

# Global and China Machine Tool Industry Report, 2009-2010



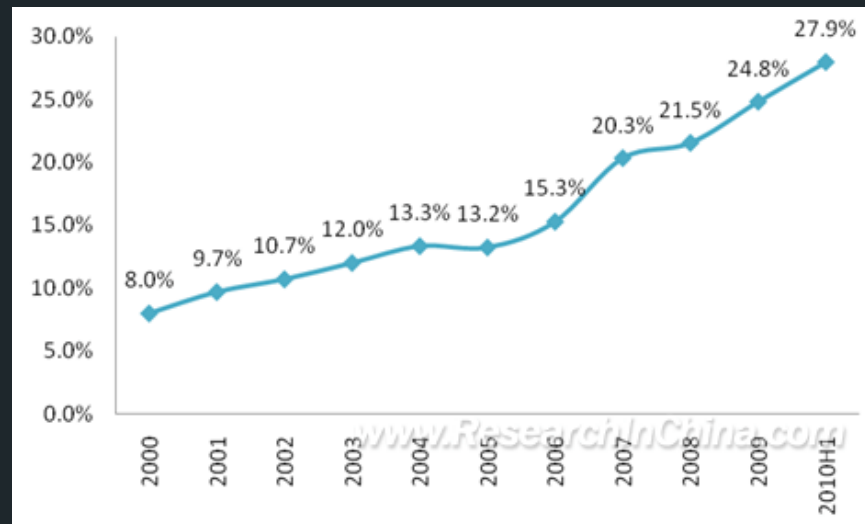
In 2009, affected by the economic crisis, the global machine tool industry suffered heavy losses, and the gross industrial output value and sales revenue fell by 32% and 33% respectively from a year earlier. Stimulated by a series of policies for expanding domestic demand, China machine tool industry thrived and the industrial output value grew by 7.6% year-on-year, surpassing Germany and Japan to rank No.1 in the world for the first time. The sales revenue of China machine tool industry rose by 0.5% year-on-year, becoming the largest consumer of machine tools all over the world for successive nine years.

China machine tool industry has made new progress in the aspects including output, localization, numerical control and demand structure.

The import substitution rate of China-made machine tools was 55% in 2007, 61% in 2008 and 70% in 2009.

As a kind of high-precision and automation machine tool, CNC machine tool saw rapid growth in China in recent years. As of 2009, the output of CNC metal cutting machine tools had reached 143,900 sets, 10.2 times that in 2000; the CNC rate rose from 8% in 2000 to 24.8% in 2009.

### Output and CNC Rate of Metal Cutting Machine Tools in China, 2000-2010

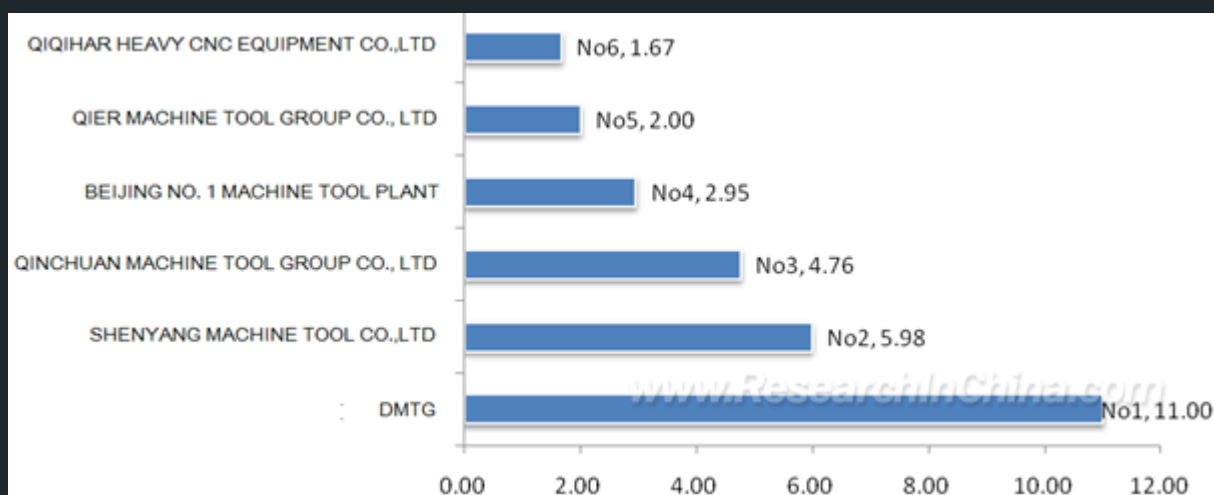


Source: ResearchInChina

At the same time, the demand structure of China machine industry has changed soundlessly. The demand for ordinary and economical type of CNC machine tool has shrunk, while the demand for popular and high-end type of CNC machine tool continues to grow. It is expected that the demand for CNC machine tool will reach over 100,000 sets in China in 2010, of which 40% will come from medium and high-end models, the market size will be between RMB6 billion -7 billion.

The report focuses on the development of the global and China machine tool industry, sub-sectors, and import & export of main products. It also analyzes the world's well-known machine tool enterprises such as YAMAZAKI MAZAK, GILDEMEISTER, and TRUMPF, as well as eighteen Chinese counterparts.

### Top 6 Enterprises in China Machine Tool Industry by Revenue, 2009 (RMB bn)



Source: ResearchInChina

# Table of Contents

- **1 Introduction to Machine Tool Industry**
  - 1.1 Definition & Classification
  - 1.2 Position in National Economy
  - 1.3 Periodicity Analysis
  - 1.4 Industry Chain
- **2 Development of Global Machine Tool Industry**
  - 2.1 History
  - 2.2 Development
    - 2.2.1 Production
    - 2.2.2 Consumption
    - 2.2.3 Import & Export
- **3 Development of China Machine Tool Industry**
  - 3.1 Development Environment
  - 3.2 Summary
- **4 Operation of China Machine Tool Industry**
  - 4.1 Production & Marketing of the Entire Industry
    - 4.1.1 Production
    - 4.1.2 Sale
  - 4.2 Production and Marketing of Major Sub-sectors
    - 4.2.1 Production & Marketing
    - 4.2.2 Metal Cutting Machine Tool
    - 4.2.3 Metal Forming Machine Tool
- **5 Import & Export of Major Machine Tools**
  - 5.1 Overview
  - 5.2 Metal Processing Machine Tool
    - 5.2.1 Import
    - 5.2.2 Export
  - 5.3 CNC Machine Tool
    - 5.3.1 Import & Export
    - 5.3.2 Import & Export of Machining Centers
  - 5.4 Combined Machine Tool
    - 5.4.1 Import
    - 5.4.2 Export

- 6 Key Machine Tool Enterprises in the World
- 6.1 YAMAZAKI MAZAK
  - 6.1.1 Profile
  - 6.1.2 Operation
  - 6.1.3 Enterprises in China
- 6.2 GILDEMEISTER
  - 6.2.1 Profile
  - 6.2.2 Operation
  - 6.2.3 Development in China
- 6.3 TRUMPF
  - 6.3.1 Profile
  - 6.3.2 Operation
  - 6.3.3 Enterprises in China
- 6.4 AMADA
  - 6.4.1 Profile
  - 6.4.2 Operation
  - 6.4.3 Development in China
- 6.5 OKUMA
  - 6.5.1 Profile
  - 6.5.2 Operation
  - 6.5.3 Development in China
- 6.6 MAG
  - 6.6.1 Profile
  - 6.6.2 Operation
  - 6.6.3 Development in China
- 6.7 MORI SEIKI
  - 6.7.1 Profile
  - 6.7.2 Operation
  - 6.7.3 Development in China
- 6.8 JTEKT
  - 6.8.1 Profile
  - 6.8.2 Operation
  - 6.8.3 Development in China
- **7 Key Machine Tool Enterprises in China**
- 7.1 Shenyang Machine Tool Co., Ltd
  - 7.1.1 Profile
  - 7.1.2 Operation
  - 7.1.3 Competitive Edge
- 7.2 DMTG
  - 7.2.1 Profile
  - 7.2.2 Operation
  - 7.2.3 Key Projects
  - 7.2.4 Technological Advantages

- 7.2.5 Development Strategies
- 7.3 Qiqihar Heavy CNC Equipment Co., Ltd
- 7.3.1 Profile
- 7.3.2 Operation
- 7.3.3 R&D Capabilities
- 7.4 Qier Machine Tool Group Co., Ltd
- 7.4.1 Profile
- 7.4.2 Operation
- 7.4.2 R & D Capabilities
- 7.5 Beijing No. 1 Machine Tool Plant
- 7.5.1 Profile
- 7.5.2 Operation
- 7.5.3 Production Capacity
- 7.6 Jinan First Machine Tool Co., Ltd
- 7.6.1 Profile
- 7.6.2 Operation
- 7.7 Jinan Second Machine Tool Co., Ltd
- 7.7.1 Profile
- 7.7.2 Operation
- 7.7.3 R&D Capabilities
- 7.8 Hanland Machine Tool Group Co., Ltd
- 7.8.1 Profile
- 7.8.2 Operation
- 7.8.3 Key Projects
- 7.9 Qinchuan Machine Tool Group Co., Ltd
- 7.9.1 Profile
- 7.9.2 Operation
- 7.9.3 Competitive Edge
- 7.10 Spark Machine Tool Co., Ltd
- 7.10.1 Profile
- 7.10.2 Operation
- 7.10.3 Development Strategies
- 7.11 Qinghai Huading Heavy Machining Tool Co., Ltd
- 7.11.1 Profile
- 7.11.2 Operation
- 7.12 Jiangsu Shinri Machinery Co., Ltd.
- 7.12.1 Profile
- 7.12.2 Operation
- 7.12.3 R&D Capabilities
- 7.13 Chongqing Machine Tool Co., Ltd
- 7.13.1 Profile
- 7.13.2 Operation
- 7.13.3 Competitive Edge

- 7.14 Sichuan Changzheng Machine Tool Group Co., Ltd
  - 7.14.1 Profile
  - 7.14.2 Operation
  - 7.14.3 R&D
  - 7.14.4 Key Projects
- 7.15 Yunnan CY Group Co., Ltd
  - 7.15.1 Profile
  - 7.15.2 Operation
- 7.16 Guilin Machine Tool Co. Ltd
  - 7.16.1 Profile
  - 7.16.2 Operation
  - 7.16.3 Advantages
- 7.17 Wuhan Heavy Duty Machine Tool Group Corporation
  - 7.17.1 Profile
  - 7.17.2 Operation
  - 7.17.3 R&D Capabilities
- 7.18 Shanghai Electric Machine Tool Group
  - 7.18.1 Profile
  - 7.18.2 Operation
  - 7.18.3 Development Strategies

# Selected Charts

- Classification of Machine Tools
- Demand of Equipment Manufacturing for Machine Tools
- Correlation between Growth Rate of Machine Tool Industry and GDP Growth Rate
- Correlation between Growth Rate of Machine Tool Industry and Fixed Asset Investment Growth Rate
- Machine Tool Industry Chain
- Main Indicators of Global Machine Tools (Metal Processing Machine Tools), 2009
- Output Value and YoY Growth Rate of Global Machine Tools (by Country/Region), 2009
- Consumption and Per Capita Consumption of Global Machine Tools (by Country/Region), 2009
- Import Value and YoY Growth Rate of Global Machine Tools (by Country), 2009
- Export Value and YoY Growth Rate of Global Machine Tools (by Country), 2009
- Incentive Policies for China Machine Tool Industry in Recent Years
- China's Shares in Global Metal Processing Machine Tool Market, 2009
- Localization of China Machine Tool Industry, 2001-2009
- Output and CNC Rate of Metal Cutting Machine Tools in China, 2000-2010
- Import Growth Rate of High-end Machine Tools and General Machine Tools in China, 2009
- Consumption Structure of Machine Tools in Japan and Germany, 2009
- Consumption Structure of Machine Tools in China, 2009
- Gross Industrial Output Value and YoY Growth Rate of China Machine Tool Industry, 2006-2009
- Sales Value and YoY Growth Rate of China Machine Tool Industry, 2006-2010
- Value of New Orders of key Machine Tool Enterprises in China, Jan-Jun, 2010



- Gross Industrial Output Value and Consumption of Chinese Metal Processing Machine Tools, 2009
- Prime Operating Revenue and Total Profit of China Metal Cutting Machine Tool Industry, 2005-2010
- Output of Metal Cutting Machine Tools in China, 2000-2010
- Output of Metal Cutting Machine Tools in China (by Province and City), 2009
- Output of CNC Metal Cutting Machine Tools in China, 2000-2010
- Output of CNC Metal Cutting Machine Tools in China (by Province and City), 2009
- Sales Revenue and Total Profit of China Metal Forming Machine Tool Industry, 2005-2010
- Output of Metal Forming Machine Tools in China, 2006-2010
- Output of CNC Metal Forming Machine Tools in China, 2006-2010
- Output of CNC Metal Forming Machine Tools in China (by Province and City), 2009
- Export Value and YoY Growth Rate of Chinese Machine Tools, 2009
- Import Value and YoY Growth Rate of Chinese Metal Processing Machine Tools, 2006-2010
- Import Value and YoY Growth Rate of Chinese Metal Processing Machine Tools (by Origin), 2009
- Export Value and YoY Growth Rate of Chinese Metal Processing Machine Tools, 2006-2010
- Export Value and YoY Growth Rate of Chinese Metal Processing Machine Tools (by Export Market), 2009
- Export Destination and Proportion of Chinese Metal Processing Machine Tools, H1 2010
- CNC Machine Tool Import & Export Volume and Value of Chinese CNC Machine Tools, 2009-2010
- Monthly Import Value of Chinese CNC Machine Tools, 2009-2010
- Monthly Export Value of Chinese CNC Machine Tools, 2009-2010
- Import Volume and Value of Chinese Processing Centers, 2008-2010

- Export Volume and Value of Chinese Processing Centers, 2008-2010
- Import Volume and Value of Chinese Combined Machine Tools, 2008-2010
- Export Volume and Value of Chinese Combined Machine Tools, 2008-2010
- Sales Revenue of Yamazaki Mazak, FY2005-FY2008
- Major Indicators of Ningxia Little Giant Machine Tool Co. Ltd., 2004-2008
- Enterprises in China and Contact Information of Yamazaki Mazak
- Gildemeister's Order Value and Sales Revenue, 2005-2009
- Gildemeister's Machine Tool Order Value and Sales Revenue, 2005-2009
- Trumpf's Major Indicators and YoY Growth Rate, FY2008-FY2009
- Trumpf's Sales Revenue Structure, FY2008-FY2009
- Trumpf's Sales Revenue (by Region), FY2004/2005-2008/2009
- TRUMPF's Enterprises in China and Distribution
- Amada's Sales Revenue and Net Income, FY2005-FY2010
- Amada's Order Value and Sales Revenue (by Product), FY2009-FY2010
- Amada's Sales Revenue (by Region), FY2009-FY2010
- Okuma's New Order Value and Reserved Order Value, FY2005-FY2009
- Okuma's Sales Revenue, FY2005-FY2009
- Okuma's New Machine Tool Order Value and Sales Revenue, FY2008-FY2009
- Okuma's Order Value (by Region), FY2006-FY2009
- Major Indicators of OKUMA (Beijing) Machine Tool Co., Ltd., 2004-2008
- MAG's Sales Revenue, 2006-2008
- Sales Revenue and Net Income of MORI SEIKI, FY2006-FY2010
- Order Value of MORI SEIKI (by Region), FY2008-FY2009
- Jtekt's Sales Revenue and Net Income, FY2006-FY2010
- Jtekt's Sales Revenue (by Region), FY2006-FY2010
- Prime Operating Revenue and Net Income of Shenyang Machine Tool Co., Ltd, 2007-2010

- Prime Operating Revenue of Shenyang Machine Tool Co., Ltd (by Product), 2007-2009
- Output Value & CNC Rate of Shenyang Machine Tool Co., Ltd, 2003-2009
- Proposed Projects of Shenyang Machine Tool Co., Ltd, 2010-2012
- DMTG's Sales Revenue, 2004-2010
- Operating Income and Net Income of Qiqihar Heavy CNC Equipment Co., Ltd, 2004-2009
- Major Indicators of Qier Machine Tool Group Co., Ltd, 2007-2009
- Sales Revenue of Beijing No. 1 Machine Tool Plant, 2005-2009
- Major Indicators of Jinan First Machine Tool Co., Ltd, 2004-2008
- Major Indicators of Jinan Second Machine Tool Co., Ltd, 2004-2008
- Prime Operating Revenue and Total Profit of Hanland Machine Tool Group Co., Ltd, 2004-2009
- Prime Operating Revenue and Total Profit of Qinchuan Machine Tool Group Co., Ltd, 2004-2009
- Major Indicators of Spark Machine Tool Co., Ltd, 2004-2009
- Major Indicators of Jiangsu Shinri Machinery Co., Ltd., 2007-2008
- Prime Operating Revenue and Total Profit of Chongqing Machine Tool Co., Ltd, 2006-2010
- Sales Revenue and Total Profit of Sichuan Changzheng Machine Tool Group Co., Ltd, 2004-2009
- Major Indicators of Yunnan CY Group Co., Ltd, 2007-2009
- Major Indicators of Guilin Machine Tool Co., Ltd, 2004-2008
- Major Indicators of Wuhan Heavy Duty Machine Tool Group Corporation, 2004-2008
- Prime Operating Revenue and Total Profit of Shanghai Electric Machine Tool Group (by Subsidiary), 2007-2008

# How to Buy

Product details			How to Order
Single user	USD 2,000	File PDF	By email: report@researchinchina.com
Enterprisewide	3,000	PDF	By fax: 86-10-82601570
Publication date: Oct. 2010			By online: www.researchinchina.com
For more information, call our office in Beijing, China:			
Tel: 86-10-82600828			
Website: www.researchinchina.com			