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 Company Reports, and National Bureau of Statistics of China etc.
Abstract

In 2012, although the growth rate of global demand for industrial robots has slowed down, the sales volume of robots worldwide set the record the second highest just after that in 2011 and arrived at 159,000 units. In particular, China’s demand for industrial robots sees the most rapid growth and it has been the world’s second large market just behind Japan.

During 2005-2012, China’s industrial robot market sales showed an AAGR of about 29%, and the sales volume in 2012 approximated 27,000 units, presenting a year-on-year growth rate of 19.2%. Currently, automotive sector and electronics industry are the two fields where industrial robots (mainly welding, handling, assembly and other types of industrial robot) find the most massive application.

As far as the industrial robot market of China is concerned, there is still a wide gap between local brands of robot cell products and foreign brands in terms of competitiveness. Local enterprises in the industrial robot market are still mainly industrial robot system integrators in the downstream, while foreign brands sell products by cooperating with system integrators, thus with certain reliance on these integrators. In 2012, 96% of total sales of industrial robot cell products in China were made by foreign brands, among which, the four magnates FANUC, YASKAWA, KUKA, and ABB accounted for as much as 53.8%.
Among the domestic industrial robot cell production enterprises, only Dongguan Start To Sail Industrial Robots Co. Ltd sold up to 400 units in 2012, while none of Anhui Efort Intelligent Equipment, Shanghai Triowin Automation Machinery, GSK CNC Equipment, Shenyang Siasun Robot & Automation and other local enterprises sold more than 200 units.

FANUC boasts 13 subsidiaries around the world. In 2012, the company sold 3,900 units of industrial robot cell products in China, and it is currently the largest supplier in the Chinese industrial robot cell product market. Its production base in China for industrial robots is located in Shanghai. It also has a new factory located in Baoshan district with an annual designed capacity of 3,800 sets of robots and complete systems.

As of the end of April, 2012, ABB has sold more than 200,000 robots around the world. At present, Shanghai ABB Engineering Co., Ltd is the global headquarters for ABB’s robot business and also ABB’s only production base for painting robots worldwide and the world’s largest production base for industrial robots.

Shenyang Siasun Robot & Automation Co., Ltd. is a subsidiary under the Chinese Academy of Sciences. Currently, its main business is the integration of downstream industrial robot systems, while reducers, servo motors, industrial robots cell products and other upstream products are its focus of future business development. In 2012, the company has gained operating revenue of more than $300 million yuan from its industrial robot business, its third largest business, which accounted for 28.8% of its total operating revenue.

Based on the analysis of the latest production and sales data as well as the market structure of both global and China industrial robot markets, the "Global and China Industrial Robot Industry Report, 2013" sheds light on the business progress, product R&D and capacity expansion of major industrial robot companies at home and abroad and makes rational prediction about the future prospects of the Chinese industrial robot market.
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