China Automated Logistics Equipment 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

The year 2017 witnessed rapid expansion of automated logistics equipment market in China with the size soaring by 26.0% year-on-year to RMB87.2 billion and expected to exceed RMB100 billion in 2018. Propelled by favorable policies on intelligent automated equipment and swift growth of emerging logistics methods like smart logistics, E-commerce logistics and cold-chain logistics, the market is predicted to maintain an average annual rate of around 25% over the next five years, reaching RMB279.7 billion in 2022.

Product segment: automated sorting & conveying equipment get most popularized, accounting for 35.0% of the Chinese logistics equipment market in 2017, followed by automated stereoscopic warehouse (about 20%). Automated logistics equipment will become more intelligent and integrated, and various new logistics equipment, such as unmanned warehouse, unmanned port, UAV and logistics robot, will come into being thanks to technological innovation.

There comes the robust demand for logistics equipment from E-commerce, pharmaceuticals, clothing, automobile, home appliance, new energy, food, home building material, tobacco and military sectors in recent years. Automobile is the largest market for automated logistics equipment, occupying 18.8% (the equivalent of RMB16.38 billion) of total scale of the Chinese automated logistics equipment market. As more NEV production line projects are approved and more body-in-white production lines are transformed into automated production system, the demand for automated logistics equipment from the Chinese automobile market is expected to rise to RMB52.11 billion in 2022.

Pattern of Enterprises: foreign companies like DAIFUKU (Japan), Schaefer (Germany), Vanderlande (the Netherlands) and Dematic (the United States) are still dominant in China, particularly in high-end fields (E-commerce, airport, etc.). Most of these giants are system integrators that can provide total solutions. By contrast, local Chinese suppliers provide only equipment and focus on downstream industries like tobacco, pharmaceuticals, power system, clothing and food. Typical players are Shanxi Oriental Material Handling, Miracle Automation Engineering, Mesnac, Hubei Sanfeng Intelligent Conveying Equipment and SIASUN Robot & Automation.

In addition, amid bright prospects for automated logistics equipment, major E-commerce tycoons including Alibaba, JD and Suning have made their presence in automated logistics and equipment market, such as “new logistics” launched by Cainiao and “next-generation logistics” put forward by JD. In 2017, JD put the first whole-process unmanned warehouse into use; SF began construction of large logistics UAV headquarters base. Meanwhile, AGV firms represented by Quicktron, Geek+ and Aresbots stepped up their efforts in the field, further intensifying competition in automated logistics equipment market. t enterprises.

China Automated Logistics Equipment Industry Report, 2018-2022 by ResearchInChina underlines the followings:

◆Chinese automated logistics equipment system market (size, product mix, demand structure, competitive landscape, etc.);

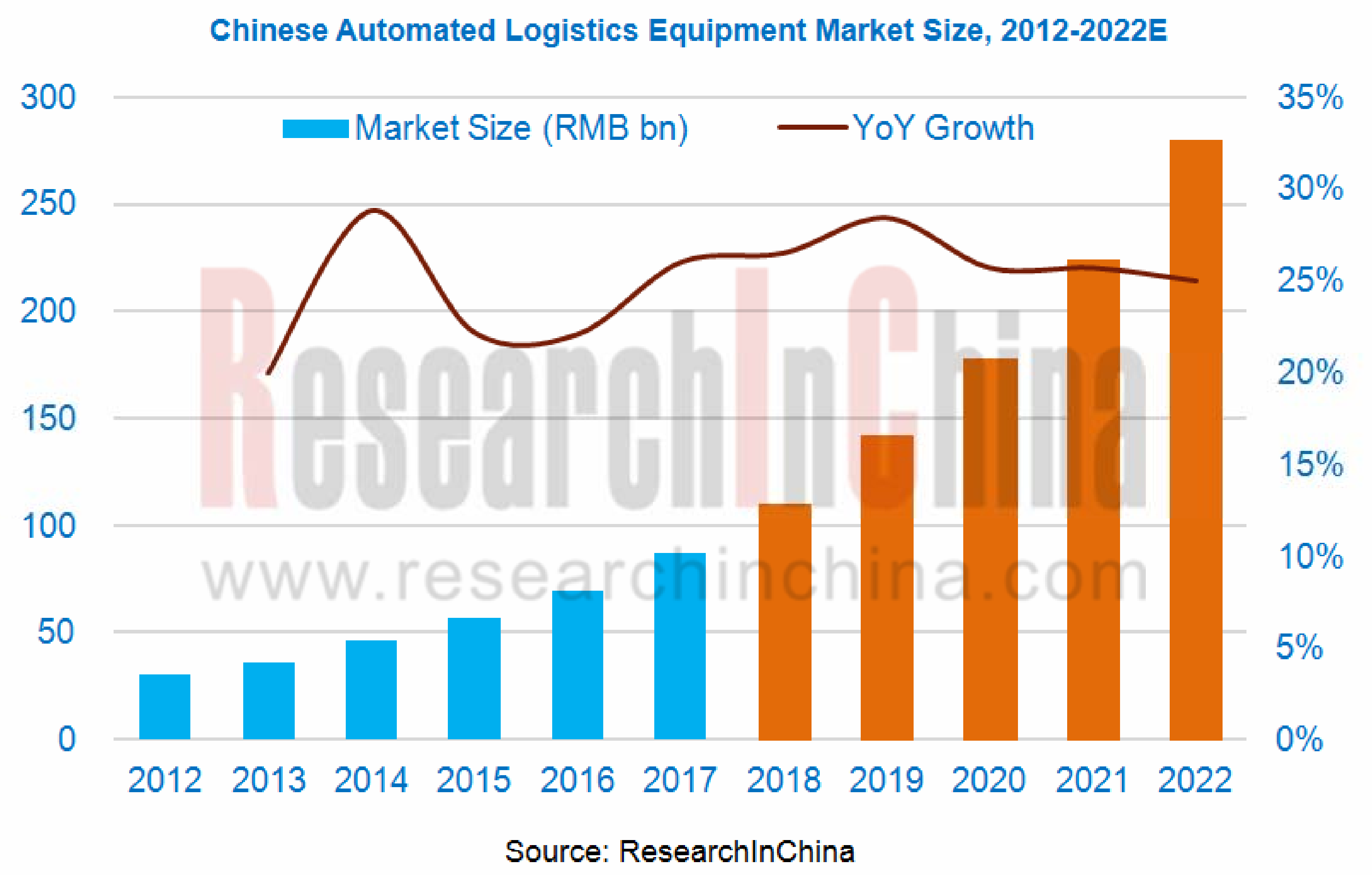
◆Chinese automated logistics equipment market segments (automated stereoscopic warehouse, automated conveying equipment, AGV and forklift) (development, market size, competitive landscape, etc.);

◆Automated logistics equipment in major downstream sectors like automobile, tobacco, and pharmaceuticals in China (development, demand, corporate pattern, etc.);

◆Development of and trends in logistics, smart/E-commerce logistics, and cold-chain logistics markets in China

◆Operation of nine global automated logistics equipment companies and their development in China;

◆Operation and development strategies of twelve Chinese automated logistics equipment enterprises.


Chinese Automated Logistics Equipment Market Size, 2012-2022E
Market Size (RMB bn)
YoY Growth
300
250
200
150
100
50
0
35%
30%
25%
20%
15%
10%
5%
0%
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
Source: ResearchInChina

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