



Global and China CNC Machine Tool Industry Report, 2019-2025

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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

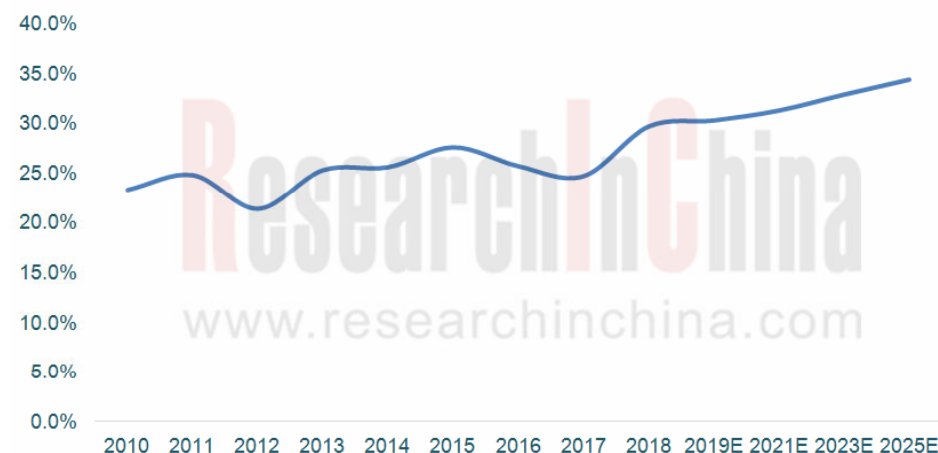
With the sustained growth of the global economy, the consumption in the machine tool sector will continue to grow by more than 3.0% in 2019, which will propel the global CNC machine tool industry whose output value outnumbered \$70 billion in 2018 to escalate steadily. As the world's leading producer and consumer of CNC machine tools, China garnered the CNC machine tool output value of over \$6 billion (by the exchange rate 1:6.6174) in 2018, a more than 10% share of the global total.

In 2018, China CNC machine tool industry characterized the followings:

CNC level: China had a CNC rate of machine tools at 29.7% in 2018, far lower than Europe, America, Japan and other developed countries (Japan: over 90%; Germany: above 75%; the United States: beyond 80%). Wherein, the CNC level of metal cutting machine tools was 39.0%, higher than that of metal forming machine tools (only 9.9%).

Breakdown products: Among CNC machine tools, CNC lathes and machining centers are used more widely, with their output seizing nearly 50.0% of the total output of CNC machine tools in 2018. In the field of CNC lathes, small and medium-sized horizontal lathes prevail, but more than 85% of high-end small lathes in China needs importing.

CNC Level of Chinese Machine Tools, 2010-2025E



Source: Global and China CNC Machine Tool Industry Report, 2019-2025 by ResearchInChina

Technical level: China relies on the import of high-end CNC machine tools, and the localization level is less than 20%; the localization level of medium and low-end CNC machine tools is as high as over 85%, but the core components herein still hinge on foreign technology. More than 80% of CNC systems used for the China-made ordinary CNC machine tools are imported, and at least 85% of servo systems/motors come from abroad.

Competitive landscape: the leading Chinese CNC machine tool manufacturers are comprised of Dalian Machine Tool, Shenyang Machine Tool, Qinchuan Machine Tool & Tool, JIER Machine-Tool, Ningbo Haitian Precision Machinery, etc. However, in the past two years, the giants have been confronted with difficulties successively (Shenyang Machine Tool suffered losses ceaselessly, Dalian Machine Tool was asked for reorganization and rectification due to breach of bonds), causing a continued slide in industrial concentration. In 2018, CR10 was less than 30%.

As some foreign-funded enterprises set up CNC machine tool production bases or R&D centers in China, China's local production capacity and level will be improved in the future, which will further promote the comprehensive competitiveness of CNC machine tools made in China.

Global and China CNC Machine Tool Industry Report, 2019-2025 by ResearchInChina mainly deals with the following:

- ◆ Technology, classification, industry chain, etc. of CNC machine tools;
- ◆ Global and China's machine tool output, consumption, import and export, competitive landscape, etc.;
- ◆ Overview of the global CNC machine tool market; market Size, import and export, etc. of CNC machine tools in major countries (Japan, Germany, South Korea);
- ◆ Development environment, output, demand, import and export, competitive landscape of CNC machine tools in China;
- ◆ Production scale, import and export, competitive landscape, etc. of major CNC machine tool products (CNC lathes, CNC grinders, machining centers);
- ◆ Market size, major suppliers, etc. of CNC machine tool core components (CNC systems, servo systems, electric spindles, etc.);
- ◆ Market size, CNC machine tool applications, etc. of downstream applications (automotive, aviation, railroad equipment, electronic information, etc.);
- ◆ Operation and CNC machine tool business of 12 foreign and 20 Chinese CNC machine tool manufacturers.

1. Overview of CNC Machine Tool Industry

- 1.1 Overview
- 1.2 Classification
- 1.3 Industry Chain

2. Status Quo of Global and China Machine Tool Industry

- 2.1 Global
 - 2.1.1 Production
 - 2.1.2 Consumption
 - 2.1.3 Import and Export
 - 2.1.4 Competitive Landscape
- 2.2 China
 - 2.2.1 Market Size
 - 2.2.2 Metal Cutting Machine Tool
 - 2.2.3 Metal Forming Machine Tool
 - 2.2.4 Import and Export
 - 2.2.5 Competitive Landscape

3. Status Quo of CNC Machine Tool Markets Worldwide

- 3.1 Overview
- 3.2 Main Countries
 - 3.2.1 Japan
 - 3.2.2 Germany
 - 3.2.3 South Korea

4. Status Quo of CNC Machine Tool Market in China

- 4.1 Development Environment

4.1.1 Policy Environment

4.1.2 Technological Environment

4.2 Market Situation

4.2.1 Market Overview

4.2.2 Production

4.2.3 Demand

4.3 Import and Export

4.3.1 Import

4.3.2 Export

4.4 Competitive Landscape

4.4.1 Competition between Enterprises

4.4.2 Regional Competition

4.5 Development Trend

5. Main CNC Machine Tool Products in China

5.1 CNC Lathe

5.1.1 Production

5.1.2 Import & Export

5.1.3 Key Manufacturers

5.2 CNC Grinder

5.2.1 Production

5.2.2 Import & Export

5.2.3 Key Manufacturers

5.3 Machining Center

5.3.1 Production

5.3.2 Import & Export

5.3.3 Key Manufacturers

6. Core Components of China CNC Machine Tool Industry

6.1 CNC System

6.1.1 Supply and Demand

6.1.2 Market Pattern

6.2 Servo System

6.2.1 Overview

6.2.2 Servo Motors

6.2.3 Motorized Spindle

6.2.4 Feed Transmission System

7. Downstream Sectors of China CNC Machine Tool Industry

7.1 Automobile

7.1.1 Market Size

7.1.2 Automotive & Parts-use CNC Machine Tool

7.2 Aviation Industry

7.2.1 Market Size

7.2.2 Aviation-use CNC Machine Tools

7.3 Rail Transit Equipment

7.3.1 Market Size

7.3.2 Rail Transit-use CNC machine tools

7.4 Electronic Information

7.4.1 Market Size

7.4.2 CNC Machine Tools for 3C

8. Major Foreign CNC Machine Tool Manufacturers

8.1 Mazak

8.1.1 Profile

8.1.2 Layout in China

8.2 Trumpf

8.2.1 Profile

8.2.2 Operation

8.2.3 Layout in China

8.3 Amada

8.3.1 Profile

8.3.2 Operation

8.3.3 Layout in China

8.4 Okuma Corp.

8.4.1 Profile

8.4.2 Operation

8.4.3 Development Strategy

8.4.4 Layout in China

8.5 DMG MORI AKTIENGESELLSCHAFT

8.5.1 Profile

8.5.2 Operation

8.5.3 Revenue Structure

8.5.4 Layout in China

8.6 DMG MORI CO., LTD

8.6.1 Profile

8.6.2 Operation

8.6.3 Layout in China

8.7 Other Players

8.7.1 Hass

8.7.2 Emag

8.7.3 MAG

8.7.4 Gleason

8.7.5 Indes

8.7.6 Makino

9. Key Chinese CNC Machine Tool Enterprises

9.1 Shenyang Machine Tool (Group) Co., Ltd.

9.1.1 Profile

9.1.2 Operation

9.1.3 CNC Machine Tool Business

9.1.4 Major Listed Subsidiary -- Shenyang Machine Tools Co., Ltd.

9.1.5 Major Listed Subsidiary -- Shenji Group Kunming Machine Tool Co., Ltd.

9.1.6 Development Strategy

9.2 Qinchuan Machine Tool & Tool Group Co., Ltd.

9.2.1 Profile

9.2.2 Operation

9.2.3 Revenue Structure

9.2.4 CNC Machine Tool Business

9.2.5 Development Strategy

9.3 Jiangsu Yawei Machine-Tool Co., Ltd.

9.3.1 Profile

9.3.2 Operation

9.3.3 Revenue Structure

9.3.4 Gross Margin

9.3.5 Development Strategy

9.4 Wuhan Huazhong Numerical Control Co., Ltd (HNC)

9.4.1 Profile

9.4.2 Operation

9.4.3 Gross Margin

9.4.4 Development Strategy

9.5 Qinghai Huading Industrial Co., Ltd.

9.5.1 Profile

9.5.2 Operation

9.5.3 CNC Machine Tool Business

9.5.4 Development Strategy

9.6 Weihai Huadong Automation Co. Ltd.

9.7 RIFA Precision Machinery

9.7.1 Profile

9.7.2 Operation

9.7.3 Revenue Structure

9.7.4 Gross Margin

9.7.5 Development Strategy

9.8 J-TECH CNC Technology Co., Ltd.

9.9 Ningbo Haitian Precision Machinery Co., Ltd

9.10 Nantong Guosheng Intelligent Technology Group Co., Ltd.

9.11 Other Enterprises

9.11.1 Qiqihar Heavy CNC Equipment Co., Ltd

9.11.2 JIER Machine Tool, Ltd.

9.11.3 BYJC

9.11.4 SPARK Machine Tool

9.11.5 Zhejiang Headman Machinery Co., Ltd

9.11.6 Zhejiang Golden Fire Machine Co., Ltd.

9.11.7 Beijing Jingdiao Co., Ltd.

9.11.8 Zhejiang Ruiyuan Machine Tool Co., Ltd.

9.11.9 Dalian Machine Tool Group

9.11.10 Wuxi Shangji Automation Co., Ltd.

Basic Components of CNC Machine Tool
CNC Machine Tool Technology Chain
Classification of CNC Machine Tools
CNC Machine Tool Industry Chain
Global Machine Tool Sales, 1997-2019
Global Machine Tool Output Value, 1998-2017
Output Value of Top Ten Machine Tool Producing Countries Worldwide, 2016-2017
Global Machine Tool Consumption, 2012-2019
Consumption of Machine Tools Worldwide (by Country/Region), 2016-2017
Top 10 Machine Tool Import and Export Countries Worldwide, 2016-2017
Level of Machine Tool Manufacturing and Representative Companies in the World's Major Countries
Key Economic Indicators of Machine Tool Industry in China, 2010-2019
Output of Metal Working Machine Tools in China, 2010-2025E
Output and YoY Growth of Metal Cutting Machine Tools in China, 2010-2025E
Metal-cutting Machine Tool Output in China by Region, 2012-2018
Metal Forming Machine Tool Output and YoY Growth, 2010-2025E
Import and Export Value of Metal Cutting Machine Tools in China, 2007-2018
Import and Export Value of Metal Forming Machine Tools in China, 2007-2018
Import Value of Major Metal-working Machine Tools by Product in China, 2018
Export Value of Major Metal-working Machine Tools by Product in China, 2018
Major Metal Cutting Machine Tool Manufacturers in China
CNC Machine Tool Output Value in the World's Major Countries, 2014-2019E
Ratio of Output Value of CNC Metal-working Machine Tool to That of Metal-working Machine Tool in Major Countries, 2019/2025E
Major Global CNC Machine Tool Manufacturers
Output Value and Penetration of CNC Machine Tool in Japan, 2006-2019E
Production and Output Value of Main CNC Machine Tools in Japan, 2010-2018
CNC Machine Tool Imports in Japan, 2006-2019E
Imports of Main CNC Machine Tools in Japan, 2014-2017

CNC Machine Tool Exports in Japan, 2006-2019E
Exports of Main CNC Machine Tools in Japan, 2014-2017
Machine Tool Output Value in Germany, 2013-2017
Key Economic Indicators of CNC Machine Tool Industry in Germany, 2016-2017
Machine Tool Market Size in South Korea, 2014-2018
Machine Tool Order Value (by Application) in South Korea, 2008-2017
Machine Tool Order Value in South Korea, 2008-2017
Order Value of Main CNC Machine Tools in South Korea, 2017
CNC Machine Tool Imports & Exports in South Korea, 2013-2017
Import Structure of Main CNC Machine Tools in South Korea, 2016-2017
Policies on CNC Machine Tool Industry in China, 2010-2018
Patent Application Structure of Global CNC Machine Tool by Geography, 2018
Import of CNC Machine Tool-related Technologies and Products Encouraged by China
Penetration of CNC Machine Tool in China, 2010-2025E
Penetration of CNC Metal-cutting Machine Tool in China, 2009-2025E
Penetration of CNC Metal Forming Machine Tool in China, 2009-2025E
CNC Machine Tool Output and YoY Growth in China, 2009-2025E
CNC Machine Tool Output in China by Product, 2009-2025E
CNC Machine Tool Output Structure in China by Level, 2010-2025E
Import of CNC Machine Tool in China, 2010-2018
CNC Machine Tool Import in China by Product, 2013-2018
Export of CNC Machine Tool in China, 2010-2018
CNC Machine Tool Export in China by Product, 2013-2018
Competitive Landscape of China CNC Machine Tool Market, 2018
Regional Competitive Landscape of CNC Metal-cutting Machine Tool Market in China, 2014-2018
Regional Competitive Landscape of CNC Metal Forming Machine Tool Market in China, 2014-2018
Opportunities and Challenges for Chinese CNC Machine Tool Industry in "Thirteenth Five-year"

Production and Output Value of CNC Lathe in China, 2009-2025E
Apparent Consumption of CNC Lathe in China, 2011-2025E
Production Structure of CNC Lathe in China, 2014-2018
CNC Lathe Imports in China by Product, 2011-2017
CNC Lathe Exports in China by Product, 2011-2017
Main CNC Lathe Manufacturers in China
Market Share of Major Chinese CNC Lathe Manufacturers, 2017
Production and Output Value of CNC Grinder in China, 2009-2025E
Apparent Consumption of CNC Grinder in China, 2011-2025E
Production Structure of CNC Grinder in China by Output Value, 2017&2021&2025E
CNC Grinder Imports in China by Product, 2011-2017
CNC Grinder Exports in China by Product, 2012-2017
Penetration of CNC Grinder in Major Companies in China, 2018
Production and Output Value of Machining Center in China, 2009-2025E
Apparent Consumption of Machining Center in China, 2011-2025E
Machining Center Imports in China by Product, 2011-2017
Machining Center Exports in China by Product, 2011-2017
Main Machining Center Manufacturers in China
Competitive Landscape of Machining Center Market in China, 2017
Structure of CNC System
Major Global CNC System Suppliers
Major China-made CNC System Manufacturers and Products
Competitive Landscape of CNC System
Classification of Servo system for CNC Machine Tools
Application of Servo System in CNC Machine Tools
Market Size of Servo System for Machine Tools in China, 2011-2025E
Application of Servo Motors in CNC Machine Tools

China's Patent Filings about Servo Motor, 2010-2019
Main Servo Motor Suppliers in China
Diagram of Motor Spindle for CNC Machine Tool
Market Size of Motorized Spindles for CNC Machine Tools in China, 2014-2025E
Major Domestic and Foreign Manufacturers of Motor Spindles for CNC Machine Tools
Electric Spindle Suppliers in Application Segments
Major Domestic and Foreign Manufacturers of Ball Screw Assemblies for CNC Machine Tools
Major Chinese and Foreign Manufacturers of Guide Rails for CNC Machine Tools
Applied Industries of CNC Machine Tools
Global Automobile Sales Volume and Growth Rate, 2010-2025E
Sales Volume and Proportion of Global Major Automakers, 2018
Automobile Sales Volume of Main Countries Worldwide, 2018
Automobile Sales Volume in China, 2018
Domestic and Foreign Manufacturing Level of CNC Machine Tools for Automobiles
Global General Aviation Aircraft Sales (USD mln), 1995-2018
Global General Aviation Aircraft Shipments, 1995-2018
Global General Aviation Aircraft Delivery Structure (by Product), 2010-2019
Main Producing Areas and Output of General Aviation Aircrafts Worldwide, 2018
Main Consumption Areas of General Aviation Aircrafts Worldwide, 2018
Global Rotorcraft Shipments and Growth Rate, 2011-2025E
Global Rotorcraft Delivery Structure (by Product), 2010-2019
Main Applications of CNC Machine Tools in Aviation Manufacturing
New Urban Rail Transit Projects and Investment in China, 2015-2019E
Rail Transit Equipment Ownership in China by Product, 2010-2019E
Main Applications of CNC Machine Tools in Rail Transit Equipment
Revenue of Electronic Information Industry and Growth Rate in China, 2009-2025E
Global Computer and Cell Phone Shipments, 2013-2025E
Automated Market Structure of China's Electronics Manufacturing, 2018

Growth Rate of PLC Market in China's Electronics Manufacturing, 2015-2020E
Growth Rate of HMI Market in China's Electronics Manufacturing, 2015-2020E
Growth Rate of Low-voltage Inverter Market in China's Electronics Manufacturing, 2016-2020E
Growth Rate of Servo Market in China's Electronics Manufacturing, 2016-2020E
Penetration of Metal Body for Cell Phone in China, 2012-2019E
Percentage of Metal Body of Main Cell Phone Brands in China
Market Size Forecast of CNC Machine Tools for 3C Industry in China
Situation of Mobile Phone Metal Case Manufacturers in China
Production Bases of Yamazaki Mazak, 2018
Yamazaki Mazak's Companies in China, 2016
Revenue and Growth Rate of Trumpf, FY2010-FY2018
Machine Tools of Trumpf
Revenue Structure of Trumpf by Product, FY2018
CNC Machine Tool Production Bases of Trumpf in China, 2018
Revenue and Net Income of Amada, FY2011-FY2018
Amada's Order Amount (by Product), FY2016-FY2017
Amada's Sales (by Product), FY2016-FY2017
Revenue Breakdown of Amada by Region, FY2013-FY2017
Amada's Sales in Chinese Market, 2009-2019
Amada's Machine Tool Companies in China, 2018
Revenue and Net Income of Okuma, FY2011-FY2018
Revenue Breakdown of Okuma by Product, FY2011-FY2017
Revenue Breakdown of Okuma by Region, FY2013-FY2018
Machine Tool Market Structure of Okuma, FY2017-FY2018
Okuma's Sales Outlets in China
Business Structure of DMG MORI AKTIENGESELLSCHAFT
Revenue and Order Intake of DMG MORI AKTIENGESELLSCHAFT, 2008-2018
Revenue of DMG MORI AKTIENGESELLSCHAFT by Business, 2009-2018

Orders Intake of DMG MORI AKTIENGESELLSCHAFT by Business, 2009-2018
Machine Tool Revenue and Order Intake of Dmg Mori Aktiengesellschaft (by Region), 2017-2018
Main Machine Tool Companies of Gildemeister, 2018
Business & Product History of DMG MORI, 2009-2016
Revenue and Net Income of DMG MORI, FY2009-FY2018
Revenue of DMG MORI by Segment, FY2014-FY2018
Global Production Network of DMG MORI
Orders Structure of DMG MORI by Product, 2018
Orders Structure of DMG MORI by Application Sector, 2018
Main Products Produced by DMG MORI's Tianjin Factory
Orders from China of DMG MORI, FY2017-FY2019
HFOs of Hass in China
Global Presence of EMAG
Key Operational Indicators of EMAG, 2017
Equity Structure of Shenyang Machine Tool, 2019
Revenue and Net Income of Shenyang Machine Tool, 2013-2019
Revenue Structure of Shenyang Machine Tool (by Product), 2016-2017
Revenue of Shenyang Machine Tool from Top Five Customers and % of Total Revenue, 2017
CNC Machine Tool Output and Sales Volume of Shenyang Machine Tool, 2012-2017
Major Suppliers of Raw Materials for Shenyang Machine Tool
Equity Structure of Shenyang Machine Tool Co., Ltd., 2018
Revenue and Net Income of Shenyang Machine Tool Co., Ltd., 2008-2018
Revenue Breakdown of Shenyang Machine Tool Co., Ltd. by Region, 2010-2018
Revenue Structure of Shenyang Machine Tool Co., Ltd. by Product, 2010-2018
CNC Machine Tool Gross Margin of Shenyang Machine Tool Co., Ltd., 2010-2018
Output and Sales Volume of Shenyang Machine Tool, 2017
Revenue of Shenyang Machine Tool from Top Five Customers and % of Total Revenue, 2017

Revenue and Net Income of Shenji Group Kunming Machine Tool, 2015-2018
Revenue Structure of Shenji Group Kunming Machine Tool (by Product), 2017-2018
Output and Sales Volume of Shenji Group Kunming Machine Tool (by Product), 2017
i5 Platform Architecture Diagram
i5 Machine Tool CNC System Architecture
i5 Intelligent Machine Tool Output of Shenyang Machine Tool (Group), 2015-2018
Intelligent Machine Tool i5M8 Products of Shenyang Machine Tool (Group)
Equity Structure of Qinchuan Machine Tool & Tool, 2018
Revenue and Net Income of Qinchuan Machine Tool & Tool, 2008-2018
Key Enterprises and Performance of Qinchuan Machine Tool & Tool, 2018H1
Operating Revenue and Gross Margin of Qinchuan Machine Tool & Tool by Product, 2013-2018
Revenue Breakdown of Qinchuan Machine Tool & Tool by Region, 2013-2018
CNC Machine Tool Output of Qinchuan Machine Tool & Tool, 2014-2018
“Three 1/3” Strategic Vision of Qinchuan Machine Tool & Tool
Equity Structure of Yawei Machine Tool, 2018
Main Business of Yawei Machine Tool
Revenue and Net Income of Yawei Machine Tool, 2009-2018
Yawei Machine Tool’s Major Competitors for CNC Machine Tool Business
Revenue Structure of Yawei Machine Tool by Product, 2016-2018
Operating Revenue Breakdown of Yawei Machine Tool by Region, 2008-2018
Gross Margin of Yawei Machine Tool, 2008-2018
Major capital operation of Yawei Machine Tool, 2013-2019
Equity Structure of Huazhong Numerical Control, 2018
Revenue and Net Income of Huazhong Numerical Control, 2008-2018
Operating Revenue Breakdown of Huazhong Numerical Control by Product, 2009-2018
Operating Revenue Breakdown of Huazhong Numerical Control by Region, 2010-2017
Gross Margin of Huazhong Numerical Control, 2008-2018
Main Customers for Huazhong Numerical Control’s CNC System for 3C

Equity Structure of Qinghai Huading Industrial, 2018
Revenue and Net Income of Qinghai Huading Industrial, 2008-2018
Operating Revenue Breakdown of Qinghai Huading Industrial by Business, 2011-2017
Operating Revenue Breakdown of Qinghai Huading Industrial by Region, 2011-2017
Revenue of Major CNC Machine Tool Subsidiaries of Qinghai Huading Industrial, 2011-2018
Revenue and Net Income of Weihai Huadong Automation, 2008-2018
Operating Revenue Breakdown of Weihai Huadong Automation by Product, 2011-2018
Operating Revenue Breakdown of Weihai Huadong Automation by Region, 2011-2018
Gross Margin of Weihai Huadong Automation by Product, 2011-2017
Output and Sales Volume of CNC Machine Tool of Weihai Huadong Automation, 2016-2017
Equity Structure of RIFA Precision Machinery, 2018
Revenue and Net Income of RIFA Precision Machinery, 2008-2018
Operating Revenue Breakdown of RIFA Precision Machinery by Product, 2015-2018
Operating Revenue Breakdown of RIFA Precision Machinery by Region, 2011-2018
Gross Margin of RIFA Precision Machinery by Product, 2015-2018
Revenue and Net Income of J-TECH CNC Technology, 2014-2018
Revenue Structure of J-Tech CNC Technology (by Product), 2015-2018
Top Five Customers of J-Tech CNC Technology, 2016-2018
Top Five Suppliers of J-Tech CNC Technology, 2016
Equity Structure of Haitian Precision Machinery, 2018
Revenue and Net Income of Haitian Precision Machinery, 2014-2018
Revenue Structure of Haitian Precision Machinery (by Product), 2015-2018
Revenue Structure of Haitian Precision Machinery (by Region), 2015-2018
Capacity of Haitian Precision Machinery, 2018
Output and Sales Volume of Haitian Precision Machinery (by Product), 2015-2018
Major Customers of Guosheng Group
Revenue of Guosheng Group, 2014-2017
Revenue Structure of Guosheng Group (by Product), 2014-2017

Revenue Structure of Guosheng Group (by Region), 2014-2017
Revenue of Guosheng Group from Main CNC Machine Tool products, 2014-2017
Output and Sales Volume of Guosheng Group's Main CNC Machine Tool products, 2014-2017
Prices of Guosheng Group's Main CNC Machine Tool products, 2014-2017
Revenue of Qiqihar Heavy CNC Equipment, 2011-2018
CNC Machine Tool Output of Qiqihar Heavy CNC Equipment, 2014-2018
Major Customers of JIER Machine Tool
Revenue of JIER Machine Tool, 2011-2019
Major Subsidiaries of BYJC
Revenue of Spark Machine Tool, 2009-2019
Revenue and Net Income of Zhejiang Headman Machinery, 2015-2018
CNC Machine Tool Revenue Structure of Zhejiang Headman Machinery, 2015-2016
Marketing Network of GFIR Machine Tool
Main Subsidiaries of Beijing Jingdiao
Revenue and Profit of Dalian Machine Tool Group, 2010-2017
Production Bases of Dalian Machine Tool Group
Main Product Production Models and Subsidiaries of Dalian Machine Tool Group
Revenue and Net Income of Wuxi Shangji Automation, 2015-2018
Revenue Structure of Wuxi Shangji Automation (by Product), 2015-2018
Revenue Structure of Wuxi Shangji Automation (by Region), 2015-2018
Output and Sales Volume of Wuxi Shangji Automation's Main Products, 2015-2018
Revenue of Wuxi Shangji Automation from Top Five Customers and % of Total Revenue, 2017-2018

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