



**China Motion Controller Industry Report,
2018-2023**

Mar.2019

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.

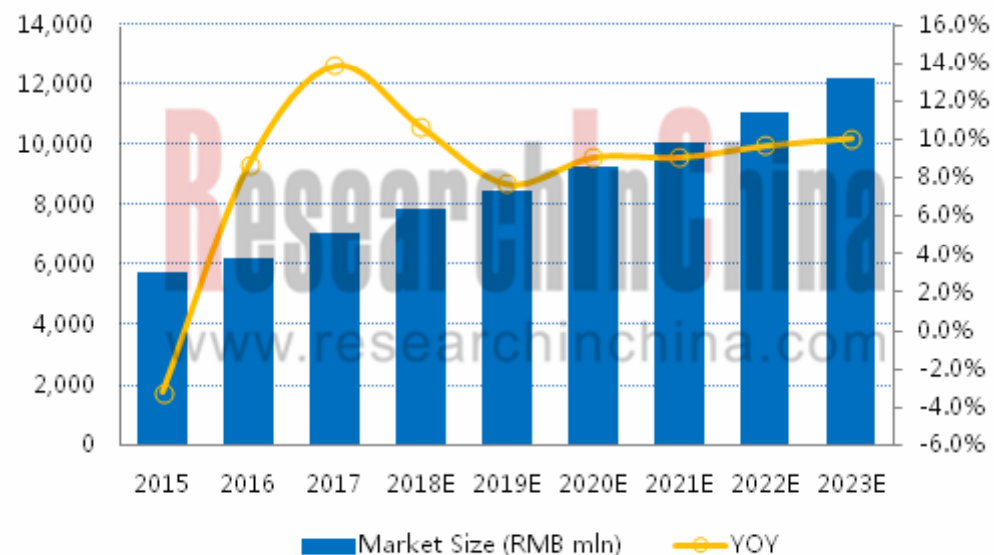
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

The motion controller industry of China has seen a volatile growth rate over the recent years in the wake of a shift in the global economy and downstream demand. In 2017, the robust growth in both traditional manufacturing sectors (machine tool, packaging machinery, textile machinery, etc.) and the emerging ones (robotics, semiconductor, etc.) gave great impetus to motion controller market which grew at a rate of over 13%; in 2018 “Coming off early highs” became a commonplace in the downstream sectors, which led to a lower increase in the motion controller market. Yet it is predicted that the motion controller market in China will rebound a bit in 2019.

China's Motion Controller Market Size and YoY Growth, 2015-2023E



Source: ResearchInChina

In China, motion controllers fall into three types: PC-based controller, special controller and programmable logic controller (PLC). As the structural adjustment in manufacturing goes on in the country, special controller and PLC markets begin to shrink while PC-based controller is on the rise and will replace the PLC in a broader range of fields for its outperformance in motion control. Special controller which was first used in CNC, now has made its way into industrial robots, textile machinery and so forth, especially in industrial robot industry where it will sustain its key role in the years to come.

In the Chinese motion controller market, European and Japanese giants are dominant, but Chinese peers have sprung up, with a narrowing gap between competitors, which intensifies competition. In 2017, the top three players by market share were Siemens, Syntec and LNC Technology, among which Siemens was way ahead of its counterparts, and Syntec and LNC Technology were two bellwethers in special CNC system field; Advantech and Google Technology gathered pace in the PC-based motion controller market.

A growing number of companies are racing to access into motion controller market as concepts like industry 4.0 and intelligent manufacturing becomes prevalent and gets implemented, as they did in 2017 alone when several cases of mergers and acquisitions occurred. For instance, B&R became part of ABB's Industrial Automation division as a new global business unit--Machine & Factory Automation; Servotronics joined Midea Group as the latter's key developer of motion controllers, drives and motors (including customized ones); Estun bought a 100% stake in TRIO, a British motion controller maker. In December 2018, Shanghai MOONS' Electric Co., Ltd. announced acquisition of T Motion to strengthen its competence in the high-end motion control solution market.

China Motion Controller Industry Report, 2018-2023 highlights the following:

- ◆ Global and China motion controller industry (market size, servo/stepper system market (status and competitive pattern), etc.);
- ◆ China motion controller market (policies, market size and structure, competition, development trends, etc.);
- ◆ China PC-based/special/PLC controller market (market size, downstream application and competitive pattern);
- ◆ China motion controller downstream sectors (machine tool, robotics, semiconductor, textile machinery, printing machinery, packaging machinery, EMS, etc.) (status and demand for motion controllers);
- ◆ 22 Chinese motion controller companies (operation, motion controller business, development strategy, etc.).

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