



Global and China Bi-Metal Band Saw Blade Industry Report, 2015-2018

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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

Since the year 2012, due to the aftermath of the global financial crisis and the sub-prime crisis, the prosperity index of manufacturing in China has continued to decline, and the machine tool industry has operated under pressure on the whole. In 2014, China's output of sawing machine fell for three consecutive years to about 50,480 sets, and the sales volume of corresponding bi-metal band saw blade approximated 48.708 million meters, edging down 1.5% from 2013.

Compared with sluggish domestic demand, China's bi-metal band saw blade exports continue to expand, largely thanks to better quality of products and improvement in competitiveness of local companies. The country's export value of bi-metal band saw blade was USD16.714 million in 2014 and USD8.061 million in the first half of 2015, representing a year-on-year surge of 51.34% and 16.22%, respectively.

Top 3 importers of Chinese bi-metal band saw blade are U.S., Italy, and India, which together imported about USD2.8906 million worth of bi-metal band saw blade from China in the first seven months of 2015, making up 35.86% of China's total export value of such product.

Top10 Export Destinations of Bi-metal Band Saw Blade from China, Jan-Jul 2015

| <i>Ranking</i> | <i>Export Destination</i> | <i>Export Value (USD)</i> |
|----------------|--|---------------------------|
| 1 | U.S. | 1,164,146 |
| 2 | Italy | 995,884 |
| 3 | India | 730,539 |
| 4 | Poland | 693,768 |
| 5 | South Africa | 472,375 |
| 6 | Russia | 411,979 |
| 7 | Separate Customs Territory of Taiwan, Penghu, Kinmen and Matsu | 402,951 |
| 8 | Singapore | 382,997 |
| 9 | Indonesia | 375,110 |
| 10 | South Korea | 275,450 |

Source: China Customs; ResearchInChina

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From the perspective of competitive landscape of the Chinese bi-metal band saw blade, in 2014, local brands, focusing on middle and low-end products, took more than 60% of the market with representative companies being Bichamp Cutting Technology and Benxi Tool; foreign brands aim at high-end products market, and representative players include U.S. LENOX, Japanese Amada, and Swedish Bahco, with the latter two having established factories separately in Lianyungang (Jiangsu) and Kunshan to manufacture bi-metal band saw blade. Among local brands, Benxi Tool has the largest production capacity, manufacturing 15 million meters of bi-metal band saw blade annually.

The company's brands are primarily middle and low-end ones, including LIONS, FORK, SHARE, and ROMANCE. The second largest company in terms of capacity is Bichamp Cutting Technology, which produces 11.72 million meters of bi-metal band saw blade annually and has its products in full range of brands.

In terms of comprehensive strength, Bichamp Cutting Technology enjoys obvious superiority over other local brands. The company reported revenue of RMB277 million and net income of RMB53.81 million in 2013, up 11.08% and 7.86% over the previous year respectively. The revenue for 2014 was RMB350 million, rising by roughly 26.25% year on year.

Among foreign brands, American DoALL and Japanese Amada are the two companies capable of providing full sawing services. Amada has four bi-metal band saw blade manufacturing bases around the world, separately located in Japan (one), Austria (one), and Lianyungang, China (two). In the first quarter of FY2015, the Amada Group made revenue of JPY7.571 billion from Bandsaws Division, 8.4% higher than that in the same period of FY2014, accounting for 13.3% of its total revenue.

Global and China Bi-metal Band Saw Blade Industry Report, 2015-2018 focuses on the followings:

- High-speed steel, an upstream raw material of bi-metal band saw blade, and top3 companies;
- Operation, output, import & export volume, development trends of sawing machine industry, a sector served by 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, import & export volume, and competitive landscape of bi-metal band saw blade industry in China;
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