Global and China Industrial Robot Servo Motor Industry Report, 2015-2019

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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

As the executive component in control system, servo motor constitutes one of the three core parts of industrial robot.

Starting in 2013, China became the world's largest industrial robot market, with the sales volume for 2014 surging by 55% to 57,000 units. Propelled by industrial upgrading and the demand for machines replacing human labor, China's industrial robot market will continue to grow rapidly, with the sales volume estimated to reach 182,000 units by 2019.

The rapid growth of industrial robots has to a certain extent stimulated the development of servo motor market. If we calculate that 90% of industrial robots use servo motors and each industrial robot is equipped with the average number of servo motors, the added demand for industrial robot servo motors in China came to 231,000 units in 2014. And this figure is expected to rise to 737,000 units by 2019.

At present, 85% of China's industrial robot servo motor market is dominated by foreign brands, the mainstream suppliers including Japan's Panasonic, Yaskawa, and Mitsubishi and Europe and America's Lenze and Bosch Rexroth. Among them, Japanese brands account for the highest market share, at around 50.0% in 2015. However, the Chinese enterprises, mostly still at the development and testing stage, virtually have no industrialized industrial robot servo motors.

To reverse the situation, a small number of Chinese companies including Estun Automation and Inovance have in recent years continued to break the technical bottleneck and to strengthen product R&D and the construction of industrialization projects.

Inovance: In 2010, the company began to develop industrial robot servo products. As of the end of 2015, the company had developed IS620N series EtherCAT bus-based servo drive and servo motor with absolute encoder, etc.

Estun Automation: Up till now, the company has launched EMJ AC servo motor for industrial robots, and at the same time, it will plan to construct robot-dedicated servo system project, which is to put production in 2017.

HNC：In 2012, through acquiring Wuhan Huada New Type Motor Co. and Golden-Age Motor Technology, HNC began to produce AC servo motor products. In May 2015, the company set up Foshan Golden Age Motor Technology Co. to make layout of industrial robot servo motor-related products.

Business Layout of Major Industrial Robot Servo Motor Manufacturers in China

Company	Production Base	Industrial Distribution
Inovance	Shenzhen	As of the end of 2015, the company had introduced many products including IS620N series servo motor with absolute encoder that is used in industrial robot products
ESTUN	Nanjing	The company proposed to construct a robot-dedicated servo system project, which will achieve the design capacity in 2017; It will undertake special projects of "863" program to promote the R&D of robot servo motor and driver
华中数控	Wuhan	In May 2015, the company set up Foshan Golden Age Motor Technology Co. to make layout of industrial robot servo motor-related products
雷赛智能 Leadshine	Shenzhen	The company planned to build an intelligent robot control system R&D center project to develop robot-dedicated AC servo system and other products.
CTB	Beijing	The company planned to develop a 3-8-axis industrial robot servo motor and other products.
GSK	Guangzhou	Currently, the company has undertaken the research on industrial robot and special motor ("863" program). It is also one of the organizations that draws up the National Robotics Standard.

Source: Global and China Industrial Robot Servo Motor Industry Report, 2015-2019; ResearchInChina

The report mainly focuses on the followings:

- Market size, regional structure, product mix, and competitive landscape of global and China industrial robots;
- Global demand for industrial robot servo motor and competitive landscape, etc.
- Market size, demand, product mix, and competitive landscape of China industrial robot servo system and servo motor;
- Operation, industrial robot servo motor business, and development in China of 7 global industrial robot servo motor companies;
- Operation and development strategies of 10 major Chinese industrial robot servo motor companies.

Table of contents

Selected Charts

- Classification of Servo Motor
- Difference between Servo Motor and Stepper Motor
- Utilization Percentage of Industrial Robot Motors in China by Model, 2015
- Structure of Typical Servo System
- Classification of Servo System by Motor Type
- Sales Volume of Global Industrial Robots, 2008-2018E
- Ownership of Global Industrial Robots by Region/Country, 2013-2018E
- Density of Industrial Robots in Major Countries, 2014
- Density of Industrial Robots for Automobiles in Major Countries, 2014
- Sales Volume of Global Industrial Robots by Region/Country, 2013-2018E
- Sales Volume of Global Industrial Robots by Application, 2012-2014
- Four Families of Industrial Robots Worldwide
- Distribution of Global Industrial Robot Manufacturers by Industry Chain
- China's Policies on Industrial Robots and Parts, 2010-2015
- Sales Volume and YoY Growth of Industrial Robots in China, 2005-2020E
- Sales Volume and Percentage of China-made Industrial Robots, 2011-2020E
- Ownership of Industrial Robots in China, 2005-2020E
- Sales Volume of Industrial Robots in China by Model, 2014-2015
- Sales Volume Percentage of China-made Industrial Robots by Sector, 2014-2015
- Import Value and YoY Growth of Industrial Robots in China, 1996-2014
- Market Size and Density of Industrial Robots in China, 2014-2018E
- Number of Robot Enterprises in Major Regions in China, 2015
- Industrial Robot Market Pattern in China, 2014
- Sales Volume of Main Homemade Industrial Robots in China, 2015
- Global Demand for Servo Motors, 2009-2019E

Selected Charts

- Demand Structure of Servo Motors Worldwide by Region, 2014
- Global Demand for Industrial Robot Servo Motors, 2013-2019E
- Global Top 5 Industrial Robot Servo Motor Manufacturers, 2015
- Market Size and YoY Growth of Industrial Robot Servo System in China, 2011-2019E
- Demand for Industrial Robot Servo Motors in China, 2013-2019E
- Number of Servo Motors Configured in One Industrial Robot in China by Model
- Demand Structure of Homemade Industrial Robot Servo Motors in China by Robot Type, 2014
- Demand Structure of Industrial Robot Servo Motors in China by Country/Robot Type, 2014
- Competitive Landscape of Industrial Robot Servo Motors in China by Region, 2014-2015
- Servo Motor-related Business Revenue and Capacity of Major Industrial Robot Servo Motor Enterprises in China, 2014-2015
- Business Structure of Mitsubishi Electric
- Revenue and Net Income of Mitsubishi Electric of FY2010-FY2015
- Revenue Structure of Mitsubishi Electric by Business, FY2010-FY2015
- Revenue Structure of Mitsubishi Electric by Business, FY2014
- Revenue Structure of Mitsubishi Electric by Country/Region, FY2010-FY2015
- Global Development Strategy of Mitsubishi Electric, FY2014-FY2020
- Development Plan for Mitsubishi Electric's FA Segment, FY2016
- Number of Parts Installed in Mitsubishi Electric’s Joint Robot
- Development Strategy of Mitsubishi Electric’s Elevators & Escalators in China, 2016
- Businesses and Core Products of Yaskawa Electric
- Distribution of Yaskawa Electric’s Major Production Bases as of Sept 2015
- Development Strategy of Yaskawa Electric, 2025
- Revenue and Net Income of Yaskawa Electric, FY2010-FY2015
- Robot Capacity of Yaskawa Electric by Country, FY2012-FY2015
- Development Plan of Yaskawa Electric, FY2016

Selected Charts

- Revenue Structure of Yaskawa Electric by Business. FY2006-FY2015
- Revenue Structure of Yaskawa Electric by Country/Region, FY2010-FY2015
- Revenue of Yaskawa Electric in China, FY2011-FY2015
- Yaskawa Electric's Major Subsidiaries in China
- Yaskawa Electric's Development Strategy in China, FY2015
- Business Structure of Fuji Electric
- Revenue and Net Income of Fuji Electric, FY2010-FY2015
- Revenue of Fuji Electric by Business, FY2013-FY2015
- Revenue Structure of Fuji Electric by Country/Region, FY2013-FY2015
- Revenue and Operating Income of Fuji Electric's Power Electronics by Segment, FY2013-FY2014
- Motor Output of Fuji Electric, FY2014-FY2018
- Plant Distribution of Fuji Electric's Power Electronics as of Sept 2015
- Revenue of Fuji Electric in China, FY2013-FY2015
- Fuji Electric's Production Bases in China
- Business Divisions and Product Distribution of FANUC
- Revenue and Net Income of FANUC, FY2010-FY2015
- Accumulative Robot Output of FANUC, 1980-2015
- Revenue Structure of FANUC by Business, FY2012-FY2015
- Revenue Structure of FANUC by Region, FY2012-FY2014
- Revenue of FANUC's FA Segment, FY2012-FY2015
- Cumulative Commodity Output and Cumulative Servo Motor Output of FANUC's FA Segment, 1957-2015
- FANUC's Servo Motor Product Development and Cumulative Output, 1960-2016
- Revenue and Net Income of Lenze, FY2010-FY2015
- Servo Motor Products of Bosch Rexroth
- Revenue and YoY Growth of Bosch Rexroth, 2005-2014

Selected Charts

- Revenue of Bosch Rexroth by Region, 2014
- R&D Costs and % of Total Revenue of Bosch Rexroth, 2005-2014
- Baldor's Servo Motor Products
- Revenue and Net Income of Inovance, 2009-2015
- Revenue Structure of Inovance by Product, 2014-2015
- Revenue Structure of Inovance by Region, 2010-2015
- Gross Margin of Inovance by Product, 2009-2015
- Revenue and Net Income of Inovance, 2014-2019E
- INVT's Main Products and Application
- Revenue and Net Income of INVT, 2009-2015
- Revenue Structure of INVT by Business, 2010-2015
- Revenue Structure of INVT by Region, 2010-2015
- Gross Margin of INVT by Product, 2008-2015
- Servo System Revenue and Gross Margin of INVT, 2010-2015
- Revenue and Net Income of HNC, 2009-2015
- Revenue Structure of HNC by Product, 2010-2015
- Revenue Structure of HNC by Region, 2010-2014
- Gross Margin of HNC by Product, 2009-2015
- HNC's Motor Revenue, 2012-2015
- Revenue and Net Income of HNC, 2015-2019E
- Revenue and Net Income of Estun Automation, 2011-2015
- Capacity, Output, Sales Volume, and Sales-output Ratio of Estun Automation by Product, 2011-2014
- Operating Revenue Structure of Estun Automation by Business, 2011-2015
- Operating Revenue Structure of Estun Automation by Region, 2014-2015
- Gross Margin of Estun Automation by Business, 2011-2015

Selected Charts

- Estun Automation's Major Projects Proposed/under Construction as of the end of 2015
- Major AC Servo Motors of Estun Automation
- AC Servo System Capacity, Output, and Sales Volume of Estun Automation, 2011-2015
- Revenue Structure of Estun Automation by Business, 2016
- Industrial Robot Capacity and Revenue of Estun Automation, 2014-2018E
- Revenue and Net Income of Beijing CTB Servo, 2012-2015
- Operating Revenue Structure of Beijing CTB Servo by Product, 2012-2014
- Operating Revenue Structure of Beijing CTB Servo by Region, 2012-2014
- Revenue and Net Income of Leadshine Technology, 2011-2014
- Proposed Projects of Leadshine Technology
- Revenue Structure of Leadshine Technology by Product, 2011-2014
- Revenue of Leadshine Technology by Region, 2011-2014
- Servo Motor Capacity, Output, Sales Volume, and Sales-output Ratio of Leadshine Technology, 2011-2015
- Strategic Layout of Major Industrial Robot Servo Motor Suppliers in China, 2016
- Market Size of Industrial Robot Servo Motors in China, 2014-2019E
- Industrial Robot Servo Motor Demand in China by Product, 2015-2019E
- Development Trend in China's Industrial Robot Servo System Product and Technology

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