

China Automated Logistics Equipment Industry Report, 2016-2020

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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.

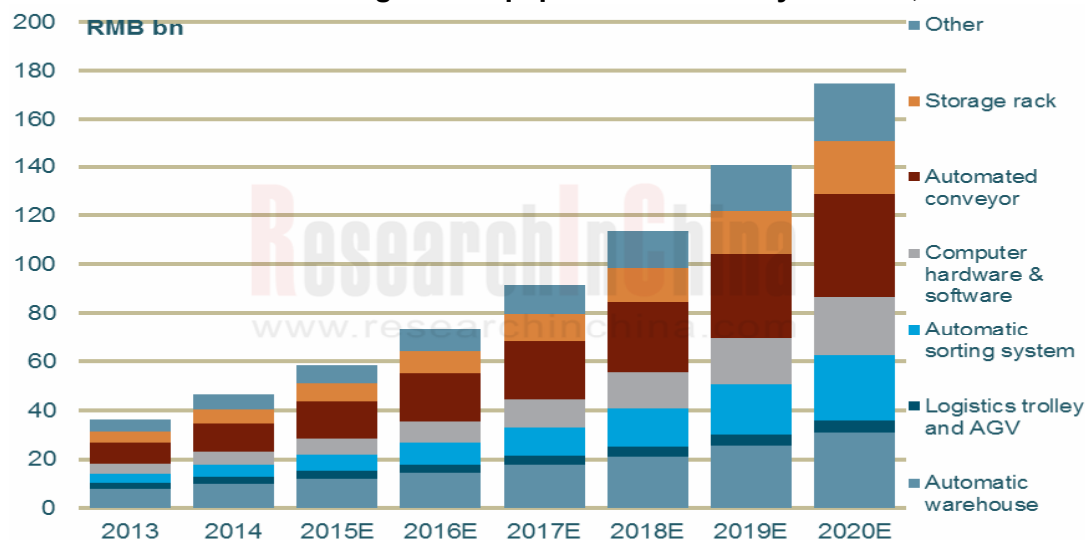
Abstract

As a key integral of automated logistics system, automated logistics equipment mainly includes AGVs, forklifts, automated stereo warehouse, automated conveyors and sorters, etc.

In 2015, the market size of automated logistics system in China approximated RMB58.3 billion, up 25.7% from a year earlier. Of all, automated conveying and sorting equipment of high value boasts market size of around RMB21.62 billion, sharing 37.1% or so.

In the future, fueled by the rise of factory automation and the rapid development of emerging logistics modes like third-party logistics and e-commerce, the market size of automated logistics equipment system in China is expected to reach RMB174.5 billion by 2020, of which RMB68.93 billion will be contributed by automated conveyor and sortation systems.

Market Size of Automated Logistics Equipment in China by Product, 2013-2020E



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Logistics automation finds application in tobacco, medical drugs, and automobiles. In 2015, the automated logistics equipment revenue from the above three sectors amounted to RMB 9.172 billion, RMB7.512 billion, and RMB8.65 billion, respectively, and the figures by 2020 are likely to rise to RMB26.901 billion, RMB24.186 billion, and RMB38.29 billion.

At present, logistics equipment suppliers in China fall into domestic Chinese suppliers and overseas peers, among which the latter plays a leading role, especially in high-end logistics fields like e-commerce and airport, which are almost monopolized by foreign companies. In contrast, domestic suppliers mostly deliver single-equipment, and are principally involved in downstream logistics sectors such as tobacco, pharmaceuticals, power system, apparel, and food.

In recent years, with the accelerated construction of intelligent plants and the growing demand for e-commerce, the competition in automated logistics equipment has picked up. In this context, a number of Chinese companies including Shanxi Oriental Material Handling, Guangdong Dong Fang Precision Science & Technology, MESNAC, and Sanfeng Intelligent Conveying Equipment have begun to enhance their competitiveness through acquisitions, construction expansion, etc.

Guangdong Dong Fang Precision Science & Technology: In June 2014, the company made layout of intelligent logistics system business by acquiring a 20% stake in Jaten Robot & Automation. In April 2015, it signed a Cooperative Letter of Intent with Italy-based Ferretto Group to further build integrated solutions for intelligent warehousing and logistics.

MESNAC: In 2010, the company started layout of robot and automatic logistics business, and established Qingdao Kengic Logistics Technology Co., Ltd. in 2015. In H1 2015, robot and the logistics information business contributed revenue of RMB50.2 million. The company's ongoing industrial robot and intelligent logistics system industrialization base project (Phase II) will add a capacity of 75 sets/a of automated logistic equipment.

Sanfeng Intelligent Conveying Equipment: capable of producing both aerial and ground intelligent conveyors (complete sets), the company's intelligent conveying equipment expansion project under construction is anticipated to reach the design capacity in 2016, when the capacity will be 300 units annually.

The report is primarily concerned with the followings:

- Market size, product mix, demand structure, and competitive landscape of automated logistics system in China;
- Development, market size, and competitive landscape of product segments of automated logistics equipment in China, including automatic stereo warehouse, automated conveyor, AGV, and forklift;
- Development, demand, corporate competition of automated logistics equipment in major downstream sectors like automobiles, tobacco, and medical drugs in China;
- Development of and trends in logistics, e-commerce, and cold-chain logistics markets in China;
- Operation of 8 global automated logistics equipment companies and their development in China;
- Operation and development strategies of 11 Chinese automated logistics equipment enterprises.

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