



**Global and China Machine Tool
Report, 2014-2016**

Jan. 2015

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

Affected by the factors such as the slowdown in macro-economic growth, the decelerated growth of fixed-assets investment, and rapid capacity expansion of downstream sectors in the early stage, China's machine tool industry has showed a significant decline since 2011. In 2012-2013, the output of metal working machine tools in China dropped by respectively 7.0% and 6.1%. This is particularly true of metal cutting machine tools, whose output fell by 7.3% and 8.9%, respectively.

In the past two years, the weakened demand from the domestic market has led to a decline in imports, with the import volume of metal working machine tools in 2013 falling by 31.4% from a year ago, the first double-digit decline in China's machine tool imports for the past decade except the 2009 financial crisis.

Meanwhile, the import structure of China's machine tool products also changed significantly. The demand for high-precision, high-speed, highly efficient, and intelligent medium and high-end CNC machine tools has increased remarkably. In 2013, this kind of machine tool was largely imported by machining centers (horizontal-type, vertical-type, and gantry-type), with the full-year import value amounting to USD3.38 billion. That was followed by laser process machines and CNC horizontal lathes, etc.

Revenue and Development Strategy of Major Manufacturers in China, 2014

	Revenue (RMB mln)	Development Strategy
	18,200 16,813	The company focused on development of medium and high-end CNC machine tools, and it established a CNC machine tool manufacturing company in Russia in 2014.
	7,550 7,379	The company achieved a transition from a traditional manufacturer to a modern industrial service provider; it had set up 34 4S dealership stores as of the end of June 2014, and this figure is expected to reach 70.
	3,600 1,285	The company competed overall listing in 2014, and it will specialize in construction of manufacturing process equipment chain.
	1,500 1,600	As a leader in large-sized CNC horizontal lathe, the company planned to attract the equity investment from Aviation Industry Corporation of China in an attempt to improve its results.
	650 500	The company developed high-end intelligent numerical control system in cooperation with DMTG, and it aggressively expanded industrial robot and manipulator business.
	945 851	While consolidating the market position of metal forming machine tool, the company cooperated with REIS in June 2014 to manufacture industrial robot.
	1,100 1,063	By cooperating with SCHIESS, the company improved the R&D capacity of large-sized high-end machine tools.
	405 247	The company vigorously developed high-end aviation machine tools. In March 2014, the company founded Zhejiang Rifa Aviation Digital Equipment Company, Ltd., and it acquired in July a 80% stake in MCM, a Italian company.

Source: Global and China Machine Tool Industry Report, 2014-2016 by ResearchInChina

In the first half of 2014, China's machine tool industry continued to present low growth, but the output rose considerably and the exports turned from negative to positive. It is predicted that machine tool industry for the whole year will return to 2011 levels.

Amid sluggish recovery of the global economy and downturn of China's machine tool market, many foreign companies are stepping up the layout in China. In 2013, Yamazaki Mazak's new plant in Dalian was completed and put into production; DMG MORI SEIKI's plant in Tianjin was opened; the German company Trumpf acquired a 72% interest in Jiangsu Jinfangyuan CNC Machine Co., Ltd. In 2014, ROTTLER worked with Shandong Yonghua Machinery Co. Ltd. to jointly build precision machine tools under the brand name of ROTTLER?YONGHUA in an attempt to develop China's high-end machine tool market, such as aerospace, shipbuilding, automobiles, and rail transit.

On the other hand, the domestic machine tool enterprises have accomplished transformation and upgrading by adjusting product structure, extending industrial chain, expanding overseas market, and innovating technologies. In 2014, DMTG, together with a third party, established a CNC machine tool company in Russia; SMTCL independently developed i5 numerical control system and achieved mass production; Qinchuan Machine Tool Group completed overall listing; Spark Machine Tool proposed to bring in AVIC's equity investment.

Global and China Machine Tool Industry Report, 2014-2016 compiled by ResearchInChina mainly focuses on the following:

- ⇒ Production and marketing, import and export, and corporate landscape of machine tools worldwide;
- ⇒ Policies, operation, import & export, and competition of machine tool industry in China;
- ⇒ Production, sales, import & export, and key enterprises of metal cutting machine tool, metal forming machine tool, and CNC machine tool industries in China;
- ⇒ Operation of 8 global key enterprises and their business in China, etc.;
- ⇒ Operation, revenue structure, development strategy, etc. of 18 key enterprises in China.

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- 1.2 Status in National Economy
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