

Global and China Industrial Robot Speed Reducer Industry Report, 2015-2018

Jan. 2016

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, drive and controller, and servomotor constitute the three core parts of industrial robot, of which the cost of speed reducer is the highest, accounting for roughly 36% of the industrial robot's total costs.

In 2014, China's industrial robot market skyrocketed, with the sales volume reaching 57,000 units, up 55.9% year on year, occupying 24.9% of the global total. It is estimated that this figure would go up to 75,000 units in 2015 and 150,000 units in 2018.

Fuelled by rapid growth of Chinese industrial robot market, the demand for speed reducers surged, with the year 2015's consumption of some 150,000 sets. If each industrial robot is equipped with 4.5 precision reducers (normally one industrial robot needy of 4-6 sets), the added demand for industrial robot speed reducers alone would reach 675,000 sets till 2018.

Despite a thriving market demand in China, China's industrial robot reducers mainly rely on imports due to a lack of core technologies. Thus, the market is basically monopolized by the companies like Nabtesco, HarmonicDrive, Sumitomo, SEJINIGB, and Spinea.

In Made in China 2025, industrial robots are catalogued as one of the key fields to be developed in future. Meanwhile, the program pointed out that China will break the technical bottleneck of robot body, reducer, servo motor, controller, sensors, drive, and other key components and system integration design and manufacturing. It is expected that China's industrial robots, speed reducers, and other core components will achieve leapfrog development.

Bullish on China's industrial robot reducer market, the companies like Nabtesco, Sumitomo, and SEJINIGB have expanded their production in China. In addition, a dozen of domestic Chinese companies such as Shaanxi Qinchuan Machinery Development Co., Zhejiang Hengfengtai Reducer MFG. Co., Nantong Zhenkang Imp.& Exp. Co., Leader Harmonious Drive Systems Co., Zhejiang Shuanghuan Driveline Co., Greatoo Intelligent Equipment Inc., and Wuhan Jinghua Speed Reducer Manufacturing Co. have been also involved in R&D and sales of China-made industrial robot reducers.

Nabtesco: As the world's largest producer of industrial robot reducer, the company accounted for 60% of the global RV reducer market share. In February 2015, it, together with Shanghai Mechanical & Electrical Industry Co., set up a joint venture -- Nabtesco (China) Precision Equipment Co. (formerly Jiangsu Nabtesco Hydraulic Co.) with the designed capacity of 200,000 sets/a precision reducers.

Sumitomo: The company has reducer plants in Tianjin, Tangshan, Songjiang (Shanghai), and Guangzhou; its sales headquarter is located in Shanghai. With the development of robot industry in China, Sumitomo planned to establish a precision reducer plant in Shanghai in FY 2015.

Shaanxi Qinchuan Machinery Development Co.: It has completed the trial-manufacture and small-lot production of eight models of robot reducer prototypes, including seven E series and one C-type (BX320C). The 90,000 sets/a industrial robot joint reducers project (Phase I) with total investment of RMB194 million is anticipated to be completed in 2016.

Nantong Zhenkang Imp.& Exp. Co.: The company has boasted the annual capacity of 5,000 units of ZKRV brand reducer E series involving five specifications of 20, 40, 80, 110 and 160E. In May 2015, the company produced the first batch of RV precision reducers and therefore became one of the enterprises that achieved mass production of RV precision reducers in China.






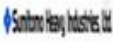

Leader Harmonious Drive Systems Co., Ltd.: The company has mass-produced harmonic reducers, which have been used in homemade robot bodies from many companies. The national standard Robot Harmonic Gear Reducer, led by the company in compilation, was released on May 6, 2014. In April 2015, the company successfully mastered technical know-how for producing robot precision reducers.

Jiangsu Tailong Decelerator Machinery Co.: In May 2015, the company succeeded in developing four models of high precision reducers: enveloping cycloid precision reducers, mini harmonic reducers, wheel-side motor reducers, and cycloid ball reducers, thus making key breakthroughs in localized production of precise reducers.

Global and China Industrial Robot Speed Reducer Industry Report, 2015-2018 by ResearchInChina focuses on the following:

- Market size, market structure, and competitive landscape of global and China industrial robots;
- Market size and market demand of global industrial robot speed reducers and the related companies;
- Supply & demand, market segments, price trend, major companies, and influencing factors of China industrial robot speed reducers;
- Operation and industrial robot speed reducer business of 5 global and 15 Chinese major companies.

Major Ongoing/Proposed Industrial Robot Speed Reducer Projects in China as of the End of 2015

Company	Project	Investment (RMB mln)	Progress
 四川发展	A 90,000 sets/a industrial robot joint reducers project (Phase I)	194	●
 Nabtesco	A 200,000 sets/a industrial robot precision speed reducers project	—	●
 双环传动	A 60,000 sets/a industrial robot RV reducers industrialization project	365	○
 广东精密传动股份有限公司	A 60,000 sets/a industrial robot precision RV reducers project	260	○
 ZTC	A 10,000 sets/a industrial robots and RV reducers project	300	○
 Santoni Heavy Industries Ltd.	A precision reducer project in Shanghai	—	○
 SEJINIGB	A robot precision reducer project in Chongqing	—	○

Ongoing ● Proposed ○

Source: Global and China Industrial Robot Speed Reducer Industry Report, 2015-2018 by ResearchInChina

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