
Description:
With increasing demand for industrial automation and intelligentization, global industrial robot industry flourishes, hitting a record high in 2013 with annual sales and ownership arriving at 178,000 units and 1.332 million units, up 12.0% and 7.9% year on year, respectively.

Global industrial robot capacities are concentrated in Japan, about 60% of the global total, while sales markets are mainly in Japan, the U.S., Germany, South Korea and China, which held a combined share of 70.2% in 2013.

China industrial robot industry sprouted in 2003, sped up from 2010, and overtook Japan as the world's largest consumer market in 2013 for the first time. According to China Robot Industry Alliance (CRIA) statistics, industrial robot sales volume in China in 2013 was 36,560 units, or 1/5 of the global total, and is expected to reach 45,000 units in 2014 and around 100,000 units in 2017.

In spite of this, the Chinese industrial robot market is still dominated by foreign companies, which sold more than 27,000 units of industrial robots in China in 2013, 74% of total sales volume, of which ABB, FANUC, Yasukawa Electric and KUKA occupied 65% or so, and nearly monopolized high-end fields like industrial robot manufacturing and welding.

In addition, China's industrial robot density (the number of robots used by every 10,000 workers) is much lower than that in developed countries, standing at only 30 in 2013, well below the global average of 62, in stark contrast to 437 in South Korea, 323 in Japan and 282 in Germany around the same time.

Being optimistic about the Chinese market due to multiple factors of positive policies, replacement of manpower by robot, industrial transformation and upgrading and increasing downstream demand, companies at home and abroad are stepping up efforts to make presence in China industrial robot industry.

ABB: Continues to enhance its exposure in the Chinese market and has introduced 10 robots; in 2014, ABB Engineering entered into an agreement with Zhongyeda Electric on cooperation in robot field.

YASKAWA Electric: In Jun. 2013, Yaskawa (China) Robotics Co., Ltd., a new factory with total investment of USD48 million went into production, and manufactured mainly industrial robot and robotic systems, with designed annual capacity of 12,000 robots and 3,000 units for the time being.

KUKA Robotics: In Mar. 2014, the robot plant located in Shanghai started operation, with designed annual capacity of 5,000 units, one third of KUKA Robotics' total output.

Kawasaki Heavy Industries: Kawasaki Precision Machinery (Suzhou) Ltd. began construction in Dec. 2013, and is scheduled to be put into production in Apr. 2015, with initial capacity of 2,000 units, manufacturing mainly robots for automobile welding and parts handling. It is expected that the capacity will be lifted to 10,000 units by 2017.

SIASUN Robot & Automation: A leader among local Chinese robot companies; posted revenue of RMB407 million from industrial robot business in 2013, a year-on-year jump of 35.6%. In Mar. 2014, the company first realized industrialization of semiconductor robot; in Jul. of the same year, the SIASUN Robot northern headquarters worth RMB3.623 billion were settled in Qingdao National High-tech Industrial Development Zone.

Anhui Efort Equipment: In Dec. 2013, the “industrial robot” industrial park project with investment of RMB2.2 billion started building, and is planned to go into operation at the end of 2015, developing annual capacity of 10,000 industrial robot bodies, core parts and peripheral equipment. In Nov. 2014, the company cooperated with Italian CMA to enhance spray painting robot business.

Key Topics Covered:
- Global industrial robot market size, market structure, major companies;
- Policy environment and technological environment for industrial robot industry in China;
Chinese industrial robot market size, market structure, investment situation and development prospect; Operation, industrial robot business and future strategies of 10 major global industrial robot companies and 14 major Chinese companies.

Contents:

1. Overview of Industrial Robot
   1.1 Definition and Classification
   1.1.1 Robot
   1.1.2 Industrial Robot
   1.3 Application and Classification
   1.4 Industrial Chain
   1.4.1 Upstream
   1.4.2 Midstream
   1.4.3 Downstream

2. Global Industrial Robot Industry
   2.1 Market Size
   2.2 Market Structure
   2.2.1 By Region/Country
   2.2.2 By Industry
   2.2.3 By Application
   2.3 Major Companies

3. Environment for Industrial Robot Industry in China
   3.1 Policy Environment
   3.1.1 National Policy
   3.1.2 Regional Policy
   3.2 Technological Environment

4. Development of Industrial Robot in China
   4.1 Development History
   4.2 Status Quo of Market
   4.2.1 Market Size
   4.2.2 Market Structure
   4.3 Status Quo of Company
   4.3.1 Major Companies
   4.3.2 Investment Situation
   4.4 Development Prospect

5. Major Chinese Industrial Robot Companies
   5.1 SIASUN Robot & Automation
   5.1.1 Profile
   5.1.2 Operation
   5.1.3 Revenue Structure
   5.1.4 Gross Margin
   5.1.5 Industrial Robot Business
   5.1.6 Development Strategy
   5.2 Shanghai STEP Electric
   5.2.1 Profile
   5.2.2 Operation
   5.2.3 Industrial Robot Business
   5.2.4 R&D
   5.3 Shenzhen Jasic Technology
   5.3.1 Profile
   5.3.2 Operation
   5.3.3 Industrial Robot Business
   5.4 MESNAC
   5.4.1 Profile
   5.4.2 Operation
   5.4.3 Industrial Robot Business
   5.5 Shanghai Triowin Automation Machinery
   5.5.1 Profile
   5.5.2 Operation
5.5.3 Industrial Robot Business
5.6 Harbin BOSHI Automation
5.6.1 Profile
5.6.2 Operation
5.6.3 Industrial Robot Business
5.7 GSK CNC Equipment
5.7.1 Profile
5.7.2 Industrial Robot Business
5.8 Anhui Efort Intelligent Equipment
5.8.1 Profile
5.8.2 Industrial Robot Business
5.9 STSrobotics
5.9.1 Profile
5.9.2 Industrial Robot Business
5.10 Other
5.10.1 Suzhou Boshi Robotics Technology
5.10.2 Changzhou Mingseal Robotic Technology
5.10.3 HUAHENG Welding
5.10.4 Harbin Haier & HIT Robot Technology
5.10.5 Tangshan Kaiyuan Group

6. Major Global Industrial Robot Companies
6.1 FANUC
6.1.1 Profile
6.1.2 Operation
6.1.3 Industrial Robot Business
6.2 YASKAWA Electric
6.2.1 Profile
6.2.2 Operation
6.2.3 Industrial Robot Business
6.3 KUKA
6.3.1 Profile
6.3.2 Operation
6.3.3 Industrial Robot Business
6.4 ABB
6.4.1 Profile
6.4.2 Operation
6.4.3 Industrial Robot Business
6.5 OTC
6.5.1 Profile
6.5.2 Operation
6.5.3 Industrial Robot Business
6.6 Comau
6.6.1 Profile
6.6.2 Operation
6.6.3 Industrial Robot Business
6.7 NACHI
6.7.1 Profile
6.7.2 Operation
6.7.3 Industrial Robot Business
6.8 Kawasaki Heavy Industries
6.8.1 Profile
6.8.2 Operation
6.8.3 Industrial Robot Business
6.9 Hyundai Heavy Industries
6.9.1 Profile
6.9.2 Business in China
6.10 St?ubli
6.10.1 Profile
6.10.2 Business in China

7. Summary and Forecast
7.1 Market
7.2 Company

Industrial Robot System Diagram
Advantages of Industrial Robot
Cost Structure of 50KG Industrial Robot in China
Global Industrial Robot Shipments, 2008-2017E
Global Industrial Robot Ownership, 2011-2017E
Global Industrial Robot Shipments by Region, 2012-2017E
Global Industrial Robot Ownership by Region, 2012-2017E
Global Industrial Robot Shipments by Industry, 2011-2013
Global Industrial Robot Market Structure by Field, 2009-2012
Major Companies in Global Industrial Robot Industrial Chain
Revenue of Global Major Four Industrial Robot Manufacturers, 2013
Planning for the Development of Industrial Robot Industry in Major Countries
Related Planning for Industrial Robot Industry in China, 2010-2014
Major Industrial Robot Industrial Park and Planning Target in China, 2014
Major Industrial Robot Research Institutes and Representative Products in China
Technological Gap between China and Foreign Countries in Key Parts for Industrial Robot
Sales Volume of Industrial Robot in China, 2005-2017E
Industrial Robot Ownership in China, 2005-2017E
Sales Volume Breakdown of Industrial Robot in China by Mechanical Structure, 2013
Sales Volume Breakdown of Industrial Robot in China by Industry, 2013
Sales Volume Breakdown of Industrial Robot in China by Field, 2013
Sales Volume Breakdown of Industrial Robot in China by Field, 2006-2010
Related Companies in China Industrial Robot Industrial Chain
Sales Volume Structure of Industrial Robot in China by Nature of Company, 2012-2013
Competitive Landscape of Industrial Robot Companies in China, 2012
Major Local Chinese Industrial Robot Companies
Main Industrial Robot Investment Projects in China, 2013-2015E
Industrial Robot Density in Major Countries, 2014
China's Automobile Output, 2008-2017E
Revenue and Net Income of SIASUN Robot & Automation, 2008-2014
Revenue Breakdown of SIASUN Robot & Automation by Product, 2010-2014
Operating Revenue Breakdown of SIASUN Robot & Automation by Product, 2010-2014
Gross Margin of SIASUN Robot & Automation by Product, 2010-2014
Revenue from and Gross Margin of Industrial Robot Business of SIASUN Robot & Automation, 2009-2014
Progress of R&D into Robot of SIASUN Robot & Automation, 2013-2014
Operating Revenue and Gross Margin of Shanghai STEP Electric, 2013-2014
Main Industrial Robots of Shanghai STEP Electric
R&D Costs and % of Total Revenue of Shanghai STEP Electric, 2011-2014
Operating Revenue Breakdown of Shenzhen Jasic Technology by Product, 2012-2014
Revenue and Net Income of MESNAC, 2008-2014
Operating Revenue Breakdown of MESNAC by Product, 2012-2013
Main Products and Customers of Shanghai Triowin Automation Machinery
Revenue and Net Income of Shanghai Triowin Automation Machinery, 2012-2014
Revenue Breakdown of Shanghai Triowin Automation Machinery by Product, 2013-2013
Handling Robot Series of Shanghai Triowin Automation Machinery
Industrial Robot Sales Volume of Shanghai Triowin Automation Machinery, 2009-2017E
Revenue and Net Income of Harbin BOSHI Automation, 2009-2014
Revenue and Gross Margin Breakdown of Harbin BOSHI Automation by Product, 2012-2014
Main Product Lines of Anhui Efort Intelligent Equipment
Main Industrial Robot Series of Suzhou Boshi Robotics Technology
Main Industrial Robot Series of Changzhou Mingseal Robotic Technology
Main Industrial Robot Series of HUAHENG Welding
Main Product Series of Harbin Haier & HIT Robot Technology
Industrial Robot Series of Main Subsidiaries of Tangshan Kaiyuan Group
Development History of FANUC
Net Revenue and Net Income of FANUC, FY2009-FY2014
Revenue Breakdown of FANUC by Business, FY2010-FY2014
Global Network of FANUC, 2014
Revenue Breakdown of FANUC by Region, FY2012-FY2013
Shanghai-FANUC Robotics Co., Ltd.
Main Customers in China for FANUC's Industrial Robots
Net Revenue and Net Income of YASKAWA Electric, FY2009-FY2014
Revenue Breakdown of YASKAWA Electric by Business, FY2009-FY2014
Revenue Breakdown of YASKAWA Electric by Region, FY2009-FY2014
Revenue and Operating Income from Robot Business of YASKAWA Electric, FY2006-FY2013
Industrial Robot Companies of YASKAWA Electric in China
Main Industrial Robot Series of YASKAWA Shougang Robot
Global Business of KUKA
Orders, Revenue and EBIT of KUKA, 2008-2013
Main Financial Indexes of KUKA Robotics Division, 2009-2014
Main Financial Indexes of KUKA Systems Division, 2009-2014
Orders Structure of KUKA Robotics by Application, 2009-2013
Orders, Revenue and Net Income of ABB, 2009-2014
Orders Structure of ABB by Business and Region, 2011-2013
Revenue Structure of ABB by Business and Region, 2011-2013
Net Revenue and Net Income of OTC, FY2010-FY2015E
Revenue of OTC by Segment, FY2010-FY2015E
Subsidiaries of OTC in China and Contacts
Global Business of Comau
Robots of Comau
Business Structure of Nachi
Net Revenue and Net Income of Nachi, 2010-2014
Revenue Breakdown of Nachi by Product, 2009-2013
Overseas Revenue of Nachi, 2010-2014
Development Planning of Nachi for 2016
Organizational Chart of Kawasaki Heavy Industries
Revenue and Net Income of Kawasaki Heavy Industries, FY2009-FY2014
Net Revenue Breakdown of Kawasaki Heavy Industries by Business, FY2012-FY2014
Robot Production Bases of Kawasaki Heavy Industries
Industrial Robots of Kawasaki Robotics (Tianjin)

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