

Global and China Automated Guided Vehicle (AGV) Industry Report, 2019-2025

Oct. 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

China's AGV industry ushered in explosive growth along with new technologies and new scenarios in recent years, with its AGV sales surging to 29,600 units in 2018 from 1,260 units in 2011, showing a CAGR of up to 57.0%.

In China, AGV navigation technology has been upgraded to the third generation. The first generation technology is magnetic tape guidance, a shrinking market; the second generation technology is QR code, a market that has matured and become saturated; the third generation technology is laser + vision, which has been used and promoted by several companies. Laser + vision technology will be more promising than other AGV guidance technologies in application.

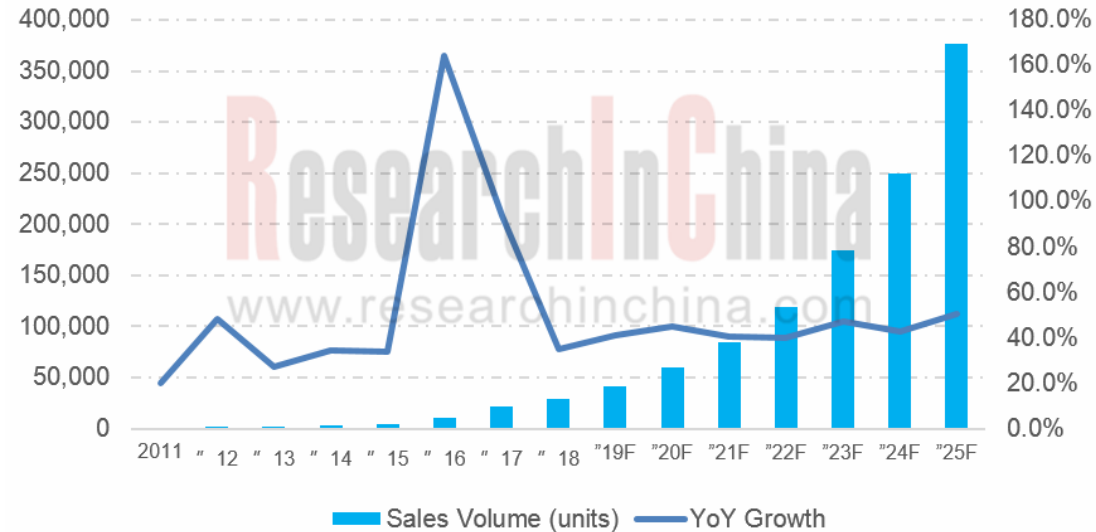
As concerns scenarios, ecommerce warehousing and smart logistics are fields for which capital and manufacturers compete over the years. They are also the moving force of growth during the AGV boom. In 2018, ecommerce and express delivery commanded over 1/3 of AGV market in China, and typical companies included Quicktron, GEEK+, HikRobot and Libiao Robotics.

Comparably, factory scenario where circumstances are complicated and technical barriers remain high, attracts powerful players in capital and technology. Examples include SIASUN Robot & Automation, an automotive AGV leader in China and Kunming Shipbuilding Equipment which sweeps 70-80% shares in tobacco industry. Manufacturing transformation and upgrading, digital factory and more flexible demand in recent years are conducive to AGV expansion. Yet, as digital factory is still a "concept" and factory scenario requires high stability robots, AGV use in the scenario still desires to be verified. By one estimate, it takes about 3 or 5 years to popularize AGV in industrial manufacturing.

In the Chinese AGV market, local companies rule the roost with a combined share of 90% or so. Among them, SIASUN, SCG, Yoneyg and Jaten are first-echelon players, with annual shipment of over 1,000 units apiece. As a whole, there is still no one leading the market, so players are in a price war in perfect competition.

The severer competition in logistics/ecommerce AGV market will lead to a reshuffle in the AGV industry; AGV manufacturing market will heat up and soar in the upcoming years. The report forecasts that China's AGV market will sustain a CAGR of roughly 40% between 2019 and 2025.

AGV Sales and Growth Rate in China, 2011-2025E



Source: Global and China Automated Guided Vehicle (AGV) Industry Report, 2019-2025

Global and China Automated Guided Vehicle (AGV) Industry Report, 2019-2025 highlights the following:

- Global AGV market (size, demand structure, competitive pattern, development in main regions, etc.);
- China AGV market (development history and model, size and concentration, structure by product/region/application, price, financing, competitive pattern by technology/product/company, development trends and forecasts);
- Core components and applied markets of AGV in China;
- 9 global and 20 Chinese AGV companies (operation, AGV products, typical application, etc.).

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