China Motion Controller Industry Report,

2013-2016

Jul. 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

In recent years, China has seen rapid development in machine tool, textile, printing, packaging, electronics, and other industries, which has boosted the demand for motion controllers. In 2006-2012, the demand for motion controllers in China presented steady growth, from 253,600 sets in 2006 to 754,500 sets in 2012. In 2013, the market demand for motion controllers in China still showed a relatively stable growth, at roughly 19%, to about 900,000 sets.

The market size of universal motion controllers, which serve as the control devices of the servo system, is directly influenced by the system. In recent years, the rapid growth of the servo system in China has driven the market size of universal motion controllers to rise from RMB543 million in 2006 to RMB1.946 billion in 2012, with a CAGR of 23.7%. And in 2013, the market size of general motion controllers in China stood at RMB2.34 billion, an increase of some 16.9% on a year-on-year basis.

According to different platforms, general motion controllers can fall into three categories: PLC controller, embedded controller, and PC-based controller card. In 2013, the market share of PLC controllers in China reached 55.68%, followed by embedded controllers.

Currently, some Chinese motion controller manufacturers including Googol Technology, Shanghai Weihong and Leadshine Technology are targeted at medium and low-end market while European and American companies focus mainly on high-end market. Generally, the market share of the Chinese enterprises has exceeded 50%, and Googol Technology ranked first with a 14.2% market share in 2013.

In recent years, with the open system, reasonable performance and lower prices, Pc-based controllers have developed at a fast pace in China, hence a popularity in the Chinese market. As for Pc-based controllers, the Chinese manufacturers have gradually emerged as major players, including Googol Technology, Leadshine Technology, Adtech, Leetro, and Shanghai Weihong, etc. Meanwhile, these players also provide dedicated controllers to some industry segments. However, Googol Technology has dominated the Pc-based controller market, with the market share in 2013 hitting as high as 45.32%.

In the forthcoming years, the growth of demand for motion controllers will still come from such industries as machine tool, printing, packaging, and electronics while the industries like tobacco machinery and medical device will see a steadily growing demand for motion controllers. It is projected that by 2016 the demand for motion controllers in China will be close to 1.9 million sets, and that the market size of general motion controllers will be very likely to reach RMB4 billion or so.

China Motion Controller Industry Report, 2013-2016 released by ResearchInChina will mainly deal with the followings:

※ Development environment of motion controllers in China, including industry and policy environment, etc.;

※ Market size of motion controllers in China and the expectations in the following 3 years, competition pattern (the market share of Top 10 manufacturers) as well as supply and demand, etc.;

※ Application of motion controllers in downstream sectors (including machine tools, textile machinery, plastics machinery industry, etc.) in China and market analysis, etc.;

※ Operation of 11 key medium and low-voltage inverter manufacturers in China (including Leadshine Technology, Googol Technology, Adtech, Advantech and Leetro, etc.) and analysis of motion controller business, etc.

Competitive Edge of Major Motion Controller Manufacturers in China, 2013

Company	Competitive Edge
leetro — Leetro	Ranking 6th in China's motion controller market, has high market share in laser machining equipment industry
WEIHONG — Weihong	Ranking 2nd among local firms in China's motion controller market, own complex surface curve& high speed/precision motion control tech
ADVANTECH — ADVANTECH	Ranking 9th in China's PC-based motion controller market, senior member of Intel IOT Solutions Alliance
ADLINK — ADLINK	Ranking 7th in China's PC-based motion controller market, senior member of Intel IOT Solutions Alliance
Leadshine — Leadshine	Ranking 2nd in China's PC-based motion controller market, has high market share in semi-automatic winder industry
ADTECH — ADTECH	Ranking 5th in China's motion controller market, own some high quality customers such as GoerTek, Foxconn
Googol — Googol	Ranking 1st in China's motion controller market, occupies over 45% market of China's PC-based motion controller industry

Map locations: Chengdu, Shanghai, Taipei, New Taipei City, Shenzhen, Hongkong

Source: China Motion Controller Industry Report,2013-2016; ResearchInChina

- Classification of Motion Controllers
- Motion Controller Industry Chain
- Market Size of Servo System Products in China, 2006-2015E
- Market Share of Servo Systems in China by Sector, 2013
- Policies on Motion Controllers in China, 2004-2013
- Development Trend of Motion Controller Industry in China
- Market Size of Motion Controllers in China, 2006-2013
- Market Share of Motion Controllers in China by Type, 2013
- Market Size of General Motion Controllers in China, 2006-2013
- Output of Motion Controllers in China, 2006-2013
- Output of Control Shafts of Motion Controllers in China, 2006-2013
- Demand for Motion Controllers in China, 2006-2013
- Market Share of Major Motion Controller Manufacturers in China, 2013
- Market Share of Major PC-based Motion Controller Manufacturers in China, 2013
- Market Share Breakdown of Motion Controllers in China by Sector, 2013
- Market Size of Machine Tools in China, 2006-2013
- Market Size of Motion Control Products in CNC Machine Tool Industry in China, 2008-2015E
- Market Size of Motion Control Products in Engraving and Milling Industry in China, 2008-2015E
- Market Size of Motion Control Products in Engraving and Milling Industry in China, 2008-2015E
- Market Size of Textile Machinery Industry in China, 2006-2015E
- Application of Motion Controllers in Textile Machinery Industry in China by 2013
- Market Size of Medical Device Industry in China, 2004-2013
- Market Size of Electronic Equipment Manufacturing Industry in China, 2009-2015E
- Market Size of Plastic Processing Machinery Industry in China, 2004-2013
- Market Size of Printing Machinery Industry in China, 2004-2013

- Revenue and Net Income of Leadshine Technology, 2011-2013
- Revenue Structure of Leadshine Technology by Product, 2011-2013
- Revenue Structure of Leadshine Technology by Region, 2011-2013
- Revenue Structure of Leadshine Technology by Sales Model, 2011-2013
- Leadshine Technology's Revenue from Distributors and % of Total Revenue, 2011-2013
- Revenue Structure of Leadshine Technology by Sector, 2011-2013
- Gross Margin of Leadshine Technology by Product, 2011-2013
- Leadshine Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2011-2013
- Leadshine Technology's Procurement from Top 5 Suppliers and % of Total Procurement, 2013
- Leadshine Technology's Revenue Top 5 Clients and % of Total Revenue, 2011-2013
- Leadshine Technology's Revenue from Top 5 Clients and % of Total Revenue, 2013
- R&D Costs of Leadshine Technology and % of Revenue, 2011-2013
- General Motion Controller R&D Project of Leadshine Technology by 2014Q1
- Leadshine Technology's Revenue from Motion Controllers by Product, 2011-2013
- Average Selling Price of Motion Controllers of Leadshine Technology, 2011-2013
- Sales Volume and Gross Margin of Motion Controllers of Leadshine Technology, 2011-2013
- Revenue and Net Income of Leadshine Technology, 2013-2016E
- Revenue and Net Income of ADTECH, 2011-2013
- Revenue Structure of ADTECH by Product, 2013
- Gross Margin of ADTECH by Product, 2013
- Main Motion Controllers of ADTECH
- Revenue and Net Income of ADTECH, 2013-2016E
- Revenue and Net Income of Leetro, 2011-2013
- Revenue Structure of Leetro by Product, 2011-2013
- Revenue Structure of Leetro by Region, 2011-2013

- Gross Margin of Leetro by Product, 2011-2013
- Leetro's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
- R&D Costs of Leetro and % of Revenue, 2011-2013
- Leetro's Revenue and Gross Margin from Motion Controllers, 2011-2013
- Main Motion Controllers of Leetro
- Leetro's Revenue and Gross Margin from Motion Controllers, 2013-2016E
- Revenue and Net Income of Googol Technology, 2009-2010
- Main Motion Controllers of Googol Technology
- Revenue and Net Income of ADLINK, 2009-2013
- Revenue Structure of ADLINK by Product, 2010-2013
- Revenue Structure of ADLINK by Region, 2010-2013
- Motion Control Card Products of ADLINK
- Revenue and Net Income of ADLINK, 2013-2016E
- Revenue and Total Profit of Advantech, 2008-2013
- Revenue Structure of Advantech by Product, 2010-2013
- Revenue Structure of Advantech by Region, 2010-2013
- Gross Margin of Advantech, 2010-2013
- R&D Costs of Advantech and % of Revenue, 2008-2013
- List of Companies Acquired by Advantech, 2013
- Revenue and Net Income of Companies Acquired by Advantech, 2013
- Motion Control Card Products of Advantech
- Revenue and Net Income of Advantech, 2013-2016E
- Revenue and Net Income of Sciyone, 2008-2014
- Revenue Structure Sciyon by Product, 2008-2013

- Revenue Structure of Sciyon by Region, 2008-2013
- Gross Margin of Sciyon by Product, 2008-2013
- R&D Costs of Sciyon and % of Revenue, 2008-2013
- Progress of Sciyon's Self-Raised Fund Investment Projects by the End of 2013
- Motion Controllers of Sciyon
- Revenue and Net Income of Sciyon, 2013-2016E
- Revenue and Net Income of Weihong Electronic, 2011-2013
- Revenue Structure of Weihong Electronic by Product, 2011-2013
- Revenue Structure of Weihong Electronic by Region, 2011-2013
- Gross Margin of Weihong Electronic by Product, 2011-2013
- Weihong Electronic's Procurement from Top 5 Suppliers and % of Total Procurement, 2011-2013
- Weihong Electronic's Procurement from Top 5 Suppliers and % of Total Procurement, 2013
- Weihong Electronic's Revenue from Top 5 Clients and % of Total Revenue, 2011-2013
- Weihong Electronic's Revenue from Top 5 Clients and % of Total Revenue, 2013
- R&D Costs of Weihong Electronic and % of Revenue, 2011-2013
- Raised Fund Investment Projects of Listed Weihong Electronic, 2013
- Sales Volume and Sales-output Ratio of Motion Control Cards of Weihong Electronic, 2011-2013
- Revenue and Net Income of Shanghai Weihong Electronic Technology, 2013-2016E
- Main Motion Controllers of TOPCNC
- Main Motion Controllers of Tankon
- Main Motion Controllers of Haichuan Numerical Control
- Gross Margin of Chinese Motion Controller Manufacturers, 2011-2013
- Demand for Motion Controllers in China, 2013-2016E
- Market Size of General Motion Controllers in China, 2006-2016E

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) …………..1,800 USD

Hard copy ……………….……. 1,900 USD

PDF (Enterprisewide license)…........ 2,800 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: