



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

**Sep. 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

As a key role in manufacturing, CNC machine tools have been emphasized by developed countries. China's CNC machine tools occupied about 30% in 2015, which indicates a big gap with developed countries such as Japan, the United States, and Germany whose CNC rates go beyond 70% each now, especially Japan achieves over 90%.

Affected by the Chinese economic slowdown as well as the restructuring of downstream industries including automotive, aerospace and rail transit, China's CNC machine tool output plunged by 13.1% year on year in 2015 and is expected to continue the downward trend with slower decline in 2016.

Nevertheless, China's CNC machine tool industry has seen a number of highlights since 2015. First, the fast-growing demand from mobile phone metal housing processing stimulates a surge in the demand for 3C-use CNC machine tools. Second, China achieves a breakthrough in aerospace-use five-axis linkage CNC machine tools, and even exports such products overseas. Third, Made in China 2025 catalogues high-end CNC machine tools as one of ten key strategic areas, and Industry 4.0 further boosts the development of the industry.

With the above incentives, Chinese CNC machine tools, especially high-end and intelligent ones, will usher in rapid development in future.

CNC systems are the key components of CNC machine tools. Currently, Chinese enterprises represented by Wuhan Huazhong Numerical Control, GSK, Shenyang Machine Tool, Dalian GONA and the like can produce economical and mid-range CNC systems, but they lose out in the high-end CNC system market to Fanuc, Siemens, Mitsubishi, DMG and other foreign counterparts. According to the plan, the localization rate of Chinese mid-range and high-end CNC systems will exceed 60% and 20% respectively by 2020.

At present, China's CNC machine tool industry has entered a critical period of transformation and upgrading, with the unsolved problems including excess capacity of medium and low-end CNC machine tools, long-term dependence on imports of high-end CNC machine tools and foreign monopoly on CNC systems and key components. In 2016, both host machines and parts manufacturers are actively seeking transformation and upgrading.

**Shenyang Machine Tool Co., Ltd.** enforced "i5" strategy in 2014 to build a new model of intelligent factory. In 2015, despite the traditional metalworking machine tool market downturn, over 5,000 i5 intelligent machine tools were ordered, of which over 3,000 ones were delivered actually. The company plans to build 30 smart factories, and strives to produce and sell 20,000 i5 intelligent machine tools in the country in 2016.

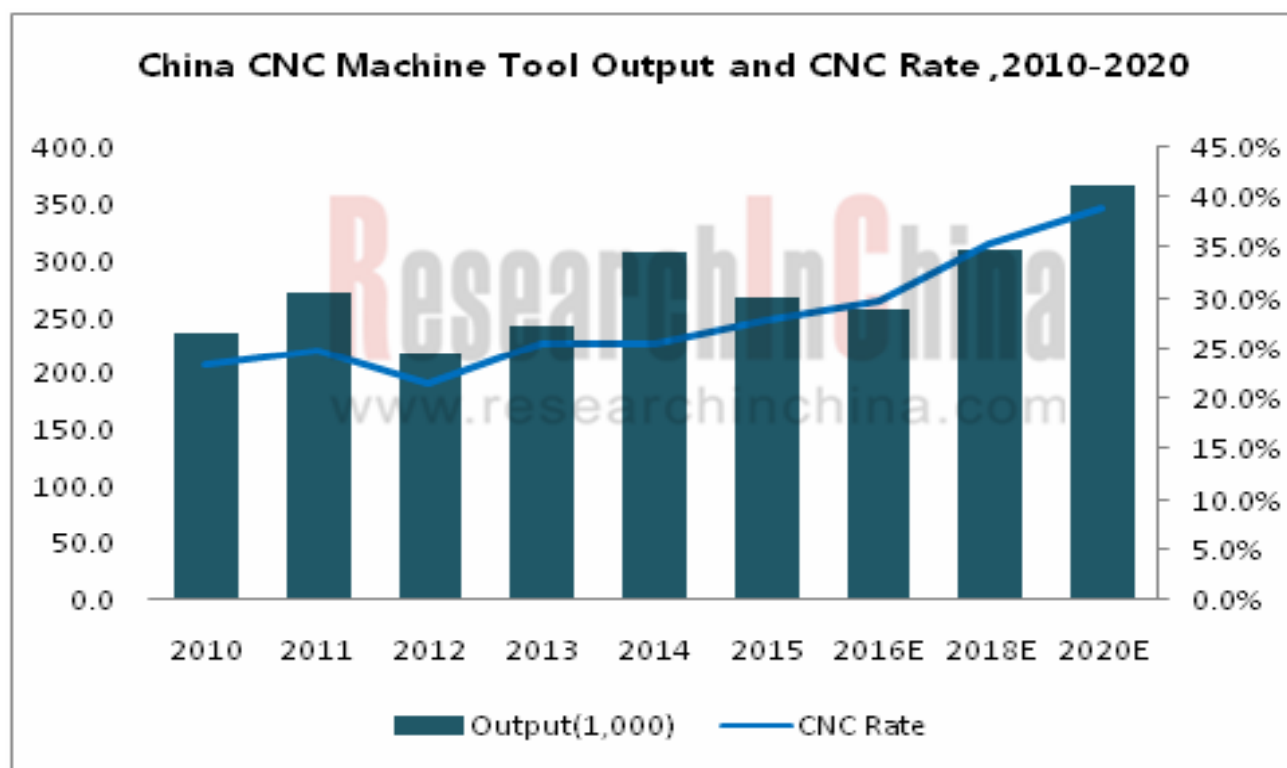
**Dalian Machine Tool Group Corporation** has enhanced the supply of high-precision efficient products and expanded Russia, Pakistan and other overseas markets radically in recent years. At the same time, it has erected incubators in Pearl River Delta and Yangtze River Delta, as well as overseas service centers in India, Russia, Mexico and other countries, in a bid to gradually improve global competitiveness. In the next five years (2016-2020), the company's goals will be global layout, intelligent products, diversified marketing, industry & academy combination and public management.

**Qinchuan Machine Tool & Tool Group Co., Ltd.** has proposed "three 1/3" strategic concepts (host machines, key components and modern manufacturing services) in recent years. In 2015, the company and Shanghai Bosch Rexroth Hydraulic & Automation Ltd. signed a strategic agreement on strengthening the cooperation in CNC systems, gear boxes and industrial robotics reducer.

**Wuhan Huazhong Numerical Control Co., Ltd** implements "one core and two subjects" strategy around Made in China 2025. The core is CNC system technologies, and the subjects refer to CNC machine tools and industrial robots. In 2015, the company acquired Jiangsu Jinming's expanding robots and system integration. In May 2016, the company invested RMB200 million in establishing Wuhan Intelligent Control Industrial Technology Institute Co., Ltd. with Wuhan Airport Economic Zone Construction Investment And Development Co., Ltd. jointly to intensify its supporting capacity in the field of new energy vehicles.

Global and China CNC Machine Tool Industry Report, 2016-2020 mainly deals with the following:

- ⇒ Market supply & demand, import & export, and competitive landscape of the global and China machine tool industry;
- ⇒ Global situation of CNC machine tools, and development of CNC machine tools in major countries;
- ⇒ Supply & demand, import & export, key enterprises and development trends of China machine tool industry;
- ⇒ Status quo and key enterprises of the core CNC machine tool component market (including CNC systems, servo systems and the like);
- ⇒ Automotive, aerospace, rail transit, electronic information and other downstream markets as well as their CNC machine tool applications;
- ⇒ Operation and business in China of 12 key global companies;
- ⇒ Operation, revenue structure and development strategies of 19 key Chinese enterprises.



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