



Global and China Industrial Robot Industry Report, 2013

Sep. 2013

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.

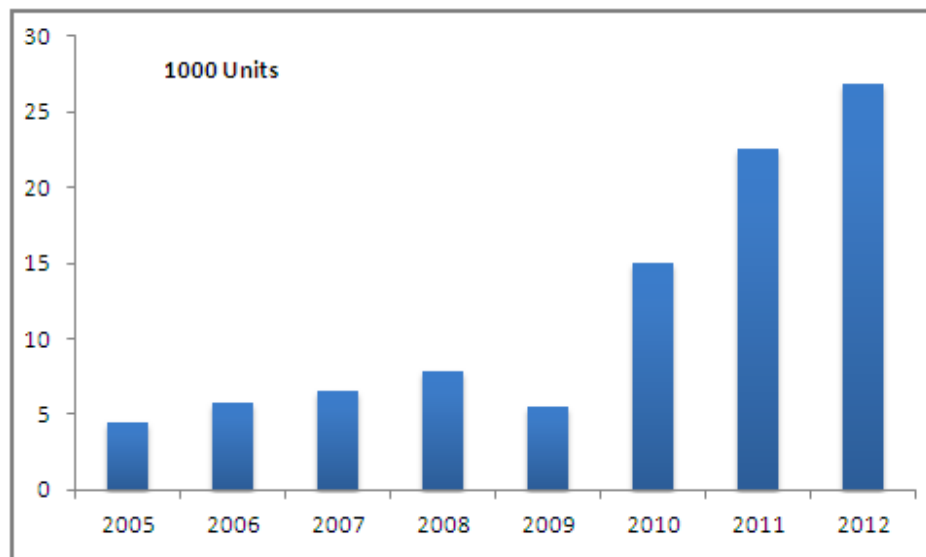
Abstract

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%.

Sales Volume of Industrial Robots in China, 2005-2012



Source: IFR, ResearchInChina Global and China Industrial Robot Industry Report, 2013

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.

Being subject to Chinese Academy of Sciences, Shenyang Siasun Robot & Automation Co., Ltd is primarily focused on the integration of downstream industrial robot systems, while decelerators, servo motors, industrial robot cell products and other upstream products are the priorities of future business development. In 2012, company's revenue from industrial robot business (the third largest leading product business of the company) surpassed RMB300 million, making up 28.8% of its total 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.

1. Overview of Industrial Robot

- 1.1 Definition and Classification of Robot
- 1.2 Definition and Internal Structure of Industrial Robot
- 1.3 Application and classification of Industrial Robot
- 1.4 Industrial Chain of Industrial Robot

2. Global Industrial Robot Industry

- 2.1 Industrial Development Model
- 2.2 Market Overview
 - 2.2.1 Market Scale
 - 2.2.2 Market Structure

3. China Industrial Robot Industry

- 3.1 Evolution
- 3.2 Policy Environment
- 3.3 Technology
- 3.4 Development Model
- 3.5 Market Overview
 - 3.5.1 Market Scale
 - 3.5.2 Applications
 - 3.5.3 Competitive Structure
- 3.6 Prospect
 - 3.6.1 Factors
 - 3.6.2 Market Forecast

4. Industrial Robot Companies in China

- 4.1 Siasun Robot & Automation Co., Ltd.
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Revenue Structure
 - 4.1.4 Gross Margin
 - 4.1.5 Industrial Robot Business
 - 4.1.6 R & D Investment
 - 4.1.7 Prospect
- 4.2 Dalian Zhiyun Automation Co.,Ltd
- 4.3 Miracle Automation Engineering Co.,Ltd
- 4.4 Mesnac Co.,Ltd.
- 4.5 Harbin Boshi Automation Co., Ltd.
- 4.6 Suzhou Boshi Robot Technology Co Ltd.
- 4.7 Changzhou Mingseal Robotic Technology Co., Ltd.
- 4.8 Harbin Haier hagongda Robot Technology Co., Ltd.
- 4.9 Start To Sail Industrial Robots CO Ltd
- 4.10 Anhui Efort Intelligent Equipment Co., Ltd.
- 4.11 Shanghai Triowin Automation Machinery Co.,Ltd.
- 4.12 GSK CNC Equipment Co., Ltd
- 4.13 Shanghai STEP Electric Corporation

- 4.14 Shenzhen Jasic Technology Co.,Ltd.
- 4.15 Tangshan Kaiyuan Group
- 4.16 Nanjing Panda Electronics Company Limited
- 4.17 Fengyu Company
- 4.18 Harbin Welding Institute
- 4.19 Beijing Huawei Zhongxing Electric Co., Ltd.
- 4.20 Foshan Shunde JaTen Electronic Co., Ltd.
- 4.21 HUAHENG Welding CO., Ltd
- 4.22 Shenzhen Adtech Technology Co., Ltd (ADTECH)
- 4.23 China Shipbuilding Trading (Kunming) Co., Ltd. (CSTCKM)

5. International Industrial Robot Companies

- 5.1 FANUC
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Industrial Robot Business
 - 5.1.4 Industrial Robot Business in China
- 5.2 YASKAWA
- 5.3 KUKA
- 5.4 ABB
- 5.5 OTC
- 5.6 Hyundai Heavy Industries
- 5.7 Staubli
 - 5.7.1 Profile
 - 5.7.2 Business in China

- 
- Industrial Robot System Composition Diagram
 - Structure of Industrial Robot Industry Chain
 - Industrial Robot Value Chain
 - Global Industrial Robot Industry Development Model
 - Global Sales of Industrial Robots, 2008-2015E
 - Global Sales of Industrial Robots in Major Industries, 2009-2012 (TOP 5)
 - Structure of Global Industrial Robot Market, 2009-2012 (by Sector)
 - Global Sales of Industrial Robots, 2009-2012 (by Region)
 - Industrial Robot Sales in the World's Major Countries, 2008-2012 (TOP 5)
 - Sales of Industrial Robots in the World's Major Emerging Countries, 2008-2012
 - Partial Planning of China Robot Industry, 2010-2013
 - China's Major Industrial Parks of Industrial Robots and Planning Objectives in 2013
 - China's Major Robot R&D Institutions and Their Representative Products
 - Sales Volume of Industrial Robots in Chinese Market, 2005-2012
 - Cumulative Installations of Industrial Robots in China, 2005-2012
 - Sales Volume of Industrial Robots in China, 2009-2012 (by Sector)
 - Competitive Structure of Industrial Robot Market in China in 2012
 - Average Annual Wages and Annual Growth Rate of Wages in China Manufacturing Industry, 2005-2012
 - Proportion of Population Aged over 65 in China, 2000-2012
 - Cumulative Growth Rate of China's Export Trade Value, 2005-2012
 - Sales Forecast in China Industrial Robot Market, 2013-2020
 - Revenue and Net Income of Shenyang Siasun Robot & Automation Co., Ltd., 2007-2013
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Product)
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Region)
 - Gross Margin of Siasun Robot & Automation, 2010-2013 (by Product)

- 
- Industrial Robot System Composition Diagram
 - Structure of Industrial Robot Industry Chain
 - Industrial Robot Value Chain
 - Global Industrial Robot Industry Development Model
 - Global Sales of Industrial Robots, 2008-2015E
 - Global Sales of Industrial Robots in Major Industries, 2009-2012 (TOP 5)
 - Structure of Global Industrial Robot Market, 2009-2012 (by Sector)
 - Global Sales of Industrial Robots, 2009-2012 (by Region)
 - Industrial Robot Sales in the World's Major Countries, 2008-2012 (TOP 5)
 - Sales of Industrial Robots in the World's Major Emerging Countries, 2008-2012
 - Partial Planning of China Robot Industry, 2010-2013
 - China's Major Industrial Parks of Industrial Robots and Planning Objectives in 2013
 - China's Major Robot R&D Institutions and Their Representative Products
 - Sales Volume of Industrial Robots in Chinese Market, 2005-2012
 - Cumulative Installations of Industrial Robots in China, 2005-2012
 - Sales Volume of Industrial Robots in China, 2009-2012 (by Sector)
 - Competitive Structure of Industrial Robot Market in China in 2012
 - Average Annual Wages and Annual Growth Rate of Wages in China Manufacturing Industry, 2005-2012
 - Proportion of Population Aged over 65 in China, 2000-2012
 - Cumulative Growth Rate of China's Export Trade Value, 2005-2012
 - Sales Forecast in China Industrial Robot Market, 2013-2020
 - Revenue and Net Income of Shenyang Siasun Robot & Automation Co., Ltd., 2007-2013
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Product)
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Region)
 - Gross Margin of Siasun Robot & Automation, 2010-2013 (by Product)

- 
- Industrial Robot System Composition Diagram
 - Structure of Industrial Robot Industry Chain
 - Industrial Robot Value Chain
 - Global Industrial Robot Industry Development Model
 - Global Sales of Industrial Robots, 2008-2015E
 - Global Sales of Industrial Robots in Major Industries, 2009-2012 (TOP 5)
 - Structure of Global Industrial Robot Market, 2009-2012 (by Sector)
 - Global Sales of Industrial Robots, 2009-2012 (by Region)
 - Industrial Robot Sales in the World's Major Countries, 2008-2012 (TOP 5)
 - Sales of Industrial Robots in the World's Major Emerging Countries, 2008-2012
 - Partial Planning of China Robot Industry, 2010-2013
 - China's Major Industrial Parks of Industrial Robots and Planning Objectives in 2013
 - China's Major Robot R&D Institutions and Their Representative Products
 - Sales Volume of Industrial Robots in Chinese Market, 2005-2012
 - Cumulative Installations of Industrial Robots in China, 2005-2012
 - Sales Volume of Industrial Robots in China, 2009-2012 (by Sector)
 - Competitive Structure of Industrial Robot Market in China in 2012
 - Average Annual Wages and Annual Growth Rate of Wages in China Manufacturing Industry, 2005-2012
 - Proportion of Population Aged over 65 in China, 2000-2012
 - Cumulative Growth Rate of China's Export Trade Value, 2005-2012
 - Sales Forecast in China Industrial Robot Market, 2013-2020
 - Revenue and Net Income of Shenyang Siasun Robot & Automation Co., Ltd., 2007-2013
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Product)
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Region)
 - Gross Margin of Siasun Robot & Automation, 2010-2013 (by Product)

- 
- Industrial Robot System Composition Diagram
 - Structure of Industrial Robot Industry Chain
 - Industrial Robot Value Chain
 - Global Industrial Robot Industry Development Model
 - Global Sales of Industrial Robots, 2008-2015E
 - Global Sales of Industrial Robots in Major Industries, 2009-2012 (TOP 5)
 - Structure of Global Industrial Robot Market, 2009-2012 (by Sector)
 - Global Sales of Industrial Robots, 2009-2012 (by Region)
 - Industrial Robot Sales in the World's Major Countries, 2008-2012 (TOP 5)
 - Sales of Industrial Robots in the World's Major Emerging Countries, 2008-2012
 - Partial Planning of China Robot Industry, 2010-2013
 - China's Major Industrial Parks of Industrial Robots and Planning Objectives in 2013
 - China's Major Robot R&D Institutions and Their Representative Products
 - Sales Volume of Industrial Robots in Chinese Market, 2005-2012
 - Cumulative Installations of Industrial Robots in China, 2005-2012
 - Sales Volume of Industrial Robots in China, 2009-2012 (by Sector)
 - Competitive Structure of Industrial Robot Market in China in 2012
 - Average Annual Wages and Annual Growth Rate of Wages in China Manufacturing Industry, 2005-2012
 - Proportion of Population Aged over 65 in China, 2000-2012
 - Cumulative Growth Rate of China's Export Trade Value, 2005-2012
 - Sales Forecast in China Industrial Robot Market, 2013-2020
 - Revenue and Net Income of Shenyang Siasun Robot & Automation Co., Ltd., 2007-2013
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Product)
 - Revenue of Siasun Robot & Automation, 2010-2013 (by Region)
 - Gross Margin of Siasun Robot & Automation, 2010-2013 (by Product)

- 
- Revenue and Gross Profit of Siasun Robot & Automation, 2009-2013
 - R&D Costs and % of Total Revenue of Siasun Robot & Automation, 2010-2012
 - Major R&D Projects and Progress of Siasun Robot & Automation in 2013
 - Revenue and Net Income of Siasun Robot & Automation, 2013-2015E
 - Revenue and Net Income of Dalian Zhiyun Automation Co.,Ltd, 2007-2013
 - Revenue of Dalian Zhiyun Automation, 2010-2013 (by Product)
 - Revenue of Dalian Zhiyun Automation from 2010-2013 (by Region)
 - Gross Margin of Dalian Zhiyun Automation, 2010-2013 (by Product)
 - R&D Costs and % of Total Revenue of Dalian Zhiyun Automation, 2010-2012
 - Revenue and Net Income of Miracle Automation Engineering Co.,Ltd, 2007-2013
 - Revenue and Gross Margin of Miracle Automation Engineering Co.,Ltd, 2010-2013 (by Products)
 - Qingdao Kinger Robot Products
 - Revenue and Net Income of Mesnac Co.,Ltd, 2007-2013
 - Revenue of Mesnac Co.,Ltd, 2010-2013 (by Product)
 - Gross Margin of Mesnac Co.,Ltd, 2010-2013 (by Product)
 - Revenue and Gross Margin from Industrial Robot Business of Mesnac Co.,Ltd, 2010-2013
 - Mesnac Co.,Ltd's R&D Investment Projects in Industrial Robots, 2010-2012
 - R&D Costs and % of Total Revenue of Mesnac Co.,Ltd, 2011-2012
 - Revenue and Net Income of Harbin Boshi Automation Co., Ltd., 2009-2013
 - Revenue of Harbin Boshi Automation Co., Ltd., 2010-2013 (by Product)
 - Gross Margin of Harbin Boshi Automation Co., Ltd., 2010-2013 (by Product)
 - R&D Costs and % of Total Revenue of Harbin Boshi Automation, 2011-2012
 - Main Product Lines of Industrial Robots of Suzhou Boshi Robot Technology Co.,Ltd
 - Main Product Lines of Industrial Robots of Changzhou Mingseal Robotic Technology Co., Ltd

- Main Product Lines of Haier & Hit Robot Technology Co.,Ltd
- Revenue of Dongguan Start To Sail Industrial Robots Co. Ltd, 2008-2011
- Main Product Lines of Industrial Robots of Anhui Efort Intelligent Equipment Co., Ltd.
- Sales Volume of Industrial Robots of Shanghai Triowin Automation Machinery Co., Ltd, 2009-2017E
- Models and Technical Parameters of Major Industrial Robots Produced by GSK
- Revenue and Net Income of Shanghai STEP Electric Corporation, 2007-2013
- Revenue of Shanghai STEP Electric Corporation, 2010-2013 (by Product)
- Gross Margin of Shanghai STEP Electric Corporation from 2010-2013 (by Product)
- Major Industrial Robot Products of Shanghai STEP Electric Corporation
- Revenue and Net Income of Shenzhen Jasic Technology Co.,Ltd, 2007-2013
- Revenue of Shenzhen Jasic Technology Co.,Ltd, 2010-2013 (by Product)
- Gross Margin of Shenzhen Jasic Technology Co.,Ltd, 2010-2013 (by Product)
- Industrial Robot Product Lines of Tangshan Kaiyuan Group's Major Subsidiaries
- Revenue and Net Income of Nanjing Panda Electronics Co.Ltd, 2007-2013
- Revenue of Nanjing Panda Electronics Co.Ltd from 2010-2013 (by Product)
- Gross Margin of Nanjing Panda Electronics Co.Ltd, 2010-2013 (by Product)
- Non-Private-Placement Capital Raising Investment Projects of Nanjing Panda Electronics in 2013
- Industrial Robot Product Lines of Huaheng Welding Co., Ltd
- Revenue and Net Income of Huaheng Welding Co., Ltd, 2008-2011
- Major Industrial Robot Product Lines of Shenzhen Adtech Technology Co., Ltd
- Major Industrial Robot Product Lines of Kunming Logistics and Information Engineering Co., Ltd
- Net Sales and Net Income of FANUC, FY2009-FY2013
- Sales of FANUC, FY2010-FY2013 (by Division)
- Sales Structure of Fanuc in FY2012 (by Region)
- Fanuc's Sales from Robot Business, FY2010-FY2013

- 
- Fanuc's Sales Volume of Industrial Robots in China, 2010-2012
 - Fanuc's Major Clients of Industrial Robots in China
 - Net Sales and Net Income of Yaskawa Electric, FY2007-FY2013
 - Sales of Yaskawa Electric, FY2007-FY2013 (by Region)
 - Sales of Yaskawa Electric, FY2007-FY2013 (by Business)
 - Revenue and Operating Income of Yaskawa Electric's Robot Business, FY2008-FY2013
 - Major Industrial Robot Product Lines of Yaskawa Shougang Robot Co.,Ltd
 - Orders, Sales and EBIT of KUKA Group, 2008-2013
 - Major Financial Indicators of KUKA Robotics Division, 2009-2013
 - Major Financial Indicators of KUKA Systems Division, 2009-2013
 - Revenue and Net Income of ABB Group, 2009-2013
 - Revenue Structure of ABB Group in 2012 (by Product and by Business)
 - Order Growth Rate of ABB Group from 2012-2013 (by Region)
 - Net Sales and Net Income of OTC, FY2010-FY2014
 - OTC's Sales, FY2010-FY2013 (by Division)

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license)2,100 USD
 Hard copy 2,200 USD
 PDF (Enterprisewide license)..... 3,300 USD

※ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- ❑ *Multi-users market reports*
- ❑ *Database-RICDB*
- ❑ *Custom Research*
- ❑ *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: