Global and China AGV (Automated Guided Vehicle/ Mobile Robot) Industry Report, 2017-2021

Apr.2017

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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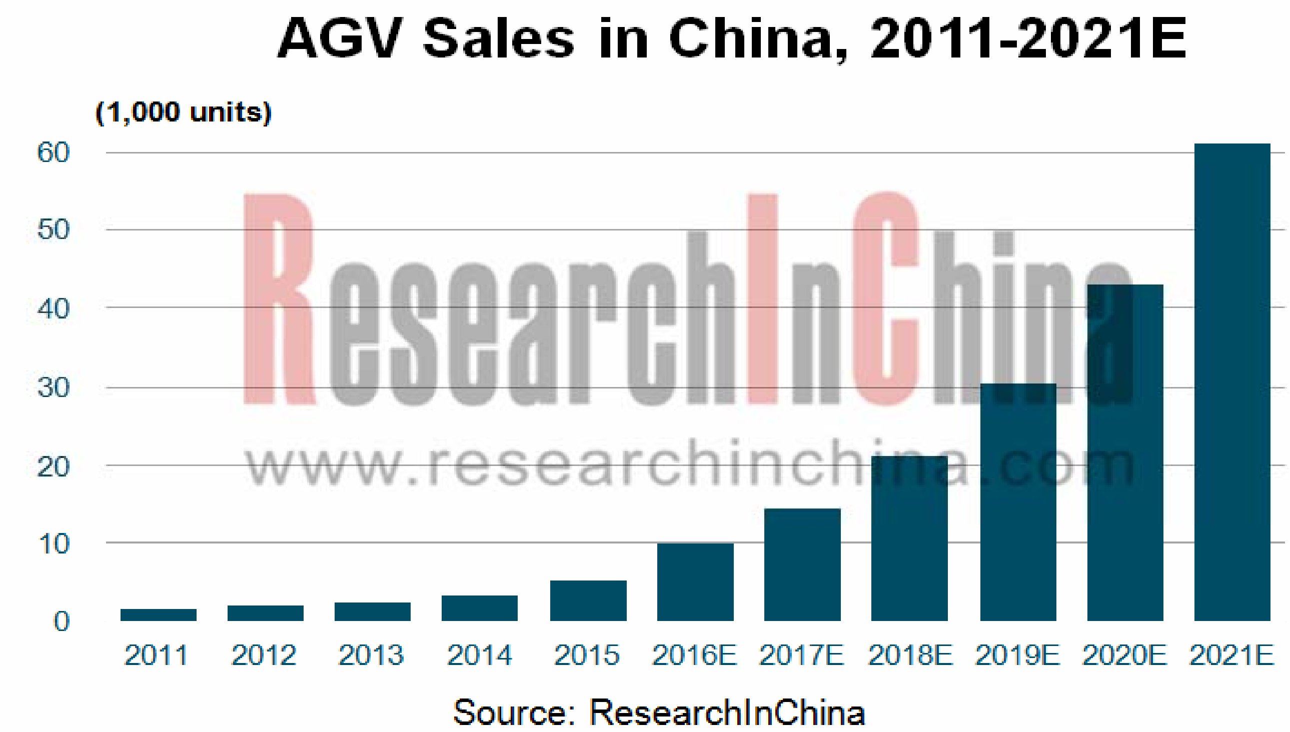
Abstract

In 2016, global AGV sales surged by 38.8% from a year earlier to 22,600 units thanks to favorable policies including industry 4.0 and intelligent automation and more use of AGV for e-commerce; China saw a substantial rise of 88.5% YoY in AGV sales to 9,950 units. It is expected that China's AGV sales will grow at an average annual rate of 43.0% during 2017-2021, achieving 61,000 units in 2021.



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Production logistics including automobile and home appliance manufacturing still has the largest and steady demand for AGV in China, with a share of around 55% in the country's total demand for AGV in 2016, but poses higher requirements on intelligent automation of AGV products; warehousing logistics like ecommerce witnesses soaring demand for AGV, occupying roughly 29% of the total in 2016 and expectedly up to 32% in 2021.

In the Chinese AGV market in 2016, domestic companies grabbed an 85% share in total sales, and foreign peers 15%. In fact, the foreign players such as JBT, Egemin, Rocla, Swisslog, Daifuku and Meidensha, dominated the high-end market; the low- and middle-end markets were taken up by Chinese brands, e.g., Siasun, KSEC Intelligent Equipment, Machinery Technology Development and Sanfeng Intelligent Conveying Equipment.

At present, dependence on imported AGV core parts like laser navigation, motor and control system still constitutes one of the key impediments to expansion of China's AGV market. In recent years, Chinese manufacturers intensified development and research of AGV, sparing no effort to advance localization of core parts. Thereof, Siasun and KSEC Intelligent Equipment self-developed AGV control systems; GreatStar Industrial and CSG Smart Science & Technology were stepping up manufacture of their own laser sensors for AGV to improve market competence.

Additionally, restricted by technology, AGC products are in the majority in Chinese AGV market, making up around 43% in 2016; AGVs with heavy load and linkage will be key products in China's AGV industry layout, according to the Development Plan for China Robotics Industry (2016-2020).

Global and China AGV (Automated Guided Vehicle, Mobile Robot) Industry Report, 2017-2021 by ResearchInChina highlights the following:

◆Global AGV market (size, demand structure, competitive landscape, development in Japan, Europe, the United States, etc.);
◆Chinese AGV market (size, product structure, demand structure, price, competitive landscape, development trend, etc.);
◆Supply of core parts for AGV, including AGV system, on-board control system, drive system (motor, speed reducer, etc.), navigation system (magnetic navigation sensor, laser navigation, laser scanner, etc.), charging system, etc.;
◆Development of main downstream industries (automobile, parking, electric power, tobacco, etc.) of AGV, and demand for AGV;
◆Operation and development strategy of 23 global and Chinese AGV producers.

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