



**Global and China Machine Tool Industry  
Report, 2010-2011**

**Sep. 2011**

## ***This report***

- ◆ **Analyzes global and China machine tool industry development**
- ◆ **Focuses on the market segments, such as metal cutting machine tool, metal forming machine tool; also export and import of China machine tool industry**
- ◆ **Highlights the operation of key enterprises worldwide and in China**

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## Abstract

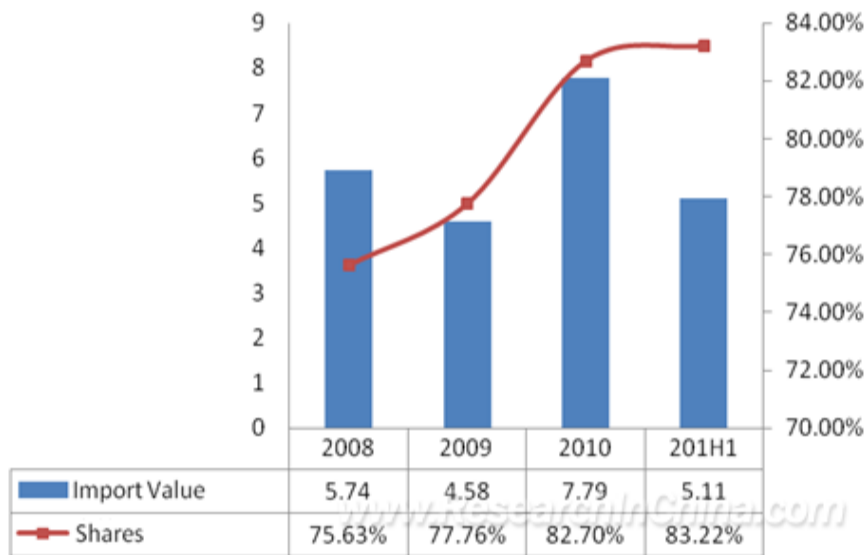
In 2010, the global machine tool industry bottomed out and recovered rapidly, with the gross industrial output value rising 21.1% YoY, the sales revenue up by 12.6% YoY, and the import value growing 17.1% YoY. In particular, China achieved the gross industrial output value of RMB553.68 billion, the industrial sales revenue of RMB543.44 billion and the import value of RMB15.715 billion in 2010, becoming the world's largest producer, consumer and importer of machine tool.

Over the recent two years, the strong consumer demand in the machine tool industry of China has attracted many foreign companies. Now, almost all of the world's top 10 machine tool manufacturers have invested or set up joint ventures in China, including Yamazaki Mazak, Mori Seiki, Okuma. In 2011, Yamazaki Mazak will continue to speed up its development in China. On the one hand, it will expand the capacity of its subsidiary "Ningxia Little Giant Machine Tool Co., Ltd."; and on the other hand, it plans to establish a second machine tool producer in China -- Yamazaki Mazak Machine Tool (Liaoning) Co., Ltd. In the same year, Mori Seiki also accelerates its pace in China, it will cooperate with Gildemeister and ShenYang Machine Tool Co., Ltd. to set up a joint venture to produce small machining centers equipped with tapered spindle #30.

At the same time, Chinese machine tool manufacturers have accelerated technology introduction and product R&D. In 2010, Shenyang Machine Tool launched five new categories of products, including new boring machine series, new CAK series, new HTC series, new vertical and horizontal machining center series. In July 2011, Kunming Machine Tool signed a proprietary technology transfer agreement with Germany SCHIESS, targeting high-end machine tools.

Though China machine tool industry develops rapidly, there are two outstanding problems. First, the host machine is big but not strong; second, the development of CNC systems and functional components is backward. Most of medium and high-end CNC machine tools are exported. In 2010, the metal processing machine tools imported by China valued USD9.42 billion, up 24.4% from the peak in 2008. Especially, the import value of CNC metal processing machine tools (mainly machining centers, CNC lathes, precision CNC grinding machine) was USD7.79 billion, accounting for 82.7% of the total import value.

## Import Value and Proportion of CNC Metal Processing Machine Tools in China, 2008-2011 (USD bn)



Source: China Customs; ResearchInChina

In order to effectively solve the problems in China machine tool industry and promote the healthy development of the industry, China promulgated Twelfth Five-Year Development Plan for Machine Tool Industry in July 2011, stipulating that the focuses in the next five years include four types of host machine (metal cutting machine tools, metal forming machine tools, forging machines, woodworking machines), functional components, machine tool accessories, medium and high-end CNC systems and other products.



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