

Global and China Industrial Robot Speed Reducer Industry Report, 2019-2025

June 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

Robot speed reducer as a critical technology for Industry 4.0, makes up 36% costs of an industrial robot. Japanese tycoons like Nabtesco, HarmonicDrive and Sumitomo are monopolists in robot speed reducer market, among which Nabtesco sweeps 60% shares and HarmonicDrive 15%.

The growing industrial robot market demands more speed reducers in recent years, especially in 2017 when a short supply even happened in the Chinese market. Despite a slowdown in global demand in 2018, industrial robot speed reducer market will still have a rosy prospect in the long run.

Given this, several world-renowned giants rushed to expand their scale. In October 2018, Nabtesco said it would buy a land in Hamamatsu to build a new precision reducer factory; HarmonicDrive has a plan to increase to 200,000 units the capacity of two of its Japanese factories, Hotaka and Ariake, plus its reducer capacity of German and American plants, sending its total capacity to 240,000-280,000 units annually (at the end of fiscal year 2020); in March 2019, Sumitomo constructed a new robot speed reducer factory in Vietnam.

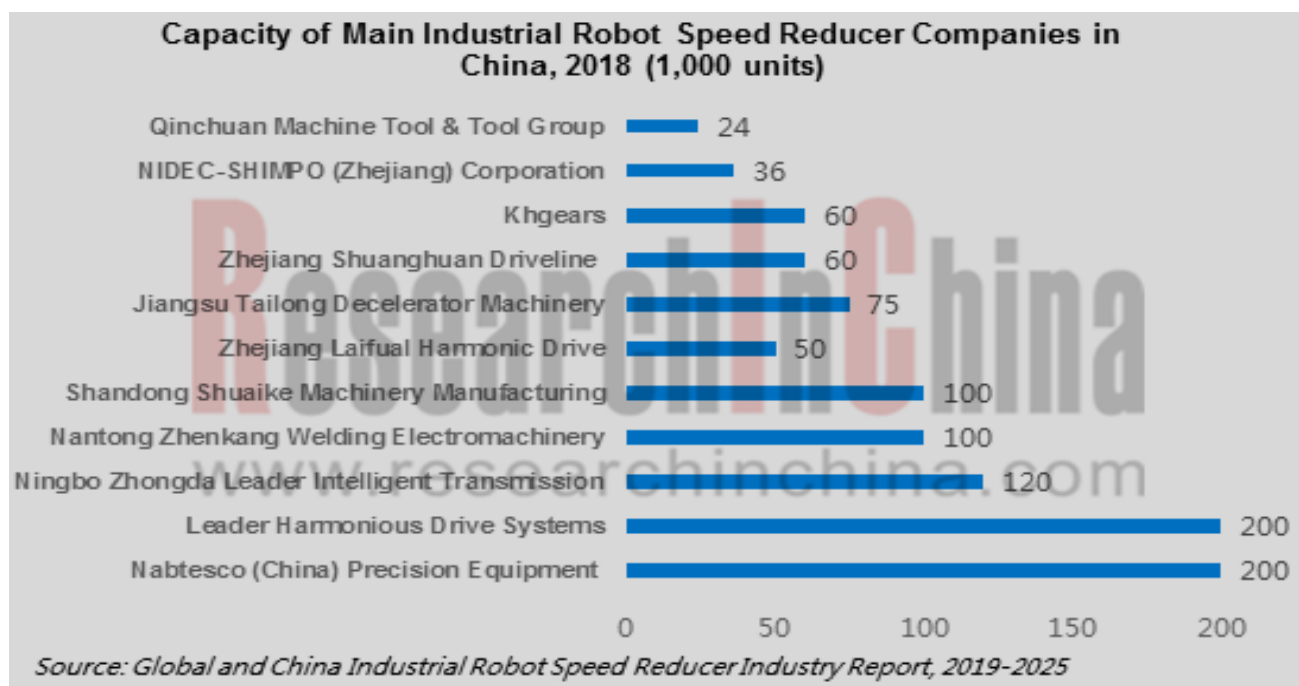
In the meantime, projects of new reducer companies in China came to an end in 2018, leading to concentrated new supply. Yet, the whole speed reducer market faced oversupply in the year, as China's industrial robot market which was hurt by the investment cuts in automobile and 3C industries, grew at a far slower pace and thus demanded less on the previous year. According to the statistical data, China's demand for industrial robot speed reducers exceeded 470,000 units, a year-on-year increase of no more than 10%, compared with over 120% in 2017. It is predicted that the country will need roughly 500,000 units in 2019.

With regard to supply, in 2018, Nabtesco (China) Precision Equipment Co., Ltd. managed to deploy a capacity of 200,000 precision speed reducers as scheduled, and in August signed the Phase II project (200,000 precision speed reducers) with Wujin National Hi-Tech Industrial Zone of Changzhou City in Jiangsu Province, taking its total capacity to 400,000 units a year. Zhejiang Shuanghuan Driveline Co., Ltd. successfully manufactured its industrial robot RV speed reducers in large volume, a product having been accepted by clients like EFFORT and SIASUN; the company is expected to boast a capacity of 100,000 units in 2020. Leader Harmonious Drive Systems Co., Ltd., a harmonic reducer leader, shipped more than 120,000 units in 2018, making itself China's biggest and the world's second largest harmonic reducer supplier; its 600,000 units/year harmonic reducers intelligent manufacturing base project which was kicked off in 2017 will become operational in 2020.

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Global and China Industrial Robot Speed Reducer Industry Report, 2019-2025 highlights the following:

- Global and China industrial robot market (size, structure, competitive pattern and forecast);
- Global industrial robot speed reducer market (size, structure, competitive pattern and forecast);
- China industrial robot speed reducer market (supply and demand, segments, price, key companies, factors, forecast, etc.);
- 5 global and 28 Chinese companies (operation, industrial robot speed reducer business, development plan, etc.).



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