

2012中国(上海)国际机器人展览会

2012 China (Shanghai) International Robot Show

CiROS



展后报告

Final Report



中国(上海)国际机器人展览会组委会

Organizing Committee

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引言 · Introduction



机器人是一种整合了控制论、机械、计算机、材料和仿生学的高科技产物，作为一种高度自动化、智能化设备，机器人在国民经济各领域的用途重要而广泛。工业机器人及其自动化成套设备的拥有量和水平是衡量一个国家制造业综合实力的重要标志。

中国机器人研究起步于上世纪70年代，在国家“七·五”科技攻关计划中工业机器人被列入了发展计划，90年代的“863计划”确定了特种机器人与工业机器人并重的发展方针，开发了7种工业机器人系列产品，102种特种机器人。到90年代末，中国已建立了9个机器人产业化基地和7个科研基地。然而中国机器人产业水平还很低，无论在研发、生产还是应用方面，和世界水平相比，还有很大差距，我国目前应用于工业领域的机器人大多为进口；在智能机器人领域，我国取得了一些进展，但综合实力仍远不

The robot is a high-tech product integrating cybernetics, machinery, computers, materials and bionics. As an equipment of high automation and intellectualization, it is important and extensively used in every field of national economy. The number of ownership and level of industrial robots and its complete sets of equipment are vital signs to measure the comprehensive strength of a country's manufacturing industry.

The study of China's robots started in the 1970's and the industrial robot was listed in the development plan of national Seventh Five-year technological plan. The development policy that special robots are as important as industrial robots was determined in 863 project in the 90's, which invented seven series industrial robot products and 102 kinds of special robots. China has set up nine robot industrialization foundation and seven scientific research foundation until the end of the 90's. While the level of china robot industry is lower than world's level and there is a great difference whether in R&D, production and application. Currently, most of china's robots used in industries are imported from foreign countries. Although we have made some progress in the field of intellectual robots, our comprehensive strength is still lower than the

如发达国家。

2009年国务院提出了发展战略性新兴产业的构想，2011年，工信部正式发布智能制造装备产业规划。作为智能制造装备的重要组成部分，机器人产业将迎来战略性发展契机。

为迎头赶上机器人产业的国际先进水平，推动我国机器人产业的健康快速发展，中国机械工业联合会与上海东博展览有限公司于2012年7月3日至6日共同举办了“2012中国（上海）国际机器人展览会暨2012中国机器人产业推进大会”，旨在通过搭建产业、科研和技术交流平台，增进机器人产业领域交流合作，推动装备制造企业进入这一新兴产业，为我国国民经济各领域大规模应用机器人做好充分准备。

one of developed countries.

In 2009, the State Council has put forward the idea of developing new strategic industry. And in 2011, the Ministry of Industry and Information Technology of the People's Republic of China has formally issued the intellectual manufacturing equipment industry plan. Robots, as an important part of intellectual manufacturing equipment, will embrace a strategic development opportunity.

To keep pace with international advanced level of the robot industry and promote sound and rapid development of China's robot industry, China Machinery Industry Federation (CMIF) and EASTPO Exhibition Co., Ltd together held "2012 China (Shanghai) International Robot Show & 2012 China Robot Industry Promotion Conference", aiming at promoting exchange and cooperation in robot industry by building up a platform for industries, scientific research and technological exchange and facilitating equipment manufacturing enterprises to enter the new industry and fully preparing for the application of robots on a large scale in each field of national economy.

展会概览 · Exhibition Profile



本届展会展出总面积共计6000M²，共有来自中国、美国、德国、意大利、瑞士、日本、法国、韩国等国家和地区的近百家展商参加了本届展会；国内外知名企业如发那科、ABB、KUKA、沈阳新松、广州数控、德国倍福、那智不二越、东芝、埃夫特工业机器人公司、阿尔德巴兰、上海未来伙伴机器人有限公司、紫光优蓝，重庆金山等踊跃参展，充分展示目前国内外机器人领域的技术发展和创新产品，是目前国内水平最高，规模最大，专业化程度最高的机器人专业展。

展出的展品，包括工业机器人和服务型机器人两大类，涵盖机器人产业的众多领域：面向工业领域的

CIROS 2012 covered an area of 6000M² and up to 100 exhibitors from various countries and regions attended, such as China, the United States, Germany, Italy, Switzerland, Japan, France and Korea etc. Famous enterprises at home and abroad took an active part in the show such as FANUC, ABB, KUKA, SIASUN, GSK, BECKHOFF, NACHI, TOSHIBA, EFORT, ALDEBARAN, Shanghai Future Partner Robot Co., Ltd, UNISROBO and JINSHAN SCIENCE & TECHNOLOGY and so on. They have shown overseas and domestic technological development and innovative products in robot field, which makes CIROS show the biggest, most professional and with the highest level at the present in China.

The exhibits included industrial and service robots covering many areas of robot industry: multi-joint robots, mechanical arms or multi-degree of freedom

多关节机械手、机械臂或多自由度机器人，如用于焊接、涂装、上下料搬运作业机器人；用于非制造业并服务于人类的各种智能机器人，如家庭服务机器人、排爆机器人、教育娱乐型机器人、军用机器人、农业机器人，以及各类伺服系统、控制系统、软件等。

就数量而言，在本届展会所展出的机器人中，工业机器人占了大部分，ABB、KUKA、发那科、广州数控、那智不二越、埃夫特等展商都各自把代表当今工业机器人先进水平的产品展示与众不同。从展出的工业机器人来看，视觉识别、触觉等功能在展出的工业机器人中已相当普遍，定位精度、运动速度、最大载荷等各项技术指标均给人留下深刻印象。

of robots, robots for welding, painting and up-down material handling; various intellectual robots of non-manufacturing industry serving human beings like family service robots, explosive-handling robots, education and amusement robots, military robots, agricultural robots and all kinds of servo, control systems, software etc.

In terms of quantity, industrial robots were the majority of all displayed robots. Exhibitors like ABB, KUKA, FANUC, GSK, NACHI and EFORT etc showed visitors their products which represented the advanced level of industrial robots. Seeing from the industrial robots, visual identity and tactile function and other functions have been fairly universal and technical indexes like location accuracy, velocity, maximum load and etc all leave visitors a deep impression.

CiROS 2012

展会概览 · Exhibition Profile



在智能机器人方面，阿尔德巴兰展出的具有视觉、触觉和听觉的机器人别具一格；北京紫光优蓝的“爱乐优”家庭机器人具备语音识别、器官感应、目标识别、环境感知、行为决策等多种功能；上海交大展出的排爆机器人，越障、爬梯灵活自如；还有如上海未来伙伴机器人公司的便携式排爆机器人、东北石油学院的用于教学的四足、六足机器人、上海太敬集团的机器人舞蹈等，也显示了在各个应用领域的实用价值。

展会期间，主办方还举行了“2012中国机器人产业推进大会”，在这场在今后很长一段时间里将对机器人产业产生重要影响的大会上，包括国家科学技术部原副部长马颂德、国家工业和信息化部装备产业司副巡视员李本建、中国机械工业联合会执行副会长蔡惟慈、中国机械工业联合会执行副会长宋晓刚、国家863计划机器人技术主题专家组组长王田苗等领导出席

In intellectual robots, robots with vision, tactile and hearing showed by ALDEBARAN are unique; the family robots “ILU” of UNISROBO are possessed with many kinds of functions like speech recognition, organ induction, target recognition, environment perception, behavioral decision and so on; the explosive-handling robots showed by Shanghai Jiaotong University are flexible to get over obstacles and climb stairs; also the portable explosive-handling robots of Shanghai Future Partner Robot Co., Ltd; four-feet and six-feet robots for teaching showed by Northeast Institute of Petroleum and robot dancing performance showed by TAIJING and so on. All these have shown practical values in every application field.

During the CIROS show, the organizer also held “2012 China Robot Industry Promotion Conference”, which will exert a vital effect on China robot industry for a long time in the future. It was input from many leaders including former vice minister of the Ministry of Science and Technology, Ma Songde; vice inspector of Equipment Industry Department of Industry and Information Technology Ministry, Li Benjian; vice executive president of China Machinery Industry Federation, Cai Weici and Song Xiaogang; the leader

本次大会，并作重要讲话；日本机器人学会副会长小平纪生、北京机械工业自动化研究所副总工程师吴桐、上海高威科总经理田劲松等嘉宾在会上做精彩演讲；他们就机器人产业的现状、存在问题、发展前景等话题分别作专题演讲。与会代表们就中国在机器人产业研究方面的政策取向、推动机器人产业发展方面的政策解读，以及中国机器人发展战略、产业现状及发展规划、机器人功能部件的发展趋势等一系列话题，做了深入而广泛的交流与探讨。

本届中国（上海）国际机器人展览会与素享盛名的上海国际机床展（第14届）同期同地举行，彰显出机器人产业作为高端装备制造业的一个重要组成部分，对未来整个战略性新兴产业所具有的独特地位与作用，并与第14届上海国际机床展一起，达到了预期目标，取得圆满成功。

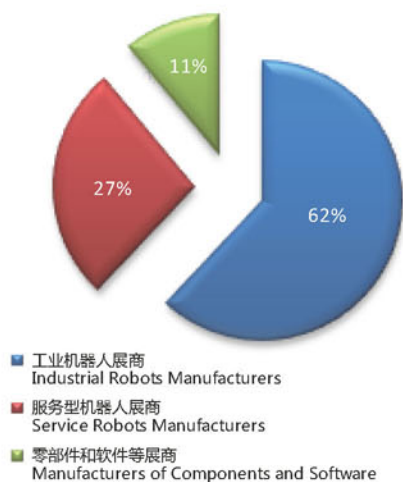
of the expert group of robot technology theme of National 863 Project, Wang Tianmiao; vice president of Japan Robot Society; associate general engineer of Beijing Research Institute For Automation Of Machinery Industry, Wu Tong; general manager of Shanghai GO-WELL, Tian Jingsong and so on. They all delivered a speech on subjects about robot industry's current situation, problems and development prospect. The representatives made deep and extensive exchange and discussion about a series of topics on China's policy direction in the study of robotics, the policy interpretation in promoting the development of robot industry, China robot development strategy, the industry's situation, and future plan, the development trend towards robotic functional components and so on.

CIROS 2012 is held concurrently with famous Shanghai International Machine Tool Fair (14th session) at the same place, which demonstrates that the robot industry enjoys a unique status and plays a unique role in the new future strategic industry as an important part of high-end equipment manufacturing industry. The CIROS show has reached the expected goal as well as the EASTPO show and was a complete success.

展商分析 · About exhibitors

参加本届中国（上海）国际机器人展览会的共有来自美国、德国、意大利、瑞士、日本、法国、韩国等国家和地区的25家境外展商，以及国内各省市自治区的57家国内展商。

25 overseas exhibitors from various countries and regions such as the United States, Germany, Italy, Switzerland, Japan, France and Korea etc and 57 domestic exhibitors from China's provinces.



展商构成

本届展会共有82家展商参展，其中工业机器人展商51家，占比62%；服务型机器人厂商22家，占比27%；零部件和软件等展商9家，占比11%。展品范围覆盖了机器人产业的整个产业链。

Exhibitors Breakdown

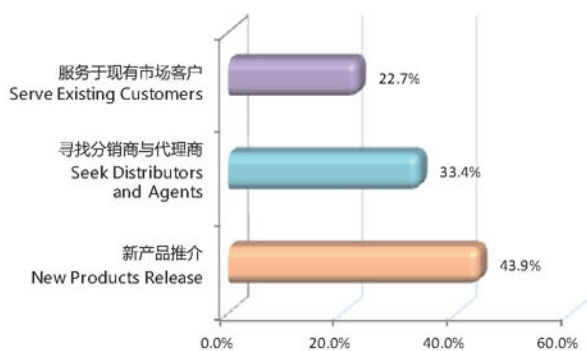
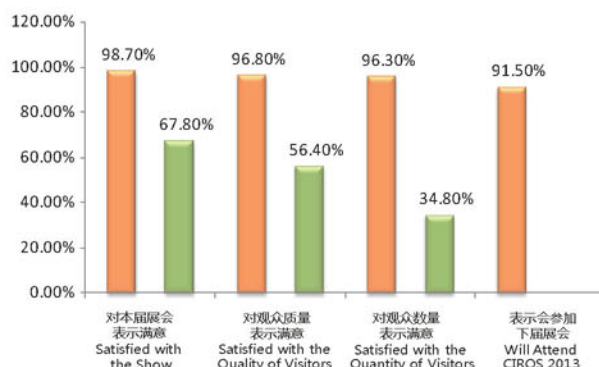
82 exhibitors has participated in CIROS 2012, among which there are 51 industrial robots manufacturers, accounting for 62% of the whole exhibitors, 22 service robots manufacturers, accounting for 27% of the whole exhibitors, 9 manufacturers of components, software and others, accounting for 11% of the whole exhibitors. The whole chain of the robot industry was involved in the exhibits.

展商满意度调查

据主办方对参展企业所作的调查，98.7%的展商对本届中国（上海）国际机器人展览会表示满意，其中67.8%的展商表示非常满意；96.8%的展商对到其展位的观众质量表示满意，其中56.4%的展商表示非常满意；96.3%的展商对到其展位的观众数量表示满意，其中34.8%表示非常满意；91.5%的展商表示将参加下一届中国（上海）国际机器人展览会。

Exhibitors Satisfaction Survey

According to the survey on exhibitors conducted by the organizer, 98.7% of the exhibitors are satisfied with the CIROS show, among which 67.8% of the exhibitors are very satisfied; 96.8% of the exhibitors are satisfied with the quality of visitors and 56.4% are very satisfied; 96.3% of the exhibitors are satisfied with the quantity of visitors and 34.8% are very satisfied; 91.5% the exhibitors will participate in CIROS 2013.



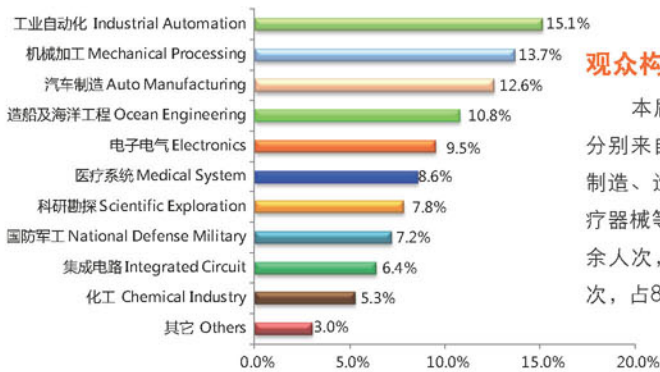
展商参展目标

据主办方对参展商的调查显示，有70%以上的展商对参展本届机器人展的目标明确，即以各用户行业企业为目标，开发新的市场，并获得行业重要信息；其次是为了寻找新的合作伙伴如代理商和分销商；有22.7%的展商表示是服务于现有市场客户；有43.9%的展商推出了新产品，或改进型产品。

Target of Participation

The survey shows that over 70% of the exhibitors have definite targets with the CIROS show. That is to aim at the user industries and enterprises, develop new markets and get important industry's news. Others may seek new cooperative partners such as agents and distributors. And 22.7% of the exhibitors want to keep relationship with existing customer and 43.9% of the exhibitors release new products or improved products.

观众分析 · About visitors



观众构成

本届展会观众共计20200余人次，分别来自工业自动化、机械加工、汽车制造、造船及海洋工程、航空航天、医疗器械等用户领域；其中海外观众2200余人次，占10.9%，国内观众18000人次，占89.1%。

Visitor Breakdown

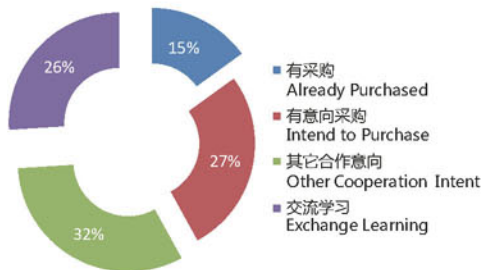
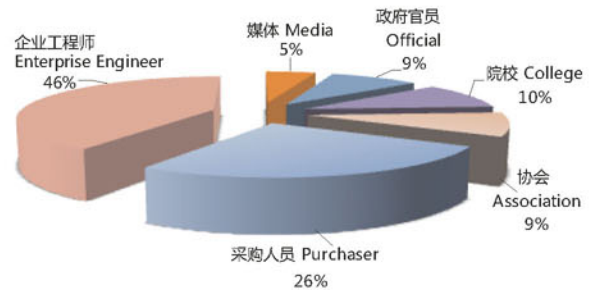
CIROS 2012 has attracted over 20,200 visitors from industrial automation, mechanical processing, auto-manufacturing, shipbuilding and ocean engineering, aerospace, medical machinery etc. Among which, 2200 are overseas visitors, accounting for 10.9% of the visitors and 18,000 are domestic visitors, accounting for 89.1% of the visitors.

观众职级和职务

统计显示，21.7%的观众来自企业决策层，60.4%的观众来自企业中层，余为一般观众；从观众在其单位中所属的部门看，41%的观众属企业研发部门，11%的观众从事市场营销，26%来自企业的采购部门。

Position Classification of Visitors

Statistic shows that 21.7% of the visitors are from decision-making management of enterprises, 60.4% are mid-level managers, the others are ordinary visitors; according to the department in company of visitors, 41% of the visitors are from R&D dept, 11% from marketing dept and 26% from purchasing dept.

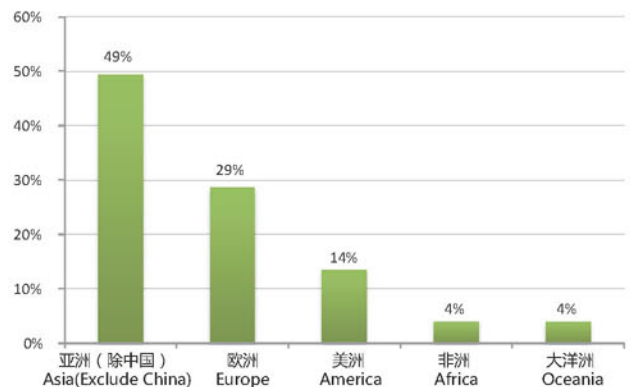
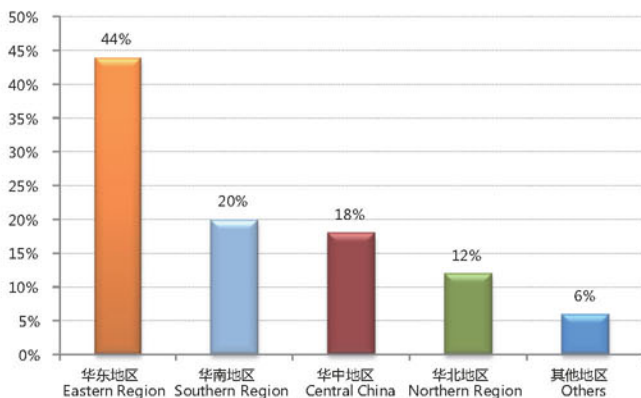


观众意向

调查显示，有41%的专业观众与展商达成了合作意向（包括采购、代理、分销等），有55%的观众表示将与有关展商进一步联系、洽谈。有95%的观众表示将参观下届展会。

Visitors Intention

The survey shows that 41% of the visitors have reached deals with exhibitors (including purchasing, agency and distributors) while 55% of the visitors will make further contact and negotiation with relevant exhibitors. And 95% of the visitors will visit CIROS 2013.



展商和观众评价 Comment from Exhibitors and Visitors



展商感言 · Exhibitor's Testimonials

● 那智不二越株式会社——高级工程师 刘晓东:

我们参展的目的无非是宣传企业、树立品牌形象和拓展市场,对本届国际机器人展的评价总体满意,在观众组织、广告宣传等方面做得很好。对观众的数量和质量也很满意,超出了我们的预期。

Liu Xiaodong Senior Engineer of NACHI

Our purpose is nothing but to publicize the enterprise, establish brand image and expand the market. Totally, we are satisfied with the CIROS show. The organizing of visitors, advertisements and other items of work are well done. The quantity and quality of visitors are better than we have expected.

● 上海东芝机械有限公司——销售主管 胡志伟:

我们是日资企业,首次参加中国(上海)国际机器人展览会,觉得这个展会办得不错,观众数量超出我们的预期,其中许多都是专业观众,我们对主办方的组织、现场服务感到满意。今后我们还会参加这个展会。

Hu Zhiwei Sales Executive of TOSHIBA MACHINE

We are the Japanese enterprise. We think the show is good at the first presence. The number of visitors is more than we have expected and many of them are the professional ones. We are satisfied with the organization and on-site service and will continue to participate in CIROS show.

● 阿尔帕机器人(深圳)有限公司——市场经理 刘成军:

我们参加本届机器人展会,觉得效果不错,观众挺多,其中观众也很有专业水准,明年我们还将继续参展。

Liu Chengjun Marketing Manager of ALPHA ROBOTICS

We have got very good results on CIROS show. There are many visitors and we are satisfied with professional visitors. We will participate in CIROS 2013.

● 广州数控——销售主管 刘萍:

今年是首届上海国际机器人展,办得不错,观众人流超出我们预期,也有达成成交或合作意向的,我们将会继续参加这个展会。

YLiu Ping Sales Executive of GSK

CIROS show is held for the first time this year and very good. Visitors are more than our expectation. During the show, we have reached some deals and cooperation intention with visitors.

● 北京紫光优蓝机器人技术有限公司——市场经理 王金平:

这个展会办得挺好,工作人员专业热情,观众也组织的到位,我们还会继续参展。

Wang Jinping Marketing Manager of UNISROBO

The show is good and visitors are organized well and staff is professional and enthusiastic. We will continue to participate in CIROS show.

观众感言 · Visitor's Testimonials

● 广汽丰田汽车有限公司——工程师 叶涛:

我们在生产线上用机器人比较多,看了本届中国(上海)国际机器人展感觉不错,得到不少宝贵信息,也与一些展商进行了沟通,对我们采购的决策很有帮助,明年我们还会来观展。

Ye tao Engineer of TOYOTA

We use robots more on our production line. We feel good about the CIROS show. And we get much valuable information and communicate with some exhibitors, which is of good help to our decision for purchasing. We will come to visit the show next year.

● 国家电网公司运行分公司上海管理处——主任 屈万一:

我参观了本届上海国际机器人展,感觉不错,不论是展商还是展品,都有一定的代表性和先进性。我们电网方面将来也会用到机器人来进行作业,我们会继续关注这个展会。

Qu Yanyi Director of STATE GRID Shanghai Administration

I visit the CIROS show this year and feel very good. Whether the exhibitors or exhibits are representative and advanced. We will use robots in the operation of power grid in the future. We will still pay attention to CIROS show.

● 上海大众 联合技术中心电器——工程师 孙道旺:

我们单位一共去了五个人参观本届机器人展,感觉不错,展商和展品都很好,对设备采购决策、信息收集都很有帮助。

Sun Daowang Electrical Engineer of SHANGHAI VOLKSWAGEN

Five of our staff have gone to the CIROS show and feel very good. Exhibitors and exhibits are both excellent. The show is helpful for us to make decision on purchasing equipment and collect information.

● 中国电信股份有限公司上海研究院——高级工程师 林毅:

看了这个展会,觉得很好,尤其是工业机器人,展品有世界先进水平,与一些展商进行洽谈,有收获。稍感遗憾的是家庭服务型机器人展品少了些。我们会密切关注这个展会。

Lin Yi Senior Engineer of Shanghai Institute of CHINA TELECOM

I feel very good about the show especially industrial robots. Exhibits have reached advanced world level. We have negotiated with some exhibitors and it is fruitful. It is a little regret that family service robots are much less than the others. We will pay close attention to CIROS show.

● 一汽轿车股份有限公司——项目主管 王子欣:

本届机器人展组织、现场管理工作有序,做得很好,我们一汽在生产线上机器人用得也比较多,主要用在焊接、装配、涂胶等工作场合,主要是进口机器人。我们会继续关注这个展会,多接触客户、多了解行情。

Wang Zixin Project Executive of FAW CAR CO., LTD.

The CIROS show is well organized and work of on-site management is perfectly in order. We use many robots on production lines mainly the imported robots in welding, assembling, gluing and so on. We will continue to visit the show to contact more customers and know more information about the market.