

Global and China Industrial Robot Speed Reducer 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

Speed reducers, drive and controllers, and servomotors constitute the core parts of industrial robots, of which speed reducers are divided into RV reducers, harmonic reducers and planet speed reducers.

At present, 75% of the world's precision speed reducers are monopolized by Japan-based Nabtesco and HarmonicDrive, which provide speed reducers to ABB, FANUC, KUKA and other international mainstream robot manufacturers. Nabtesco accounts for 60% share of the global RV reducer market, while HarmonicDrive enjoys the absolute superiority in the harmonic reducer market.

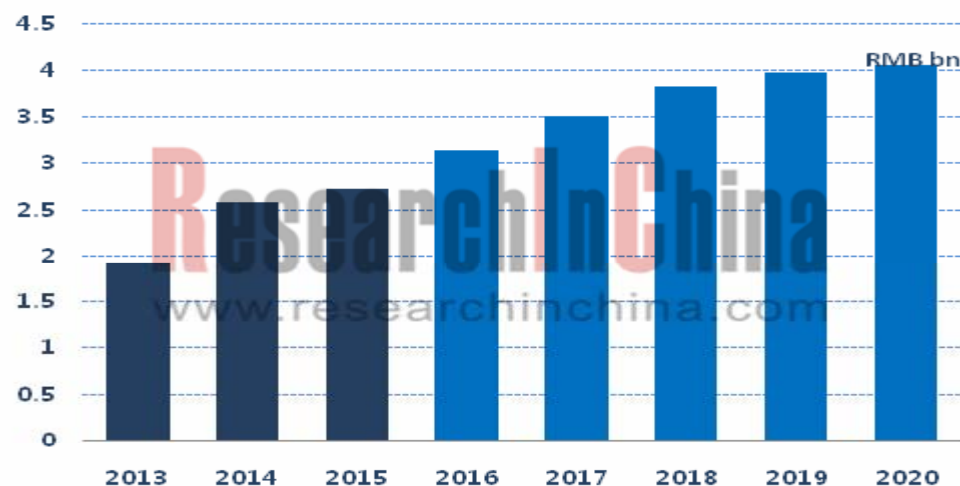
Since 2013, Chinese industrial robot market has ranked first in the world, with the sales volume of 68,000 sets in 2015 (up 19.9% year on year, accounting for 26.8% of the global total). Driven by Made in China 2025, Robot Industry Development Plan (2016-2020) and other industrial policies, China's robot sales volume is expected to exceed 80,000 sets in 2016 and outnumber 180,000 sets in 2020.

Nevertheless, China has been dependent on the imported precision speed reducers as core components, with the import dependency of about 75%. This is attributed to two aspects: First, the wide technical gap between China and foreign countries; second, the small market size which makes a scale effect impossible. In recent years, with the development of industrial robots in China, precision speed reducers and other key components made in China have played a crucial role in the whole industry, and been included in a number of industrial plans; meanwhile, Robot Harmonic Gear Reducer (GB / T30819- 2014), Robot Precision Cycloid Pinwheel Reducer and other industrial standards have been introduced in succession to technically support the development of industrial robot speed reducers in China.

In addition, a dozen of domestic Chinese companies such as Shaanxi Qinchuan Machinery Development, Shanghai Mechanical & Electrical Industry, Nantong Zhenkang Imp.& Exp., Hengfengtai Precision Machinery, Leader Harmonious Drive Systems and Beijing CTKM Harmonic Drive Co., Ltd. have enhanced development and application of industrial robot speed reducers. As of the end of 2016, more than 20 Chinese companies had developed precision speed reducers, and some of them even had achieved small batch production. Meanwhile, emerging enterprises such as AceStep in the domestic market focused on the development of the third-generation QB-configuration industrial robot precision speed reducers and launched QB-80E and QB-40E speed reducers worldwide in December 2016. Foreign investors also quickened their pace in China, for instance, Nabtesco's factory in Changzhou, China was opened and put into operation in May 2016 with the planned annual capacity of 100,000 speed reducers in Phase I to mainly serve the world's four major robot makers; by 2020, the annual capacity will jump to 200,000 speed reducers.

With the maturity of technologies as well as the expansion of the industrial scale, it is expected that China's industrial robot reducer market demand will exceed RMB4 billion by 2020, of which about RMB3 billion will stem from RV reducers.

Chinese Industrial Robot Speed Reducer Market Size, 2013-2020E



Source: ResearchInChina

Global and China Industrial Robot Speed Reducer Industry Report, 2016-2020 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 21 Chinese major companies.

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