



**Global and China Machine Tool Industry
Report, 2011-2012**

Sept. 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 primary information sources include China Machine Tool & Tool Builder's Association, WIND Database etc.

Abstract

In 2011, the global machine tool industry continued to grow, with the total industrial output value increased by 34.7% year-on-year, the sales surged by 34.5% year-on-year and the import value up by 37.3% year-on-year. In particular, China still held its position as the world's largest machine tool producer, consumer and importer, with the metalwork machine tool output breaking 1 million sets and the output value grew by 29.4%. Still, the sales realized the year-on-year rise of 32.9%, and the import value hit the year on-year growth of 40.6%.

The report highlights the following aspects:

- Production, consumption and import & export of global machine tool industry;
- Production, consumption and import & export of China machine tool industry;
- Production, sales and CNC rate of metal-cutting and metal-forming machine tools in China;
- Operation, development in China and strategy of 8 key enterprises worldwide;
- Operation, R&D capability, project scheduling and development strategy of 21 leading Chinese enterprises.

As for products, the CNC rate of machine tools has further increased in China in recent years. In particular, the CNC rate of metal-cutting machine tools by output rose from 20.3% in 2007 to 29.9% in 2011, and the CNC rate by output value climbed from 43.7% to 55.4%, accordingly. Nevertheless, China has still a long way to go to lift up its CNC rate of machine tool, comparing with the developed countries with the CNC rate by output reaching over 60% and the CNC rate by output value up to 80%.

As for enterprises, the competitive edge of Chinese machine tool enterprises is strengthening. Take SMTCL and DMTG for example, they have joined in the rank of global industrial leaders. In 2011, Shenyang Machine Tool (Group), with SMTCL (000410) as the core, came top with the revenue from machine tool business hitting USD2.783 billion, while DMTG held the fourth place worldwide.

In order to consolidate its leading position, SMTCL carried out a “pyramid” product strategy targeting different grades of products and, built long-term cooperative relationship with Germany-based BOSCH, Schaeffler and US-based GE. DMTG is also striving to stand out and is making increasing efforts for going public. And it is projected to land on capital market in 2013.

In addition, Wuhan Heavy Duty Machine Tool Group Corporation and BYJC place their going public scheme high on the agenda.

Alongside with Chinese enterprises are growing stronger and stronger, foreign businesses, such as Yamazaki Mazak, Amada and Mori Seiki, are accelerating their pace to tap into Chinese market.

Yamazaki Mazak: In October 2011, it invested JPY5 billion to set up the second plant in China - Yamazaki Mazak (Liaoning) (the first China-based plant is Little Giant Machine Tool) which is mainly engaged in the production of high-end general CNC machine tool products. And the new plant is planned to be finished and put into production in 2012.

Amada: In December 2011, it set up a general office in Shanghai for the management of businesses across China and, it also formulated a brand-new Chinese market strategy. According to the plan, Amada is scheduled to build new plant in Qingpu, Shanghai, and set up a technical center in 2013. Meanwhile, it plans to increase its China-based sales outlets to 22 ones in 2013 from 15 ones in 2011.

Mori Seiki: It has established branches in Shanghai, Beijing, Dalian, Chongqing, Shenzhen and Dongguan since 1990. In May 2012, it invested USD75 million in Tianjin to set up Mori Seiki (Tianjin) which will mainly engage in the production of top-grade CNC machine tools. The phase I project is set to be finished in September 2013 and to realize the full capacity by 2017.

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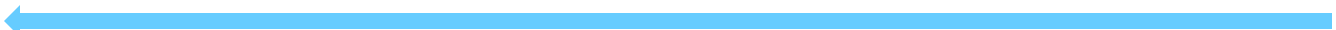
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