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China Motion Controller Industry Report, 2015-2017

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Abstracts

Motion controllers are the devices that control all kinds of motor-driven actuators to follow the predetermined trajectory, and they find key application in machine tool, textile machinery, plastic machinery, printing machinery, packaging machinery, medical equipment and other industries.

Affected by factors such as industry upgrading and product structure adjustment of equipment manufacturing, Chinese motion controller market hovered at a low level since 2012, and then basically stabilized in 2014 with the market size of RMB7.13 billion which went up 8.5% year on year.

With the promulgation of 'Made in China 2025' and other policies, industrial robots and CNC machine tools have become the focus, which means motion controllers will see rapid development as the core components of intelligent equipment. It is expected that Chinese motion control market size will approximate RMB10 billion in 2017.

Motion controllers are divided into general motion controllers and special motion controllers, of which the former can fall into three categories: PC-based controllers, PLC-based controllers, and embedded controllers. Currently, PLC-based controllers prevail as traditional mainstream controllers, and will integrate with the emerging open-style PC-based controller amid competition.

Chinese motion controller market is mainly dominated by world-renowned giants, while local Chinese players are mostly small and medium-sized firms which target at medium and low-end markets. Among China's domestic enterprises, Leetro, Googol Technology, Leadshine Technology, Weihong Electronic Technology and Adtech give priority to motion controllers and provide customers with system solutions.

Googol Technology: As China's largest maker of motion controllers, Googol Technology

holds nearly half of the market share in the field of PC-based motion controllers. In 2014, the company established Chongqing Googol Automation Applied Technology Development Co., Ltd. and Googol Yangtze River Intelligent Manufacturing Technology Research Institute in Yongchuan, Chongqing. In 2015, it is building Googol Park at Songshan Lake, which is expected to be completed by the end of this year. By then, Googol Park will become one of the first batch of industry 4.0 unmanned intelligent plants in China.

Leetro: The company has embarked on independent R & D of general motion controllers earlier than most of its rivals in China. Its products are mainly used in optical engraving machines, dispensers and other industries. In the first half of 2015, the company's two new products - AC servo drivers and network controllers were launched for a trial; in the second half year, the small-lot production may be accomplished.

Adtech: This leading provider of motion control solutions in China serves Foxconn, GoerTek and the like. In 2014, the company was acquired by Shanghai STEP Electric Corporation; meanwhile, its annual motion controller/card revenue amounted to RMB80.328 million, accounting for 52% of company's total revenue.

China Motion Controller Industry Report, 2015-2017 released by ResearchInChina highlights the following:

Development environments of motion controllers in China, including industrial environment and policy climate, etc.;

Competition pattern, supply and demand of Chinese motion controller market;

Market situation of general motion controllers and special motion controllers in China;

Development of motion controller downstream industries in China;

Operation, revenue structure and development strategies of 16 key motion controller companies in China.

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