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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 costeffective 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.

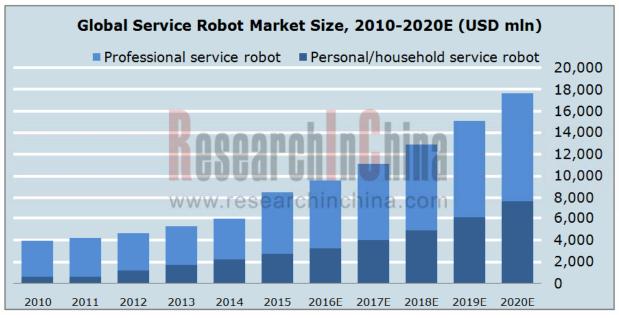
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Abstract

In 2015, the global market size of service robots reported USD8.49 billion, surging by 42.2% on a year-on-year basis, and it is expected during 2016-2020 to show an annual average growth rate of 16.5%, which will be mainly driven by: (1) The aging of population, shortage of labor force, the rise of per capita income and so forth spur the growing demand for family service robots; (2) Breakthroughs have been made in the emerging technologies such as human-machine interaction (HMI) and internet+, contributing to the maturity of service robots.

Compared with industrial robot, the global service robot market is still at an early stage in industrialization, which is dominated by the players from Japan, Germany, the United States, etc. As the most potential market of service robots around the globe, China's market scale reached RMB8.2 billion in 2015, and will be over RMB30 billion by 2020 with the help of markets like artificial intelligence (AI) and the Internet.



Source: ResearchInChina

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According to the type of service, service robots can be divided into personal/household service robot and professional service robot. In 2015, professional service robots contributed to 63.1% of sales, while personal/household service robots 36.9%. Nevertheless, due to the merits of small body and low cost, personal/household service robots represented by cleaning robot are easy to be mass-produced, which therefore are anticipated to achieve explosive growth in the future and sweep an estimated market share of nearly 50% till 2020.

For that reason, numerous companies such as Irobot, Ecovacs, Fmart, Xiaoi Robot, and Minleo have set foot in the field of cleaning robots. Medical robot is one of professional service robots with most potentialities. In particular, surgical robot and exoskeleton robot are set the stage for industrialization. At present, Intuitive Surgical, Inc. is the leader in surgical robots, holding a global market share of more than 50%; and Israeli ReWalk lead the competition in exoskeleton robot market. By contrast, China medical robot market started late, featured with a low penetration rate and with the enterprises generally small-sized. But facilitated by the intelligent healthcare+internet industry, the medical robot market of China will maintain a growth rate of about 30% in the forthcoming five years.

In general, the service robot market embraces bright prospects and Chinese companies and foreign counterparts compete fiercely. The entrants now fall into the three groups:

- 1) The emerging research-based enterprises (such as Jibo, Kinightscope, Savioke and UBTECH) by technical superiority are generally small-sized and with a singularity of products, and they desires to be operated with the help of financing, pre-sales, leasing and other means.
- 2) The enterprises (such as Ecovacs and Fmart) accessing to the service robot field by intelligent upgrading of traditional products make perfect channel layout and see comparatively rapid market development.
- 3) The giants such as Google, Amazon, Microsoft, Alibaba and SoftBank enjoy advantages in capital and industrial chain, and make their presence through means like acquisitions into the service robot field, in a bid to capture the market opportunities.

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Global and China Service Robot Industry Report, 2016-2020 by ResearchInChina highlights the followings:

- Size, product structure, regional development, enterprise pattern and development tendency of global service robot market;
- Environment, size, regional distribution and development trend of China service robot market;
- Development of global and Chinese personal/household service robot markets and segmented products (housekeeping service robot, education robot, accompanying robot, etc.);
- Global and Chinese professional service robot market scale and development of segmented products (like medical robot and agricultural robot);
- Global and Chinese market development of core components(servo motor, sensors, lidar, intelligent speech, etc.) for service robot;
- 15 global and Chinese personal/household service robot companies' operation and development of their service robot business;
- 10 global and Chinese professional service robot companies' operation and their development strategies.

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The Vertical Portal for China Business Intelligence

Table of contents

1 Introduction to Service Robot	3.5 Development Trend	5.1 Market Size	
1.1 Definition		5.2 Demand Structure	
1.1.1 Robots	4 Development of Household/Personal Service	5.3 Medical Robot	
1.1.2 Service Robot	Robot Industry	5.3.1 Overview	
1.2 Classification	4.1 Development Status	5.3.2 Market Size	
1.4 Industry Chain	4.2 Market Size	5.3.3 Surgical Robotics	
1.3 Development History	4.2.1 Sales Revenue	5.3.4 Enterprise Pattern	
,	4.2.2 Sales Volume	5.4 Agricultural Robot	
2 Development of Global Service Robot Industry	4.3 Demand Structure	5.4.1 Market Size	
2.1 Development Status	4.4 Housekeeping Robot	5.4.2 Development Trend	
2.2 Market Size	4.4.1 Product Structure	•	
2.2.1 Sales Revenue	4.4.2 Market Size	6 Market Development of Core Components for	
2.2.2 Sales Volume	4.4.3 Regional Development	Service Robot	
2.3 Classification Structure	4.4.4 Enterprise Pattern	6.1 Servo Motor	
2.4 Regional Development	4.4.5 Technological Advancement	6.1.1 Technical Principle	
2.4.1 USA	4.4.6 Development Trend	6.1.2 Market Development	
2.4.2 Japan	4.5 Education Robot	6.1.3 Application in Service Robot	
2.4.3 South Korea	4.5.1 Development Status	6.1.4 Motor Control	
2.4.4 Europe	4.5.2 Market Size	6.3 Sensors	
2.5 Competitive Landscape	4.5.3 Enterprise Pattern	6.3.1 Technical Principle	
2.6 Development Trend	4.5.4 Development Trend	6.3.2 Market Size	
·	4.6 Accompanying Robot	6.3.3 Application in Service Robot	
3 Development of China Service Robot Industry	4.6.1 Market Prospects	6.4 Lidar	
3.1 Policy Environment	4.6.2 Development Status	6.4.1 Operating Principle	
3.2 Technical Patents		6.4.2 Composition	
3.3 Market Size	5 Development of Professional Service Robot	6.4.3 Application in Service Robot	
3.4 Regional Structure	Industry	6.4.4 Scale of Demand	
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7.4.2 Profit Model

7.5 SoftBank Robotics Holdings Corp (SBRH)

The Vertical Portal for China Business Intelligence

Table of contents

6.5 Intelligent Speech	7.6 Fmart	8 Key Manufacturers of Professional Service
6.5.1 Overview	7.6.1 Profile	Robot in the World and China
6.5.2 Market Size	7.6.2 Operation	8.1 Intuitive Surgical, Inc.
6.5.3 Application in Service Robot	7.6.3 Channels	8.1.1 Profile
6.6 Others	7.6.4 Service Robot Business	8.1.2 Operation
6.6.1 Al Smart Chip	7.7 Ecovacs	8.1.3 Revenue Structure
6.6.2 Operating System	7.7.1 Profile	8.1.4 Gross Margin
6.6.3 Image Recognition	7.7.2 Channel Construction	8.1.5 R&D Cost
	7.7.3 Service Robot Business	8.2 ReWalk Robotics Ltd.
7 Key Manufacturers of Personal/Household Service	7.8 Siasun Robot & Automation	8.2.1 Profile
Robots in the World and China	7.8.1 Profile	8.2.2 Operation
7.1 Irobot	7.8.2 Operation	8.2.3 Revenue Structure
7.1.1 Profile	7.8.3 Revenue Structure	8.2.4 Gross Margin
7.1.2 Operation	7.8.4 Gross Margin	8.2.5 R&D Cost
7.1.3 Shipments	7.8.5 Service Robot Business	8.3 Aethon
7.1.4 Channels	7.8.6 Development Prospects	8.4 Harbin Boshi Automation Co., Ltd.
7.1.5 Products	7.9 Hangzhou GreatStar Industrial	8.4.1 Profile
7.1.6 Development in China	7.9.1 Profile	8.4.2 Operation
7.2 Jibo	7.9.2 Operation	8.4.3 Medical Robotics Business
7.2.1 Profile	7.9.3 Progress in Service Robot Business	8.5 Midea Group Co., Ltd.
7.2.2 Marketing Channel	7.10 Canny Elevator	8.6 Truking Technology Limited
7.2.3 Development in China	7.11 Shanghai Xiaoi Robot Technology Co.,Ltd	8.7 Guangdong Jinming Machinery Co., Ltd.
7.3 Kinightscope	7.12 Minleo	8.8 Chongqing Dima Industry Co., Ltd.
7.4 Savioke	7.13 UBTECH	8.9 Xuzhou Handler Special Vehicle Co., Ltd.
7.4.1 Profile	7.14 ZEBOT	8.10 Beijing TINAVI Medical Technology Co., Ltd.

7.15 PartnerX

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- Classification of Service Robots
- Service Robot Industry Chain
- Core Modules and Technologies for Service Robot
- Enterprise Pattern of Global Service Robot Industry
- Development History of Service Robot
- Global Service Robot Market Size, 2010-2016
- Global Sales Volume of Service Robots, 2010-2016
- Global Market Shares (by Sales) of Service Robots (by Type), 2014&2020
- Service Robotics Industry Development Plans of Major Countries
- Service Robot Market Size (by Application) in North America, 2012-2022E
- Service Robot Market Size in Japan, 2010-2035E
- Accompanying Robot (by Application) Market Size in Japan, 2015-2035E
- Global Market Shares of Europe in Professional Service Robots (by Application)
- Number of Service Robot Manufacturers (by Region) Worldwide
- Major Global and Chinese Manufacturers of Service Robots (by Type)
- Pattern of World's Service Robot (by Type) Manufacturers
- Global Service Robot Market Size, 2016-2020E
- Sales Volume of Service Robots Worldwide, 2016-2020E
- China's Plans on Robotics Industry, 2010-2016
- Robotics Industry Parks in China and Planning Goal, 2014-2016
- Number of Patent Filings about Chinese Service Robots, 2006-2016
- Percentage of Service Robot Patent Application Types in China as of End-April 2016
- Sales Volume of Service Robots in China, 2013-2016
- Sales Volume of Professional Service Robots (Segmented Products) in China, 2013-2016
- Geographical Distribution of Service Robots in Use in China
- Growth Potentiality of Service Robots in China

The Vertical Portal for China Business Intelligence

- Sales Volume of Service Robots (by Type) in Chinese Market, 2016-2020E
- Sales Revenue of China Service Robot Market, 2015-2020E
- Sales Volume of Professional Service Robots (Segmented Products) in China, 2016-2020
- · Development Trend of Service Robots in China
- Competitive Edges of Household Service Robots in Major Countries
- Global Sales Revenue of Household/Personal Service Robots, 2010-2020E
- Global Sales Volume of Household/Personal Service Robots, 2010-2020E
- Average Price of Global Personal/Household Service Robots, 2010-2020E
- Application Structure (by Sales) of Personal/Household Service Robots, 2014&2020E
- Basic Architecture of a Sweeping Robot
- Sweeping Robot VS Dust Catcher
- Sweeping Robot's Random Collision Mode VS Path Planning Mode
- Global Housekeeping Robot Market Size, 2012-2020E
- Structure of Global Home Floor-sweeping Utensils, 2012&2015
- Coverage of Sweeping Robots (by Country) Worldwide, 2016
- Sweeping Robot Development of Major Countries and Backbone Enterprises in the World
- Penetration Rate of Household Sweeping Robots in China, 2016
- Market Shares (by Enterprise) of Cleaning Robots in Major Regions Worldwide, 2015
- Competitive Landscape of China's Sweeping Robot Market
- Technological Evolution of Sweeping Robot Technologies
- Comparison of Key Sweeping Robot Manufacturers in Their Product Technologies
- Cleaning Robot Enterprises and Industry Development Trend
- Scenarios of Major Applications of Education Robot
- Global Education Robot Market Size, 2015-2020E
- Top 10 Education Robot Enterprises in the World, 2016
- Top 10 Education Robot Manufacturers in China, 2016

The Vertical Portal for China Business Intelligence

- Market Shares of Education Robot Enterprises in China, 2015
- Main Research Direction of Education Robot
- 65-year-old (or above) Population in China and % in Total, 2008-2015
- 15 to 64-year-old Population's Proportion in Total of China, 2009-2015
- Average Family Size in China, 2009-2015
- Major Accompanying Robots in the World
- Global Sales Revenue of Professional Service Robots, 2010-2020E
- Global Sales Volume of Professional Service Robots, 2010-2020E
- Average Price Trend of Global Professional Service Robots, 2010-2020E
- Proportion of Global Professional Service Robotics (by Sales value),2014&2020E
- Average Unit Price of Global Major Professional Service Robots (by Product), 2016
- Classification of Medical Robotics and Major Companies
- Global Medical Robot Market Size, 2010-2020E
- Medical Robotics Configuration in Hospitals of Chinese Mainland, As of August 2016
- Global Major Surgical Robot Enterprises and Their Products
- Sales Volume and Value of Global Agricultural Robots, 2010-2020E
- Composition of Servo Motor
- Global Demand for Servo Motors, 2009-2019E
- Servo Motor Configuration of Major Service Robot Brands
- · Parameters and Price Trend of South Korea-made Robotics Servo
- Comparison of Global Major Service Robots' Servo Parameters
- Distribution of Service Robot (by Mode of Moving) Brands
- Control Types, Walking Manners and Prices of Global Major Service Robots
- Atlas Robot VS Asimo Robot
- Global Sensor Market Size, 2014-2020E
- Sensors Configured in Big Dog Robot

The Vertical Portal for China Business Intelligence

- Quantity of Sensors Configured in Big Dog Robot and Their Functions
- Sensor Configuration of Humanoid Robot Nao
- Sensor Configuration of Pepper
- Lidar's Principles
- Lidar's Composition and Functions of Components
- Lidar for Service Robot
- Lidar Imaging Technology
- World's Major Lidar Producers and Applications of Their Products
- Price Trend of Lidar
- Scale of Mobile Robots' Demand for Lidar in China, 2016-2030E
- Development Course of Interactive System
- Development Course of Intelligent Speech
- Global Intelligent Voice Market Size, 2015-2020E
- Chinese Intelligent Voice Market Size, 2015-2020E
- Market Shares of Global and Chinese Intelligent Speech Companies, 2015
- Speech Recognition Products of Global Speech Recognition Companies and Their Applications
- Universal Chip VS Special Chip
- Operating Speed of CPU, GPU and FPGA under Varied Threads
- Comparison of Service Robot's Operating Systems
- Quantity of Hardware Devices Loaded with Android System, 2012-2015
- Number of Robots Types Applying ROS System
- Structure of the Robot Applying ROS System
- Principles of Image Recognition
- Future Research Direction of Image Recognition
- Development Course of Irobot
- Revenue and Net Income of Irobot, FY2011-FY2016

The Vertical Portal for China Business Intelligence

- Revenue of Irobot (by Product), 2013-2015
- Robot Shipments of Irobot (by Product), 2014-2016
- Major Sweeping Robots of Irobot
- Product Distribution of Irobot's Household Robots
- Revenue and Net Income of Fmart, 2013-2016
- Operating Revenue Breakdown and Structure of Fmart (by Product), 2013-2016
- Revenue and Costs of Fmart (by Marketing Channel), 2013-2015
- Robot Business Revenue, Operating Costs and Gross Margin of Fmart, 2013-2016
- Development History of Ecovacs' Cleaning Robots
- Ecovacs' Online Sales on "11.11" (i.e., Nov.11), 2011-2016
- Ecovacs' Share in China's Household Sweeping Robot Market, 2007-2015
- Revenue and Net Income of Siasun Robot & Automation, 2012-2016
- Revenue Structure of Siasun Robot & Automation (by Product), 2015
- Operating Revenue Structure of Siasun Robot & Automation (by Region), 2014-2015
- Gross Margin of Siasun Robot & Automation (by Product), 2013-2016
- Main Intelligent Service Robot Types of Siasun Robot & Automation
- Revenue and Net Income of Siasun Robot & Automation, 2015-2020E
- Revenue and Net Income of Hangzhou GreatStar Industrial, 2013-2016
- Revenue Breakdown and Structure of Hangzhou GreatStar Industrial (by Product), 2014-2016
- Operating Revenue of Hangzhou GreatStar Industrial (by Region), 2014-2016
- Big Events in the Development of Service Robots of Hangzhou GreatStar Industrial, 2014-2016
- Hangzhou GreatStar Industrial's Major Companies Involved in Service Robot and Their Products, 2016
- Revenue and Net Income of Canny Elevator, 2013-2016
- Revenue Breakdown and Structure of Canny Elevator (by Product), 2014-2016
- Operating Revenue Breakdown and Structure of Canny Elevator (by Region/Country), 2014-2015
- Progress in Service Robot Business Layout of Canny Elevator

The Vertical Portal for China Business Intelligence

- Revenue and Net Income of UNISROBO, 2014-2016
- Introduction to Service Robots of UNISROBO
- Revenue and Net Income of Shanghai Xiaoi Robot Technology, 2013-2016
- Revenue Breakdown and Structure of Shanghai Xiaoi Robot Technology (by Product), 2014-2015
- Operating Revenue Breakdown and Structure of Shanghai Xiaoi Robot Technology (by Region), 2013-2015
- Output Path of Xiaoi Robot's Core Technologies
- Evolution of Xiaoi Products
- Full Channel Access of Xiaoi Robot
- Development History of Shanghai Xiaoi Robot Technology
- Operating Revenue Breakdown and Structure of Shanghai Xiaoi Robot Technology (by Channel), 2013-2015
- Revenue and Net Income of Minleo, 2013-2016
- Revenue Breakdown and Structure of Minleo(by Product), 2014-2016
- Operating Revenue Breakdown and Structure of Minleo(by Region), 2013-2015
- Operating Revenue Breakdown and Structure of Minleo(by Channel), 2013-2015
- Sales Objective of UBTECH, 2016
- Sales Structure of UBTECH's Alpha1S Products (by Region)
- Channel Distribution of Alpha1S
- Technical Parameters of UBTECH Alpha Robots
- Key Technical Parameters of UBTECH's JIMU Robot Series
- Presence of Worldwide R&D Centers of ZEBOT
- Revenue and Net Income of Intuitive Surgical, 2010-2016
- System Placements of da Vinci Surgical System, 2014-2016
- Installations of da Vinci Surgical System (by Business) in the United States, 2010-2015
- Installations of da Vinci Surgical System (by Region), 2010-2015
- System Placements of da Vinci Surgical System by Region, 2014-2015
- Surgical Operation Quantity of da Vinci Surgical System by Type, 2009-2016

The Vertical Portal for China Business Intelligence

- Gross Margin of Intuitive Surgical, 2010-2016
- R&D Costs and % of Total Revenue of Intuitive Surgical, 2012-2016
- Revenue of Rewalk Robotics, 2012-2016
- Net Income of Rewalk Robotics, 2012-2016
- Revenue of Rewalk Robotics by Region, 2012-2016
- Gross Margin of Rewalk Robotics, 2012-2016
- R&D Costs and % of Total Revenue of Rewalk Robotics, 2012-2016
- Development Trend of Rewalk's Product Technologies, 2016-2020E
- Revenue and Net Income of Boshi Automation, 2011-2016
- Gross Margin of Boshi Automation, 2010-2016
- Revenue of Boshi Automation by Product, 2010-2016
- Revenue Breakdown and Structure of Boshi Automation (by Region), 2014-2015
- Revenue and Net Income of Midea Group, 2012-2016
- Gross Margin of Midea Group, 2012-2016
- Revenue of Midea Group by Product, 2012-2016
- Midea's Layout in Service Robots as of End-August 2016
- Midea's Subsidiaries Involving Robotics Business
- Revenue and Net Income of Truking Technology, 2010-2016
- Gross Margin of Truking Technology, 2010-2016
- Revenue of Truking Technology by Product, 2010-2015
- Revenue and Net Income of Jinming Machinery, 2010-2016
- Gross Margin of Jinming Machinery, 2010-2016
- Revenue of Jinming Machinery by Product, 2010-2016
- Research Direction of Jinming Machinery and Tsinghua University's Joint Research Center
- Revenue and Net Income of Dima Industry, 2010-2016
- Gross Margin of Dima Industry, 2010-2016

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