

Global and China Industrial Robot Industry Report, 2013



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In 2012, although the growth rate of global demand for industrial robots has slowed down, the sales volume of robots worldwide set the record the second highest just after that in 2011 and arrived at 159,000 units. In particular, China's demand for industrial robots sees the most rapid growth and it has been the world's second large market just behind Japan.

During 2005-2012, China's industrial robot market sales showed an AAGR of about 29%, and the sales volume in 2012 approximated 27,000 units, presenting a year-on-year growth rate of 19.2%. Currently, automotive sector and electronics industry are the two fields where industrial robots (mainly welding, handling, assembly and other types of industrial robot) find the most massive application.

As far as the industrial robot market of China is concerned, there is still a wide gap between local brands of robot cell products and foreign brands in terms of competitiveness. Local enterprises in the industrial robot market are still mainly industrial robot system integrators in the downstream, while foreign brands sell products by cooperating with system integrators, thus with certain reliance on these integrators. In 2012, 96% of total sales of industrial robot cell products in China were made by foreign brands, among which, the four magnates FANUC, YASKAWA, KUKA, and ABB accounted for as much as 53.8%. Among the domestic industrial robot cell production enterprises, only Dongguan Start To Sail Industrial Robots Co. Ltd sold up to 400 units in 2012, while none of Anhui Efort Intelligent Equipment, Shanghai Triowin Automation Machinery, GSK CNC Equipment, Shenyang Siasun Robot & Automation and other local enterprises sold more than 200 units.

FANUC boasts 13 subsidiaries around the world. In 2012, the company sold 3,900 units of industrial robot cell products in China, and it is currently the largest supplier in the Chinese industrial robot cell product market. Its production base in China for industrial robots is located in Shanghai. It also has a new factory located in Baoshan district with an annual designed capacity of 3,800 sets of robots and complete systems.

As of the end of April, 2012, ABB has sold more than 200,000 robots around the world. At present, Shanghai ABB Engineering Co., Ltd is the global headquarters for ABB's robot business and also ABB's only production base for painting robots worldwide and the world's largest production base for industrial robots.

Shenyang Siasun Robot & Automation Co., Ltd. is a subsidiary under the Chinese Academy of Sciences. Currently, its main business is the integration of downstream industrial robot systems, while reducers, servo motors, industrial robots cell products and other upstream products are its focus of future business development. In 2012, the company has gained operating revenue of more than \$300 million yuan from its industrial robot business, its third largest business, which accounted for 28.8% of its total operating revenue.

Being subject to Chinese Academy of Sciences, Shenyang Siasun Robot & Automation Co., Ltd is primarily focused on the integration of downstream industrial robot systems, while decelerators, servo motors, industrial robot cell products and other upstream products are the priorities of future business development. In 2012, company's revenue from industrial robot business (the third largest leading product business of the company) surpassed RMB300 million, making up 28.8% of its total revenue.

Based on the analysis of the latest production and sales data as well as the market structure of both global and China industrial robot markets, the "Global and China Industrial Robot Industry Report, 2013" sheds light on the business progress, product R&D and capacity expansion of major industrial robot companies at home and abroad and makes rational prediction about the future prospects of the Chinese industrial robot market.

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