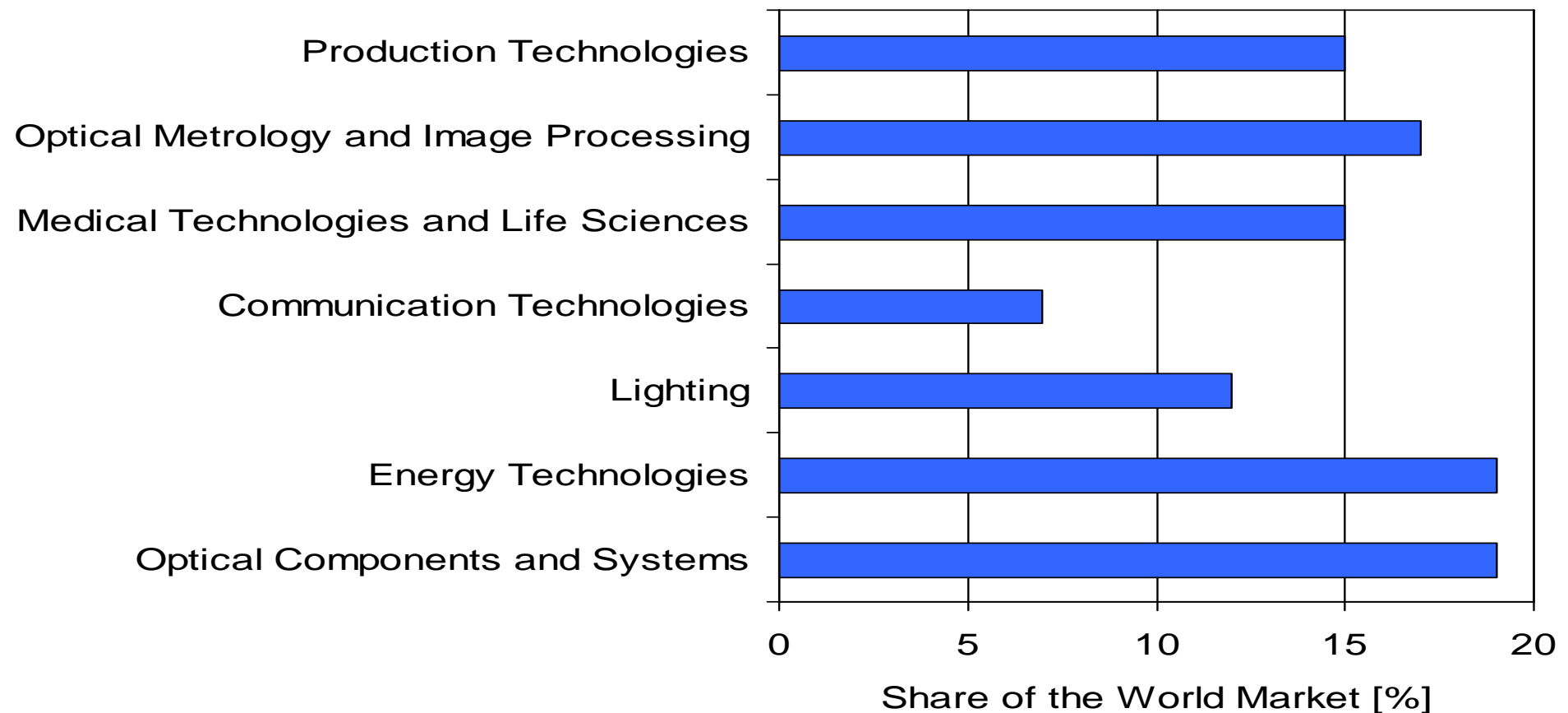
Europe has **19 %** of the overall worldwide photonics production volume and leads in many key sectors such as lighting, measurement and automated vision, production technologies, medical technologies and life sciences, defence photonics, and optical components and systems. In these areas the European share ranges from 25 – 45 %.

For the period 2005 to 2015 an annual growth rate of the world photonics market of **7.6 %** is predicted. The expected volume in 2015 is **Euro 439 billion**.

Source: OPTECH CONSULTING AG

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Optical Technologies in Germany: Share of the World Market in 2005



Source: OPTECH CONSULTING AG

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Optical Technologies in Baden-Württemberg 2005 – 2007

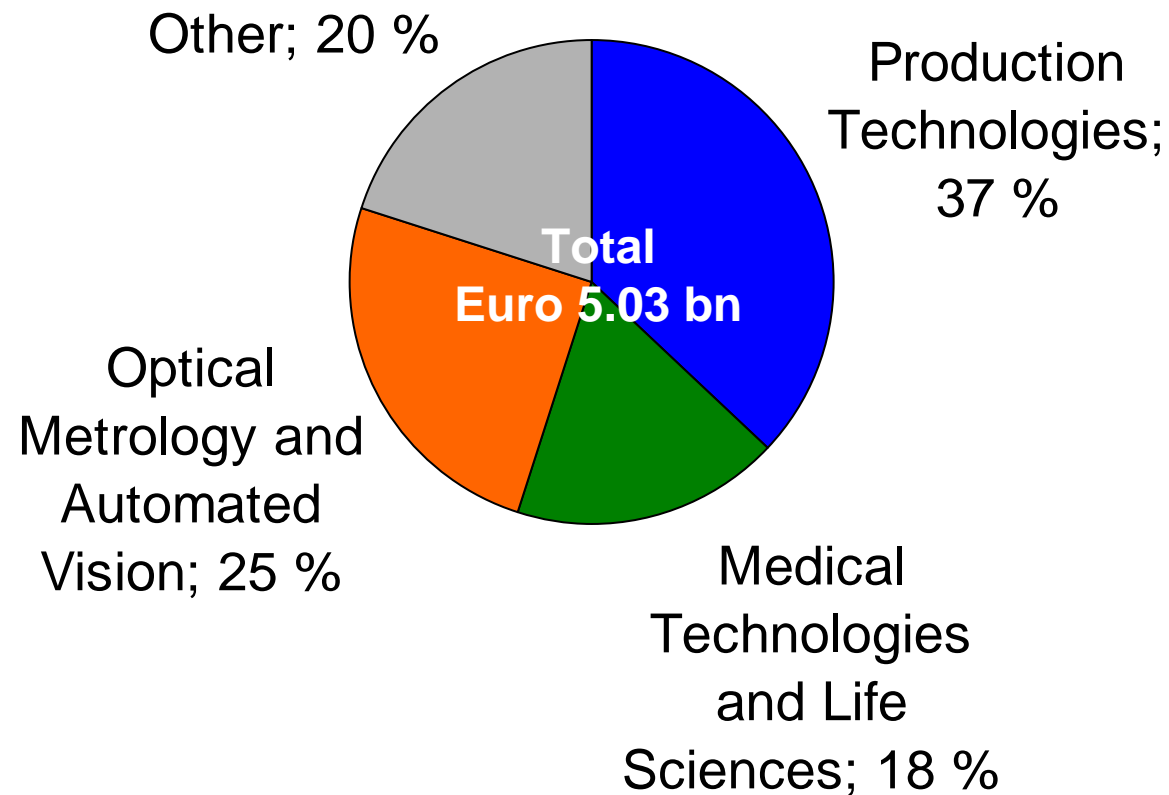
Production Volume and Growth Rates

Year	Production Volume [Euro Billion]	Growth Rate Compared to Previous Year [%]
2007	5.0	10.9
2006	4.5	11.4
2005	4.1	n.a.

Source: OPTECH CONSULTING AG

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Optical Technologies in Baden-Württemberg in 2007



Source: OPTECH CONSULTING AG



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Optical Technologies in Baden-Württemberg

Production Volumes in Detail

	2007	2005
Production Technologies	1.9	1.2
Optical Metrology and Automated Vision	1.3	1.1
Medical Technologies and Life Sciences	0.9	0.8
Other	1.0	0.9
Total	5.0	4.1

Source: OPTECH CONSULTING AG



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Comparison

Key Figure	Unit	Baden-Württemberg	Germany	World
Sales Revenue 2007	Euro Billion	5.0	n.a.	n.a.
Sales Revenue 2006	Euro Billion	4.5	n.a.	235
Sales Revenue 2005	Euro Billion	4.1	16.3	211
Employees 2005 (w/o suppliers)	-	22,700	86,700	n.a.
Employees 2005 (with suppliers)	-	n.a.	101,500	n.a.
Export Ratio	%	67.5	65	-
R&D Ratio	%	9.3	9.7	n.a.

Source: OPTECH CONSULTING AG

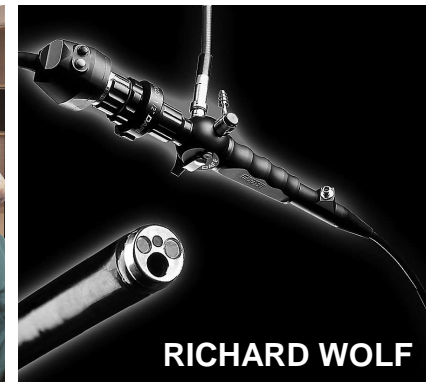
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Strengths

Baden-Württemberg is leading in the fields of production technologies with global enterprises like Carl Zeiss AG and TRUMPF Group as well as many innovative small and medium sized companies.

Furthermore there are strong players in the field of medical technologies and life sciences as well as sensor technologies with companies like KARL STORZ and RICHARD WOLF as well as SICK and Polytec.

Baden-Württemberg generates 25 % of Germany's production volume in the field of optical technologies.



Baden-Württemberg is the leading Photonics location in Germany!

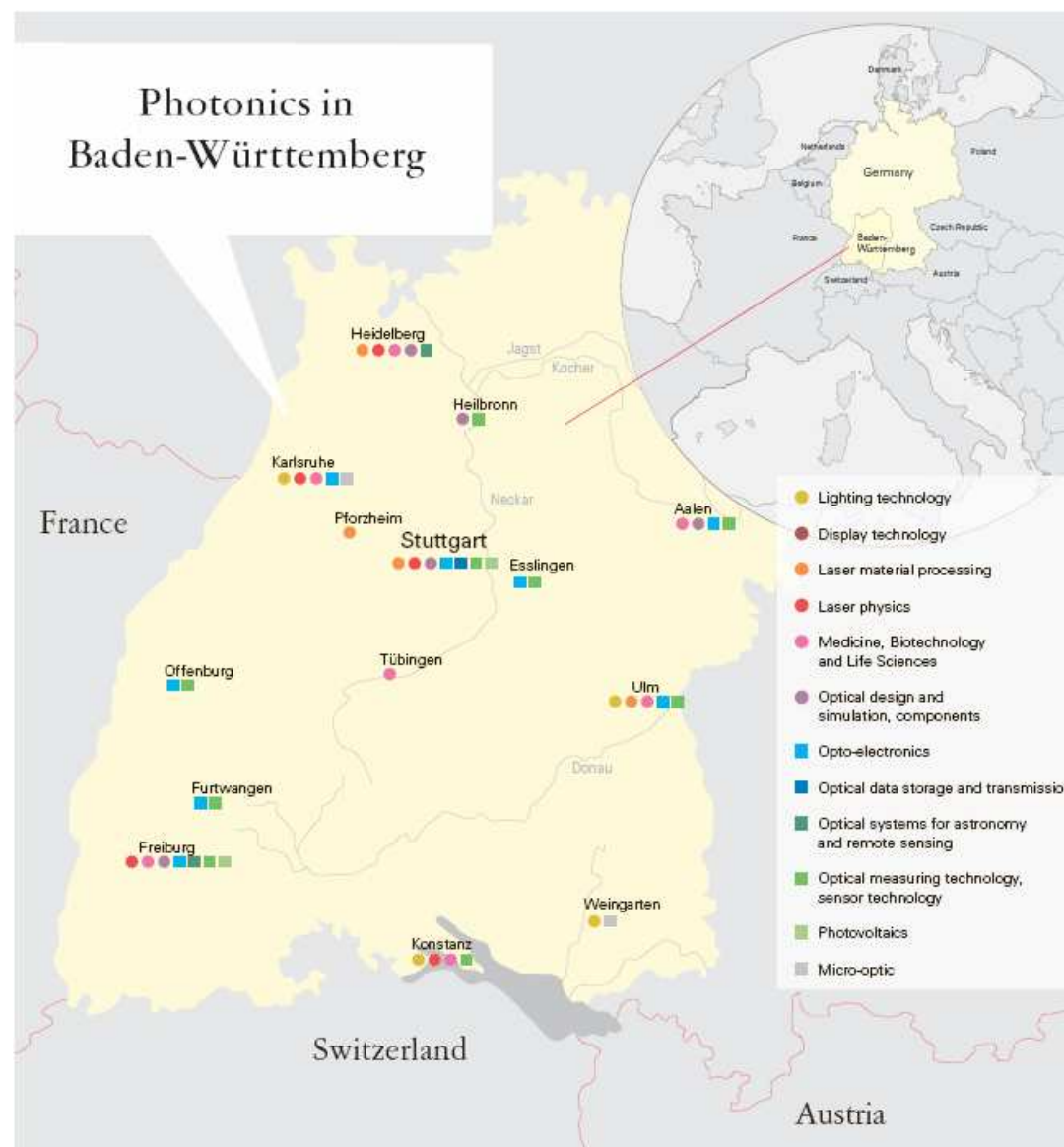


7 Universities and 6 Universities of Applied Sciences work in the field of photonics

- 1) Top Level University of Freiburg
- 2) Top Level University of Heidelberg
- 3) Top Level University of Karlsruhe
- 4) University of Stuttgart
- 5) University of Ulm
- 6) University of Tuebingen
- 7) Top Level University of Konstanz

- 1) University of Appl. Sc. Aalen
- 2) University of Appl. Sc. Esslingen
- 3) University of Appl. Sc. Furtwangen
- 4) University of Appl. Sc. Heilbronn
- 5) University of Appl. Sc. Konstanz
- 6) University of Appl. Sc. Offenburg
- 7) University of Appl. Sc. Pforzheim
- 8) University of Appl. Sc. Weingarten

4 of 9 Top Level Universities in Germany are located in Baden-Württemberg.



Source: Brochure „Photonics in Baden-Württemberg“ by bw-i



Contact

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