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# China Motion Controller Industry Report, 2021-2026

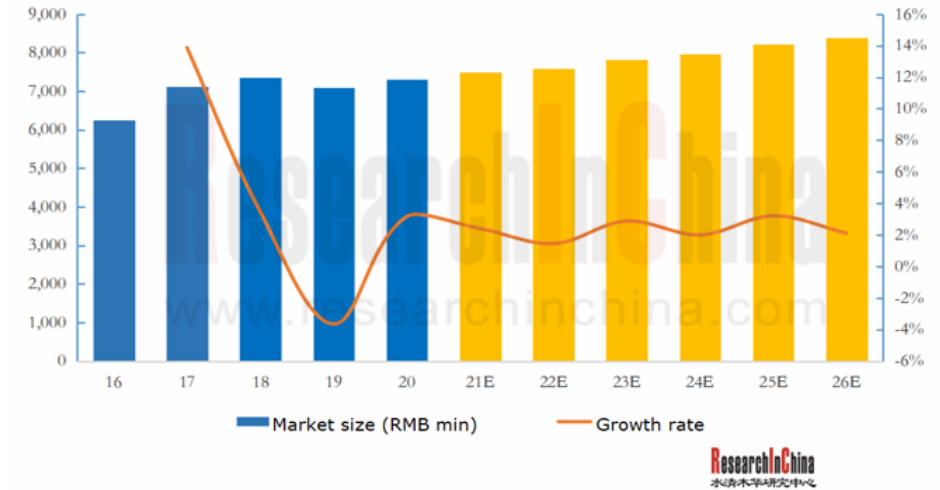
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# Abstract

The motion control system is the core component of intelligent manufacturing equipment, usually composed of controllers, motors, drivers, and human-computer interaction interfaces. Through the control program, the system controls the position, speed, direction, etc. of mechanical motion parts in real time after computer processing so as to make them move according to the predetermined motion parameters and motion trajectory. The motion control system determines the accuracy and efficiency of equipment as an important part of differentiation between devices of different brands. It is mainly used in machine tools, textile machinery, plastic machinery, printing machinery, packaging machinery, medical equipment and other industries.

Due to the slowdown in the development of downstream industries such as machine tools, packaging equipment and textile equipment, China's motion controller market has been hovering at a low level in recent years. In 2019, the market size dropped by 3.7% to RMB7.09 billion. Despite the COVID-19, China's effective control over the epidemic still attracted overseas orders in 2020, which boosted the Chinese motion controller market size to RMB7.31 billion with a year-on-year increase of 3.2%. With the introduction of policies such as "Made in China 2025", industrial robots and CNC machine tools have become the focus of development. As the core components in the field of intelligent equipment, motion controllers will see rapid development in the future. It is expected that China's motion control market size will hit RMB8.4 billion.

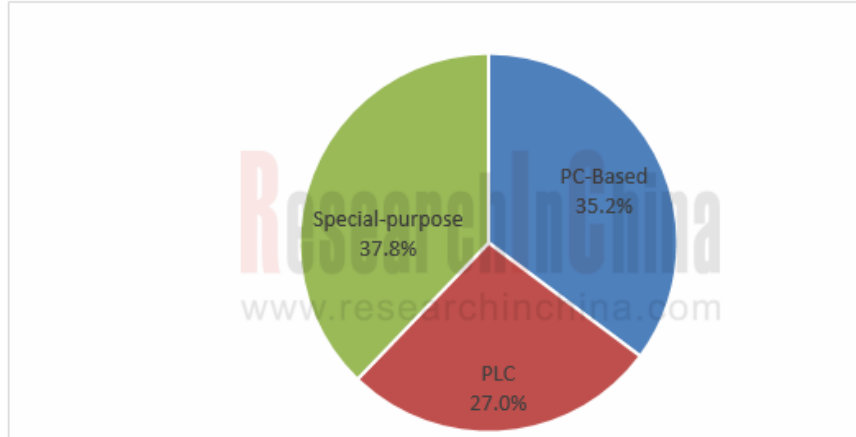
**Chinese Motion Control Market and Growth Rate, 2016-2026E**



Source: ResearchInChina

Motion controllers are divided into general-purpose motion controllers, which include PC-based and PLC-based types, as well as special motion controllers. At present, PLC-based motion controllers are the mainstream traditionally, while PC-based motion controllers have emerged as open controllers in recent years. In the future, the two will gradually merge amid competition. In 2020, the market share of PC-based, PLC-based and dedicated motion controllers was 35.2%, 27.0% and 37.8%, respectively.

## Chinese Motion Controller Market Share by Segment



Source: ResearchInChina

China Motion Controller Industry Report, 2021-2026 released by ResearchInChina highlights the following:

- Definition, classification, industry chain and technology trends, etc. of motion controllers;
- Industrial environment and policy environment, etc. of Chinese motion controllers;
- Supply and demand, competition, etc. of global and Chinese motion controller market;
- Status quo of China's general-purpose motion controller and dedicated motion controller market;
- The development of the downstream industry of China's motion controllers, etc.;
- The operation, revenue structure and development strategies of 14 key motion controller companies in China and 7 international motion controller companies.

There are a large number of companies in China's motion controller industry, including international leading brands (like Panasonic, Siemens, Mitsubishi and B&R), well-known domestic brands (such as Inovance Technology, Estun, Leadshine, and Huacheng Industrial Control), and numerous small and medium enterprises. From the perspective of the competitive landscape, foreign brands enjoy the lion's share and dominate the high-end market, while local brands mostly occupy the medium and low-end market with fierce competition.

In terms of market segments, foreign brand companies target the high-end general-purpose motion controller market in China, while domestic companies are positioned in the medium and low-end market. Specifically, Mitsubishi, Panasonic, Siemens and other foreign brands master the most high-end market, whereas the medium and low-end market is in a completely market-oriented competition pattern; as for the domestic PC-based control card market, foreign brands such as DELTA TAU and Trio grasp the high-end market, but domestic brands are making efforts in the medium and low-end market where the share of foreign brands is shrinking.

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## Beijing Headquarters

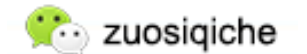
TEL: 13718845418

FAX: 010-82601570

Email: [report@researchinchina.com](mailto:report@researchinchina.com)

Website:  
[www.researchinchina.com](http://www.researchinchina.com)

WeChat: [zuosiqiche](https://www.wechat.com/p/zuosiqiche)



## Chengdu Branch

TEL: 028-68738514

FAX: 028-86930659