

# Research Report on Industrial Robot Industry in China, 2014-2018

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## Abstracts

An industrial robot is an automatically controlled, reprogrammable, multipurpose manipulator programmable in three or more axes. Although major enterprises focus on robotics for a long time, no enterprise can master the core technology of the whole industry chain. For instance, ABB has an advantage in robot control technology and software while Fanuc enjoys an advantage in numerical control technology. Meanwhile, Yaskawa Electric possesses the advantage in servomotor and robots in cleaning field while KUKA Group is competitive in control and software. Core control and software that decide the performance of robots are kept in the original countries though several international giants establish production bases in China. Therefore, industrial robots are technology-intensive products while the industry possesses high technical barriers.

The top 4 industrial giants, including KUKA, ABB, Yaskawa and Fanuc, build production bases in China in recent years. ABB locates its global headquarter of robot business and one of the major production bases in Shanghai.

The demand for industrial robots increases rapidly as labor costs increase and market competition becomes intense in China. The average annual installation volume of industrial robots was 15,000 in China in 2008-2012. China will be the largest market of industrial robots in 2014.

The installation volume of industrial robots exceeded 20,000 in China in 2013. Automobile industry remained the major application area while the market of industrial robots expanded significantly in downstream application areas. The application in whole vehicles and automobile accessories accounted for less than 50% in downstream application areas, which expanded from traditional automobile industry to other industries.

The rapid growth of domestic market represents the low density of industrial robots compared with major manufacture countries. In 2011, the density of industrial robots was 21 per 0.01 million workers in Chinese manufacture industry while the number was 339, 347, 261 and 135 respectively in Japan, South Korea, Germany and the U.S.A. The density in segment markets such as automobile industry and electronic industry is far below the level in major manufacture countries.

Chinese government issued a series of policies to support the development of industrial robot industry. In December 2013, the Ministry of Industry and Information Technology of China stated in Guidance on Promoting Industrial Robot Industry that a sound industrial robot system, 3-5 leading enterprises with international competence and 8-10 auxiliary industrial clusters should be established by 2020. Meanwhile, as the technology innovation and international competence of industrial robot industry and enterprises increase, the market share of high-end products should exceed 45% while the density of industrial robots (the number of industrial robots among 0.01 million workers) should exceed 100.

The industrial robot parc hardly reached 0.15 million in China by the end of 2013. The number is expected to exceed 0.3 million by the end of 2018. The CAGR of annual installation volume of industrial robots is predicted to exceed 20% in 2014-2018.

A large demand for industrial robots exists in medium and low-end labor-intensive industries. Therefore, the market has huge growth potential in China. Due to the low affordability in medium and low-end market, domestic enterprises of industrial robots can take advantage of the low cost and familiarity with the market in competition with foreign-funded enterprises. It is believed that domestic enterprises will occupy most of the medium and low-end market while the high-end market of industrial robots will continue to be seized by international giant enterprises in the coming years.

Generally, the market of industrial robots will develop rapidly in China in the next few years. Investment opportunities exist in industries related to the industry chain of industrial robots.

Readers can obtain the following information or more through this report:

Supply and demand Status of Industrial Robots in China

Support Policies of Chinese Government on Industrial Robots

Competition in Industrial Robot Market

Major Manufacturers of Industrial Robots in China

Factors Influencing the Development of Industrial Robot Industry

Prospect of Industrial Robot Industry

The following enterprises and people are recommended to purchase this report:

Manufacturers of Industrial Robots

Enterprises Related to Industry Chain of Industrial Robots

Investors/Research Institutes Concerned about Industrial Robot Industry

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