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Message From The President





eflecting on the preceding year, our industry encountered a blend of adversities and victories. The realm of photonics demonstrated exceptional adaptability and resilience. Through their diverse photonics technologies, our industry played a pivotal role in boosting innovation across various domains, including Medical & Life Sciences, Industrial, Aerospace & Defense, and Quantum & Nano Technology. Looking ahead, the future of the photonics industry in the forthcoming year appears promising. The surge in inquiries and opportunities within our field indicates a burgeoning demand for photonics solutions across

multiple sectors. Nevertheless, it's imperative to acknowledge the global uncertainties and economic fluctuations that accompany these prospects. The challenges presented by geopolitical transformations, recent disruptions in the supply chain over the past couple of years, and unforeseen events require a collective and strategic response. As a resilient and unified consortium, our position at EPIC is strategic in navigating these uncertainties. We're poised to utilize the collective wisdom and strength of our exceptional network to encourage collaboration, exchange valuable insights, and collectively confront these challenges.

EPIC remains steadfast in its commitment to bolstering the competitiveness of its members, offering a comprehensive suite of services that cater to diverse needs. From our robust recruitment platform to the dissemination of invaluable market reports, from orchestrating international delegation trips to nurturing investor relations, and not forgetting the pivotal networking and technology meetings that lie at the core of EPIC, we continually strive to empower our members with resources and opportunities that drive their success. Throughout the year, EPIC's unwavering dynamism has been evident through the orchestration of over 80 meticulously curated events and insightful visits to more than 140 esteemed companies. These initiatives have served as conduits, fostering connections among hundreds of leaders and technological experts within our vibrant community. At the heart of these efforts lies our dedication to delivering member services par excellence while constantly augmenting our offerings. The establishment of innovative working groups on Marketing, Sustainability, and Workforce exemplifies our commitment to evolving in tandem with industry trends and member needs.

Our community stands as a testament to EPIC's resounding success, boasting a formidable collective of over 800 member companies, constituting the vibrant pulse of the European Photonics industry. To our esteemed EPIC members, I extend heartfelt gratitude for not only supporting the association financially but also for generously sharing your wealth of knowledge and vision of our industry. Your unwavering commitment is instrumental in propelling the association's agenda forward, ensuring an environment of competitiveness and growth for the European photonics industry. While the impetus behind EPIC's accomplishments stems from the dedication of its members, it is essential to acknowledge and express sincere appreciation to our devoted team of staff employees. Their unwavering commitment, stability, and unwavering dedication form the bedrock upon which EPIC's initiatives thrive. On behalf of our entire community, I extend profound gratitude to our committed team for their tireless efforts in furthering the interests of our members.

Basil Garabet

President & CEO, NKT Photonics & President of EPIC

The Association

Driving competitiveness of the European photonics industry through an international network

EPIC is the world-leading industry association that promotes the sustainable development of organizations working in the field of photonics in Europe. We foster a vibrant photonics ecosystem by maintaining a strong network and acting as a catalyst and facilitator for technological commercial advancements.

Board of Directors





The EPIC Team consist of 12 highly skilled professionals from all around Europe.



Anna Mårtensson Marketing Manager



Anna Trachtova Marketing Manager



Dr. Antonio Castelo *Technology Manager for Bio-Medical & Lasers*



Carlos Lee Director General



Elisenda Lara Marketing Manager



Dr. Ivan Nikitski *Technology Manager for Quantum and PICs*



Dr. Jeremy Picot-Clemente Technology Manager for Optics & Green Photonics



Justine Massip Events Manager



Lidia Briquets
Programme Manager



Natascha Orban Events Manager



Neringa Noreikiene Events Manager



Ulrike Helfferich Chief Operating Officer



EPIC annual membership contribution

Company with annual revenue > € 250 million € 11,600

Company with annual revenue €100-250 million € 9,280

Company with annual revenue € 50-100 million € 6,960

Company with annual revenue € 10-50 million € 4,640

Company with annual revenue < € 10 million € 2,320

Start-up (less than 5 years) € 590 - 2,320

University/Research Institute € 2,320

Cluster/Association/ Government Agency € 2,320



EPIC Exhibitions

In 2023, EPIC participated in prominent global exhibitions to engage with members and fellow companies. Our booths functioned not only as meeting spaces but also as tranquil areas to enjoy a cup of coffee while delving into the latest discussions.

- → COMPAMED, Düsseldorf, Germany
 - · ECOC, Glasgow, Scotland
 - · OFC Exhibition, San Diego, USA
 - · Photonics West, San Francisco, USA
 - · PIC International, Brussels, Belgium
 - PIC Summit, Eindhoven, The Netherlands
 - W3+Fair, Jena, Germany
 - · W3+Fair, Wetzlar, Germany
 - LASER WORLD of PHOTONICS, Bengaluru, India
 - · LASER WORLD of PHOTONICS, Munich, Germany



EPIC Attends



EPIC attends various industrial events throughout the year, as we consider these valuable tools to stay connected with the photonics community.

- ---> Attended Altechna new building opening
 - Attended ICOS Industrial Advisory Board
 - Attended Meeting at Lahore Chamber of Commerce & Industry
 - Attended art photonics 25th anniversary
 - Attended New Years reception at Jenoptik
 - Online welcome 8th Creator conference
 - Online welcome address OVH exhibition
 - · Online welcome address WLC conference
 - Online welcome address CHInano conference exhibition
 - · Participated in ITF
 - Participated in MedTech forum
 - Participated in Photonics 21 Board of Stakeholders Meeting
 - Participated in Quayside Showcase Day
 - Participated in World Clean Tech Awards





- Presented at GIKI
- Presented at Lahore College for Women
- Presented at OITDA Seminar
- Presented at Pakistan Academy of Sciences
- Visited AWE Europe
- Visited CIOE
- Visited Laser Korea
- Visited TOP Conference



EPIC Networking

During exhibitions EPIC builds a vibrant photonics community by creating numerous networking opportunities for its members.

- CEO Exhibitor Breakfast, LASER WORLD of PHOTONICS, Munich
 - Executive 5 Mile Run, Photonics West, San Francisco
 - Members Lunch, Photonics West, San Francisco
 - · Members Networking Reception, Photonics West, San Francisco
 - · Members Lunch, OFC, San Diego
 - Members Run, OFC, San Diego
 - VIP Breakfast, W3+Fair, Jena
 - VIP Networking Lunches & Reception, Photonics West, San Francisco
 - · VIP Networking Reception, ECOC, Glasgow
 - · VIP Networking Reception, OFC, San Diego











"Hi, I just wanted to say that the EPIC Semiconductor event was great! I found it really educational and interesting. More events like that!"

Petter Elgh, Sales Engineer – Nordics & France, Cobolt



" Many thanks to you Jeremy, the entire EPIC team, and Exail for a fantastic event at an amazing venue. This has been an extremely useful, but also enjoyable meeting to advance photonics for space. I am looking forward to more of the same! Well, the auditorium beneath a castle may be hard to beat... "





EPIC Events

EPIC strengthens the connections among its members and the community by creating a forum to meet, to engage in discussions about challenges and opportunities, and to explore potential collaborations. EPIC events are typically by-invitation-only, ensuring a high-quality and relevant audience for optimal networking effectiveness.

- \longrightarrow
- → 20th Anniversary Celebration, Munich
 - EPIC Annual General Meeting, Helsinki
 - EPIC & Ethernet Alliance Meeting at ECOC, Glasgow
 - Meeting on Fiber Sensors at HBK FiberSensing, Porto
 - Meeting on Laser Applications along Battery Manufacturing Process at ARENA2036, Stuttgart
 - · Meeting on Micro-Optics at the LASER World of PHOTONICS, Munich
 - Meeting on Photonics assisted Cancer Pathology and Surgery at University Hospital Antwerp
 - Meeting on Photonics for AR/VR/MR at Jabil Optics, Jena
 - Meeting on Photonics for Space: Opening New Horizons at Exail, Paris
 - · Meeting on Ultrafast Laser Processing at LASER World of PHOTONICS, Munich
 - Members Investors Meeting, Eindhoven
 - Technology Meeting on Industrial Quantum Photonics Technology at TOPTICA, Munich
 - Technology Meeting on Microelectronics & Photonics Two Sides of One Coin, Munich
 - Technology Meeting on Photonics for Bio and Life Science Applications at PARK INNOVAARE, Zurich
 - Technology Meeting on Photonics in Defense, Kielce
 - Technology Workshop on PIC Post-Processing & Packaging at the LASER World of PHOTONICS, Munich
 - TechWatch at CIOE on Optical Components, Materials and Innovative Applications, Shenzhen
 - TechWatch at ECOC, Glasgow
 - · TechWatch at W3+Fair, Jena
 - TechWatch at W3+Fair, Wetzlar
 - TechWatch on Laser and Photonics Application at COMPAMED, Düsseldorf



At EPIC we capture each of our events through an extensive collection of photographs. We always share the event highlights with participants in our Flickr album shortly after each occasion. Over the years we have gathered more than 10,000 photos and below are some of the 2023 highlights.



"The EPIC Technology Meeting on Industrial Quantum Photonics Technology at TOPTICA was perfectly organized and the support with photos, presentations, booklet, and everything was outstanding. This is really helpful to build a network and to pass on the insights to colleagues."

Dr. Michael Hohmann, Senior Expert / New Technologies at Physik Instrumente













EPIC 20 Year Anniversary

Tom Pearsall created the European Photonics Industry Consortium in 2003 and presented his idea to Dr. Henri Rajbenbach of the Electronics & Communications unit of the European Commission. The response of the European Commission was positive, and to help ensure a strong impact it attached the EPIC proposal as an additional work package to the existing OPTIMIST program.

Over the two decades since the founding of EPIC, there has been a remarkable growth in photonics, leading to numerous Nobel Prizes awarded for scientific breakthroughs in this field. We proudly celebrated these achievements during our 20 Year Anniversary Celebration in Munich.

During this special evening, we brought together influential figures from the photonics community, including Peter Leibinger (Chairman of the Supervisory Board and CTO of TRUMPF), Mats Hede (Managing Director of Photonics Nordics), Markus Spanner (CEO of PI), Reinhard Pfeiffer (CEO of Messe Muenchen), and Tom Pearsall himself who gave inspirational talks.

Look at all the images from the EPIC 20th Anniversary Celebration







In the beginning of the year we launched a new special tab on our website to celebrate our past 20 years and tell more about some of our most important milestones.

Leading up to the celebrations we also hosted a Contest of Samples featuring the new EPIC logo. The idea was that technology is not only powerful and game-changing,

but also beautiful so we invited EPIC members to showcase their creativity by submitting a picture of a sample with the EPIC logo on it and participate in the contest. The samples where showcased in the EPIC booth at LASER WORLD of PHOTONICS.



We would like to extend our greatest thanks to all those who have made it possible to reach this point and all the members who have accompanied us over the years!



EPIC Company Visits

EPIC continues to build a strong network of decision-makers and experts. At our events and delegation trips we organize group company visits where members tour facilities of local companies.



EPIC Delegation Trips



As part of EPIC's membership services, we help members access international markets through the coordination of international delegation trips. These trips are organized by having members attend an exhibition or conference where they have networking lunch or dinner with local players and stakeholders – such as, distributors, industry associations, and, sometimes, government officials.

We also provide delegates with a list of companies that we are well-connected with to which our members can organize individual company visits. Through these international delegations, EPIC members engage with local players and stakeholders, learn from them, and have a better understanding of the opportunities and/or challenges in accessing the local market.







































EPIC Outreach

EPIC continues to build a global network of decision-makers and experts. By interacting with the industry, we learn about the latest technology developments, understand manufacturing challenges and explore business and collaboration opportunities for our members. Below are some visits we made during 2023.













































































































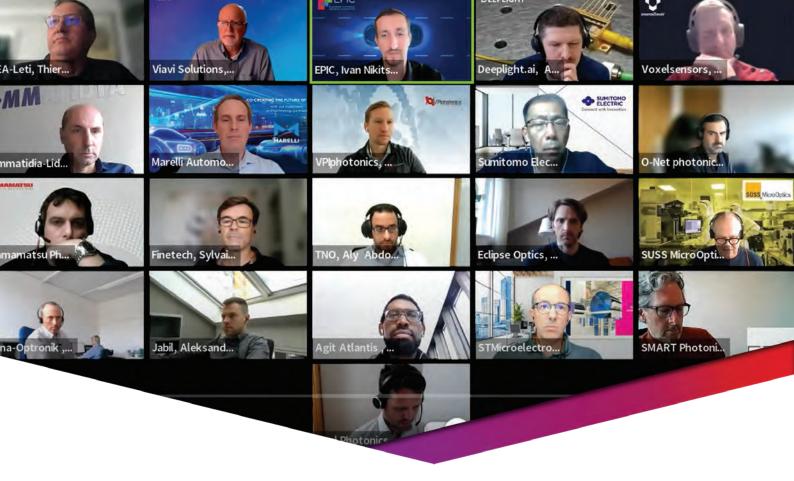












EPIC Online Technology Meetings

The online technology meeting series offers members a chance to stay updated on the latest hot topics and gain valuable insights from fellow members, all free of charge.

- Additive Manufacturing
 - Agriculture
 - · Bio-Imaging
 - Food and Beverages
 - Hybrid Photonics Integration
 - Laser-based Manufacturing for Implants
 - · LIDARs on Chips
 - Metamaterials and Metalenses

- Micro LED for Automotive Applications
- New Mid-IR Developments for Novel Industrial Manufacturing
- Optical Design and Simulations: Tools & Use-cases
- Optical Metrology Solutions for the Industry
- Photonics for Climate Change Monitoring
- Photonics for Wearables
- Quantum Metrology and Quantum Sensors



"The Mid-IR Online Technology Meeting was interesting and I appreciated the developments and contents that were presented."

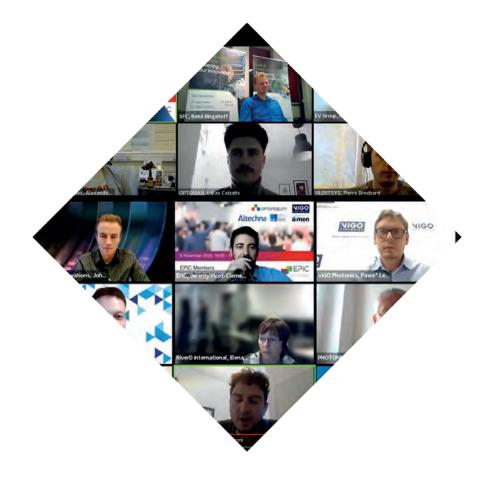
Christina Bertoni, Project Leader, Electrolux

EPIC Product Releases



EPIC hosts quarterly product releases, allowing members to showcase their latest products and technologies.

- → · AIMEN
 - Altechna
 - Arden Photonics
 - EV Group
 - Excelitas
 - Hamamatsu Photonics
 - KERDRY
 - Optofidelity
 - OPTOMAN
 - PHABULOuS Pilot Line
 - PlanOpSim
 - SEDI-ATI Fibres Optiques
 - SFC Energy
 - SILENTSYS
 - Superlum Diodes
 - TOPPAN Photomask
 - UFI Ultrafast Innovations
 - VIGO Photonics
 - Workshop of Photonics





All online meetings are available on YouTube

EPIC Market Reports

Every employee of an EPIC member company has free access to the EPIC library on the extranet where you can find hundreds of technology presentations and numerous market reports to download.

- ---> EPIC Technology Report: Maskless Lithography by Ruth Houbertz
 - EPIC Market Report on Optical Fiber Sensors Commercialization: Present Status and Future

Opportunities and Trends by Alexis Mendez

- EPIC Global Semiconductor Monthly Report by Malcolm Penn
- EPIC Technology Report on Freeform Optical Systems by Oliver Faehnle
- EPIC report extract on Photonics' Contribution to the Development of Quantum Markets by Yole

Look at all our market reports





EPIC Articles



EPIC regularly publishes editorials, articles, interviews, press releases, etc. in partnership with leading media.

- Article "Laser technologies for micro and nano fluidics systems" by Jeremy Picot-Clemente in Photonics Views
 - Article "Terahertz Sources and Detectors Enabling New Applications" by Ivan Nikitski in Photonics Spectra
 - Article "Wrap up of EPIC Meetings on Quantum Photonics at TOPTICA and Laser for Battery Manufacturing at ARENA2036" in Applicazioni Laser
 - · Article "A spotlight on skin" by Antonio Castelo in Medical Device Developments
 - · Article "Advances in Integrated Photonics" by Ivan Nikitski in Laser Focus World
 - Article "Hyperspectral imaging's potential for transforming the imaging field" by Jeremy Picot-Clemente in Laser Focus World
 - Article "Laser processes are shaping electromobility in Europe" by Antonio Castelo in Photonics Views
 - Article "Laser Texturing Combines Form and Function to Add Value" by Antonio Castelo in Photonics Spectra
 - Article "Quantum sensors making waves accross Europe" by Ivan Nikitski in Photonics Views
 - Article "The future of optical measurement technology" by Antonio Castelo in Photonics Views
 - Article "The Integration of Materials in Photonic Chips" by Ivan Nikitski in Photonics Spectra
 - Article "XR unmasked: exploring the complexities of design and simulation in extended reality" by Jeremy Picot-Clemente in Photonics Views



EPIC Member Interviews

In these series of interviews, we ask leaders of EPIC member companies to share with us their experience on the challenges and opportunities to run a company, the critical steps in the growth of the organization, and to give tips to inspire future entrepreneurs.



- Aldas Juronis, CEO of EKSPLA
- · Antreas Theodosiou, Founder of Lumoscribe
- Bárbara Buades, CEO of MEETOPTICS
- Berthold Schmidt, CEO of TRUMPF Photonic Components
- Bjørn Andersen CEO of SHUTE Sensing Solutions
- · David Méchin, Director of Photonics Bretagne
- · Eero Koivusalo, COO of RefleKron
- · Emmanuel Hannart, CEO of Acgiris
- Evaldas Stralkus, CEO of QS Lasers
- · Håkan Karlsson, Head of Hübner Photonics & CEO of Cobolt
- Jan Trommershausen, CEO of AEMtec
- Jean-Christophe Eloy, President and CEO of Yole Group
- Jean-Louis Guyaux, CTO of Riber
- Jessica van Heck, Managing Director of PHABULOuS
- Jo Uthus, CEO of CrayoNano
- Jörg Jetter, CEO of 4JET
- · Marc Ricci, Director General of Pole Optitec
- Marek Krehel, CTO of 3DAG
- Mats Hede, Managing Director of Hamamatsu Photonics Nordics
- Michael Scheppke, Vice-President of EXFO
- · Michal Nejbauer, CEO of Fluence Technologies
- Mirella Koleva, CEO of Quantopticon
- Nicolas Volet, Assistant Professor at Aarhus University & CTO of UV Medico
- Oleksii Ilchenko, CEO of Lightnovo
- Peter Leibinger, CTO and Chairman of the Supervisory Board of TRUMPF
- Philippe Babin, CEO of AEPONYX
- Poul Svensgaard, CEO of Delta Optical Thin Film
- · Stephan Berlitz, Head of Light and Innovation of Audi





EPIC CEO & Lifetime Achievement Awards

The EPIC CEO Award 2023 was presented to Håkan Karlsson, the head of the Photonics division at HÜBNER Group and CEO of Cobolt.

EPIC has honored Håkan Karlsson with the CEO Award 2023 for his contributions to the photonics industry. His leadership has driven Cobolt's growth, establishing it as a key supplier to manufacturers and research labs in various application areas.

"I am very honored to receive the EPIC CEO Award," said Håkan Karlsson. "This award is a recognition of the hard work and dedication of the entire HÜBNER Photonics team. Together, we have built a company that is at the forefront of the photonics industry, and we will continue to supply our customers with unique products that push the boundaries of what is possible."

EPIC Lifetime Achievement Award to Kestutis Jasiunas - acknowledging exceptional leadership in the field of scientific picosecond lasers

EPIC announced Kestutis Jasiunas as the recipient of the EPIC Lifetime Achievement Award for his outstanding contributions and leadership in the laser industry. Jasiunas, the Chairman of the Board of EKSPLA, has led the company to become a major player in the global market for scientific picosecond lasers.

Commenting on the award, Jasiunas said, "I am honored to receive this recognition from EPIC. EKSPLA's success is a testament to the hard work and dedication of our team, and I am proud of what we have achieved together. Our goal is to continue to push the boundaries of laser technology and develop innovative solutions for our customers."

Marketing in Photonics



During the year we started to build a community for marketing professionals working in photonics. We have organized online meetings on topics like SEO, press content for photonics and Google Analytics – GA4. We also took the opportunity to meet in person during LASER WORLD of PHOTONICS where we organized a coffee break with discussions dedicated to marketing.

We have also launched a community on LinkedIn where marketers can gather and share their knowledge, experience and best practices. We regularly post about the latest topics and share our insights and ideas.

For 2024 we plan to continue growing the community and serving our members new interesting online meetings on hot topics as well as going deeper into already explored territory.

Join the Marketing in Photonics community on LinkedIn







HR Workgroup

The Human Resources (HR) Workgroup, spearheaded by SMART Photonics and in collaboration with existing EPIC projects on the topic, has proven to be a fruitful initiative. With the combined efforts of various participants and the inclusion of additional members, the Workgroup has achieved notable results throughout 2023. Two online meetings and several in-person initiatives have been instrumental in advancing our shared objectives.

Key accomplishments in 2023 include:

1. Job Walls at industry events: Notably, we established job walls at the W3+Fair in Wetzlar and at ECOC in Glasgow. These initiatives showcased job vacancies within the photonics industry.

We will also keep developing the biggest job board in photonics: www.jobs-in-photonics.com

 Day of Photonics Celebration: Over 100 companies joined forces to celebrate the Day of Photonics, a dedicated effort to engage young talents in the field. Some of the participating companies organized lectures at local schools and universities, contributing to the promotion of photonics careers.











Looking ahead to 2024, our focus is on expanding the pool of talents in photonics across Europe and internationally. We aim to provide member companies with a diverse array of skilled individuals while collectively promoting photonics as an appealing career choice. Join us in our upcoming meetings as we continue our collaborative efforts.

Sustainability Workgroup

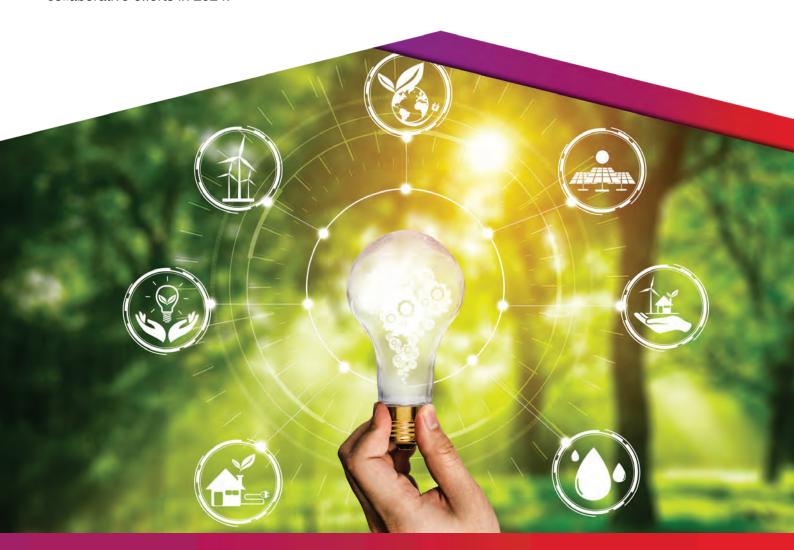


During 2023 EPIC initiated a new Sustainability Workgroup chaired by our member Eclipse Optics, and so far we have had three online meetings and one in-person gathering at the LASER WORLD of PHOTONICS. Each meeting follows a structured agenda, with two companies sharing their sustainability practices in the first part. The second part is dedicated to identifying collective goals and objectives that can be more effectively achieved as a group rather than individually. Currently, our workgroup boasts around 20 active members.

Key accomplishments of the Sustainability Workgroup in 2023 include:

- 1. Progressing towards the creation of recommendations and a checklist designed to guide photonics companies in becoming more sustainable.
- 2 Identifying and prioritizing the United Nations Sustainable Development Goals (SDGs) that align with our group's objectives.
- 3. Establishing the Chair and Co-Chairs of the Workgroup to ensure effective leadership.
- 4. Developing a set of actions for the upcoming year.

We are committed to fostering sustainability within the photonics industry and look forward to further collaborative efforts in 2024.



EPIC Media Partners

EPIC collaborates with some of the leading magazines in the photonics field to further support its members.

- Applicazioni Laser
 - AZoNetwork
 - Electro Optics
 - Fibre Systems
 - · Laser Focus World
 - LED Professional
 - Medical Device Developments
 - Novus Light Technologies Today
 - Optical Connections
 - Photonics Spectra
 - PhotonicsViews
 - Photoniques
 - PIC International Magazine



EPIC Association Partners



EPIC values strong partnerships to connect our members to the industry. Whether this is through partner events, business partners or association partners. EPIC is always looking for meaningful partnerships to support its members.

- → AILU
 - AIPH
 - CECIMO
 - Clean Rivers HUB
 - COBO
 - CSA China SSL Association
 - DIGITALEUROPE
 - Driving Vision News (DVN)
 - European Machine Vision Association (EMVA)
 - FarmTech Society (FTS)
 - FTTH Council Europe
 - IEEE Photonics Society
 - IVAM
 - KM ZERO Food Innovation Hub
 - LAS Russian Laser Association
 - OIF
 - Organic Electronics Saxony (OES)
 - PETRA
 - SEAFOM
 - SEMI
 - The Association for Vertical Farming
 - The Ethernet Alliance
 - The Nanophotonics Europe Association
 - UK Meta Materials Network
 - VR/AR Association (VRARA)

EPIC Partner Events

We support our member organizations and partners to communicate and spread the word about different events taking place that might bring value to EPIC members. You can find upcoming events on our website in the partner events section.

- ---> 6th European Machine Vision Forum
 - Beam Shaping New solutions for laser material processing, Fraunhofer IWS
 - Commercialising Quantum Global
 - ECOC 2023
 - ICALEO
 - · Image Sensors Europe
 - IQT the Hauge
 - ISA EPIC Online Technology Meeting on Photonics for Light Therapy and Aesthetics Applications
 - Laser Symposium & ISAM
 - Leti Photonics Workshop
 - Luceda User Group Meeting
 - Measuring by Light
 - PIC Summit Europe
 - · Polymer Replication on Nanoscale
 - Quantum.Tech Europe
 - Wafer-Level Optics: Enabling high-quality lens replication by synchronizing materials and processes by DELO
 - WIN EURASIA



European Initiatives & Pilot Lines



EPIC participates in five European funded initiatives and pilot lines to support the European Ecosystem for photonics.



JePPIX Pilot Line. Manufacturing pilot line for Indium Phosphide PICs offering design, manufacturing and testing services. www.jeppix.eu



MedPhab Pilot Line. Pilot line dedicated to manufacturing, testing, validating and upscaling new photonics technologies for medical diagnostics. www.medphab.eu



MULTIPLE. Project to develop cost-effective multi-modal monitoring solutions with a breakthrough impact on production quality and efficiency.

www.multipleproject.eu



PHABULOuS Pilot Line. European Pilot Line for the manufacturing of free-form micro-optics offering accelerated innovation & production cycles from prototypes to piloting and large volume production. www.phabulous.eu



FOR EUROPE

PhotonHub Europe. Single pan-EU Photonics Innovation Hub offering a comprehensive range of supports to industry for the accelerated uptake and deployment of photonics.

www.photonhub.eu



PULSATE. The PAN-European network for empowering SMEs digital competences in laser-based advance and additive manufacturing (LBAAM).

www.pulsate.eu

Thank You Sponsors!

We would like to extend a special thank you to all the companies who sponsored one or several events during 2023.

























































































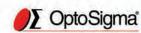






























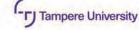
























EPIC Members



EPIC is the largest photonics industry association in the world already representing more than 800 companies. We are grateful to all the companies that support us on this enlightening journey promoting a sustainable photonics ecosystem.











































































































































































































































































































































































































































































































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SUPERLUM

























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