

AGV (Automated Guided Vehicle) Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic AGV (Automated Guided Vehicle) market with the following conditions:

1. Research period: From July to September, 2016
2. Research target: domestic AGV manufacturers, companies developing AGV technologies, related organizations, relevant government offices
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email, and literature research

What is an AGV (Automated Guided Vehicle)?

AGVs (Automated Guided Vehicles) in this research indicate rail less types among all AGV systems defined in JIS D6801. Cargo-loading and cargo-pulling types and AGFs (Automated Guided Forklifts) are included. In addition to AGV themselves, those AGVs used as a part of unmanned transportation systems or driving kits are also included.

◆ Key Findings

■ **AGV Market Size in FY2015 Leaped by 22.3% on Y-o-Y Basis to Achieve 9,427 Million Yen**

The domestic AGV (Automated Guided Vehicle) market size, based on the shipment value at manufacturers, is on the rise, driven by the economic recovery. The market in FY2015 expanded by 22.3% from the preceding fiscal year to attain 9,427 billion yen, and is projected to rise by 8.8% in FY2016 to achieve 10,257 billion yen. The domestic economic recovery has contributed to massed adoption of AGVs at some of users, which boosted the entire market. The market is expected to continue rising in FY2016, but there are also some concerns, including a tendency of stronger yen.

■ **Successful New Product Development of AGV Lies in Safety Measures According to Application**

The keys for successful increase of the AGV demands lie in how to acquire new users yet to introduce AGVs. AGVs are currently used for FA (Factory Automation,) the mainstream application, and are expected to be applied to distribution/warehouses and retailing, and others. Unlike the users in the manufacturing industries who can have support from technical experts to hammer out in-house applications, the new application of AGVs at newly entered makers is hardly imaginable due to their lack of experience of using AGVs. Although safety measures have been standardized, exploring of new demands require detailed measures to be considered according to new applications.

■ **Market Forecast: FY2019 AGV Market Size Projected to Attain 11,290 Million Yen**

While growth of AGV demands for FA has gradually been slowing down, newly developed demands of AGVs are expected to become apparent by newly entered AGV makers, which is likely to launch the market for such demands little by little. As a result, the domestic AGV market size for FY2019 is projected to achieve 11,290 million yen, based on the shipment value at manufacturers. In order to develop new demands, AGV manufacturers are required to proactively access to the users and make meaningful suggestions at the AGV-adopted sites. The key for the growth is in the new areas other than the manufacturing sites.

◆ **Report format:**

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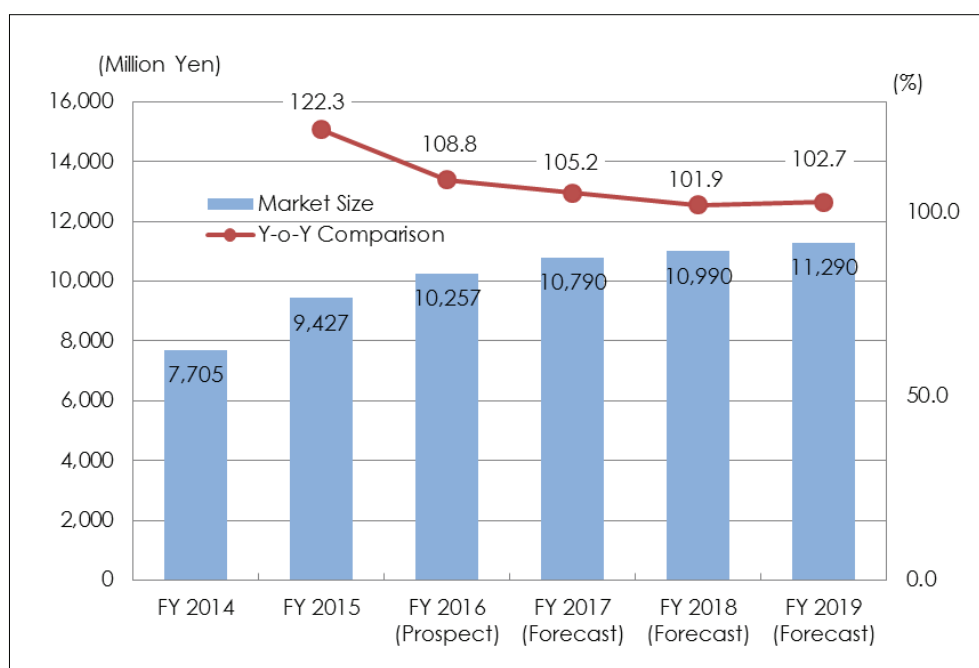
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■ **Figure 1: Transition of Domestic AGV (Automated Guided Vehicles) Market Size**



Estimated by Yano Research Institute

Notes:

1. The market size is based on the shipment value at manufacturers.
2. An AGV (Automated Guided Vehicle) in this research indicates rail less types of AGVs among all AGV systems defined in JIS D6801. Cargo-loading and cargo-pulling types and AGFs (Automated Guided Forklifts) are included. In addition to AGV themselves, those AGVs used for a part of unmanned transportation systems or driving kits are also included.