

**Global and China Machine Tool Report,
2016-2020**

Apr. 2016

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 factors such as economic downturn at home and abroad, weak market demand and the amounting pressure of industrial transformation and upgrading, the machine tool industry of China was on a downward path in 2015 when the operating revenue fell 9.2% from a year earlier and total profit plunged 43.5% year on year; specifically, the metal cutting machine tool has come down for four consecutive years, and the metal forming machine tool dropped sharply for the first time. It is expected that in 2016 China's machine tool industry would continue to decline but the drop range is anticipated to be narrowed.

Although it remains sluggish, the machine tool industry of China showed some new characteristics in 2015 as the industrial restructuring paces up. First, the structure of demand accelerates to be upgraded, with common machine tools seeing a significant decline but high-end products like machining center rising; then, the export market showed negative growth as a whole, but special processing machine tool and others still kept growth; next, the support capability of functional components and so on was improved, and breakthroughs were made in the CNC system.

Facing harsh reality of the industry, Chinese enterprises are seeking strategic breakthroughs by means like innovation of products, extension of industrial chain as well as cooperation between enterprises.

Dalian Machine Tools Group (DMTG): As the vanguard in Chinese machine tool industry, DMTG's output of metal cutting machine tools reached 38,000 units and gained the revenue of more than RMB160 million in 2015, both ranking first within the industry. In April 2016, the East China Base project of DMTG was settled in the Economic Development Zone, Zhangjiagang city, with the project investment up to RMB4.5 billion; of all, the first-stage investment is about RMB1.5 billion mainly for constructing a machine tool manufacturing base, a remanufacturing base and an incubation base.

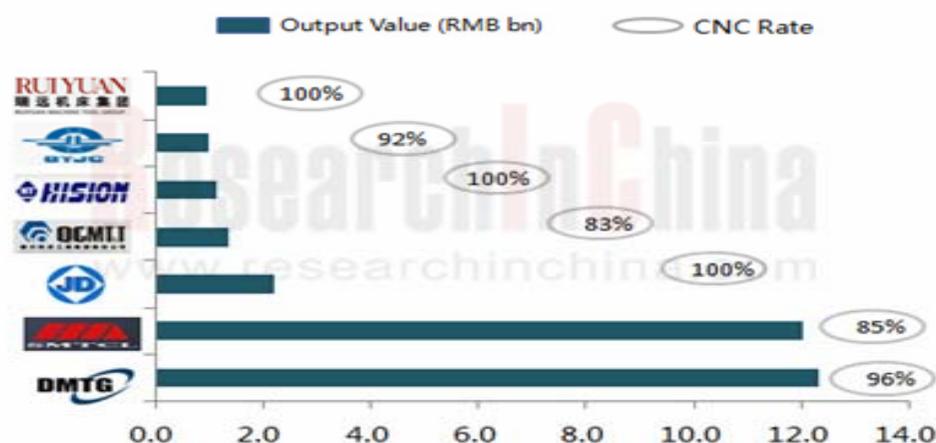
Shenyang Machine Tool Co., Ltd. (SMTCL): As a pioneer in Chinese machine tool industry, SMTCL launched the world's first model of intelligent motion control technology i5 in 2014 on basis of which the i5 series intelligent machine tools were manufactured. The orders for i5 series hit 4,800 sets or more in 2015. Then in April 2016, SMTCL raised funds of at most RMB3 billion for the intelligent machine tool industrialization and upgrading project as well as the R&D and layout of the marketing network upgrading project.

Qinchuan Machine Tool & Tool (Group) Corp (QCMT&T): Being listed in 2014, QCMT&T is now deploying "three one-thirds" business segments including host machine, functional parts, and modern manufacturing services.

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Wuhan Huazhong Numerical Control Co., Ltd. (HNC): As the representative company in CNC system in China, HNC has actively carried out “one core, two segments” strategy, i.e., to build the core of numerical control system technologies, and two segments – machine tool CNC system and industrial robot. In May 2015, HNC joined hands with Foshan Municipal Nanhai District Lianhua Asset Operation & Management Co., Ltd to set up a joint venture named Foshan Huashu Robot Co., Ltd (temporary). In December 2015, the Dongguan-based Startup Incubation Base built by HNC with DMTG was put into operation officially.

Metal-cutting Machine Tool Output Value and CNC Rate of Major Machine Tool Manufacturers in China, 2015



Global and China Machine Tool Industry Report, 2016-2020 highlights the followings:

- Production and sale, import & export of machine tool and competitive pattern of enterprises worldwide;
- Policies on and operation, import & export and competition of Chinese machine tool industry;
- Production and sale, import & export and key manufacturers of metal cutting machine tool, metal forming machine tool and CNC machine tool in China;
- Operation and business in China of eight world renown companies;
- Operation, revenue structure, development strategies and so forth of 18 Chinese players.

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