



**Global and China Industrial Robot Speed
Reducer Industry Report, 2018-2022**

June 2018

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

Global and Chinese market of precision speed reducer, a core component of industrial robot, has always been monopolized by Nabtesco, HarmonicDrive, Sumitomo, Spinea and SEJINIGB because of higher technology barriers.

China has been the world's largest consumer market for industrial robots since 2013. Global industrial robot sales exceeded 300,000 units in 2017, including more than 130,000 units in China, representing a year-on-year increase of 18.0% and over 50%, respectively, primarily thanks to the country's industrial transformation and upgrading, rising labor costs and decline in production costs of robots. The Chinese industrial robot market is estimated to keep an AAGR of above 20% during 2018-2022.

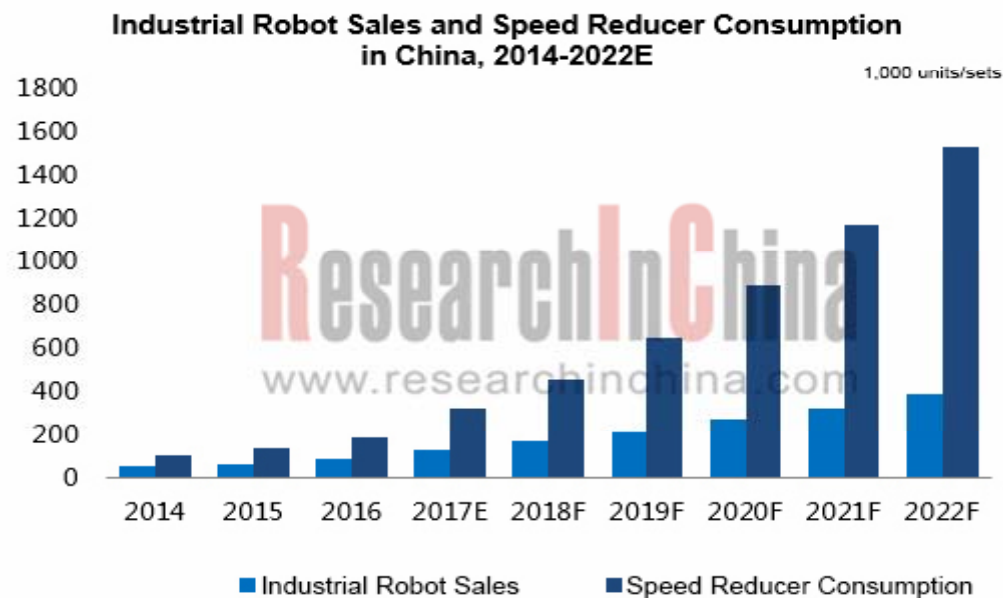
With the development of the industrial robot industry in China, especially the rise of homegrown robot, the domestic demand for industrial robot speed reducers soared in 2017. The market briefly experienced a shortage of foreign supply. Chinese enterprises took advantage to strengthen R&D and increase investment, and many companies marched into the speed reducer field, including some robot body manufacturers. At the same time, industry leaders such as Leader Harmonious Drive Systems, Zhejiang Laifual Harmonic Drive, Nantong Zhenkang and Shaanxi Qinchuan Machinery Development achieved volume sales in 2017 and plan to further expand production capacity so as to meet the growing market demand.

The Chinese industrial robot speed reducer market remained hot in the first half of 2018, as a number of domestic robot manufacturers placed large purchase orders. For example, Efort will buy at least 3,000 Zhenkang RV speed reducers in 2018; Peitian Robot will purchase nearly 10,000 harmonic reducers from Leader Harmonious Drive Systems. Spurred by high market demand, China's consumption of industrial robot speed reducer is predicted to rise by at least 40% year-on-year in 2018.

In addition, international leaders like Nabtesco and HarmonicDrive have also scaled up input into speed reducer. According to Nabtesco's plan, the precision speed reducer capacity will reach 1.2 million units by 2020, including 200,000 units/a at the Changzhou plant. Harmonic Drive Systems plans to lift investments in Hotaka and Ariake plants in Japan, boosting its production capacity in Japan to 200,000 units per month by 2021.

Global and China Industrial Robot Speed Reducer Industry Report, 2018-2022 underlines the followings:

- ◆ Global and Chinese industrial robot market (size, structure, competitive landscape, etc.);
- ◆ Global industrial robot speed reducer market (size, demand, status quo of companies, etc.);
- ◆ Chinese industrial robot speed reducer market (supply & demand, market segments, price trend, major competitors, influencing factors, etc.);
- ◆ Five global and 28 Chinese major enterprises (operation, industrial-robot speed reducer business, etc.).



Source: Global and China Industrial Robot Speed Reducer Industry Report, 2018-2022

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