Amadeus
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Investing in Robotics and Automation
Amadeus Capital Partners

• **A leading European technology investor**
  - >$1 Billion commitments
  - >160 companies
  - 22 years

• **Longstanding sector focus in**
  - Mobile/Communications
  - Software and Services
  - Medical Technology/Healthcare IT
Early stage investing in the UK

Investment focus areas: Deep Tech in B2B opportunities

• Artificial Intelligence & Machine Learning
• Autonomous Systems & Human Computer Interfaces
• Digital Health & Medical Technology
• Enterprise SaaS & Cyber Security
• Novel Materials & Quantum Technologies
Robotics Market Size

- 2015: $26BN
- 2020: $50BN
- 2025: $90BN

13.4% CAGR

Sources:
1. Boston Consulting Group
2. Wintergreen Research
3. Grandview Research
4. Goldman Sachs
5. Reuters
6. Zion Market Research
~$90B predicted market size in 2025 by industry

Significant increase in consumer robotics companies since 2012

Source: Boston Consulting Group
Global VC investment in robotics & drones from 2010-19

~$6B of VC Investment into ~600 companies in 2019

Largest deals in 2019:

- **NURO**: $940m
- **Horizon Robotics**: $600m
- **CMR Surgical**: $239m

Source: PitchBook Data, Inc.
Agritech: an emerging sector

£1.84B worldwide investment in 2019 compared with £1.06B in 2016*

VC Investment in technology applications to Agritech by global region in 2019

Between 2017 and 2019, Europe saw a significant increase in investment related to Agritech and Robotics, from £3m to £43.5m

*TechNation 2020 report
Opportunities in market
Vertical, full-service applications

Advanced mobility, drones, industrial and labour automation: agricultural robots, waste sorting, retail service robots

Mazor X Stealth robot-assisted spinal surgery system. Source: Medtronic

RELIABLE SAFETY

The Tally robot, from Simbe Robotics, helps out in stores so people can be freed from the monotonous task of checking shelves for inventory (Image: The company)
Opportunities in market
Horizontal, generalised applications

Sensors, chips, cameras, LIDAR, machine vision
Amadeus’ Investments in Robotics

Across the value chain