

Global and China Automated Guided Vehicle (AGV) Industry Report, 2018-2023

October 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

In 2017, the automated guided vehicle (AGV) sales soared 93.7% year on year and reached 22,000 units in China, and the figure would rise to 36,000 units or so in 2018. In the upcoming five years, the growing demand from production & logistics market of automobiles and home appliances as well as emerging industries like intelligent logistics will give impetus to the Chinese AGV market with an expected average annual growth rate of about 49%. AGV sales is anticipated to report 269,000 units in 2023.

Among them, the manufacturing and logistics of automobile and home appliances have huge demand for AGV in China, together consuming more than 50% of AGVs in 2017. The demand from traditional AGV applications, where AGV gets vigorously promoted in an all-round manner, remains stable. The application of AGV in emerging fields like power patrol inspection, intelligent parking, automated ports, and digital stages also gains greater popularity. For instance, the intelligent parking AGV projects are being carried out. The robotic stereo garage was unveiled at Nanjing Confucius Temple in early 2018, using “laser navigation + comb exchange” car-handling AGV with independent intellectual property rights. Beijing-based Wukesong Underground Parking Lot set up over 60 AGV intelligent parking spaces in July 2018.

Navigation technology is a key integral of AGV products. Although magnetic-tape navigation and electromagnetic navigation are still the main navigation modes used by Chinese AGV products, technologies like hybrid navigation, outdoor navigation, free navigation and contour navigation have been increasingly mature in recent years and are expected to become mainstream ones.

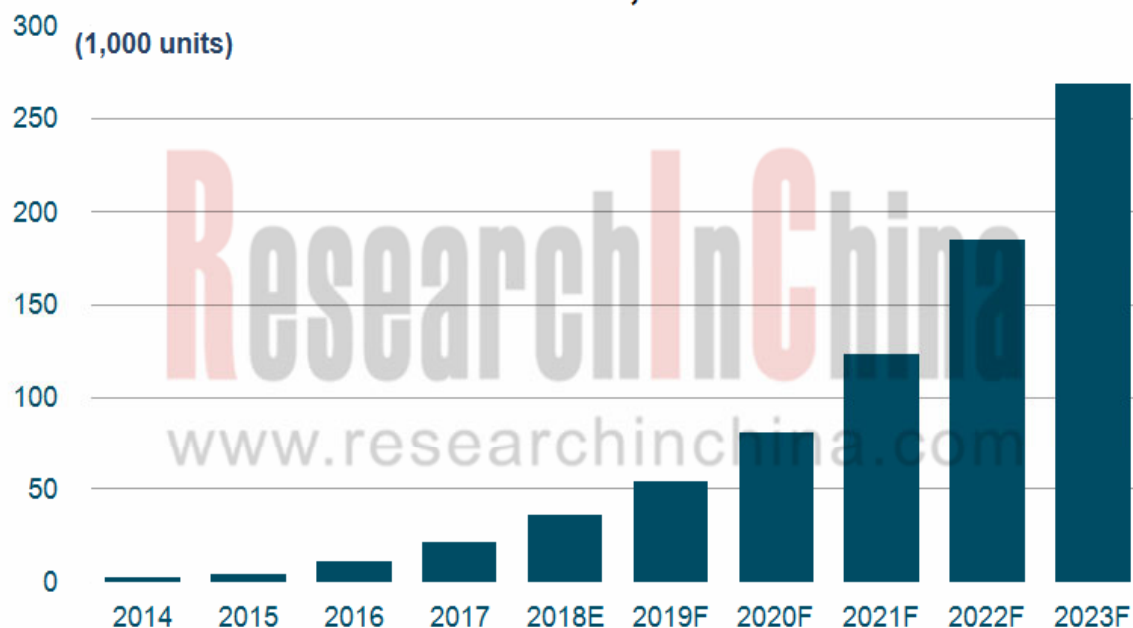
The AGV products of domestic-funded enterprises, represented by SIASUN Robot & Automation, Yunnan KSEC Intelligent Equipment, Machinery Technology Development, and Hubei Sanfeng Intelligent Conveying Equipment, dominate in the Chinese AGV market, accounting for 86% of the country's total sales in 2017. Foreign companies, such as JBT, Daifuku, Dematic, Swisslog, and Meidensha, make their presence in the middle and high-end market in China by relying on superior technologies.

The Chinese AGV capital market was full of vigor with annual financing exceeding RMB1 billion in 2017, and some startups expedited their foray by aggressive research and development of technologies so that competition among AGV companies pricks up. With maturity of intelligent technologies, the capital market will be more flourishing in 2018.

Global and China Automated Guided Vehicle (AGV) Industry Report, 2018-2023 by ResearchInChina highlights the following:

- ◆ Global AGV market (size, demand structure, competitive landscape and development in regions like Japan, Europe and the United States);
- ◆ Chinese AGV market (size, product structure, demand structure, prices, competition and development trends);
- ◆ Market development of core AGV components like AGV system, on-board control system, drive system (electric motor, reducer, etc.), navigation system (magnetic navigation sensor, laser navigation, laser scanner, etc.), and charging system;
- ◆ The development of such key downstream sectors as automobile, parking, electric power, tobacco, and the demand for AGV;
- ◆ 23 global and Chinese AGV manufacturers (operation, AGV business, development strategy, etc.

AGV Sales in China, 2014-2023E



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1 Overview

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

2 Global AGV Market

- 2.1 Market Size
- 2.2 Demand Structure
- 2.3 Competitive Landscape
- 2.4 Regional Development
 - 2.4.1 Japan
 - 2.4.2 Europe
 - 2.4.3 United States
 - 2.4.4 India

3. Chinese AGV Market

- 3.1 Development Overview
- 3.2 Market Situation
 - 3.2.1 Market Size
 - 3.2.2 Ownership
 - 3.2.3 Sales Volume
- 3.3 Market Structure
 - 3.3.1 By Navigation Technology
 - 3.3.2 By Product
 - 3.3.3 By Market
 - 3.3.4 Others
- 3.4 Price
- 3.5 Competitive Pattern

3.5.1 By Region

- 3.5.2 By Type of Company
- 3.5.3 Ranking of Companies
- 3.6 Development Trend

4 Upstream and Downstream Industries of AGV

- 4.1 AGV Core Parts
 - 4.1.1 Development Overview
 - 4.1.2 Drive Device System
 - 4.1.3 AGV On-board Control System
 - 4.1.4 Navigation/Guidance System
 - 4.1.5 AGV Battery/Energy System
 - 4.1.6 AGV Master Control System
- 4.2 Downstream Industries of AGV
 - 4.2.1 Automobile Manufacturing
 - 4.2.2 Parking
 - 4.2.3 Power Patrol Inspection
 - 4.2.4 Tobacco Logistics
 - 4.2.5 Heavy Load

5 Major Global AGV Players

- 5.1 JBT
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 AGV Business
 - 5.1.4 Presence in China
- 5.2 Daifuku
 - 5.2.1 Profile

5.2.2 Operation	6.3.1 Profile
5.2.3 AGV Business	6.3.2 Operation
5.2.4 Presence in China	6.3.3 AGV Business
5.3 Dematic	6.4 Hangzhou Great Star Industrial Co., Ltd.
5.3.1 Profile	6.4.1 Profile
5.3.2 Operation	6.4.2 Operation
5.3.3 Presence in China	6.4.3 AGV Business
5.4 Swisslog	6.5 Guangdong Dongfang Precision Science & Technology Co., Ltd.
5.4.1 Profile	6.5.1 Profile
5.4.2 Operation	6.5.2 Operation
5.4.3 AGV Business	6.5.3 AGV Business
5.4.4 Presence in China	6.5.4 Prospects
5.5 Meidensha	6.6 Zhejiang Noblelift Equipment Joint Stock Co., Ltd.
5.6 Oceaneering AGV Systems	6.6.1 Profile
5.7 Grenzebach Corporation	6.6.2 Operation
5.8 Elettric 80	6.6.3 AGV Business
5.9 Rocla	6.6.4 Output and Sales Volume
	6.6.5 Development Strategy
6 Key Chinese AGV Companies	6.7 CSG Smart Science & Technology Co., Ltd.
6.1 Shenyang Siasun Robot & Automation Co., Ltd.	6.7.1 Profile
6.1.1 Profile	6.7.2 Operation
6.1.2 Operation	6.7.3 AGV Business
6.1.3 AGV Robot Business	6.8 Guangzhou Jingyuan Mechano-Electric Equipment Co., Ltd.
6.1.4 Development Strategy	6.9 Shanghai Triowin Automation Machinery Co., Ltd.
6.2 Yunnan KSEC Intelligent Equipment Co., Ltd.	6.10 Shenzhen Casun Intelligent Robot Co., Ltd.
6.2.1 Profile	6.11 Yonegy Logistics Automation Technology Co., Ltd.
6.2.2 Operation	6.12 Guangzhou Sinorobot Technology Co., Ltd.
6.3 Machinery Technology Development Co. Ltd.	6.13 Shenzhen OKAGV Co., Ltd.

- Architecture Diagram of AGV
- Composition of AGV System
- Operating Scene and Communication Mode of AGV
- Classification of AGV
- Structure of AGV Software
- AGV Industry Chain
- AGV Production Line VS Traditional Production Line
- Global AGV Sales Volume and YoY Growth, 2011-2023E
- Global AGV Market Size, 2014-2023F
- Global AGV Market share by Application, 2017
- Financing and M&As of Major Global AGV Companies, 2016-2018
- Revenue of Major Domestic and Foreign AGV Producers, 2014-2018
- AGVS/AGV Sales Volume in Japan, 2000-2023E
- AGVS Sales Structure in Japan by Category, 2014-2023F
- AGV Market Size in Japan, 2014-2023F
- Newly Installed AGVS and AVGs by European Integrators, 2000-2013
- AGV Installations in Europe, 2011-2015
- AGVS Installations of Major European and American AGV Producers, 2015
- AGV (by Type) Market Size in India, 2014-2025E
- Development History of AGV in China
- AGV Patent Filings in China, 2005-2016
- Development Model of Major AGV Producers in China, 2018
- AGV Market Size and YoY Growth in China, 2014-2023E
- AGV Ownership and YoY Growth in China, 2014-2023E
- AGV Sales Volume and YoY Growth in China, 2011-2018

- AGV Structure in China by Navigation Mode, 2017
- Difference between AGV and AGC
- AGV Sales Structure in China by Product, 2015-2023E
- AGV Demand Structure in China by Sector, 2016&2021E
- Average Price of AGV in China, 2014-2023E
- AGV Price of Major Global and Chinese Producers in China, 2018
- Regional Structure of AGV Producers in China, 2017
- Market Share of AGV Companies in China by Country, 2014-2022E
- Top10 Chinese AGV Producers, 2018
- Presence of Major Global AGV Producers in China, 2018
- Major Global and Chinese AGC Producers, 2018
- Financing and M&As of Major AGV Producers in China, 2014-2018
- AGV Sales Volume and YoY Growth in China, 2017-2023E
- Development Trends of AGV
- Number of Motors, Drivers and Speed Reducers of Per Unit AGV Drive System by Drive Mode
- New Demand for AGV Motors in China, 2016-2023E
- New Demand for AGV Speed Reducers in China, 2016-2023E
- Composition of Laser Guided AGV On-board Control System
- New Demand for AGV On-board Controllers in China, 2016-2023F
- Major Chinese Controller Producers, 2018
- Classification of AGV Navigation Modes and Core Components
- New Demand for AGV Laser Scanners in China, 2016-2023E
- Main AGV Obstacle Avoidance Sensors in China
- Major Chinese AGV Sensor Companies, 2018
- Operating Principle of Magnetic Navigation Sensor for AGV System

- Cycles of AGV Batteries
- Contactless Power Supply AGV System
- Supercapacitor Power Supply AGV System
- Batteries as a Percentage of AGV Projects in Europe, 2015
- Structure of AGV Batteries in China by Product, 2015
- Main Charging Methods of AGV Batteries
- Classification of Global AGV Software Systems
- AGV Software Systems Used by Global and Chinese AGV Producers
- Ownership of Automobiles in China, 2012-2023E
- Production and Sales of Automobiles in China, 2012-2023E
- Production and Sales of New Energy Vehicle in China, 2011-2017
- Features and Configurations of AGV Systems for Car Production Lines
- Density of Use of Car AGVs in Major Countries
- Major Car AGV Producers in China
- Car AGV Sales Volume in China, 2016-2023E
- Global and Chinese AGV Products for Parking
- Global and Chinese AGV for Parking Projects, 2018
- Merits of Patrol Robot
- Power Industry's Demand for AGVs in China, 2016-2023E
- Acquisition Mode of Power Patrol Robots in China, 2015-2017
- State Grid's Tenders for Intelligent Patrol Robot in Recent Years
- Performance Comparison of Products of Key Chinese Producers of Power Patrol Robot
- Development History of Tobacco Logistics in China, 2003-2018
- Competitive Pattern of AGV for Tobacco Logistics
- Use of AGVs in Some Tobacco Factories in China

- Heavy Load AGV Producers by Purpose
- Businesses of JBT
- Subsidiaries of JBT, 2018
- Revenue and Net Income of JBT, 2010-2018
- Order Backlog of JBT by Product, 2013-2018
- Revenue Breakdown of JBT by Product, 2010-2018
- Revenue Breakdown of JBT by Region, 2012-2017
- Revenue of JBT by Region, 2017
- AGV Locations of JBT
- JBT's Subsidiaries in China, 2017
- Business Structure of Daifuku
- Revenue Breakdown of Daifuku by Region, 2020E
- Net Sales and Net Income of Daifuku, FY2010-FY2018
- Order Intake of Daifuku, FY2014-FY2017
- Orders Structure of Daifuku by Sector, FY2014-FY2018
- Sales Structure of Daifuku by Sector, FY2014-FY2018
- Sales Structure of Daifuku by Region, FY2013-FY2018
- Main AGV Clients of Daifuku
- AGV Systems of Daifuku
- Daifuku's Sales in China, FY2013-FY2018
- Daifuku's Presence in China
- M&As of Dematic, 2010-2018
- Revenue of Dematic, 2014-2017
- Typical Customers of Dematic in China
- Milestones of Dematic's Suzhou Plant

- Businesses and Products of Swisslog
- Operation Data of Swisslog, 2014-2017
- Orders, Revenue and Operating Margin of Swisslog, 2016-2017
- Orders and Revenue Structure (by Business) of Swisslog, 2010-2017
- Revenue Structure (by Region) of Swisslog, 2014
- WDS (Warehouse & Distribution Solutions) Orders and Sales of Swisslog, 2010-2014
- WDS (Warehouse & Distribution Solutions) Revenue Structure of Swisslog by Business, 2013-2014
- WDS (Warehouse & Distribution Solutions) Orders of Swisslog by Industry
- Swisslog's Development Strategy for WDS (Warehouse & Distribution Solutions)
- AGVs of Swisslog
- Business Structure of Meidensha
- Net Sales and Net Income of Meidensha, FY2011-FY2018
- Orders of Meidensha, FY2016-FY2017
- Net Sales Structure of Meidensha by Business, FY2012-FY2018
- Net Sales Breakdown of Meidensha by Region, FY2012-FY2017
- Main Products and Clients of Meidensha's Industrial Systems
- AGV Systems of Meidensha
- Meidensha's Subsidiaries in Mainland China, 2018
- Business Segments of Oceaneering
- Revenue and Net Income of Oceaneering, 2016-2018
- Revenue Structure of Oceaneering by Business, 2016-2017
- Revenue Structure of Oceaneering by Region, 2016-2017
- AGVs of Oceaneering AGV Systems
- Grenzebach's Facts, 2018
- Business Members of Grenzebach

- Grenzebach's Subsidiaries by Country/Region
- Elettric 80's Fact, 2018
- Development Course of Rocla
- Revenue and Net Income of Shenyang Siasun Robot & Automation, 2012-2018
- Operating Revenue Structure of Shenyang Siasun Robot & Automation by Product, 2014-2018
- Operating Revenue Structure of Shenyang Siasun Robot & Automation by Region, 2014-2018
- Gross Margin of Shenyang Siasun Robot & Automation by Product, 2013-2018
- AGVs of Shenyang Siasun Robot & Automation
- Main Partners of Shenyang Siasun Robot & Automation
- AGVs of Yunnan KSEC Intelligent Equipment
- Revenue and Net Income of Machinery Technology Development, 2013-2018
- Revenue Structure of Machinery Technology Development by Business, 2013-2015
- Revenue Structure of Machinery Technology Development by Business, 2016-2018
- Revenue Structure of Machinery Technology Development by Region, 2013-2015
- AGV Business Performance of Machinery Technology Development
- Revenue and Net Income of Hangzhou Great Star Industrial, 2013-2018
- Revenue Structure of Hangzhou Great Star Industrial by Product, 2014-2018
- Operating Revenue Breakdown of Hangzhou Great Star Industrial by Region, 2014-2018
- Revenue and Net Income of Zhejiang Guozi Robotics, 2012-2018
- Characteristics of Zhejiang Guozi Robotics' AGV Systems
- Strategic Layout of Guangdong Dongfang Precision Science & Technology
- Revenue and Net Income of Guangdong Dongfang Precision Science & Technology, 2012-2018
- Revenue Structure of Guangdong Dongfang Precision Science & Technology by Product, 2014-2018
- Operating Revenue Structure of Guangdong Dongfang Precision Science & Technology by Region, 2014-2017
- Milestones in AGV-related Logistics System Business of Guangdong Dongfang Precision Science & Technology

- Operation Operation of Main AGV Subsidiaries of Guangdong Dongfang Precision Science & Technology, 2015-2018
- Revenue and Net Income of Zhejiang Noblelift Equipment, 2011-2018
- Operating Revenue Breakdown of Zhejiang Noblelift Equipment by Product, 2013-2017
- Operating Revenue Breakdown of Zhejiang Noblelift Equipment by Region, 2013-2017
- Gross Margin of Zhejiang Noblelift Equipment by Product, 2013-2017
- Milestones in AGV-related Business of Zhejiang Noblelift Equipment, 2015-2018
- Capacity, Output and Sales Volume of Zhejiang Noblelift Equipment by Product, 2011-2017
- Revenue and Net Income of CSG Smart Science & Technology, 2013-2018
- Revenue Structure of CSG Smart Science & Technology by Product, 2015-2018
- Revenue Structure of CSG Smart Science & Technology by Region, 2015-2018
- Revenue and Net Income of Huaxiao Precision (Suzhou), 2013-2018
- Revenue and Net Income of Guangzhou Jingyuan Mechano-Electric Equipment, 2013-2017
- Revenue and Net Income of Shanghai Triowin Automation Machinery, 2012-2018
- Revenue Structure of Shanghai Triowin Automation Machinery by Product, 2014-2017
- Revenue Breakdown of Shanghai Triowin Automation Machinery by Region, 2012-2017
- Gross Profit and Gross Margin of Shanghai Triowin Automation Machinery by Product, 2012-2016
- Applications of Shanghai Triowin Automation Machinery's AGV Robots and Main Clients
- Revenue and Net Income of Shenzhen Casun Intelligent Robot, 2013-2018
- Revenue Structure of Shenzhen Casun Intelligent Robot by Product, 2016-2017
- Gross Margin of Shenzhen Casun Intelligent Robot by Product, 2013-2017
- Applications of Shenzhen Casun Intelligent Robot's AGVs and Main Clients
- Main Automotive Clients of Shenzhen Casun Intelligent Robot
- Main Clients of Shenzhen Casun Intelligent Robot in Electronic and Home Appliances Industries
- Main Clients of Yoneyg Logistics Automation Technology
- AGV Products of Yoneyg Logistics Automation Technology

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