Global and China CNC Machine Tool 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

In 2014, the global CNC machine tool output value approximated USD48.1 billion, with the CNC level standing at about 60%. Particularly, the developed countries such as Japan, the United States, Germany, and South Korea enjoyed relatively higher CNC level, at roughly 85%. In future, with improvements in CNC level of developing countries, the global CNC machine tool output value will continue to rise steadily.

In 2014, the CNC machine tool output in China came to around 308,000 sets, up 26.7% from a year earlier. In 2015, due to a combination of factors including economic downturn, weak downstream demand as well as a decline in output of economical-type CNC machine tools, CNC machine tool output is estimated to drop to 270,000 sets.

In recent years, Chinese CNC machine tool market characterizes the followings:
First, higher market concentration. The top 5 CNC machine tool manufacturers accounted for a combined market share of 50% or so. Among them, Shenyang Machine Tool Co. and Dalian Machine Tool Group made up an aggregate of over 50% in CNC lathes and machining centers.

Second, lower CNC level. At present, China's CNC machine tools occupied about 30%, which indicates still a big gap with such developed countries as Japan, the United States, and Germany. According to Made in China 2025 released in 2015, high-end CNC machine tools are catalogued as the key development area. With policy incentive, the CNC level of machine tools is expected to rise to around 40% in 2018 and to 60% in 2025.

Third, lack of competitiveness in core components. CNC system, servo motors, and motor spindles are the main functional components, and the production technologies are in the hands of a few Japanese, American and European companies. Although China has made great progress in R&D of medium- and high-grade CNC system (successful development of multichannel and multi-axes linkage movement and other high-performance CNC system products) in recent years, the market share was very low, with over 60% of China's CNC system market dominated by Siemens and Fanuc in 2014.

Fourth, high import dependence. more than 80% of high-end CNC machine tools and over 90% of high-end core components in China need to be imported from Japan, the United States, and Germany. Among them, vertical machining center imports account for the largest share, at around 50% of total CNC machine tool imports.

Fifth, uneven regional distribution. The production of the two major products -- CNC lathe and machining center converges in Northeast China and East China; CNC grinders and functional components (ball screw and linear guide rail, etc.) are manufactured mainly in the Yangtze River Delta Region; more than 90% of CNC metal forming machine tools come from Central China and East China. And CNC machine tool industry in Central China and South China is relatively weak, with the output share less than 5%.

Sixth, intelligentized development. According to the development plan of Made in China 2025, the State will focus on supporting high efficient and intelligentized development of equipment.

To this end, the enterprises including Dalian Machine Tool Group and Shenyang Machine Tool Co. have begun to shift their focuses to the development of intelligentized products.

Development Strategy of China Major CNC Machine Manufacturers, 2016

Manufactures	Market Share of 2015	Development Strategy
SMTCL		A transformation from an industrial manufacturer to an comprehensive intelligent manufacturing; actively engaged in research and development of intelligent CNC system and machine tools;
DMTG		Focusing on R&D of intelligent CNC machine tools applied in 3C, military industry, automobiles, and environmental industry, among others; Making global layout through the means like construction and M&A;
JIER		Placing emphasis on the layout of high-end CNC machine tools applied in automobile manufacturing;
QCMT&T		Dedicated to the construction of high-end CNC machine tool industry chain; Entering the robot reducer industry;
BYJC		Focusing on medium and heavy-duty mid and high-end CNC machine tools;

Source: Global and China CNC Machine Tool Industry Report, 2015-2018 by ResearchInChina

Global and China CNC Machine Tool Industry Report, 2015-2018 by ResearchInChina mainly deals with the following:

- Market Size, supply and demand, and import and export of CNC machine tools in major countries；
- Development environment, supply and demand, import and export, competitive landscape of CNC machine tools in China;
- China’s main CNC machine tool product segments and status quo of upstream and downstream sectors;
- Operation and CNC machine tool business of 12 foreign and 19 Chinese CNC machine tool manufacturers.

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