

Amadeus

Amelia Armour

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



Cambridge



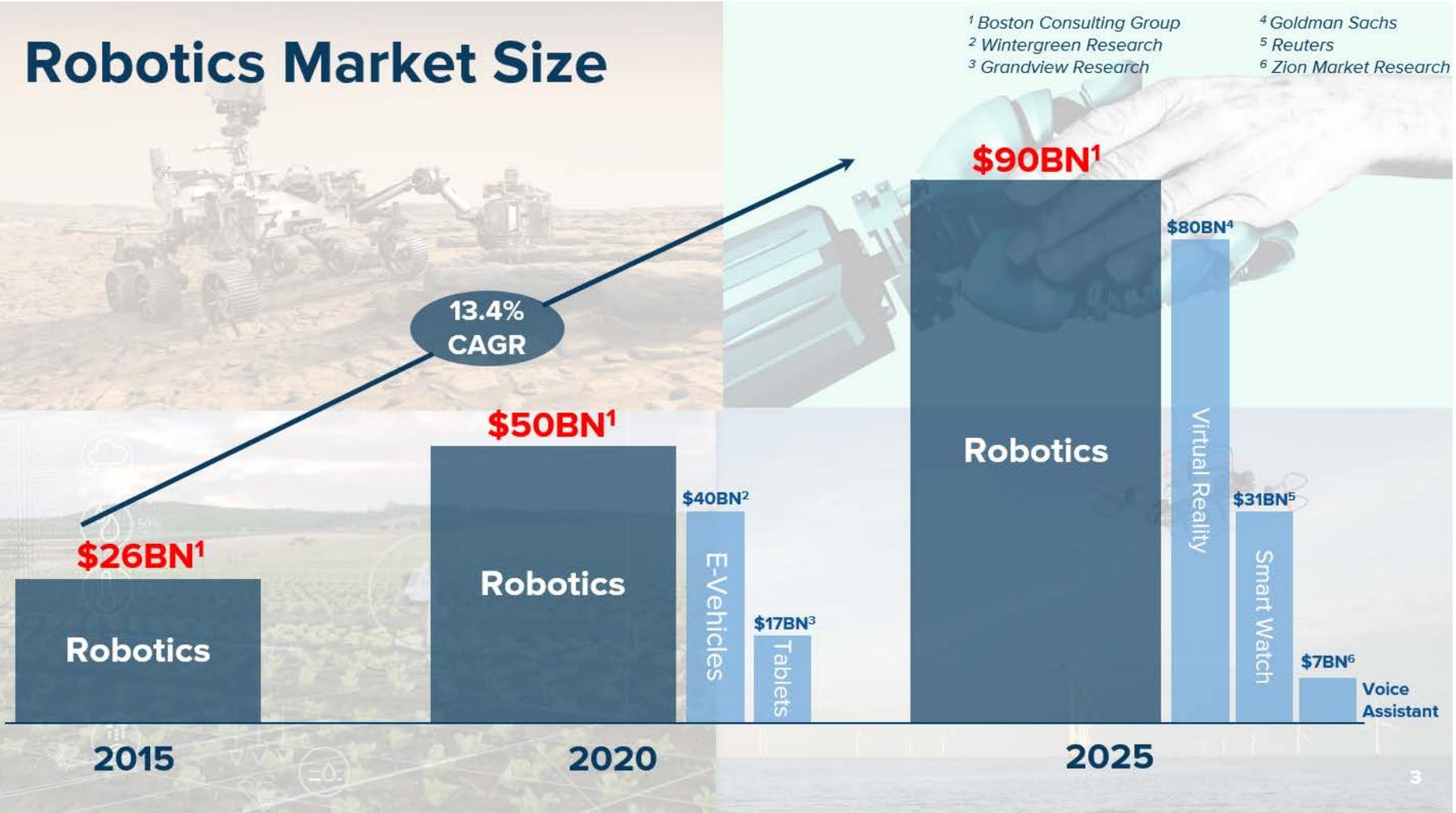
London

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 & automation

Robotics Market Size



¹ Boston Consulting Group

² Wintergreen Research

³ Grandview Research

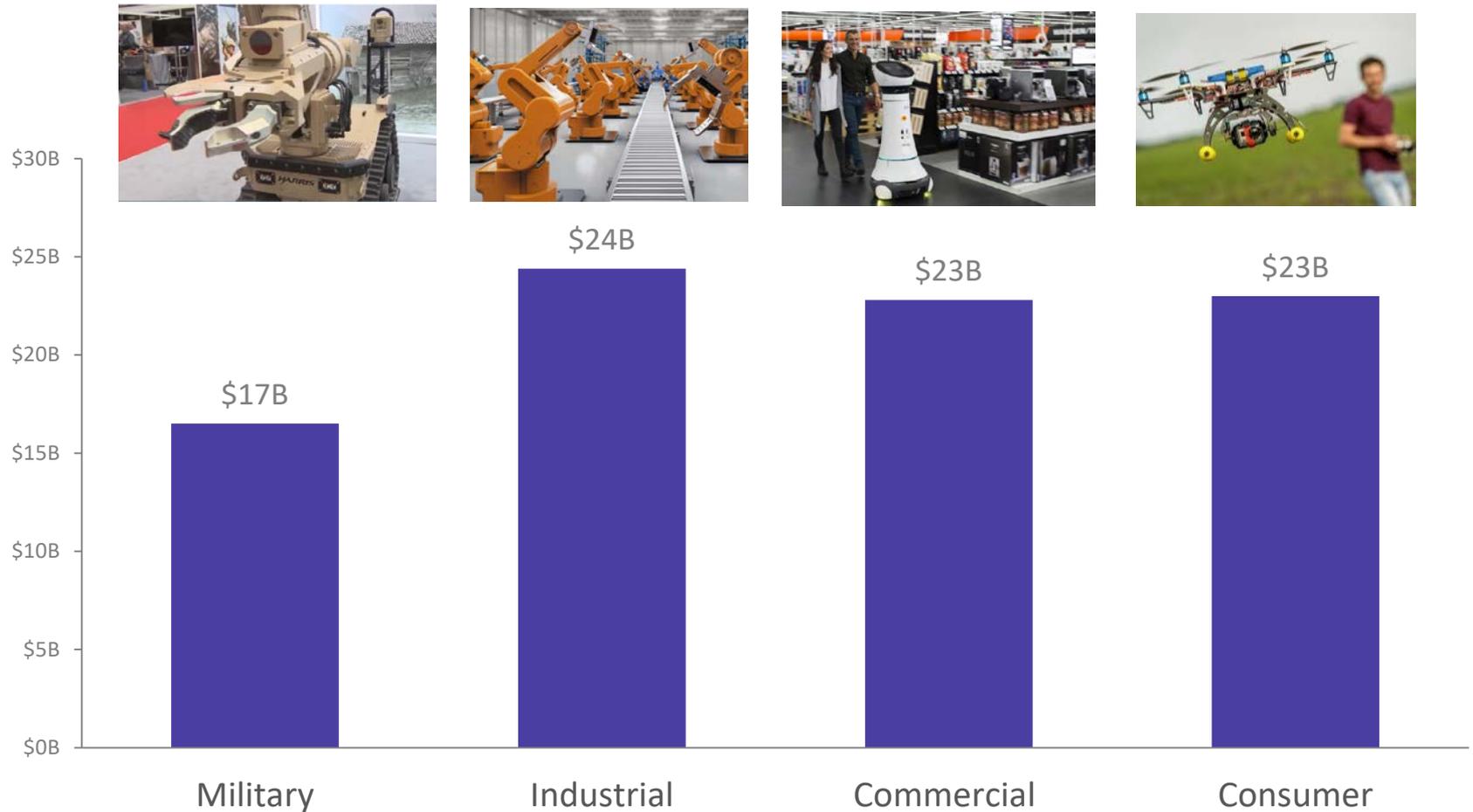
⁴ Goldman Sachs

⁵ Reuters

⁶ Zion Market Research

~\$90B predicted market size in 2025 by industry

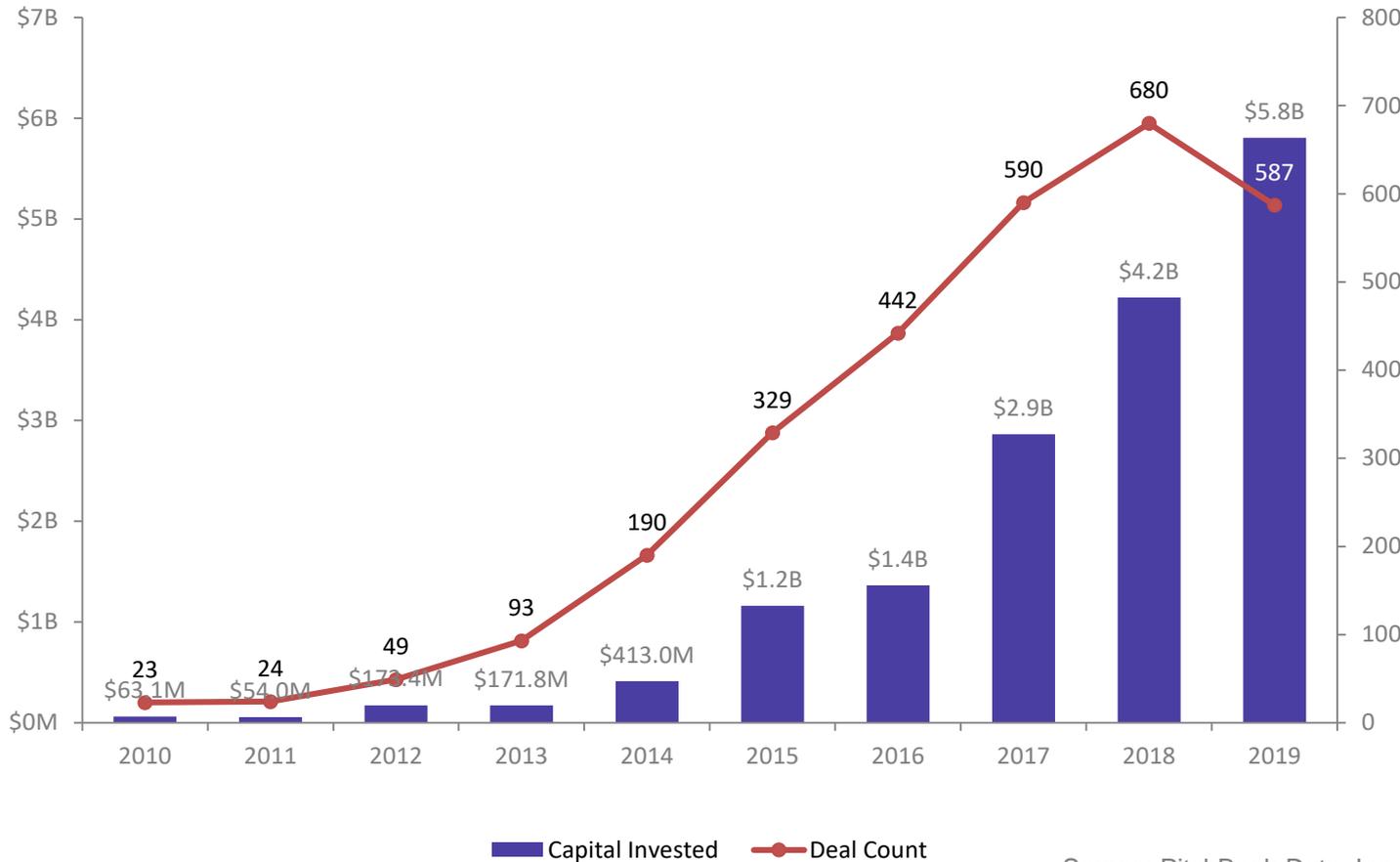
Significant increase in consumer robotics companies since 2012



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:

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NURO
\$940m
- 

Horizon Robotics
地平线机器人技术
\$600m
- 

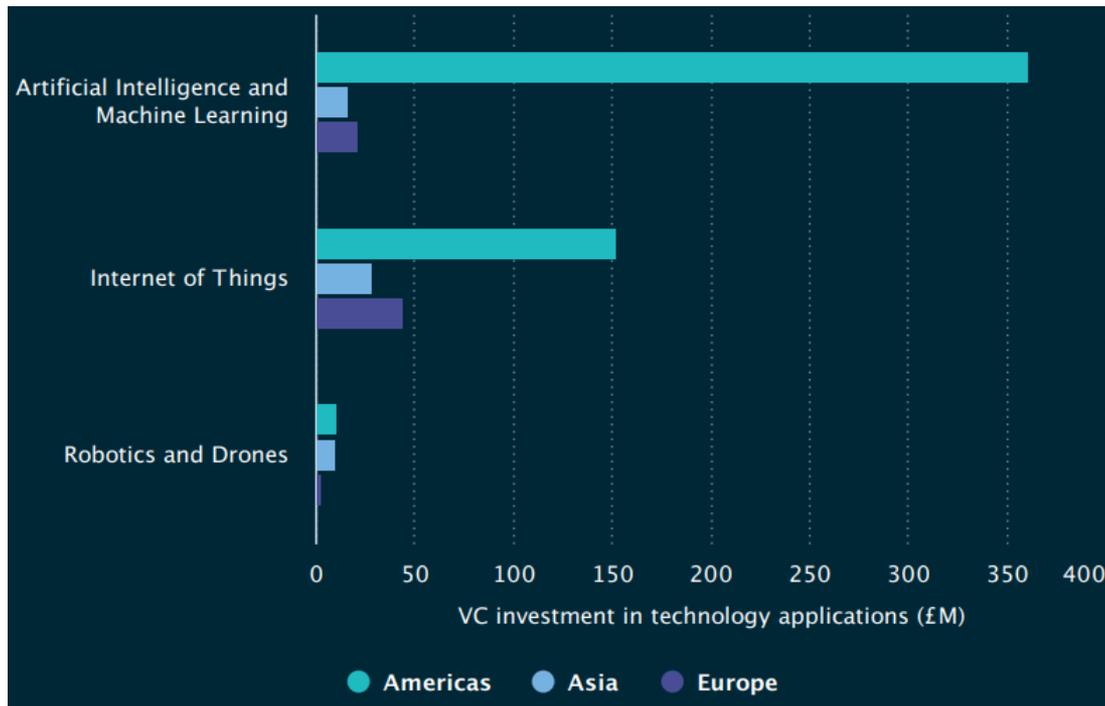
CMR SURGICAL
\$239m

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



TuSimple self-driving truck
Source: TuSimple



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

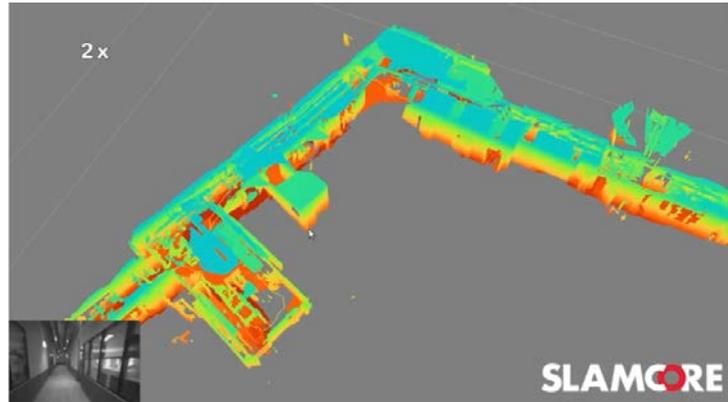
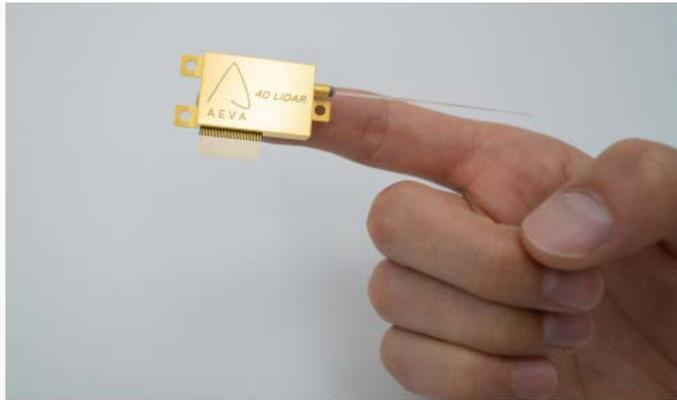


The Tally robot, from Simbe Robotics, helps out in stores so people can be freed from the monotonous task of checking shelves for inventory. (Image: The company)

Opportunities in market

Horizontal, generalised applications

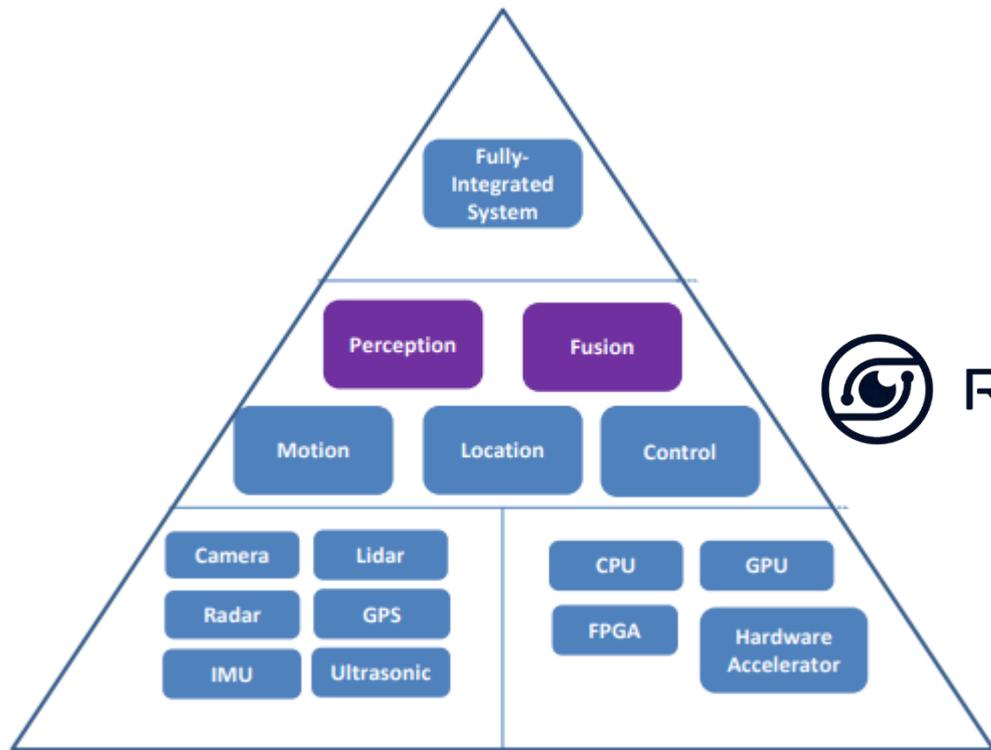
Sensors, chips, cameras, LIDAR, machine vision



Outsight

Amadeus' Investments in Robotics

Across the value chain



Amadeus

March 2020