



China CNC System Industry Report, 2011

Apr. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

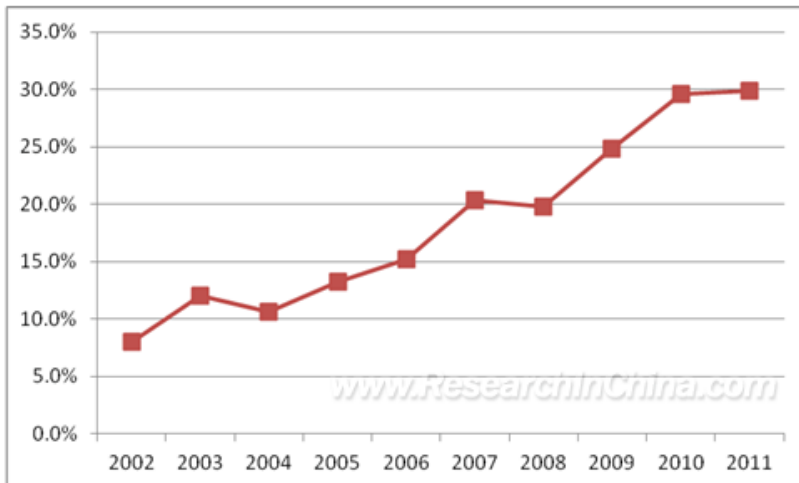
INFORMATION SOURCES

The information sources include National Bureau of Statistics of China, China Customs and China Machine Tool Industry Yearbook etc.

Abstract

The penetration of CNC machine tools has kept rising since 2002 and reached 29.9% in China in 2011. At present, economical CNC systems are the mainstream products in the Chinese CNC system market, while mid to high-end CNC systems occupy a smaller proportion. In the future, with the increasing requirement on the performance of CNC system products by various industries, the demand for mid to high-end CNC systems will increase gradually.

Penetration of CNC Metal Cutting Machine Tools in China, 2002-2011



Source: National Bureau of Statistics of China, China CNC System Industry Report, 2011

In the field of economical CNC system, domestic products have formed competitive advantages in price and scale, and occupied 95% of the Chinese market. GSK occupies the largest market share, and other leading companies include Beijing KND, Nanjing Washing, and Dalian Dasen.

Mid to high-end CNC system products are mainly dependent on imports, but some companies such as Huazhong CNC have emerged, and by virtue of advantages in price and service, continued to grab over the market share of imports. Huazhong CNC is the largest domestic enterprise in the field of mid-end CNC system, and occupied about 30% of the market in 2010.

In the field of high-end CNC system, the market is basically occupied by imports. Japan's Fanuc occupies about 50% of the market. Local enterprises in the high-end market mainly include Huazhong CNC and Shenyang Golding NC Tech.

The report outlines the development of China's machine tool industry, the supply and demand of the CNC system industry, the competition and import & export of economical and mid to high-end CNC system market segments. In addition, the report sheds light on key enterprises in China's CNC system industry, including FANUC, Siemens, Mitsubishi, Huazhong CNC and GSK.

Huazhong CNC is the largest domestic manufacturer of mid to high end CNC systems. Its CNC system business achieved revenue of RMB 89 million in H1 2011, accounting for 45% of the company's total revenue. In 2011, Huazhong CNC acquired stake in servo motor manufacturers Huada Motor and Wuhan Golden Age Motor Technology to complete its CNC system industry chain. After its fundraising and investment projects put into production, its CNC system production capacity will reach 15,000 sets per year in 2012.

GSK has obvious advantages in the economical CNC system production area. In 2010, it produced over 100,000 sets of CNC systems, and achieved operating revenue of about RMB 1.2 billion. While consolidating the field of economical CNC system, GSK has begun to set foot in the mid-end CNC system market.

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