Yano Research Institute

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RESEARCH SUMMARY

Yano Research Institute Ltd.
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Business-Use Cleaning Robots Market in Japan: Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a study on the domestic business-use cleaning robots market with the following conditions:

1. Research period: From August to October, 2014
2. Research target: Manufacturers of business-use cleaning robots, companies studying or selling those robots, the concerned government agencies and organizations
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email, literature search.

What are Business-Use Cleaning Robots?

Business-use cleaning robots in this research indicate those non-industrial robots (robots for services) with business-use sweeping and washing functions, not to be used for households. They are also defined to have sensing, self-controlling, and driving functions, but they do not have to be equipped with all of such functions, if they are able to substitute for human hands wherever in bad working environments.

As for the places where those robots target to sweep, scrub, or/and wash include: any floors, swimming pools, solar panels, chimneys/incinerator walls, business-use air conditioners, and etc. This research limits to those robots directly sold as products and exclude those in-house cleaners within the company.

◆ Key Findings

■ Domestic Number of Business-Use Cleaning Robots Shipped in FY2014 Likely to Attain 875

There was not much variety in the domestic business-use cleaning robots until FY2013. After it turned to FY2014, however, a series of companies entered or expressed entering the market. The domestic business-use cleaning robots market size, based on the number of robots shipped from manufacturers, is projected to achieve 875 in FY2014. Although it still is a limited market size it has a potential to prosper.

■ Markets of Floor/Solar-Panel Cleaning Robots Potential for Thriving

Floor-cleaning robots compose the most flourishing market among those business-use cleaning robots, since a series of newly market-entered companies and various products are scheduled to be launched during FY2014 period. Also, each of the manufacturers is planned to prepare proposals presenting what and how those robots can clean. On the other hand, the solar-panel cleaning robot market is likely to accept its first market players ever in FY2014, at which the demands for public and industrial photovoltaic plants are planned to be fully examined.

■ **Market Forecast: Domestic Number of Business-Use Cleaning Robots Shipped in FY2020 Projected to Achieve 1,850**

Business-use cleaning robots market is likely to expand further by responding to diversifying demands according to various purposes and venues.

Forecast of the market status in FY2015 and beyond depends on the domestic economy. Nevertheless, the demands for those service robots can be raised by the development promotive plans by the government and preparation for the Tokyo Olympic Games to be held in 2020. Therefore, the business-use cleaning robots market is expected to continue the double-digit growth both in volume and value, and to achieve 1,850 robots shipped by 2020.

◆ Report format:

Published report: "Business-Use Cleaning Robots Market 2014"
Issued on: October 30, 2014
Language: Japanese
Format: 126 pages in A4 format
Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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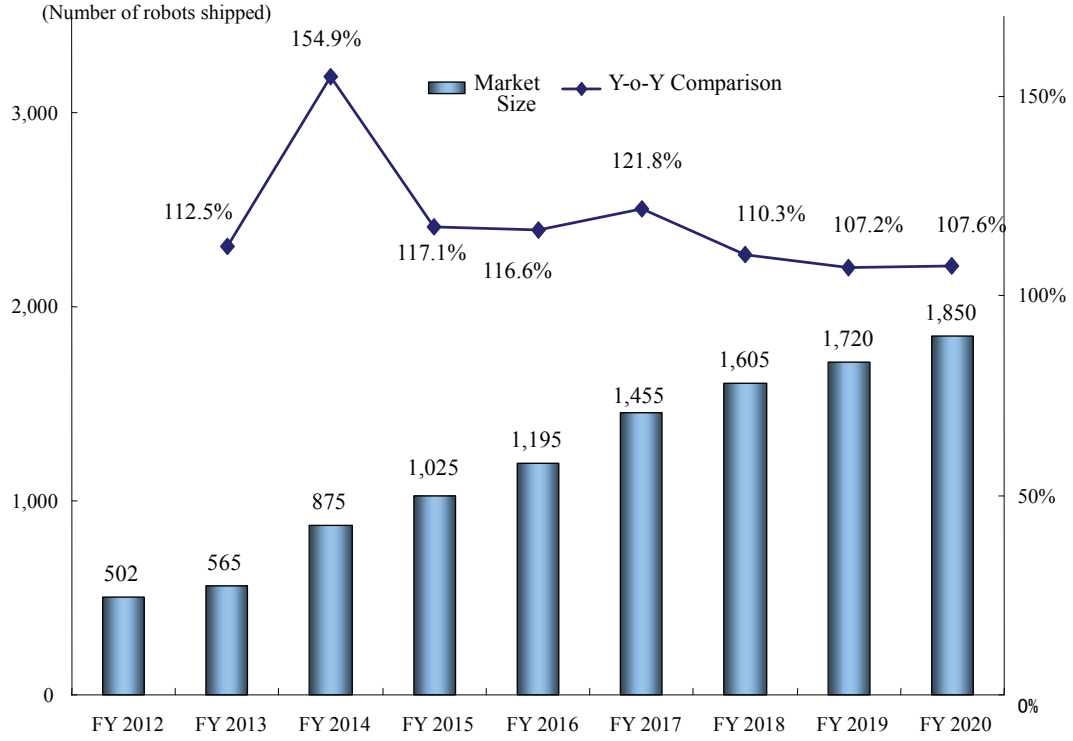
■ **Figure 1: Transition and Forecast of Domestic Business-Use Cleaning Robots Market Size**



Notes:

1. The figures are based on the shipment volume from manufacturers.
2. Business-use cleaning robots in this research indicate those non-industrial robots (robots for services) with business-use sweeping and washing functions, not to be used for households. They are also defined to have sensing, self-controlling, and driving functions, but they do not have to be equipped with all of such functions, if they are able to substitute for humans in bad working environments.