



ResearchInChina
www.researchinchina.com

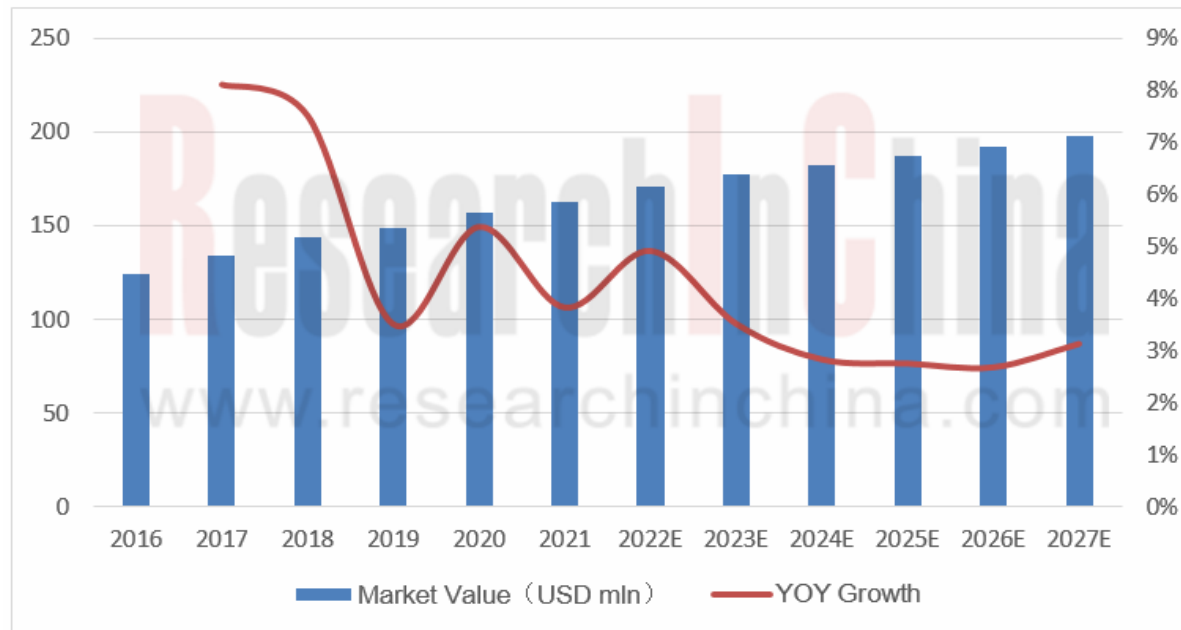
Global and China CNC Machine Tool Industry Report, 2022-2027

Apr.2022

Global CNC Machine Tool Industry at a Glance

As typical mechatronics products, CNC machine tools are a combination of mechanical technology and CNC intelligence. The upstream mainly involves castings, sheet metal parts, precision parts, functional parts, CNC systems, electrical components and other parts industries, and the downstream spreads widely to machinery industry, mold industry, automobile industry, power equipment, railway locomotives, shipbuilding, petrochemical, electronic information technology industry and the like. In 2021, the scale of the global CNC machine tool industry registered USD163.2 billion, a year-on-year increase of 3.8%.

Scale of Global CNC Machine Tool Industry, 2016-2027E

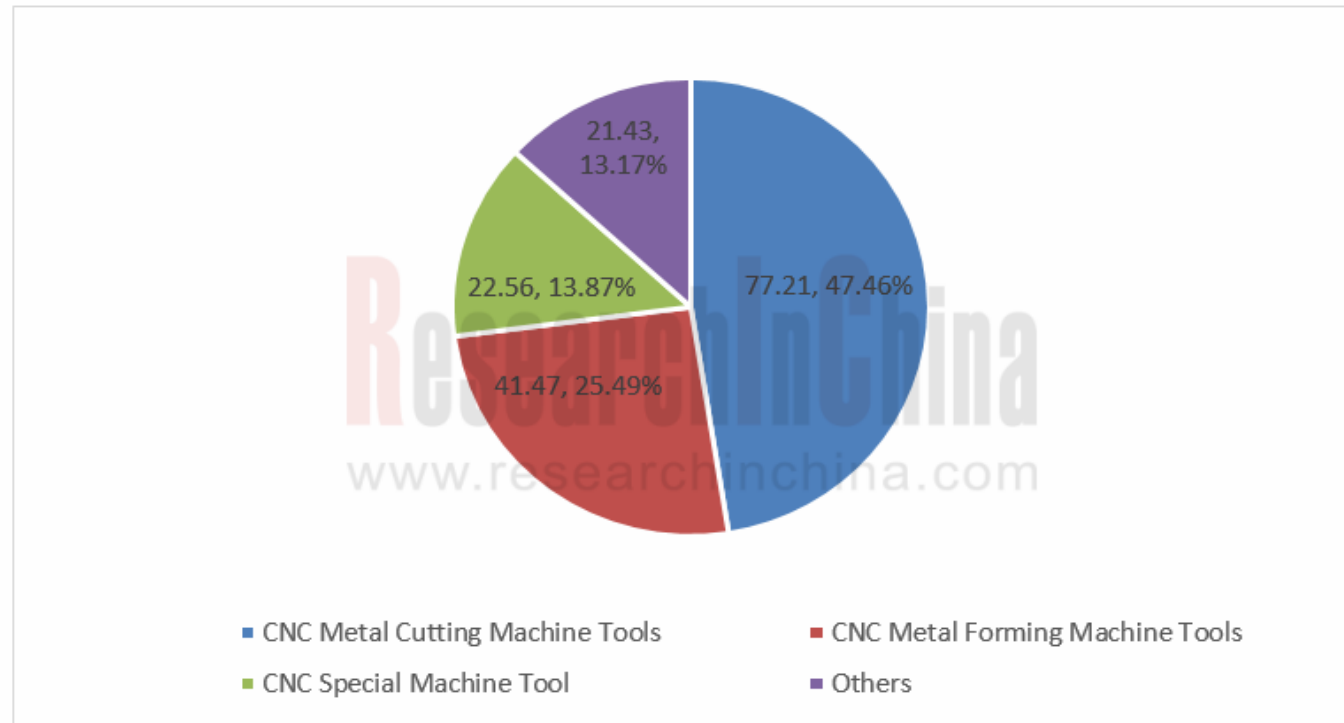


Source: ResearchInChina

Global CNC Machine Tool Industry Scale by Segment

By market segment, the scale of the global CNC metal cutting machine tools in 2021 amounted to USD77.21 billion, accounting for 47.5% of the total; the scale of CNC metal forming machine tools reached USD41.47 billion, accounting for 25.5%; the scale of CNC special processing machine tools was USD22.56 billion, accounting for 13.9%.

Scale of Global CNC Machine Tool Industry by Segment, 2021

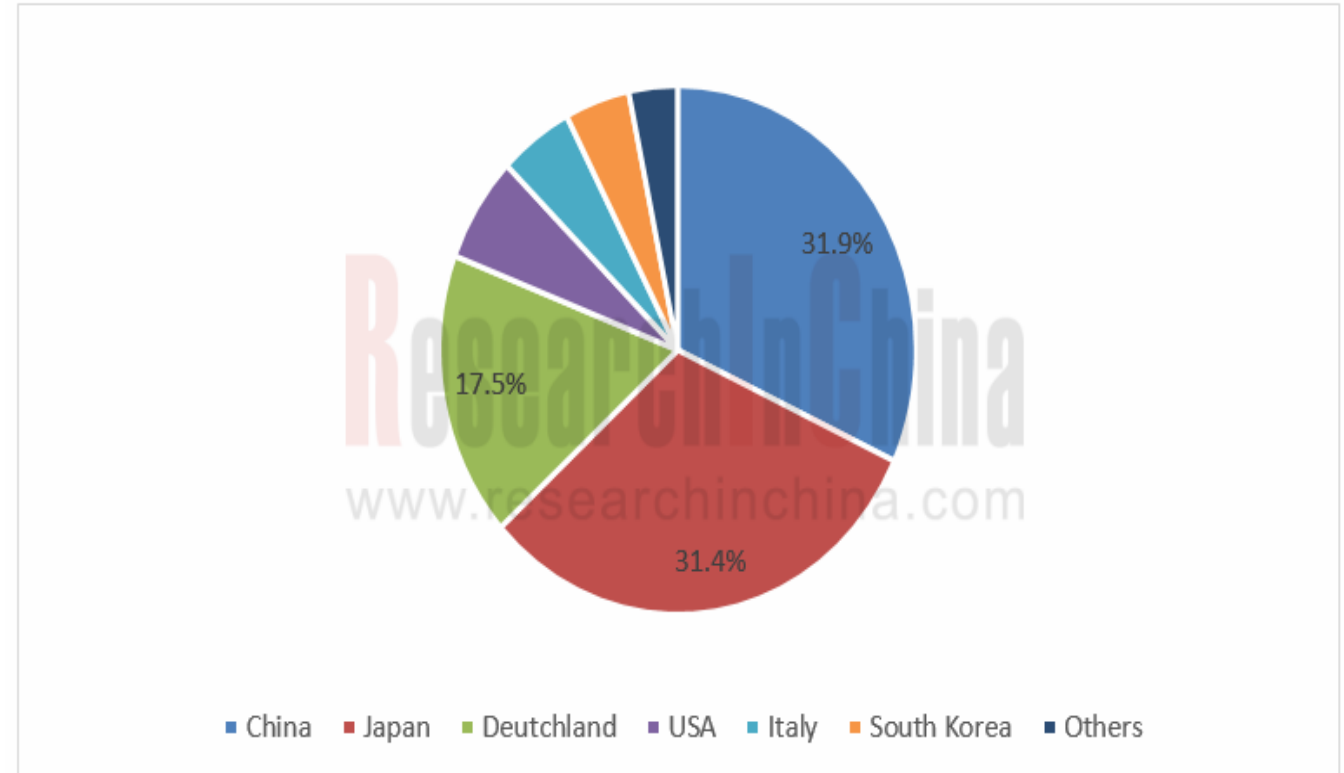


Source: ResearchInChina

Global CNC Machine Tool Industry Scale by Region

Major producers of machine tools include China, Germany, Japan, and the United States. Germany attaches great importance to the high quality, precision, sophistication and practicality of CNC machine tools and accessories; it is highly specialized in the R&D and production of various functional components and ranks among the top in the world in terms of quality and performance. Japan focuses on the development of CNC systems, and the machine tool companies in this country emphasize the layout of upstream materials and components and the integrated development of core products. The United States has strong competitiveness in design, manufacturing and basic scientific research of CNC machine tools. China's machine tool industry started late, but it is developing rapidly. Thanks to the guidance of the government's industrial policy on innovation and development, China's machine tool industry has grown significantly in terms of technology and market size, and China has become the world's largest machine tool producer and seller. In the world's largest machine tool consumption market, Chinese machine tool enterprises are highly sensitive to the market with fast response in marketing and services.

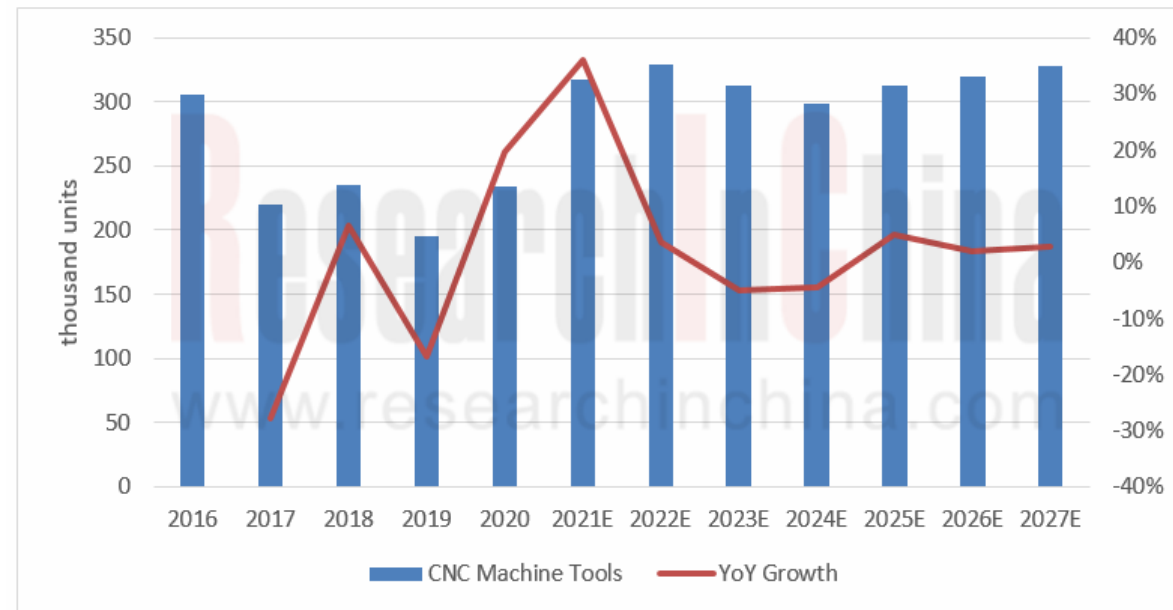
Scale of Global CNC Machine Tool Industry by Region, 2021



Source: ResearchInChina

In recent years, the optimized industrial structure of China's manufacturing industry, the rapid development of high-end manufacturing and the growing demand for intelligent manufacturing upgrades have triggered enormous demand for high-end CNC machine tools. With higher requirements of high-end manufacturing industries represented by automotive, aerospace, shipbuilding, power equipment, construction machinery, and 3C industries in China for the performance and accuracy of CNC machine tools, the market demand for CNC machine tools, especially high-end CNC machine tools, is swelling in China. Therefore, the CNC machine tool market size is expected to escalate steadily. In 2021, the market size of China's CNC machine tool industry jumped RMB21.4 billion or 8.65% over last year to RMB268.7 billion.

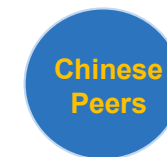
CNC Machine Tool Output and YoY Growth in China, 2016-2027E



Source: ResearchInChina

Competition between CNC Machine Tool Manufacturers in China and the World

Regarding competitive landscape, Japan-based Yamazaki Mazak, Germany-based TRUMPF and DMG MORI, a German-Japanese joint venture, rank the top three globally, followed by MAG, Amada, Okuma, Makino, GROB, Haas, EMAG.



Yamazaki Mazak, a world-renowned machine tool manufacturer, ranks first by market share all year round. Founded in 1919, the company mainly produces CNC lathes, compound turning and milling machining centers, vertical machining centers, horizontal machining centers, CNC laser systems, FMS flexible manufacturing systems, CAD/CAM systems, CNC devices and production support software, etc. Its products are known in the industry for their high speed and high precision, covering all sectors of the machinery industry. Its production bases in China include Ningxia Little Giant Machine Tool Co., Ltd. and the Dalian Plant of Yamazaki Mazak Machine Tool (Liaoning) Co., Ltd..

TRUMPF Group is one of the leading companies in the global manufacturing technology. The company has been investing in China since 2000. It has successively invested in four production enterprises in Taicang, Jiangsu and Dongguan, Guangdong to produce CNC sheet metal processing machine tools and medical equipment. It plans to gradually develop, produce and sell various types of CNC machine tools under the TRUMPF brand in China.

DMG MORI, a joint venture between Germany-based DMG and Japan-based Mori Seiki Co., Ltd., is an important equipment manufacturer in high-end manufacturing. The vertical machining centers, horizontal machining centers, three-axis machining centers, four-axis machining centers, five-axis machining centers, turning-milling machining centers, ultrasonic/laser machining centers produced by DMG MORI represent the development direction and the highest technical level of the machine tool industry worldwide.

In China, main players of CNC machine tools include **Haitian Precision**, **Guosheng Zhike** and **Rifa Precision Machinery**. Among them, Haitian Precision mainly produces CNC gantry machining centers, CNC horizontal machining centers, CNC vertical machining centers, and other machine tools. In 2021, the revenue from CNC machine tools hit RMB2.73 billion, of which 52.2% came from CNC gantry machining centers. The main products of Guosheng Zhike include CNC machine tools, intelligent automated production lines, equipment parts, etc. The revenue reached RMB1.137 billion in 2021, of which 66.3% was contributed by CNC machine tools and 16.2% by intelligent automated production lines. Rifa Precision Machinery is primarily engaged in digital intelligent machine tools and production lines, aerospace intelligent equipment and production lines, aerospace parts processing, as well as engineering, operation and leasing of fixed-wing aircrafts and helicopters, etc. In 2021, digital intelligent machine tools and production lines occupied 30.1% of the total revenue.

Table of Content

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
- 4.4 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

Table of Content

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 Other Players
 - 8.6.1 Hass
 - 8.6.2 Emag
 - 8.6.3 MAG
 - 8.6.4 Gleason
 - 8.6.5 Indes
 - 8.6.6 Makino

Table of Content

9. Key Chinese CNC Machine Tool Enterprises

9.1 Shenyang Machine Tools Co., Ltd.

9.1.1 Profile

9.1.2 Operation

9.1.3 CNC Machine Tool Business

9.1.4 Shenji Group Kunming Machine Tool Co., Ltd.

9.1.5 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.

9.6.1 Profile

9.6.2 Operation

9.6.3 CNC Machine Tool Business

9.6.4 Development Strategy

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.

9.8.1 Profile

9.8.2 Operation

9.8.3 Major Clients and Suppliers

9.8.4 CNC Machine Tool Business

9.8.5 Development Strategy

9.9 Ningbo Haitian Precision Machinery Co., Ltd

9.9.1 Profile

9.9.2 Operation

9.9.3 Production Layout

9.9.3 Development Strategy

9.10 Nantong Guosheng Intelligent Technology Group Co., Ltd.

9.10.1 Profile

9.10.2 Operation

9.10.3 CNC Machine Tool Business

9.10.4 Development Strategy

Table of Content

- 9.11 Zhejiang Headman Machinery Co., Ltd.
 - 9.11.1 Profile
 - 9.11.2 Operation
 - 9.11.3 Major Clients and Suppliers
 - 9.11.4 CNC Machine Tool Business
 - 9.11.5 Development Strategy
- 9.12 Wuxi Shangji Automation Co., Ltd.
 - 9.12.1 Profile
 - 9.12.2 Operation
 - 9.12.3 CNC Machine Tool Business
 - 9.12.4 Development Strategy
- 9.13 Other Enterprises
 - 9.13.1 Qiqihar Heavy CNC Equipment Corp., Ltd.
 - 9.13.2 JIER Machine-Tool Group Co., Ltd.
 - 9.13.3 BYJC
 - 9.13.4 Tianshui SPARK Machine Tool
 - 9.13.5 Zhejiang Golden Fire Industry Co., Ltd.
 - 9.13.6 Beijing Jingdiao Technology Group Co., Ltd.
 - 9.13.7 Zhejiang Ruiyuan Machine Tool Group Co., Ltd.
 - 9.13.8 General Technology Group Dalian Machine Tool Co., Ltd.



Beijing Headquarters

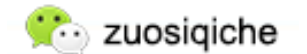
TEL: 13718845418

FAX: 010-82601570

Email: report@researchinchina.com

Website:
www.researchinchina.com

WeChat: [zuosiqiche](https://www.wechat.com/p/zuosiqiche)



Chengdu Branch

TEL: 028-68738514

FAX: 028-86930659