Global and China Automotive Industrial Robotics Industry Report, 2013-2014

Jan. 2014

ResearchInChina
www.researchinchina.com

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

The global industrial robotics market valued around USD11.156 billion in 2012, but the value slumped by 17% to USD9.249 billion in 2013 because of the yen depreciation and a significant decline in the average price of industrial robotics.

In 2013, the global shipment of industrial robotics slightly rose by 2%. Japan's industrial robotics shipment fell by 7.3% to 106,225 sets, and the average selling price dropped from JPY4.72 million in 2012 to JPY4.52 million in 2013. Thanks to the strong recovery in Europe, the U.S. and Japan, their demand for industrial robotics will not be less than China in 2014. The global market value is expected to increase by 3.5% to USD9.569 billion in the same year.

Although Japan's industrial robotics shipment declines, Japanese companies still act as the global overlord, enjoying the estimated 52.0% market share in 2013, whilst German companies were expected to occupy approximately 21.7% market share.

Welding robots account for 50% of industrial robotics, requiring high precision. In this point, even Germany can not compete with Japan. For example, only two Japanese companies in the world can produce robot reducers; one is Nabtesco with the global market share of approximately 90% and the annual sales revenue of about USD500-600 million, the other is Harmonic Drive System with the annual sales of roughly USD55-65 million.

36% of the global and 50% of China's demand for industrial robotics stems from the manufacturing of automobiles and related parts. Joint ventures which play a main role in China automobile industry like to introduce production lines from abroad. The robotics under foreign brands flow to China in the form of supporting complete automobile production line. However, it is difficult for Chinese local brand robotics to enter joint ventures, especially welding and painting sectors. In the automobile industry, robotics work on Stamping, Powertrain, Body-in-white, as well as Paint and Sealing.

The automotive industrial robotics market is split by European and Japanese companies. Japanese companies serve the Japanese market and hold absolute dominance in electronics, assembly, metalworking, plastics and food fields. European counterparts show overwhelming advantages in the automotive sector, occupying most of the markets in China, the U.S. and Europe. In the field of Body-in-white, ABB, KUKA, COMAU, FANUC and KAWASAKI rank top successively by market share. As for the Stamping aspect, ABB, KUKA, FANUC and KAWASAKI are the leaders by market share. Germany Durr seizes about 50% share in the paint market and 45% share in the sealing market.

Global Automotive Industrial Robotics Market Segments and Share of Vendors, 2013

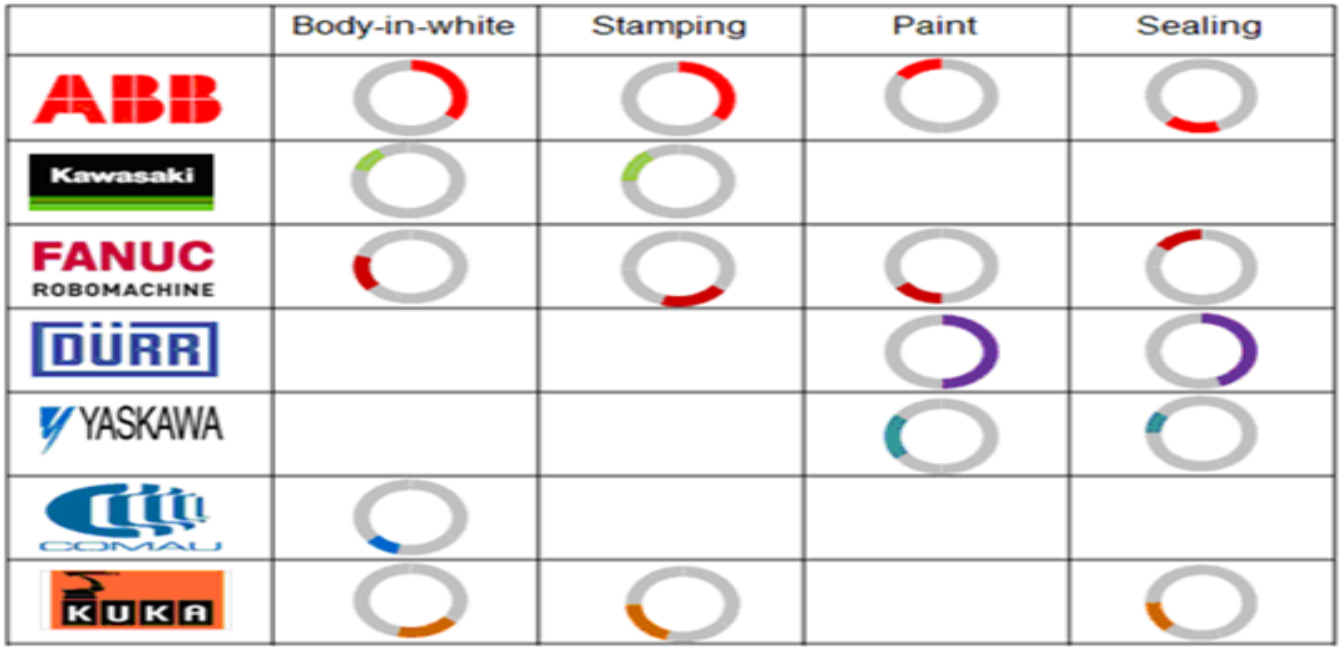

Table of contents

Selected Charts

- Cost Structure of Industrial Robotics
- Capacity of Industrial Robotics Manufacturers
- Global Industrial Robotics Market Size, 2007-2015E
- Global Industrial Robotics Shipment, 2003-2016E
- Global Industrial Robotics Shipment by Region, 2011-2016E
- China's Industrial Robotics Shipment, 2005-2016E
- Global Industrial Robotics Density by Country, 2012
- Robotics Market Size in China, USA, Japan, Germany and South Korea, 2008-2012
- Global Industrial Robotics Shipment by Country, 2011-2016E
- Global Industrial Robotics Ownership by Country, 2011-2016E
- Industrial Robotics Market Size in Automotive, Electronic, Chemical and Food Sectors, 2009-2012
- Sales Volume of Service Robot, 2011-2012
- China's Industrial Robotics Shipment by Industry, 2011-2014
- China's Robotics Shipment by Product, 2011 vs 2014
- China's Robotics Export Volume by Region, 2007-2011
- China's Robotics Import Volume by Region, 2007-2011
- China's Industrial Robotics Import Value by Region, 2011
- Market Share of Major Manufacturers in Chinese Robotics Market, 2013
- Industrial Robotics System Integration
- Japan's Industrial Robotics Supply Chain
- Suppliers of Key Industrial Robotics Components
- Revenue Ranking of Global Industrial Robotics Enterprises, 2012-2013
- Global Industrial Robotics Output Value by Region, 2012-2013
- Japan's Industrial Robotics Shipment, 2004-2013
- Japan's Industrial Robotics Orders and ASP, 2004-2013

Selected Charts

- Japan's Robotics Revenue, 2004-2013
- Japan's Robotics Shipment by Application, Q1-Q3 2013
- Revenue by Product of Japan Robotics Industry, Q1 2013
- Japan's Robotics Export Volume by Region, 2007-2011
- Body-in-white Industrial Robotics Market Share, 2013
- Stamping Industrial Robotics Market Share, 2013
- Paint Industrial Robotics Market Share, 2013
- Sealing Industrial Robotics Market Share, 2013
- YoY Growth Rate of Automobile Output in China, 2008-Oct 2013
- Monthly Sales Volume of Passenger Cars and Growth Rate in China, Jan 2012-Oct 2013
- Sales Volume of Passenger Cars in China by Model, Jan 2011-Oct 2013
- Sales Volume of Audi, BMW and Mercedes-Benz in China, Jan 2011-Oct 2013
- Sales Volume of Passenger Cars in China by Country, 2009-Oct 2013
- Monthly Sales Volume of Medium and Heavy Trucks in China, Jan 2011-Oct 2013
- Monthly Sales Volume of Light Trucks in China, Jan 2011-Oct 2013
- Monthly Sales Volume of Mini Trucks in China, Jan 2011-Oct 2013
- Monthly Sales Volume of Large Buses in China, Jan 2011-Oct 2013
- Monthly Sales Volume of Medium Buses in China, Jan 2011-Oct 2013
- Monthly Sales Volume of Mini Buses in China, Jan 2011-Oct 2013
- ABB's Revenue, Orders and Operating Profit, 2008-2013
- ABB's Revenue by Division, 2010-2013
- ABB's Orders by Division, 2010-2013
- ABB's EBIT by Division, 2010-2013
- ABB's Revenue by Region, 2010-2012

Selected Charts

- ABB's Orders by Region, 2010-2013
- Revenue and EBITDA Rate of Discrete Automation and Motion, 2010-2013
- Revenue of ABB's Discrete Automation and Motion Division by Region, 2010-2013
- Orders of ABB's Discrete Automation and Motion Division by Region, 2010-2013
- FANUC's Revenue and Operating Margin, FY2009-FY2014
- FANUC's Revenue by Division, FY2010-FY2014
- FANUC's Revenue by Region, 2010-2013
- Comau's Robotics Revenue, 2008-2012
- Comau's Robotics Shipment, 2008-2012
- Comau's Robotics Clients 2012
- Comau's Revenue and EBIT, 2009-2013
- Revenue and Gross Margin of Yaskawa Electric, FY2008-FY2014
- Revenue and Operating Margin of Yaskawa Electric, FY2008-FY2014
- Revenue of Yaskawa Electric by Division, FY2008-FY2014
- Overseas Revenue of Yaskawa Electric by Region, FY2008-FY2013
- Operating Margin of Yaskawa Electric by Division, FY2008-FY2013
- Assets and Liabilities of Yaskawa Electric, 2008-2013
- Yaskawa Electric ROSE, 2008-2013
- Yaskawa Electric Capital and Number of Employees, 2008-2013
- KUKA's Revenue and EBIT Rate, 2008-2013
- KUKA's Order Value and Number of Employees, 2008-2013
- Revenue and EBIT Rate of KUKA's Robotics Division, 2006-2013
- Revenue and EBIT Rate of KUKA's System Division, 2006-2013
- Robotics Division
- System Division

Selected Charts

- Geographical Distribution of KUKA's Orders and Staff, 2012
- DAIHEN's Revenue and Operating Margin, FY2009-FY2014
- DAIHEN's Revenue by Business, 2012-2014
- DAIHEN's Operating Profit by Business, FY2012-FY2013
- Nachi's Revenue and Operating Profit, FY2010-FY2014
- Nachi's Revenue by Application, 2012-2014
- Nachi's Revenue by Product, 2009-2012
- Adept's Revenue and Gross Margin, FY2010-FY2014
- Adept's Revenue by Business, 2010-2013
- Adept's Revenue by Region, 2010-2013
- Nabtesco's Revenue and Operating Margin, FY2009-FY2014
- Nabtesco's Assets, FY2009-FY2013
- Nabtesco's ROA and ROE, FY2009-FY2013
- Nabtesco's Cash Flow, FY2009-FY2013
- Nabtesco's CAPEX by Division, FY2014
- Nabtesco's Overseas Revenue by Region, FY2013- FY2014 H1
- Nabtesco's Revenue and Operating Profit by Division, FY2008-FY2014
- Revenue and Operating Profit of HDS, FY2009-FY2014
- Revenue of HDS by Application, FY2011-FY2014
- Revenue and Operating Profit of Shenyang SIASUN, 2007-2013
- Revenue of Shenyang SIASUN by Business, 2009-2013
- Revenue of Shenyang SIASUN by Region, 2009-2012
- Assets and Liabilities of Shenyang SIASUN, 2010-2012
- Durr's Revenue and EBIT Rate, 2008-2013
- Durr's History

Selected Charts

- Geographical Distribution of Durr's Orders and Revenue, 2011-2012
- Geographical Distribution of Durr's Staff, 2005, 2009 vs 2013
- Durr's Painting Robotics Sales Volume, 1998-2012

ResearchInChina

The Vertical Portal for China Business Intelligence

How to Buy

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) ……..2,000 USD

Hard copy …… 2,100 USD

PDF (Enterprisewide license)…..... 3,000 USD

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

ResearchInChina

www.researchinchina.com

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:

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com