



Global and China Rubber Machinery Industry Report, 2015-2018

Sep. 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

Rubber machinery is used to produce various rubber products like tyre, and it is principally composed of internal mixer, rolling extrusion machine, cutting machine, shaping mill, vulcanizing machine, mould, testing equipment, among others. The demand for rubber machinery is closely related to the investments in the downstream tyre industry.

The high-speed growth rate of Chinese rubber machinery industry in 2013 lasted till the first half year of 2014, during when the orders expanded and production and sales boomed. Then in July 2014, the United States staged anti-dumping and anti-subsidy investigations on China-made tyres used for passenger cars and light trucks, and Chinese tyre enterprises were forced to stop or reduce investments in tyre business, and even some tyre enterprises postponed or cancelled rubber machinery orders. At length, the revenue of Chinese rubber machinery industry in full year of 2014 just rose 4.6% YoY to RMB13.6 billion, with a global market share of 42.6%.

In future, as the growth rate of China's new vehicle sales volume slows down, the demand for original tyres will see a drop in growth rate, while the huge ownership of automobiles will boosted the demand for replacement tyres.

At the same time, such trends in tyre industry as informatization, automation, intelligentization, greening, and high-end (less noise, low rolling resistance, low thermogenesis, run-on-flat, all-weather and tyre pressure self-control, as well as applications of new nano materials and framework materials) will stimulate the demand for the high-end safe and green tyres with high added value, thus further driving capital inrush into high-end tyre. In the future, the demand for the high-end rubber machinery in line with the development tendencies of tyre industry such as energy saving, environmental friendliness, automation, informatization and high intelligence will show rapid growth.

Meanwhile, robots are increasingly utilized in tyre production, logistic automation, etc. In 2010, Mesnac Co., Ltd acquired Qingdao Kingrobot Automation Co., Ltd and set foot in the robot field. In 2014, Mesnac's robot and information logistic business revenue surged by 129.7% YoY to RMB193.75 million, a 6.8% share of total revenue. Greatoo Inc. also endeavored to involve in robot business, and in December 2014 the first industrial robot automation line customized by Greatoo for Hangzhou Zhongce Rubber Co., Ltd was officially put into operation. From 2013 to 2015H1, the robot business revenue of Greatoo reported RMB450,000, RMB6.22 million and RMB25.29 million, respectively.

The report highlights the followings:

- Overview of rubber machinery industry, including definition, policies, industrial chain, business model, etc.;
- Global rubber machinery and downstream markets, covering market size, regional markets, competitive landscape, tyre industry operation, etc.;
- Chinese rubber machinery market, including status quo, market size, competition pattern, exports, downstream sectors, etc.;
- Rubber machinery market segments consisting of internal mixer, radial tyre building machine, and vulcanizing machine, involving industry overview, market status quo, market demand, etc.;
- Analysis on 8 global and 18 Chinese rubber machinery companies, including profile, business performance, revenue structure, gross margin, R&D expenses, top five customers, rubber machinery business, development strategies and so forth.

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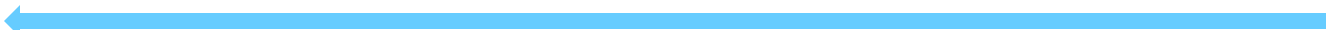
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