

Global and China Automotive Industrial Robotics Industry Report,2013-2014

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Abstracts

The global industrial robotics market valued around USD11.156 billion in 2012, but the value slumped by 17% to USD9.249 billion in 2013 because of the yen depreciation and a significant decline in the average price of industrial robotics.

In 2013, the global shipment of industrial robotics slightly rose by 2%. Japan's industrial robotics shipment fell by 7.3% to 106,225 sets, and the average selling price dropped from JPY4.72 million in 2012 to JPY4.52 million in 2013. Thanks to the strong recovery in Europe, the U.S. and Japan, their demand for industrial robotics will not be less than China in 2014. The global market value is expected to increase by 3.5% to USD9.569 billion in the same year.

Although Japan's industrial robotics shipment declines, Japanese companies still act as the global overlord, enjoying the estimated 52.0% market share in 2013, whilst German companies were expected to occupy approximately 21.7% market share.

Welding robots account for 50% of industrial robotics, requiring high precision. In this point, even Germany can not compete with Japan. For example, only two Japanese companies in the world can produce robot reducers; one is Nabtesco with the global market share of approximately 90% and the annual sales revenue of about USD500-600 million, the other is Harmonic Drive System with the annual sales of roughly USD55-65 million.

36% of the global and 50% of China's demand for industrial robotics stems from the manufacturing of automobiles and related parts. Joint ventures which play a main role in China automobile industry like to introduce production lines from abroad. The robotics under foreign brands flow to China in the form of supporting complete automobile

production line. However, it is difficult for Chinese local brand robotics to enter joint ventures, especially welding and painting sectors. In the automobile industry, robotics work on Stamping, Powertrain, Body-in-white, as well as Paint and Sealing.

The automotive industrial robotics market is split by European and Japanese companies. Japanese companies serve the Japanese market and hold absolute dominance in electronics, assembly, metalworking, plastics and food fields. European counterparts show overwhelming advantages in the automotive sector, occupying most of the markets in China, the U.S. and Europe. In the field of Body-in-white, ABB, KUKA, COMAU, FANUC and KAWASAKI rank top successively by market share. As for the Stamping aspect, ABB, KUKA, FANUC and KAWASAKI are the leaders by market share. Germany Durr seizes about 50% share in the paint market and 45% share in the sealing market.

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