

Machine Tools Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Machine Tools Market Report

The global machine tools market by revenue is expected to grow at a CAGR of around 8.5% during 2021–2026.

In terms of investment, the market is likely to rebound by 5% in 2021. Vendors catering to this industry will witness a sudden rise in demand. The global machine tools market has been immensely affected by the outbreak of the COVID-19 pandemic. Activities in the manufacturing production line have witnessed the sharpest contraction since the last decade. In 2020, machine tools production and consumption went for a toss, with industrial production decreasing by 5% worldwide. Europe was one of the most adversely affected regions. The production and supply orders reduced drastically in Q2 2020 across the world. However, the market is likely to rebound during 2021 due to the restoration of economic activities and industrial processes. The machine tools industry has witnessed massive investment owing to the growth in industrialization. However, the investment witnessed a slow down due to the outbreak of the pandemic. In 2021, rebalancing of the machine tools consumption is expected. The consumer spending and demand toward the discretionary spending on manufactured goods and services per capita income is likely to grow during the forecast period.

The following factors are likely to contribute to the growth of the machine tools market during the forecast period:

Tremendous Industrial & Economic Growth in APAC

Increased Emphasis on Industry 4.0

The rise in Infrastructure Development

Growth in Machine Tools Investment

The study considers the present scenario of the motor tools market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Machine Tools Market Segmentation

The global machine tools market research report includes a detailed segmentation by tool type, technology, end-user, geography. Metal cutting tools have a higher machine tools market share with over two-thirds of the sales contribution. The sales of these devices are high in critical industries, including aerospace, defense, automotive, and shipbuilding. They are also observing an application in non-electrical sectors, which have crucial components incorporated using high precision machine tools.

Machining center tools, lathe machines, grinding and polishing metal cutters, lasers, and electrical discharge machines (EDM) are the key products in the metal cutting portfolio. The introduction of micro-machining technology in machine-centered devices is a key trend, which is likely to increase the demand. APAC has been a significant machine center tools market. However, the breakout of the COVID-19 pandemic affected the industry drastically, with the region witnessing a decline in the demand by 28% approximately.

Owing to the rise in automation, shift toward digitalization, and the advent of industry 4.0, the demand for automated machine tools has witnessed significant growth in the last few years. Computer numerical control (CNC) machines hold over 60% of the market share and are expected to witness substantial growth during the forecast period.

The machine tools market demand is expected to increase due to expansion and increased investments by private and public players in automotive, industrial equipment, metal industries in Europe, APAC, and North America. Thus, the demand for machine tools in various industrial applications is anticipated to grow. However, the current

uncertainty over the macro-outlook of the global economy and the decreased demand for machine tool products due to the recent COVID-19 outbreak, has affected the market, thereby developing a short-term market growth challenge. The automotive industry is the largest end-user segment for machine tools. However, with the outbreak of the COVID-19 pandemic, vehicle production witnessed a drastic slowdown due to imposed lockdown. With the decline in production, the use of machine tools has also decreased. However, since the lockdown has been lifted partially in several countries and production activities have resumed, the demand for machine tools is expected to accelerate.

Tool Type

Metal Cutting

Machining Center

Lathe

Grinding Polishing

Laser, EDMs, & Other Tools

Others

Metal Forming

Bending & Forming

Pressing

Punching & Shearing

Others

Technology

CNC

Metal Cutting

Metal Forming

Non CNC

Metal Cutting

Metal Forming

End-users

Automotive

Industrial Machinery

Metal industry

Electrical & Electronics

Medical Industry

Heavy Equipment

Aerospace & Defense

Marine & Offshoring

Others

INSIGHTS BY GEOGRAPHY

The APAC machine tools market size is expected to reach USD 65 billion by 2026, growing at a promising CAGR of over 9%. The resumption of economic and infrastructural activities post-COVID-19 has a crucial factor contributing to market growth. China and India are the leading markets for machine tools to restore economic development activities in Q3 2020. Taiwan, Malaysia, and South Korea are likely to

emerge as the potential industry for machine tools manufacturers. Taiwan has witnessed decent economic growth despite the trade tension between China and the US. The country has tackled the COVID-19 virus and maintained the supply of manufacturing units with minimum disruptions. In 2021, the market is likely to revive and record a GDP of close to 3.5%. The investment in Malaysia is expected to increase in 2021. The region's market is likely to grow and offer numerous opportunities for vendors catering in the region. Also, vendors can emphasize strategic partnerships to boost market position.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

Switzerland

APAC

China

Japan

South Korea

India

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East

INSIGHTS BY VENDORS

Trade wars and the imposition of tariffs are the significant concerns confronted by vendors operating in the market. The recent trade war between the US and China affected the machine tools market immensely. Vendors could expect intense competition across regions. With upswings and downswings in the global economy, vendors could consider cost-cutting measures or create a sense of nostalgia for significantly pushing their products across challenging markets. The COVID-19 pandemic has also adversely hit the market potential. The market is slowly becoming concentrated, with Doosan and Amada occupying significant shares of the market. Although North America, APAC, and Europe are the key markets for vendors, Latin America and MEA are also expected to witness considerable growth in the coming years.

Prominent Vendors

Doosan

AMADA Group

Makino Milling Machine Co. Ltd.

JTEKT

Other Prominent Vendors

GF Machining Solutions

DMG Mori Seiki Co.

Komatsu

OKUMA Corporation

HYUNDAI WIA

Schuler AG

CHIRON Group SE

600 Group PLC

Falcon Machine Tools Co. Ltd.

MAG IAS GMBH

GROB-WERKE GmbH & Co. KG

Spinner Precision Machine-Tools

Haas Automation Inc.

Gleason Corporation

Dalian Machine Tool Group Corporation

Yamazaki Mazak Corporation

Electronica Hitech Machine Tools Pvt. Ltd.

Ace Micromatic Group

TRUMPF GmbH + Co. KG

KEY QUESTIONS ANSWERED:

1. What is the future outlook and growth projections of the global machine tools market?
2. How is the growth of the automotive sector influencing the growth of the machine tools market?
3. What are the major factors driving the machine tools market growth?
4. Which region holds the highest share in the machine tools market in 2021?
5. Who are the major players in the market?
6. What threats are faced by the existing players in the market?

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