

# Research Report on Industrial Robotics Industry in China, 2011-2020

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## Abstracts

### Description

Robots can be divided into industrial robots, service robots and special robots by usage. Industrial robots include the robots, with mechanical arms currently, used for industrial production such as welding, spraying, palletizing, and carrying.

Industrial robot is the high-end intelligent equipment with the integrated system of interdisciplinary advanced technology such as machinery, electronics, control, computer, sensor, artificial intelligence.

Kuka, together with ABB, Yaskawa Electric Corporation and Fanuc are four giants in Industrial Robotics Industry. In recent years, they have invested to build production bases in China. ABB locates its headquarter of global robot project and one of the two production bases in Shanghai. Although some big international giants have set up production base in China, the core control and software deciding the robot's performance still stay outside of China. Industrial robots are technology-intensive products with higher technical barriers.

The quantity of the global industrial robot installation was more than 230,000 units in 2015. The industrial robots mainly concentrated in the automobile, electronic and electric industry, rubber, plastics, metal industry and machinery.

International robot giants have vied for Chinese market in recent years, which leads to increasingly fierce domestic market competition.

Under the background of rising labor costs and increasingly fierce market competition,

Chinese market's demand for industrial robots is daily growing. From 2010 to 2015, the average new installation of industrial robots in China were more than 30,000 units.

With consumers' level-up demand for product performance and quality, as well as rising labor price in China, China's manufacturing industry is facing the increasing pressure on industrial transformation and upgrading. As a representative in the field of intelligent manufacturing, industrial robots are playing an increasingly important role in the process of industrial transformation and upgrading. China produced about 20,000 units of industrial robots in 2015, with more than 60% year-on-year growth, which was still unable to satisfy domestic demand. In 2014, China became the world's largest market for industrial robots. The sales volume of industrial robots in China reached 75,000 units in 2015. By the end of 2016, the inventory of China's industrial robots will be top of the world.

In view of the downstream application, automobile and electronics industry are the main application fields of industrial robots in China. The automobile industry which is the largest application field of industrial robots, accounting for more than 30%, is the application industry with the highest use density of robots.

With the development of Chinese factories' automation, industrial robots also develop rapidly in other industrial sectors, such as electronics, rubber, plastics, military industry, aviation manufacturing, food industry, medical equipment, metal products, etc.

Chinese government introduced a series of policies to support the development of industrial robotics industry. Guidelines on Promoting the Industrial Robotics Industry released by Ministry of Industry and Information Technology of the People's Republic of China in Dec. 2013 mentioned that density of robots (the quantity of robots used by 10,000 people) would reach 100 units by 2020. In Jan. 2015, MIIT released A Plan of Integrating Informationization and Industrialization of Raw Materials Industries (2015-2018) to continue to support the robots. In May 2015, the concrete planning of Made in China 2025 was released by the State Council, in which the industrial robots played a crucial part.

By the end of 2015, China's inventory of industrial robots had been more than 250,000 units. It is expected that CAGR of annual installation of China's industrial robots will surpass 20%.

Robots are needed to replace manual work in many mid-low labor-intensive industries

in China. Thus, there is enormous room for growth of industrial robots. It is predicted that in the next few years, China's mid-high end industrial robot market will still be occupied by the international giants. However, Chinese enterprises are expected to have access to market space in mid-low field.

Overall, China's industrial robot market in the next few years will maintain its rapid development. For investors, there are investment opportunities in industries related to the industrial robotics industry chain.

Through this report, the readers shall acquire the following information:

Support Policies Released by Chinese Government for Industrial Robot

Supply and Demand of Industrial Robots in China

Market Competition of Industrial Robots

Major Manufacturers of Industrial Robots in China

Prospect of Industrial Robotics Industry

The Following Enterprises and People Are Recommended to Purchase This Report:

Major Manufacturers of Industrial Robots

Users of Industrial Robots

Investors /Research Agencies Focusing on Industrial Robotics Industry

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