



Global and China Industrial Robot Speed Reducer Industry Report, 2013-2016

Jun. 2014

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

Speed reducer is one of three core parts of industrial robot, along with two others (drive and control device, servomotor), accounting for about 36% of the industrial robot's total cost.

China has made much progress in industrial robot in recent years, with sales volume for 2008-2013 registering a CAGR of 35.9%, well above the global average growth rate of 9.6%. Driven by the growing demand for industrial robot, China's total demand (including new demand and stock demand) for industrial robot speed reducer amounted to about 244,000 sets in 2013, and is estimated to reach 461,000 sets by 2016.

In spite of robust demand for industrial robot speed reducer in China, the production capacity here lags far behind that of Japan, the United State and Europe.

China now has no manufacturers that can provide mass-produced and reliable industrial robot speed reducers, and the market is almost completely dominated by international giants like Nabtesco, Harmonic Drive and Sumitomo Heavy Industries, of which Nabtesco is the

world's largest robot RV reducer manufacturer with a market share of around 60%, and Harmonic Drive is the largest robot harmonic reducer producer in the world, holding a market share of 16%.

To satisfy the growing domestic demand and improve localization level of industrial robot speed reducer, a number of local Chinese companies have engaged in R&D, trial production and small scale production of industrial robot in recent years, such as Shaanxi Qinchuan Machinery Development Co., Ltd., Nantong Zhenkang Machinery Co., Ltd., Leader Harmonious Drive Systems Co., Ltd. and Shuaike Machinery Manufacturing Co., Ltd.

Shaanxi Qinchuan Machinery Development Co., Ltd.: In 2013, the company invested RMB 194 million to carry out 90,000 sets (Phase I) industrial robot joint reducer "technological upgrading" project construction, which is expected to reach designed capacity in 2015. The company has established robot joint reducer branch and concentrated its superior resources on implementation of the project.

Nantong Zhenkang Imp.& Exp. Co., Ltd.: In April 2012, the company's robot ZKRV precision reducer passed the appraisal of Technological Achievement Evaluation Commission (experts from Xi'an Micromotor Research Institute, Beijing University of Technology, Xi'an Jiaotong University, Hangzhou Kaiierda Robot Technology Co., Ltd., etc). The company has developed production capacity of 5000 sets of ZKRV reducer series (including five specifications, namely, 20, 40, 80, 110 and 160E) in early 2014.

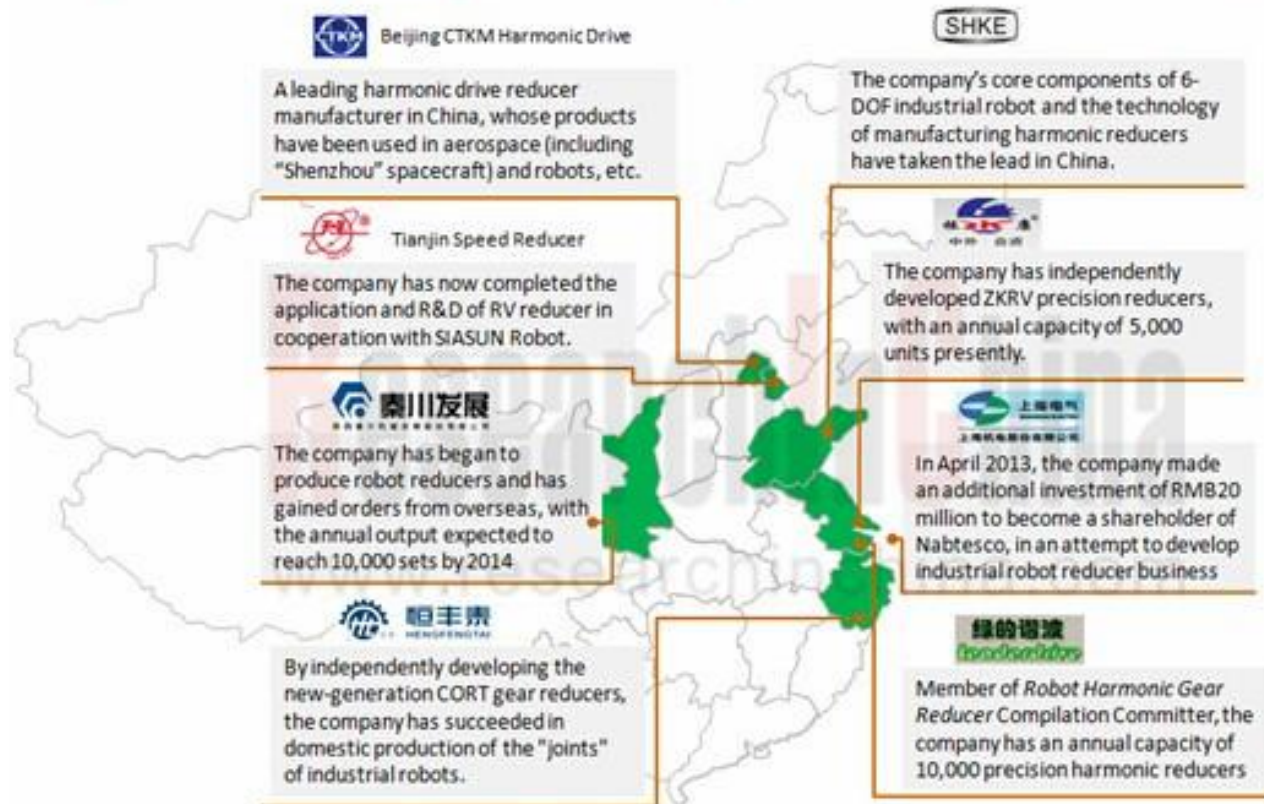
Zhejiang Hengfengtai Reducer MFG. Co., Ltd.: The company began research on robot speed reducer in 2006, and had developed three categories and seven models of prototype reducers applicable to 165kg spot welding robot and 300kg conveying robot by the end of 2013.

Leader Harmonious Drive Systems Co., Ltd.: The company participated in compiling national standards - Robot Harmonic Gear Reducer, and harmonic gear reducer manufactured by the company has been adopted by SIASUN Robot & Automation Co., Ltd. and other companies. In April 2014, the company received investment from Principle Capital to advance the development of robot business.

Global and China Industrial Robot Speed Reducer Industry Report, 2013-2016 by ResearchinChina focuses on the following:

- ✘ Supply & demand and major companies in global and China industrial robot market;
- ✘ Status quo of global industrial robot speed reducer market and relevant manufacturers;
- ✘ Supply & demand, major companies and development trend of China industrial robot market;
- ✘ Operation and industrial robot speed reducer business of 5 global and 9 Chinese major companies.

Competitive Advantage of Major Industrial Robot Speed Reducer Manufacturers in China, 2013



Source : Global and China Industrial Robot Speed Reducer Industry Report, 2013-2016 ,ResearchInChina

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