# Global and China Industrial Robot Report, 2014-2017

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## 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

With increasing demand for industrial automation and intelligentization, global industrial robot industry flourishes, hitting a record high in 2013 with annual sales and ownership arriving at 178,000 units and 1.332 million units, up 12.0% and 7.9% year on year, respectively.

Global industrial robot capacities are concentrated in Japan, about 60% of the global total, while sales markets are mainly in Japan, the U.S., Germany, South Korea and China, which held a combined share of 70.2% in 2013.

China industrial robot industry sprouted in 2003, sped up from 2010, and overtook Japan as the world's largest consumer market in 2013 for the first time. According to China Robot Industry Alliance (CRIA) statistics, industrial robot sales volume in China in 2013 was 36,560 units, or 1/5 of the global total, and is expected to reach 45,000 units in 2014 and around 100,000 units in 2017.

In spite of this, the Chinese industrial robot market is still dominated by foreign companies, which sold more than 27,000 units of industrial robots in China in 2013, 74% of total sales volume, of which ABB, FANUC, Yasukawa Electric and KUKA occupied 65% or so, and nearly monopolized high-end fields like industrial robot manufacturing and welding.

Market Share and Planned Capacity of Major Industrial Robot Manufacturers in China, 2014

| Company | Market Share | Capacity and Plan |
|---|---|---|
| FANUC |  | In 2002, the Shanghai robot factory was put into operation. And it was later expanded, with the current capacity of 3,800 units per year. |
| YASKAWA |  | In June 2013, the Changzhou robot factory was put into operation. With the designed capacity of 12,000 units/a, it now has an annual capacity of 3,000 units. |
| ABB |  | The company has Shanghai Kangqiao Base, a production facility that has produced a total of 20,000 robots, and the robotic system integration base in Chengdu, which has an annual capacity of 150 units/sets. |
| KUKA |  | In March 2014, a new robot factory was opened in Shanghai, with an annual capacity of 5000 units, accounting for one third of the global total. |
| NACHI |  | In May 2013, the Jiangsu robot factory went into production and the capacity of the year reached 1,500 units. The company planned to raise its capacity to 3,000 units by 2015. |
| Kawasaki |  | At the end of 2013, the Suzhou robot factory started construction, with the initial capacity of 2,000 units. And this figure will be expanded to 10,000 units by 2017. |

Note: the market share is calculated based on 2013's sales volume.

Source: *Global and China Industrial Robot Industry Report, 2014-2017* compiled by ResearchInChina

In addition, China's industrial robot density (the number of robots used by every 10,000 workers) is much lower than that in developed countries, standing at only 30 in 2013, well below the global average of 62, in stark contrast to 437 in South Korea, 323 in Japan and 282 in Germany around the same time.

Being optimistic about the Chinese market due to multiple factors of positive policies, replacement of manpower by robot, industrial transformation and upgrading and increasing downstream demand, companies at home and abroad are stepping up efforts to make presence in China industrial robot industry.

ABB：Continues to enhance its exposure in the Chinese market and has introduced 10 robots; in 2014, ABB Engineering entered into an agreement with Zhongyeda Electric on cooperation in robot field.

YASKAWA Electric: In Jun. 2013, Yaskawa (China) Robotics Co., Ltd., a new factory with total investment of USD48 million went into production, and manufactured mainly industrial robot and robotic systems, with designed annual capacity of 12,000 robots and 3,000 units for the time being.

KUKA Robotics: In Mar. 2014, the robot plant located in Shanghai started operation, with designed annual capacity of 5,000 units, one third of KUKA Robotics' total output.

Kawasaki Heavy Industries: Kawasaki Precision Machinery (Suzhou) Ltd. began construction in Dec. 2013, and is scheduled to be put into production in Apr. 2015, with initial capacity of 2,000 units, manufacturing mainly robots for automobile welding and parts handling. It is expected that the capacity will be lifted to 10,000 units by 2017.

SIASUN Robot & Automation: A leader among local Chinese robot companies; posted revenue of RMB407 million from industrial robot business in 2013, a year-on-year jump of 35.6%. In Mar. 2014, the company first realized industrialization of semiconductor robot; in Jul. of the same year, the SIASUN Robot northern headquarters worth RMB3.623 billion were settled in Qingdao National High-tech Industrial Development Zone.

Anhui Efort Equipment: In Dec. 2013, the “industrial robot” industrial park project with investment of RMB2.2 billion started building, and is planned to go into operation at the end of 2015, developing annual capacity of 10,000 industrial robot bodies, core parts and peripheral equipment. In Nov. 2014, the company cooperated with Italian CMA to enhance spray painting robot business.

Global and China Industrial Robot Industry Report, 2014-2017 by ResearchInChina focuses on the following:

- Global industrial robot market size, market structure, major companies;
- Policy environment and technological environment for industrial robot industry in China;
- Chinese industrial robot market size, market structure, investment situation and development prospect;
- Operation, industrial robot business and future strategies of 10 major global industrial robot companies and 14 major Chinese companies.

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