Global and China Servo System Industry Report, 2018-2022

June 2018

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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

Servo system, an integral part of industrial automation, has been developing steadily under the drive of Industry 4.0 over recent years. Global servo system market was estimated at USD11.83 billion in 2017, an increase of 7 percent from a year earlier, and is expected to expand at a CAGR of 5.8 percent between 2018 and 2022. To be specific, the Chinese servo system market was worth RMB8.01 billion (approximately USD1.19 billion at an exchange rate of 1:6.7518) in 2017, representing a year-on-year rise of 15.9 percent, and is predicted to show a CAGR of 8.6 percent during 2018-2022 thanks to the policy Intelligent Manufacturing 2025.

Product mix: the servo system is composed of servo motor, servo drive, servo encoder and controller. Among them, the servo drive and servo motor are core components, making up about 90% of the whole servo system market. The Chinese servo drive market was approximately RMB4.4 billion in 2017, up 18.2% over the previous year, with medium- and high-end product market being primarily occupied by foreign vendors. The Chinese servo motor market size reported RMB2.9 billion or so in 2017, surging by 16 percent on an annualized basis, and is expected to exceed RMB4.5 billion in 2022.

Market application: The servo system mainly finds application in the OEM market and traditional sectors like machine tool, electronic equipment manufacturing, wind power, textile machinery and packaging machinery. The demand for servo system from electronic equipment manufacturing has grown rapidly in recent years, making it the largest application area over machine tools. The market of the servo system for electronic equipment was RMB1.41 billion in 2017, up 19.2 percent on a year-on-year basis, and is anticipated to keep an AAGR of at least 15 percent from 2018 to 2022. Meanwhile, the emerging industries like industrial robot have sprung up, creating larger demand for servo system. The market of the servo system for industrial robots in China was RMB720 million or so in 2017, jumping by 20.2 percent compared with a year ago, and is expected to approach RMB1.5 billion in 2022.

As concerns competition, suppliers in the Chinese servo system market include Japan-based Yaskawa, Panasonic and Mitsubishi Electric, the USA-based Rockwell, Germany-based Siemens and Bosch Rexroth, France-based Schneider, Mainland China-based Inovance Technology, Taiwan-based Delta and TECO. Among them, Japanese brands enjoy the lion’s share. The top three suppliers in 2017 were Yaskawa, Mitsubishi and Panasonic, with the market share of over 10% apiece. Inovance Technology, the largest local supplier of servo systems in China, seized 5.2% market share in 2017.

China's servo system industry started late and is still in the stage of import substitution. Taiwanese manufacturers narrowly outperform Chinese mainland peers in production and R&D level, while hover between imported mid-range products and Chinese mainland brands by product technologies and prices. With the performance close to Japanese brands, Taiwanese brands develop faster in the low- and medium-end markets. There are a great number of manufacturers in Mainland China, but they are generally small-sized and less competitive.

The report highlights the followings:

◆The definition, classification and industrial chain of servo system;

◆Development course, development trend, market size, market structure, competitive landscape, etc. of global servo systems;

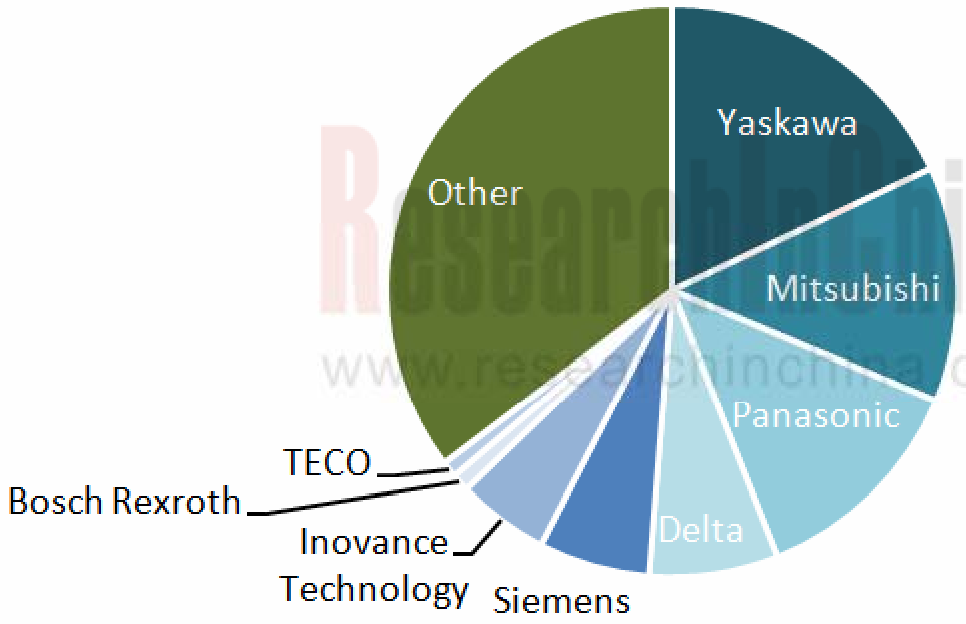
◆Development environment, market size, market structure, competitive landscape, cost structure, development trend, etc. of Chinese servo systems;

◆Market situation, market size, major manufacturers, etc. of servo system components (servo drive, servo motor, servo encoder, controller, etc.);

◆Application, market size, etc. of the servo system applied markets (electronic equipment manufacturing, machine tool, wind power equipment, food machinery, packaging machinery, industrial robot, etc.)

◆Operation, servo system business, etc. of 23 global servo system and component manufacturers.

Competitive Landscape of Chinese Servo System Market, 2017



Source: Global and China Servo System Industry Report, 2018-2022 by ResearchInChina

Table of contents

Table of contents

Selected Charts

- Servo System Structure
- Operating Mode of Servo System
- Classification of Servo System
- Classification of Servo System (by Power)
- Servo System Industry Chain
- Technologies about Servo System
- Development History of Servo System
- Development Trend of Global Servo System
- Global Servo System Market Size, 2014-2022E
- Global Demand for Servo System, 2016-2022E
- Global Servo System Market Size (by Region), 2017
- World's Major Servo System Makers and Their Edges
- Policies about Servo System Industry in China, 2011-2018
- Distribution Mode of Servo System
- China Servo System Market Size, 2012-2022E
- China AC Servo System Market Size, 2012-2022E
- China Servo System Market Size (by Power), 2017
- Structure of Servo System Applications in China, 2016-2022E
- Structure of Servo System Market Size (by Region) in China, 2017
- Pattern of Servo System Brands in China, 2017
- Competitive Landscape of Chinese Servo System Market, 2017
- Top 10 Distributors of Servo System in China
- Operating Principle of Servo Drive
- Global Servo Driver and Motor Market Size, 2014-2022E
- Chinese Servo Driver Market Size, 2012-2022E

Selected Charts

- Global Layout of Kollmorgen
- Classification of Servo Motors
- Global Demand for Servo Motors, 2012-2022E
- Global Servo Motor Demand Structure (by Region), 2017
- Demand for Servo Motors in the United States, 2012-2018
- Output of Servo Motors in Japan, 2010-2018
- Output Value of Servo Motors in Japan, 2010-2018
- China Servo Motor Market Size and Growth Rate, 2012-2022E
- China’s Output of Servo Motors, 2015-2022E
- China’s Patent Filings about Servo Motor, 2010-2017
- China’s Patent Openings about Servo Motor, 2010-2017
- Servo Encoder Structure
- China Encoder Market Size, 2012-2022E
- Competitive Landscape of Chinese Encoder Market
- Classification of Motion Controllers
- China Motion Controller Market Size, 2011-2022E
- Structure of Motion Controller Market Size (by Product), 2017
- Demand for Motion Controllers in China, 2015-2022E
- Competitive Landscape of Global Motion Controller Market, 2016
- Competitive Landscape of PC-based Motion Controller Market, 2016
- Competitive Landscape of Global Dedicated Controller Market, 2016
- Competitive Landscape of Global PLC Market, 2016
- Application of Servo System in Machine Tool Field
- Revenue from Servo System for Machine Tool in China, 2016-2022E
- Output Value of Machine Tools Worldwide, 2012-2022E

Selected Charts

Selected Charts

- Revenue Plan of Panasonic, FY2017-FY2019
- Net Sales Composition Ratio of Panasonic by Segment, FY2017
- Revenue Breakdown (by Region) of Panasonic, FY2017
- Operation of Panasonic’s Automotive & Industrial System, FY2016-FY2017
- Key Servo System Products of Panasonic
- Main Servo System Distributors of Panasonic in China
- Businesses and Core Products of Yaskawa Electric
- Main Production Bases of Yaskawa Electric
- Development Strategy of Yaskawa Electric for 2025
- Revenue and Net Income of Yaskawa Electric, FY2009-FY2017
- Development Plan of Yaskawa Electric, FY2016
- Performance of Yaskawa Electric by Business Segment, FY2017
- Revenue Breakdown (by Region) of Yaskawa Electric, FY2014-FY2015
- Major Products under Yaskawa Electric’s Motion Control Segment
- Measures about Servo System Business of Yaskawa Electric, FY2015
- Net Sales of Yaskawa Electric's Motion Control Division, FY2012-FY2016
- Operating Income of Yaskawa Electric's Motion Control Division, FY2012-FY2016
- Distribution of Yaskawa Electric’s Production Bases Worldwide
- Revenue of Yaskawa Electric in China, FY2011-FY2017
- Key Subsidiaries of Yaskawa Electric in China
- Main Servo System Distributors of Yaskawa Electric in China
- Business Structure of Mitsubishi Electric
- Revenue and Net Income of Mitsubishi Electric, FY2010-FY2017
- Global Development Strategy of Mitsubishi Electric, FY2014-FY2020
- Revenue Structure (by Business) of Mitsubishi Electric, FY2012-FY2017

Selected Charts

- Revenue Structure (by Region) of Mitsubishi Electric, FY2012-FY2017
- Development Planning of Mitsubishi Electric FA Business Segment, FY2016
- Application of Mitsubishi Electric’s Patents in China, 2013-2017
- Main Servo System Distributors of Mitsubishi Electric in China
- Revenue and Net Income of Siemens, FY2010-FY2017
- Revenue Breakdown (by Region) of Siemens, FY2016-FY2017
- Siemens’ Revenue and Growth Rate in China, FY2009-FY2017
- Revenue and Growth Rate of Bosch Rexroth, 2007-2017
- Revenue Breakdown (by Region) of Bosch Rexroth, 2016-2017
- R&D Costs and % of Total Revenue of Bosch Rexroth, 2007-2017
- Servo Motors of Bosch Rexroth
- Revenue and Profits of Schneider Electric, 2016-2017
- Revenue Structure (by Region) of Schneider Electric, 2017
- Revenue Structure (by Business) of Schneider Electric, 2017
- Distribution of Schneider Electric’s Production Bases in China
- Revenue and Net Income of Lenze, FY2010-FY2015
- Revenue of TECO, 2012-2017
- Main Servo System Products of TECO
- Revenue and Net Income of Shenzhen Inovance Technology, 2009-2017
- Revenue Breakdown and Structure (by Product) of Shenzhen Inovance Technology, 2016-2017
- Revenue Structure (by Region) of Shenzhen Inovance Technology, 2012-2017
- Gross Margin (by Product) of Shenzhen Inovance Technology, 2011-2017
- Servo System Revenue Structure of Shenzhen Inovance Technology, 2017
- Key Servo System Products of Shenzhen Inovance Technology
- Revenue and Net Income of HNC, 2011-2017

Selected Charts

- Revenue Structure (by Product) of HNC, 2012-2017
- Revenue Structure (by Region) of HNC, 2012-2017
- Gross Margin (by Product) of HNC, 2011-2017
- Revenue and Net Income of Estun Automation, 2011-2017
- Revenue Structure (by Product) of Estun Automation, 2011-2017
- Operating Revenue Structure (by Region) of Estun Automation, 2014-2017
- Main AC Servo Motors of Estun Automation
- Projects Proposed and under Construction of Estun Automation, 2018
- Main Products and Application of INVT
- Revenue and Net Income of INVT, 2009-2017
- Revenue Structure (by Business) of INVT, 2010-2017
- Revenue Structure (by Region) of INVT, 2010-2017
- Gross Margin (by Product) of INVT, 2008-2017
- Servo System Revenue and Growth Rate of INVT, 2010-2017
- Global Layout of Keb
- Main Servo System Products and Application of Delta
- Distribution of Delta’s Production Bases Worldwide
- Key Servo System Distributors of Delta
- Revenue and Net Income of Beijing CTB Servo, 2012-2017
- Revenue Structure (by Product) of Beijing CTB Servo, 2014-2016
- Servo Motor Output and Sales Volume of Leadshine Technology, 2011-2017
- Revenue Structure (by Product) of Wuxi Haihang Electric And Hydraulic Servo System, 2017

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