



**Global and China Bi-Metal Band Saw Blade
Industry Report, 2014-2017**

Sept. 2014

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

The sales volume of bi-metal band saw blade continued to slide in China, totaling 49.45 million meters throughout the year 2013, down 2.5% year on year, largely due to international financial crisis, a drop in domestic Manufacturing Sentiment Index and a decline in the output of supporting sawing machine. Despite falling sales volume, the scope of decline narrowed, compared with year-on-year contraction of 5.2% in 2012.

As far as competitive landscape of the market is concerned, local Chinese bi-metal band saw blade companies have been expanding their capacities and making more investments in the R&D of new materials, new technologies and new products, thus continuously improving market shares of local brands, from around 20% in 1999 to 60% or so in 2013. The specific measures are as follows:

Capacity expansion: Bichamp Cutting Technology, a key manufacturer in China, raised its bi-metal band saw blade capacity from 5 million meters in 2009 to 11.72 million meters in 2013; Benxi Tool Limited Liability Corporation boosted its bi-metal band saw blade capacity from 6.30 million meters in 2010 to 15 million meters in 2013;



R&D Expenses: Bichamp Cutting Technology lavished ever more capital on R&D during 2009-2013, from RMB3.38 million to RMB 11.54 million, or from 1.97% to 4.21% of the company's total revenue. In the first half of 2014, the company introduced the brand LEAPCUT, which is targeted at middle and low-end market.

While local brands are grabbing more market share, foreign players that focus on high-end products are also endeavoring to expand their presence in China. Take Japanese Amada for example. The company opened its Shanghai facility in Qingpu District of the city in May 2013; Amada Technical Center (China) opened in Shanghai in July 2013. The revenue of the company in China topped JPY 20 billion in 2012, and is expected to hit JPY 50 billion in 2014.

The Japanese Amada can provide all-round saw cutting services. In the first quarter of FY2014, the company earned revenue of JPY 51.4 billion, a jump of 13.8% from a year earlier, JPY 6.9 billion of which came from band saw business, up 14% from the year before and accounting for 13.4% of the company's total revenue.

It can be seen from development trend of the industry that the Chinese bi-metal band saw blade market is expected to recover during 2014-2015, for: 1) The demand for high speed steel, a main raw material for bi-metal band saw blade, started to pick up in the first half of 2014. Tiangong International, one of industry leaders, posted revenue of RMB 608 million from domestic high speed steel business, soaring by 231% year on year, which means that some downstream cutting tool manufacturers have resumed purchasing; 2) With gradual recovery of export markets and rapid development of emerging industries like automobile, aerospace, aviation, military industry and IT, sawing machine output in China is expected to emerge from negative growth and realize stable expansion in 2015.

Global and China Bi-metal Band Saw Blade Industry Report, 2014-2017 by ResearchInChina focuses on the following:

- ➔ High-speed steel, an upstream raw material of bi-metal band saw blade, and top 3 companies;
- ➔ Operation, output, import and export volume, development trend of sawing machine industry, a supporting sector of bi-metal band saw blade, and 7 key companies;
- ➔ Development and competitive landscape of global bi-metal band saw blade market;
- ➔ Policy climate, sales volume and competitive landscape of China bi-metal band saw blade industry;
8 global and 6 Chinese bi-metal band saw blade companies;
- ➔ Market summary and industry forecast for the period 2014-2017.

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