

**Global and China CNC Machine Tool
Industry Report, 2017-2021**

Dec. 2017

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

Global output value of machine tools came to €67.6 billion in 2016, down 2.2% from a year ago. Specifically, Japan, South Korea and Taiwan encountered sharp decline, while Germany enjoyed stable development, ranking first in the world by export volume and second only to China by output value.

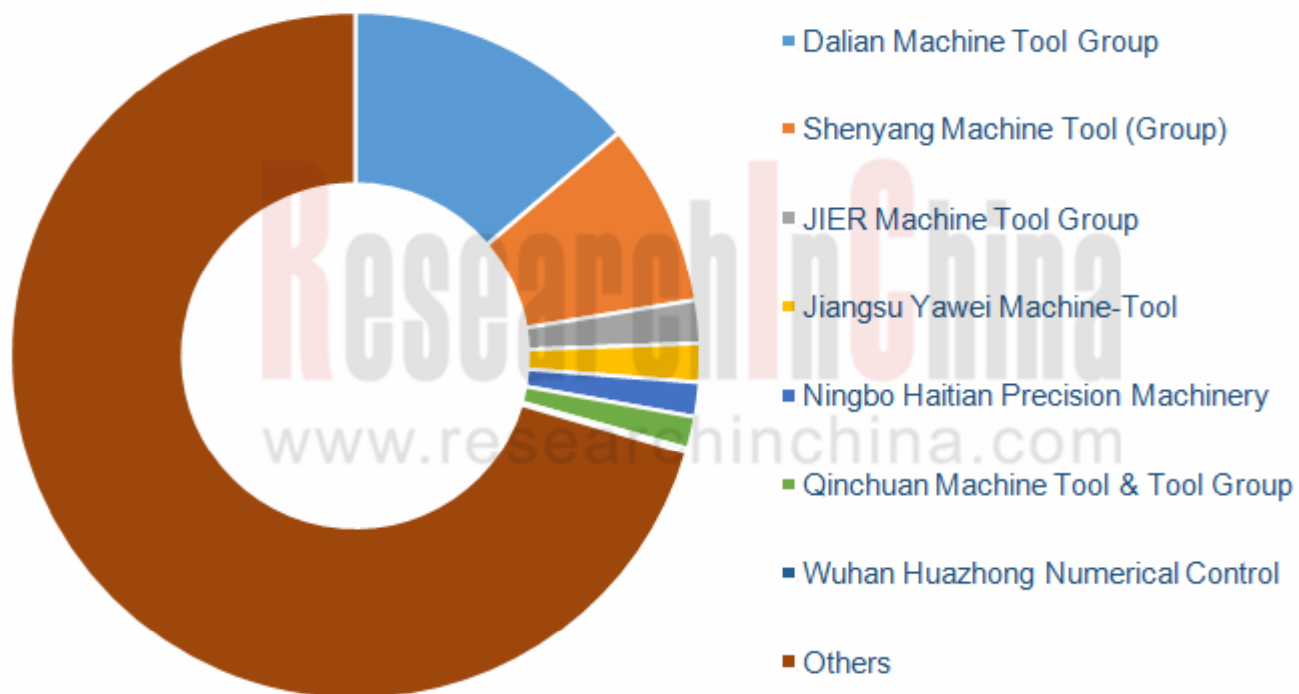
As the world's largest machine tool market, China achieved machine tool sales of RMB199.6 billion in 2016, a figure on a par with the last year. However, the penetration of CNC machine tools remained low, only 25.7% in 2016, a huge gap compared with 60%-70% in developed countries.

China manufactured 282,900 CNC machine tools in 2016, a 5.7% rise from a year earlier, including 63,791 CNC lathes (up 3.9% YoY), 37,698 machining center (up 8.8% YoY) and 1,391 CNC grinders (down 1.6% YoY).

Major Chinese CNC machine tool manufacturers include Dalian Machine Tool Group, Shenyang Machine Tool (Group), JIER Machine Tool Group, Jiangsu Yawei Machine-Tool, Ningbo Haitian Precision Machinery, Qinchuan Machine Tool & Tool Group and Wuhan Huazhong Numerical Control. Due to Shenyang Machine Tool (Group)'s years of losses and Dalian Machine Tool Group's bond defaults, the market concentration slipped critically with top5 enterprises holding a combined 30% market share in 2016.

Geographically, Northeast China and East China are main production bases for CNC metal-cutting machine tools (CNC lathe, machining center), while the Yangtze River Delta region is the major production base for CNC grinder and functional parts (ball screw and linear guideway). East China and Northeast China together seized about 73.6% of CNC metal-cutting machine tool market in 2016, compared with an 88% share for Central China and East China in CNC metal-forming machine tool market.

Competitive Landscape of the Chinese CNC Machine Tool Market, 2016



Source: ResearchInChina

CNC machine tool technology will move towards two directions in China:

1. New complex machining tools like turn-milling & mill-turning machine tool, turning-grinding center, gear machining machine tool, turn-milling and 5-axle linkage machine tool continue to spring up; the trend of complex machining becomes more obvious as heavy machine tools are added with multifunctional attachments and rotary table.
2. As power electronics and CNC technology advance and the parts like linear motor, torque motor, motorized spindle and grating calibration become more mature, the direct-drive technology finds application in CNC machine tool at a faster speed, greatly promoting changes in the structure of and improvement in performance of CNC machine tools.

Global and China CNC Machine Tool Industry Report, 2017-2021 highlights the followings:

- ◆ Global and Chinese machine tool market (size, supply & demand, import & export, competitive landscape);
- ◆ CNC machine tool markets (size, supply & demand, import & export) in major countries;
- ◆ CNC machine tool in China (development environment, supply & demand, competitive landscape, development trends, etc.);
- ◆ Machine tool segments in China (CNC lathe, CNC grinder, machining center);
- ◆ Upstream (numerical control system, servo system) and downstream (automobile, aviation, rail transit equipment, electronic information) sectors of CNC machine tool industry in China;
- ◆ 12 foreign and 19 Chinese CNC machine tool manufacturers (operation, CNC machine tool business).

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