

Industry Profile Changes October 2019

We have been making some positive changes to our Industry Profiles template in-order to incorporate new content and bring the template in line with the relaunched MarketLine platform.

What has changed?

New competitive landscape chapter: this will be available in every profile published from September onwards and provides details of what has been happening in recent years at a company level within the market. The analysis will be focused on areas such as:

- Player strategies
- New product/competitor launches
- Market Development
- Mergers & Acquisitions

The analysis is presented in a question and answer format which will allow clients to very quickly see what's covered and absorb the most relevant information to their needs.

Also included in profiles from now on are dynamic links to related company profiles have been introduced to the industry profiles on advantage, this means clients can now view the full company profile with a link directly from the "Related to this report" section of the page.

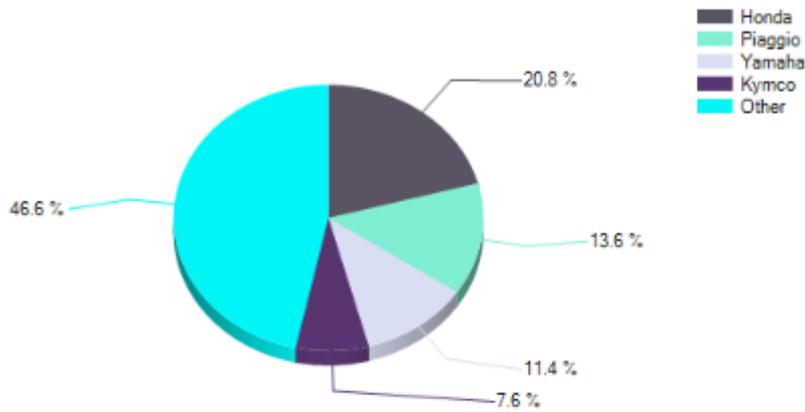
How does this benefit clients?

The **competitive landscape chapter** has been specifically added to incorporate more local level company info into the profile, addressing an area which clients have commented in the past as being a weakness with our industry reports. Overall (global level) info is still available in the company profiles but this section in the industry profiles covers info that pertains to the particular county and sector being profiled thereby providing more detailed analysis of who the leading players are in the market and how their business is performing and what their business and growth strategies are. This new section provides a link between the market players and the industry level analysis provided in the market analysis and the five-forces chapters.

Typical questions we'll be looking to answer in this chapter might include:

- Who are the leading players?
- Which players have been most successful in the recent past?
- Who are the main challengers to the incumbents?
- What strategies do the leading players follow?
- What new products/services/innovations have been launched in the market over the last year?
- How do challengers/disruptors strategies or products differ from the leading firms?
- What have been the most significant mergers/acquisitions over the last year?
- What is the rational for recent M&A activity?

Figure 5: Italy motorcycles market share: % share, by volume, 2018



Source: MARKETLINE

Who are the leading players?

Honda Motors Co Ltd is the largest motorcycles producing company in Italy with a market share of 20.8%. It is also a leading producer of aviation products. Honda produces passenger cars, light trucks, mini vehicles, general purpose engines, outdoor snow blowers, robotic mowers, generators, and portable battery inverter power sources. Honda also provides retail services.

The improvements to the **linking between company and industry profiles** has a number of benefits, the first is that clients will benefit from continually updated info in the company profiles rather than the static representations we previously had in the industry profiles. This also means that they can benefit from the vastly improved company interface that was introduced earlier this year, with better links to company news and deals, live financials, business segment analysis etc.

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Business Segments

Industrial Machinery and Robots Marine Products Motorcycles Power Products Others

Industrial Machinery and Robots

Overview

Produces and sells surface mounters and industrial robots.

- Surface mounters mount electronic parts onto circuit boards used in the electrical components for mobile phones, automobiles, and other electronic products
- Industrial robots comprise single-axis robots, cartesian robots, SCARA robots, multi-axis vertically articulated robots, and linear conveyor modules, which are used in manufacturing processes, including conveyance, supply, assembly, and inspection
- Manufacturing plant in Japan

Key Stats

- Sold JPY67.6 billion worth of surface mounters and robots in FY2017

Performance

Reported revenue of JPY67,571 million for FY2017, which grew 44.2% YoY, and recorded a CAGR of 20.5% during 2015-17. The segment accounted for 4% of the company's revenue in FY2017. It reported operating income of JPY15,603 million in FY2017, which grew 107% YoY.

Revenue grew owing to increase in sales of surface mounters and industrial robots as a result of commercial operation of a new plant.

80,000
70,000
60,000
50,000
40,000

JPY (b)

45,501 46,871 67,571

2015 2016 2017

Secondly, with the links now being directly in the left-hand navigation bar, clients can access these reports with a single click.

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