



**Global and China Machine Tool Industry  
Report, 2013**

**Dec. 2013**

## 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.

### **1. Introduction to Machine Tool Industry**

- 1.1 Definition & Classification
- 1.2 Position in National Economy
- 1.3 Industry Chain

### **2. Status Quo of Global Machine Tool Industry**

- 2.1 Overview
- 2.2 Production and Marketing
  - 2.2.1 Production
  - 2.2.2 Consumption
- 2.3 Import and Export
  - 2.3.1 Import
  - 2.3.2 Export
  - 2.3.3 Trade Balance
- 2.4 Key Enterprises

### **3. Development Environment of China Machine Tool Industry**

- 3.1 Macroeconomy
- 3.2 Policy

### **4. Status Quo of China Machine Tool Industry**

- 4.1 Overview
- 4.2 Production and Marketing
- 4.3 Import and Export
  - 4.3.1 Export
  - 4.3.2 Import
- 4.4 Competition Pattern

- 4.4.1 Corporate Competition Pattern
- 4.4.2 Regional Competition Pattern

### **5. Status Quo of Major Chinese Machine Tool Market Segments**

- 5.1 Overview
- 5.2 Metal Cutting Machine Tool
  - 5.2.1 Production and Marketing
  - 5.2.2 Import and Export
  - 5.2.3 Major Products
  - 5.2.4 Key Enterprises
- 5.3 Metal Forming Machine Tool
  - 5.3.1 Production
  - 5.3.2 Import and Export
- 5.4 CNC Machine Tool
  - 5.4.1 Overview
  - 5.4.2 Production
  - 5.4.3 Import and Export
  - 5.4.4 Key Enterprises

### **6. Key Global Machine Tool Enterprises**

- 6.1 Yamazaki Mazak
  - 6.1.1 Profile
  - 6.1.2 Operation
  - 6.1.3 Development in China
- 6.2 Trumpf
  - 6.2.1 Profile
  - 6.2.2 Operation

- 6.2.3 Development in China

### **6.3 Amada**

- 6.3.1 Profile
- 6.3.2 Operation
- 6.3.3 Development in China

### **6.4 Komatsu**

- 6.4.1 Profile
- 6.4.2 Operation
- 6.4.3 Development in China

### **6.5 DMG MORI SEIKI AKTIENGESELLSCHAFT**

- 6.5.1 Profile
- 6.5.2 Operation
- 6.5.3 Development in China

### **6.6 Jtekt**

- 6.6.1 Profile
- 6.6.2 Operation
- 6.6.3 Development in China

### **6.7 DMG MORI SEIKI**

- 6.7.1 Profile
- 6.6.1 Profile
- 6.6.2 Operation
- 6.6.3 Development in China
- 6.7 DMG MORI SEIKI
- 6.7.1 Profile

### **7. Key Chinese Machine Tool Enterprises**

- 7.1 Shenyang Machine Tool Co., Ltd. (SMTCL)
  - 7.1.1 Profile

7.1.2 Operation

7.1.3 Revenue Structure

7.1.4 Gross Margin

7.1.5 Development Strategy

7.2 Shenji Group Kunming Machine Tool Co., Ltd.

7.2.1 Profile

7.2.2 Operation

7.2.3 Revenue Structure

7.2.4 Gross Margin

7.2.5 Development Strategy

7.3 Shaanxi Qinchuan Machinery Development Co., Ltd.

7.3.1 Profile

7.3.2 Operation

7.3.3 Revenue Structure

7.3.4 Gross Margin

7.3.5 Development Strategy

7.4 Jiangsu Yawei Machine Tool Co., Ltd.

7.4.1 Profile

7.4.2 Operation

7.4.3 Revenue Structure

7.4.4 Gross Margin

7.4.5 Development Strategy

7.5 Wuhan Huazhong Numerical Control System, Inc. (HNC)

7.5.1 Profile

7.5.2 Operation

7.5.3 Revenue Structure

7.5.4 Gross Margin

7.5.5 Development Strategy

7.6 Qinghai Huading Industrial Co., Ltd.

7.6.1 Profile

7.6.2 Operation

7.6.3 Revenue Structure

7.6.4 Key Projects

7.7 Weihai Huadong Automation Co., Ltd. (HDCNC)

7.7.1 Profile

7.7.2 Operation

7.7.3 Revenue Structure

7.7.4 Gross Margin

7.7.5 Competitive Edge

7.8 Shandong Fin CNC Machine Co., Ltd.

7.8.1 Profile

7.8.2 Operation

7.8.3 Revenue Structure

7.8.4 Gross Margin

7.8.5 Competitive Edge

7.9 Tontec Technology Investment Group Co., Ltd.

7.9.1 Profile

7.9.2 Operation

7.9.3 Revenue Structure

7.9.4 Gross Margin

7.9.5 Competitive Edge

7.10 Non-listed Companies

## 8. Status Quo of China Machine Tool Remanufacturing Industry

8.1 Overview

8.2 Main Policies

8.3 Status Quo

8.4 Key Enterprises

8.4.1 Wuhan Huazhong Automatic Control Co., Ltd.

8.4.2 Wuhan Heavy Duty Machine Tool Group Corporation

8.4.3 Chongqing Machine Tool Group Co., Ltd.

8.5 Development Prospect

## 9. Summary and Forecast

9.1 Market

9.2 Products

9.3 Enterprises

9.3.1 Overseas Enterprises

9.3.2 Domestic Enterprises

- Classification of Machine Tools
- Demand of Major Industries for Machine Tools
- Machine Tool Industry Chain
- Main Indicators of Global Machine Tools (Metal Processing Machine Tools), 2009-2012
- Gross Output Value of Global Machine Tools, 2008-2013
- Output Value and Proportion of Global Machine Tools (by Country/Region), 2012
- Share of China, Japan and Germany in the Global Machine Tool Market, 2002-2012
- Output Value of Global Machine Tools by Continent, 2012
- Consumption of Global Machine Tools, 2009-2013
- Consumption and YoY Growth Rate of Global Machine Tools (by Country/Region), 2012
- Per Capita Machine Tool Consumption of 20 Countries/Regions in the World, 2012
- Import Value and YoY Growth Rate of Global Machine Tools (by Country/Region), 2012
- Export Value and YoY Growth Rate of Global Machine Tools (by Country/Region), 2012
- Machine Tool Trade Balance of 28 Countries/Regions in the World, 2011-2012
- TOP 10 Machine Tools Enterprise in the World by Output Value, 2011
- Growth Rate of GDP in China, 2011-2013
- Main Policies of China Machine Tool Industry, 2011-2013
- Share of China in the Global Machine Tool Market by Main Indicator, 2012
- Main Indicators of China Machine Tool Industry, 2012-2013
- Main Indicators of China Metal Cutting Machine Tool Industry, 2010-2013
- Main Indicators of China Metal Forming Machine Tool Industry, 2010-2013
- Import and Export Value of China Machine Tool Industry, 2009-2013
- Export Value and YOY Growth of China Machine Tool Industry by Product, 2012
- Export Value of Metal Processing Machine Tools in China, 2007-2013
- Top 10 Export Destinations of Chinese Metal Processing Machine Tools, 2012

- Import Value and YOY Growth of China Machine Tool Industry by Product, 2012
- Import Value of Metal Processing Machine Tools in China, 2007-2013
- Top 10 Import Sources of Metal Processing Machine Tools in China, 2012
- Output and Sales Volume of Metal Cutting Machine Tools in China, 2009-2013
- Top 5 Provinces/Cities by Output of Metal Cutting Machine Tools in China, 2011-2013
- Import and Export Value of Metal Cutting Machine Tools in China, 2007-2013
- Structure of Grinder Production Areas in China, 2012
- Output and YOY Growth of Metal Forming Machine Tools in China, 2008-2013
- Top 5 Provinces/Cities by Output of Metal Forming Machine Tools in China, 2011-2013
- Import and Export Value of China Metal Forming Machine Tool Industry, 2007-2013
- Output of CNC Machine Tools (CNC Metal Processing Machine Tools) in China, 2008-2013
- CNC Rate by Output of Metal Cutting Machine Tools and Metal Forming Machine Tools in China, 2008-2013
- TOP 10 Provinces/Cities by Output of CNC Metal Cutting Machine Tools and Their CNC Rates in China, 2012
- TOP 10 Provinces/Cities by Output of CNC Metal Forming Machine Tools and Their CNC Rates in China, 2012
- Import and Export Value of CNC Machine Tools (CNC Metal Processing Machine Tools) in China, 2010-2013
- Import and Export Value of CNC Metal Cutting Machine Tools in China by Product, 2010-2011
- Global Distribution of Machine Tools Production Bases of Yamazaki Mazak, 2012
- Enterprises of Yamazaki Mazak in China, 2012
- Sales of TRUMPF, FY2009-FY2013
- Order Value of TRUMPF, FY2009-FY2013
- Sales and YOY Growth of TRUMPF by Product, FY2012
- Enterprises of TRUMPF in China, 2012
- Sales and Net Income of AMADA, FY2009-FY2013
- Sales of AMADA by Product, FY2009-FY2012
- Sales of AMADA by Region, FY2008-FY2012



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- Enterprises of AMADA in China, 2012
  - Sales of Amada in China, 2009-2014E
  - Net Sales and Net Income of KOMATSU, FY2009-FY2013
  - Net Sales of KOMATSU by Business, FY2010-FY2012
  - Cooperation between GILDEMEISTER and Mori Seiki
  - Order Value and Sales of DMG MORI SEIKI AKTIENGESELLSCHAFT, 2007-2013
  - Sales of DMG MORI SEIKI AKTIENGESELLSCHAFT by Business, 2006-2012
  - Order Value of DMG MORI SEIKI AKTIENGESELLSCHAFT by Business, 2006-2012
  - Net Sales and Net Income of Jtekt, FY2008-FY2012
  - Net Sales of Jtekt by Business, FY2012
  - Net Sales of Jtekt by Region, FY2012
  - Enterprises of Jtekt in China
  - Net Sales and Net Income of DMG MORI SEIKI, FY2008-FY2013
  - Sales of DMG MORI SEIKI by Region, FY2012
  - New Order Value of Okuma, FY2008-FY2013
  - Sales and Net Income of Okuma, FY2008-FY2012
  - Order Value and Sales of Okuma by Region, FY2008-FY2012
  - Sales of Okuma by Product, FY2008-FY2012
  - Sales Network of Okuma in China
  - Revenue and Net Income of SMTCL, 2008-2013
  - Operating Revenue of SMTCL by Product, 2009-2013
  - Operating Revenue of SMTCL by Region, 2010-2013
  - Gross Margin of SMTCL, 2008-2013
  - Gross Margin of SMTCL by Product, 2010-2013
  - Revenue and Net Income of Kunming Machine Tool, 2008-2013

- Order Value and CNC Rate of Kunming Machine Tool, 2007-2013
- Operating Revenue of Kunming Machine Tool by Product, 2010-2013
- Gross Margin of Kunming Machine Tool, 2008-2013
- Revenue and Net Income of Qinchuan Machinery Development, 2008-2013
- Operating Revenue of Qinchuan Machinery Development by Business, 2010-2013
- Operating Revenue of Qinchuan Machinery Development by Region, 2010-2013
- Gross Margin of Qinchuan Machinery Development by Business, 2012-2013
- Revenue and Net Income of Yawei Machine Tool, 2009-2013
- Operating Revenue of Yawei Machine Tool by Region, 2008-2013
- Gross Margin of Yawei Machine Tool, 2008-2013
- Revenue and Net Income of HNC, 2008-2013
- Operating Revenue of HNC by Product, 2009-2013
- Operating Revenue of HNC by Region, 2010-2013
- Gross Margin of HNC, 2008-2013
- Gross Margin of HNC by Product, 2009-2013
- Revenue and Net Income of Qinghai Huading, 2008-2013
- Operating Revenue of Qinghai Huading by Business, 2011-2013
- Operating Revenue of Qinghai Huading by Region, 2011-2013
- Revenue and Net Income of HDCNC, 2008-2013
- Operating Revenue of HDCNC by Product, 2011-2013
- Operating Revenue of HDCNC by Region, 2011-2013
- Gross Margin of HDCNC, 2008-2013
- Gross Margin of HDCNC by Product, 2011-2013
- Revenue and Net Income of Fin CNC, 2009-2013
- Operating Revenue of Fin CNC by Business, 2011-2013

- Operating Revenue of Fin CNC by Region, 2010-2013
- Gross Margin of Fin CNC by Business, 2011-2013
- Competitive Edge of Fin CNC by Product
- Revenue and Net Income of Tontec Technology, 2009-2013
- Operating Revenue of Tontec Technology by Product, 2011-2013
- Operating Revenue of Tontec Technology by Region, 2011-2013
- Gross Margin of Tontec Technology, 2010-2013
- Production Modes and Subsidiaries of DMTG
- Main Operating Indicators of DMTG, 2010-2013
- Main Operating Indicators of Qiqihar Heavy CNC Equipment, 2010-2013
- Sales Revenue of Spark Machine Tool, 2004-2013
- Sales Revenue of Yunnan CY Group, 2008-2013
- Revenue of Hanland Machine Tool, 2004-2010
- Machine Tools included in Remanufacturing Products Catalog (Third Batch)
- Types of Chinese Machine Tool Remanufacturing Enterprises
- Sales Output Value and Growth Rate of Machine Tools in China, 2012-2015E
- Output and CNC Rate of CNC Machine Tools in China, 2012-2015E
- Sales and YOY Growth of Main Machine Tool Manufacturers in the World, (FY)2012
- Revenue and YOY Growth of Listed Machine Tool Companies in China, 2012
- Net Income and YOY Growth of Listed Machine Tool Companies in China, 2012

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