



Press release

Paris, December 1, 2020 – **EMBARGOED UNTIL DECEMBER 7, 8AM**

Global barometer of industrial investments: Asia's dominance grows

Data from the 2020 edition of the global barometer of industrial investments has just been published. Each year, the Barometer offers a unique snapshot of worldwide changes to the plant of the future, helping to identify regional or global trends which will form the industry of tomorrow. In this regard, it is a unique tool to analyze the specific progress of the plant of the future in terms of global industrial investment.

The global barometer of industrial investments was established in 2016 by Fives, EDF, the Institut de la réindustrialisation and Trendeo. It is part of the DEFI&CO project implemented by CESI as part of the Programme d'Investissement d'Avenir.

This barometer lists significant investment announcements, supplied by a database which collects information in real-time. Its objective is to measure investment trends at an international level, either in new production units or existing industrial units. To do this, it identifies the projects and achievements which contribute to the development of the "industry of the future", based on technological and societal criteria: flexibility, digitalization, energy efficiency, environmental protection, support for the local economy and social matters.

The 2020 edition highlights the following points:

- COVID-19 has significantly hindered global industrial investment, but Asia was less hard hit than the rest of the world;
- The criteria of the Plant of the Future are less emphasized by manufacturers during a difficult period, but globally European countries have made greater progress on this theme. Asia prioritizes technological criteria (digitalization) over social and environmental criteria;
- Manufacturers are taking major steps to promote CO₂ savings, even if these efforts mainly stem from the energy sector;
- Industrial innovation is continuing along different lines (products, processes, costs), with many projects presented as global or continental firsts in their sector;
- With regards to 5G, Asia is well ahead of the rest of the world, both in terms of numbers of projects and amounts invested;
- Foreign investment projects declined in 2020, from 54% to 48% of total investments
- With regards to hydrogen, Europe's proactive approach has bolstered its position, but it is still a fledgling sector;

- Big Tech are investing more and with higher Plant of the Future scores than their Chinese competitors. But their manufacturers and suppliers are mostly located in China;
- Relocations were noted following the trade dispute between the US and China, which currently is mainly benefiting Taiwan.

Partners of the global barometer of industrial investments have shared their thoughts on the latest results.

Gwénaél Guillemot, Director of the Institut de la Réindustrialisation and Head of the industry department at CESI Nanterre, commented: *“Decarbonization, a global issue to reduce fossil fuel consumption, is starting to persistently affect global industry. An analysis of over 3,000 investment projects shows targeted efforts, notably relating to the energy efficiency of production equipment.”*

Laurent Levacher, Industry of the Future project leader at EDF: *“To stay competitive, industry must be transformed and improve performance; faced with customer demands, it must also reduce carbon emissions. Investments linked to decarbonization remain significant in most countries and industrial sectors.”*

Bijan Cour, Hydrogen Development Manager at Fives: *“Decarbonized hydrogen is a crucial solution for the transport of the future and greater adoption of renewable energies. The technologies have achieved a sufficient level of maturity, allowing wide-scale production with the support of ambitious national programs. The industry’s development will require the involvement of leading manufacturers able to design and supply innovative, digital production lines which meet the strictest quality standards.”*

Details of the 2020 barometer results are available on request.

About the Institut de la réindustrialisation

The Institut de la Réindustrialisation was founded in 2015 by two engineering schools (EPF and CESI) and two professional federations (GIM and Syntec-Ingenierie). The Institut aims to develop and circulate knowledge and expertise on the future of industry, its skills and know-how through conferences, workshops, student awards and publications.

www.institutreindus.fr

About EDF

A key player in energy transition, the EDF Group is an integrated electricity company, active in all areas of the business: generation, transmission, distribution, energy supply and trading, energy services. A global leader in lowcarbon energies, the Group has developed a diversified generation mix based on nuclear power, hydropower, new renewable energies and thermal energy. The Group is involved in supplying energy and services to approximately 38.9 million customers (1), 28.8 million of which are in France. It generated consolidated sales of €71 billion in 2019. EDF is listed on the Paris Stock Exchange.

www.edf.fr

About Fives

As an industrial engineering Group with a heritage of over 200 years, Fives designs and supplies machines, process equipment and production lines for the world’s largest industrial players in various sectors such as steel, aerospace and special machining, aluminium, automotive and manufacturing industries, cement, energy, logistics and glass. The effectiveness of its R&D programs enables Fives to design forward-thinking solutions that anticipate industrials’ needs in terms of profitability, performance, quality, safety and respect for the environment. In 2019, Fives achieved a turnover of €1.99 billion and employed more than 8,400 people in about thirty countries.

www.fivesgroup.com

About Trendeo

Trendeo was created in 2007 with the intention of adding competences in web monitoring and economics: its first database included investment and jobs in France, followed by a second database of startups, fundraising and industrial investment around the world.

In France, there is a good correlation between our data and that collected by the French statistics institute, INSEE. Data published by Trendeo on the French economy is used by its clients and often quoted in the media (the situation of the industrial economy, fundraising, employment, etc.).

Various clients access our data on a daily basis to follow economic activity from a regional or sectoral perspective. Other clients, including a leading international consultancy firm, use our international industrial data for their research.

www.trendeo.net

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