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 Company Reports, and National Bureau of Statistics of China etc.
Abstract

China is the world's largest producer and consumer of machine tools, contributing 29.4% of the global output value and 45.1% of the global consumption of machine tools in 2012.

Since H2 2011, affected by the severe domestic and international situation, the 10-year explosive development of China machine tool industry ended while the adjustment stage commenced. The growth rate of output value and sales value of China machine tool industry dropped by 19.8 and 19.3 percentage points respectively in 2012, and only reached 6.0% and 5.5% in 2013.

In China machine tool industry, CNC machine tools see the fastest growth. In 2012, the CNC rate of metal cutting machine tools and CNC forming machine tools hit 25.8% and 5.8% separately; their CNC rates are expected to be 29.2% and 6.8% respectively in 2013, and will reach 37.0% and 7.6% separately by 2015.

The report focuses on the following aspects:

※ Machine tool production and sales, import and export, business development patterns in China and foreign countries;

※ Production and marketing, import and export of metal cutting machine tools, metal forming machine tools and CNC machine tools;

※ Eight global leading machine tool giants (including Yamazaki Mazak, Trumpf, Amada, Gildemeister, Mori Seiki) and their development in China;

※ Operation, competitive advantages and development strategies of 23 key domestic enterprises (embracing SMTCL, DMTG, Shaanxi Qinchuan Machinery Development, HNC, BYJC).

Currently, the world's top 10 machine tool manufacturers have entered China, and they conduct investment and construction herein stably though Chinese machine tool market has slowed down in the recent two years.

Yamazaki Mazak: Yamazaki Mazak has two plants in China, namely Little Giant Machine Tool specializing in the production of medium and high-end CNC machine tools and Yamazaki Mazak (Liaoning) engaged in the production of high-end general CNC machine tools. In July 2013, Little Giant Machine Tool put “Phase III Expansion and Seventh Equipment Project” with the investment of RMB173 million into operation.
**Trumpf:** Trumpf has stepped up the exploration in Chinese mid-end machine tool market. In October 2013, it reached an agreement with Jiangsu Jinfangyuan CNC Machine Tool Co., Ltd. to acquire 72% share of the latter.

**Gildemeister:** Gildemeister has strengthened the cooperation with Mori Seiki, and taken over the business in the U.S., India and Europe since 2009. On January 5, 2013, the Ministry of Commerce of China formally approved the merger of Gildemeister Technology Trading (Shanghai) Co., Ltd. and Shanghai Mori Seiki Machine Tool Co. Ltd., declaring their business combination in China.

Among nearly 5,000 machine tool enterprises with the annual sales revenue of over RMB20 million, SMTCL acts as the largest machine tool manufacturer in China and even in the world, followed by DMTG. In response to the mutations in the machine tool market in the past two years, Chinese machine tool enterprises have adopted a series of positive and effective measures, such as transformation and upgrading, overseas market exploration, development of new businesses.

**DMTG:** DMTG has accelerated the development of the CNC machine tool business. In May 2013, the company and HNC cooperated to develop high-end intelligent CNC system. At the same time, it focuses on medium and high-end smart machine tools, and successfully won order from Deutz (Dalian) Engine Co., Ltd for new-type flexible production lines, with the contract value of RMB500 million.

**BYJC:** BYJC transfers from heavy machine tools to medium and high-end machine tools. Heavy machine tools contribute more than 70% of BYJC’s revenue. In 2013, the company has changed the development direction in order to meet market demand. Additionally, BYJC’s medium-range series represented by gantry lathes, floor-type boring lathes, vertical lathes and horizontal lathes also develop towards the high-end direction.
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