



China Industrial Robot Industry Report, 2011

Feb. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and International Federation of Robotics etc .

Abstract

Undergoing the worst of financial crisis, the global robot industry again embraces a period of rapid growth. In 2010, the sales volume of industrial robots exceeded 115,000 units worldwide, almost twice of that in 2009, and the automotive, metal product and electric power industries are the major drivers for the demand.

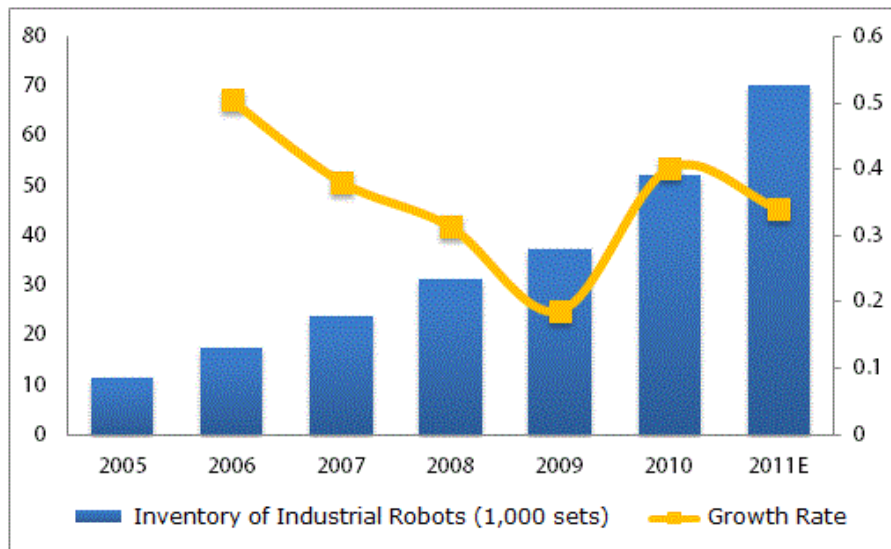
China, South Korea and ASEAN countries and regions are the most dynamic and witness the robot sales volume nearly quadruple. The top 5 countries by sales volume of industrial robots in 2010 were South Korea, Japan, U.S., China and Germany.

On a global basis, with the growing mature robot application technologies and the increasing demand for automatic operation from all walks of life, the proportion of the demand for industrial robots from such traditional sectors as automobile and auto parts is on the decline, while that from industries including electrical and electronics and food & beverage is on the rise. And the demand structure of industrial robots tends to be decentralized.

Such trend is also seen in Chinese market. In the past, since the manufacturing cost of robots was fairly high, the demand for industrial robots was mainly from automotive industry which set strict requirement on processing. However, with the rising labor costs and the improved requirement on product quality, the installation rate of industrial robots in electronics, rubber, food & beverage and medicine presents an upward trend in recent years.

Currently, China mainly imports industrial robots from Japan. In 2004, the imported industrial robots from Japan accounted for half of the total imported ones in China, and the imported European brands like ABB, KUKA and COMAU made up for the other half.

Inventory of Industrial Robots in China, 2005-2011



Source: IFR; ResearchInChina

The per capita wage in manufacturing industry experiences a continuously rising rise, and the figure has kept a growth rate of over 10% every year since 2000. Under the pressure of rising wages, Guo Taiming, the president of Foxconn announced in 2011 that the company would add one million robots to replace the low-level manual labor in the coming three years.

The disappearance of demographic dividend in China makes the machine an alternative to manual labor, so the industrial robot market in China will enjoy bright prospects.

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