

Research Report on China Industrial Robot Industry, 2015-2019

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Abstracts

Description

Industrial robot is an intelligent manipulator which combines the advanced technologies in machinery, electronics, controlling, computer, sensor and artificial intelligence. Mainstream industrial robot companies all have studied robotics for a long time although none is able to master the core technology of the industrial chain. Specifically, ABB is good at robot control and software, Fanuc numerical control, Yaskawa Electric servo motor and cleaning and KUKA control and software. Although international giants have built their manufacturing base in China, It is said that core technology and software determining robot performance are still kept abroad. Therefore, industrial robot is technology-intensive and the technical barrier of the industry is relatively high.

In 2014, driven by the stable increase in auto industry's demand, the number of industrial robot installed around the world hit a record of 0.205 million, increasing 15.2% year on year.

International robot giants have seized the Chinese market in recent years, leading to an increasingly fierce competition in the market.

Known as the big four in industrial robot industry, KUKA, ABB, Yaskawa Electric and Fanuc have successively built manufacturing bases in China in recent years, among which ABB has located its global headquarter of robot division and one of the two manufacturing bases in Shanghai.

Against the background of rising labor cost and fierce market competition, the domestic demand for industrial robot grows with each passing day. During the period of

2008-2012, the number of newly installed industrial robot averaged 15,000 per year.

As consumers' requirement of product performance and quality keeps improving and labor cost keeps rising, the pressure of transformation and upgrading facing Chinese manufacturing industry continues to increase. As a representative in intelligent manufacturing, industrial robot plays an increasingly important role in industrial transformation and upgrading. Driven by industrial policy and market demand, China's industrial robot industry has realized rapid growth with leading enterprises improving capacity and newcomers growing in number. In 2014, 12,050 industrial robots were made in China, increasing 26.2% year on year. And China has become the world's largest industrial robot market with sales in 2014 reaching 56,000. It is expected that by 2016, China's industrial robot ownership will rank first in the world, the reasons for which lie in industrial transformation, robot density and young man's attitude toward employment.

With regard to downstream application, auto and electronic industries are the major application fields of industrial robots in China. As the largest application field of industrial robot, auto industry takes up a share of 38% and is also the industry with the highest density of industrial robot.

With the development of automation in Chinese factories, industrial robots will soon be applied to such industries as electronics, rubber & plastic, war, aircraft manufacturing, food, medical equipment and metal works.

The rapid growth of industrial robot market demonstrates exactly that compared with other manufacturing powers, the density of industrial robot in China is still low. In 2011, the density of industrial robot among every 10,000 manufacturing workers was only 21, lagging far behind that in Japan (339), Korea (347), Germany (261), the US (135). Even in fractionized industries like auto and electronic industry, the density is still lower than that in other manufacturing powers.

The Chinese government has issued a series of policies to support the development of industrial robot industry. In Dec. 2013, the Ministry of Industry and Information Technology of the People's Republic of China issued the Guidelines on Promoting the Development of the Industrial Robotics Industry which set three goals to be achieved by 2020: (1) forming a perfect industrial robot industrial system and cultivating 3-5 internationally competitive leading enterprises and 8-10 supporting industrial clusters; (2) improving industrial robot enterprises' technical innovation capability and

international competitiveness as well as rising China's market share of high-end products to over 45 percent and (3) improving robot density (the number of robots for every 10,000 workers) to 100 or above.

By the end of 2014, industrial robot ownership in China was about 0.2 million. And the CAGR of annual installation of industrial robot during the period of 2015-2019 is expected to reach over 20% in China.

As there are many mid- and low-end labor-intensive industries in China that need to substitute robot for manual labor, the room for industrial robot to grow is quite large. The demand for mid- and low-end industrial robot is vast in China, but as such clients have limited ability to pay, foreign companies hardly attend to them while local enterprises could seize them by virtue of cost advantage and market familiarity.

On the whole, industrial robot market in China will keep developing fast in the next few years. Therefore, for investors, certain investment opportunities exist in relevant industries in the industrial chain of industrial robot industry.

Readers can get at least the following information through this report:

Chinese government's policy supporting industrial robot

supply and demand of industrial robot in China

competition in industrial robot market

major manufacturers of industrial robot in China

drivers of industrial robot industry

expectation to industrial robot industry

The author suggests the following groups of people purchase this report:

manufacturers of industrial robot

relevant enterprises in the industrial chain of industrial robot

investors/research institutions interested in industrial robot industry

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COMPANIES MENTIONED

Shanghai-fanuc Robotics Co., Ltd; Yaskawa Electric (China) Co., Ltd; ABB; KUKA;

Guangzhou Yardway Industrial Robots, Ltd; Anhui Efort Equipment Co., Ltd; hanghai

Triowin Automation; GSK CNC Equipment Co., Ltd; SIASUN Robot & Automation Co.,

Ltd; Estun Automation Co., Ltd

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