

# **Global CNC Busbar Processing Machine Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032**

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## **Abstracts**

According to our (Global Info Research) latest study, the global CNC Busbar Processing Machine market size was valued at US\$ 732 million in 2025 and is forecast to a readjusted size of US\$ 1112 million by 2032 with a CAGR of 6.2% during review period.

A CNC Busbar Processing Machine is purpose-built numerically controlled equipment for processing conductive copper and aluminum busbars used in electrical power distribution systems. It combines CNC, PLC or servo positioning with hydraulic, electric or hybrid actuation to perform automatic feeding, measuring, punching, slotting, local forming, cut-to-length shearing, flatwise bending, edgewise bending, twisting and springback compensation. Principal product forms comprise integrated multifunction machines, dedicated CNC punching and shearing centers, CNC bending centers and automated processing lines equipped with material storage, loading, unloading and sorting functions. Equipment capability is primarily determined by maximum busbar width and thickness, punching force, bending capacity, feed length, positioning accuracy, repeatability, tooling capacity and automation level. This study focuses on CNC Busbar Processing Machines designed for repeatable production of distribution-grade busbars in switchgear, control panels, transformers, busway systems, data-center power distribution equipment, industrial power supplies, renewable-energy systems and energy-storage electrical equipment.

## **Key Findings**

In 2025, global CNC Busbar Processing Machine production reached approximately 5,927 Units. The average price is approximately \$120,000.

China accounts for 13 of the 20 verified core manufacturers

Switchgear and control-panel manufacturing remains the principal downstream application worldwide

European suppliers lead premium automation while Chinese suppliers cover the broadest price spectrum

## Market Trends

The CNC Busbar Processing Machine market is moving from independently operated hydraulic workstations toward digitally connected flexible processing cells. Automatic feeding, low-scrap clamping, graphical programming, batch scheduling, closed-loop bending-angle correction and automated tool selection are becoming important purchasing criteria, especially for customers processing multiple busbar specifications in small and medium production batches. Product development is also shifting from isolated machine performance toward production-level optimization, including material traceability, remote diagnostics and interfaces with ERP, MES and warehouse-management systems. At the same time, the market is separating into two technical directions: flexible processing of distribution-grade copper and aluminum busbars, and coil-fed three-dimensional forming of automotive high-voltage busbars. The latter remains an adjacent equipment category because its insulation stripping, continuous feeding and spatial forming processes differ materially from traditional busbar fabrication.

## Market Dynamics

### Drivers

Demand is supported by continuing investment in electrical grids, switchgear capacity, data-center power distribution, industrial electrification, renewable-energy equipment and energy-storage systems. Expansion of these downstream industries increases requirements for accurately fabricated copper and aluminum conductors, while growing product variety makes programmable CNC equipment more economical than manual processing. Manufacturers of switchgear, transformers and busway systems are also investing in automation to reduce dependence on skilled operators, improve hole-

position and bending-angle consistency, lower material waste and strengthen production traceability. Replacement demand provides an additional foundation as older hydraulic machines are upgraded to systems with automatic positioning, graphical programming and integrated production control.

## **Restraints**

Purchasing decisions remain sensitive to capital expenditure because many regional electrical-equipment manufacturers operate at modest production volumes and can continue using manual or semi-automatic machines. The long service life of installed equipment extends replacement cycles, while substantial differences in configuration, tooling, automation and after-sales service complicate price comparisons. Copper-price volatility can postpone downstream inventory and capacity decisions even though copper is not a major direct input in machine manufacturing. General-purpose press brakes, punching systems and fiber-laser equipment also provide viable alternatives for customers with diverse sheet-metal workloads, limiting the addressable demand for dedicated CNC Busbar Processing Machines in lower-volume applications.

## **Opportunities**

The strongest opportunities lie in automated cells that combine storage, feeding, punching, shearing, bending, unloading and production-data management. Data centers, energy-storage cabinets, modular power systems and high-current electrical equipment require repeatable fabrication across growing numbers of busbar designs, creating demand for rapid changeover, digital work instructions and low-scrap production. Chinese manufacturers have opportunities to expand exports by improving software, safety compliance, documentation and overseas service, while premium suppliers can extend value through tooling, process software, remote maintenance and factory integration. Specialized systems for thick busbars, complex three-dimensional shapes and high-mix production also offer more attractive differentiation than standardized multifunction machines.

## **Challenges**

The industry faces continuing price pressure from regional manufacturers and uneven product-quality standards across markets. Customers often compare machines using nominal punching force or maximum busbar dimensions without adequately accounting

for accuracy, tooling life, cycle time, software capability and service availability, which can encourage low-price competition. International suppliers must maintain local installation and maintenance capabilities, whereas smaller manufacturers face difficulties supporting exported equipment throughout its operating life. Additional challenges include distinguishing genuine manufacturers from private-label brands, integrating machines with heterogeneous factory software and responding to advances in flexible laser and general-purpose metal-forming systems.

## Industry Chain Analysis

The upstream industry supplies machine frames, hydraulic and servo systems, CNC controllers, linear guides, ball screws, motors, sensors, tooling, electrical components and industrial software. Structural parts and conventional hydraulic components represent a significant portion of manufacturing cost, but positioning accuracy, tool design, control algorithms and bending compensation determine equipment performance and pricing power. For higher-automation systems, material-handling modules, safety systems, vision or measurement components and production-management interfaces account for a growing share of system value. Stable component sourcing and long-term availability are particularly important because CNC Busbar Processing Machines typically remain in service for many years.

Midstream participants design, manufacture, integrate and service dedicated busbar equipment. Value is created through mechanical rigidity, process integration, precision control, tooling libraries, application engineering and after-sales support rather than machine assembly alone. Downstream customers include switchgear and control-panel manufacturers, transformer producers, busway companies, data-center electrical-equipment suppliers, industrial power-system manufacturers and renewable-energy and energy-storage equipment producers. Premium margins are generally associated with integrated automation, proprietary software, specialized tooling and global service, while standardized multifunction machines compete more heavily on procurement cost and delivery time.

## Segment Insights

By machine configuration, the market comprises integrated CNC Busbar Processing Machines, dedicated punching and shearing centers, dedicated bending centers and automated processing lines. Integrated multifunction machines represent the broadest

unit-demand base because they offer compact layouts and relatively accessible investment levels for small and medium electrical-equipment manufacturers. Dedicated punching, shearing and bending centers address customers requiring higher throughput, accuracy or process specialization, while automated lines account for a higher value per project through material storage, handling, sorting and software integration. Stand-alone CNC machines remain important, but automatic-feeding systems and fully automated cells are gaining strategic importance among customers pursuing labor reduction and production traceability.

Processing capacity is commonly divided into busbar widths of up to 160 millimeters, 161–200 millimeters and above 200 millimeters. The first category addresses mainstream low-voltage switchgear and control-panel applications, while wider and thicker busbars are used in higher-current distribution, transformer and heavy electrical systems. Copper busbars remain the principal processed material, with aluminum gaining attention in weight- and cost-sensitive applications. The highest-value product opportunities are concentrated in systems combining low-scrap handling, multiple processing functions, bending compensation and digital production interfaces rather than in basic increases in nominal force alone.

## **Downstream Market Opportunities**

Switchgear and control panels remain the principal downstream market because they require recurring production of connection holes, cut lengths and standardized bends across broad product portfolios. Transformer and busway manufacturing provides additional demand for larger cross-sections and application-specific tooling. Data-center distribution systems, UPS equipment, modular power units, photovoltaic and energy-storage cabinets are becoming more important opportunity areas because they combine high current density, compact layouts and frequent design variation. These applications favor programmable machines that can maintain dimensional consistency, support rapid batch changes and provide digital production records. Automotive high-voltage busbar forming presents a separate adjacent opportunity, but its continuous-feed and three-dimensional processing architecture requires dedicated technical and market treatment.

## **Regional Insights**

China is the largest manufacturing cluster by supplier count, representing 13 of the 20 verified core manufacturers. Its supply base spans economical multifunction equipment,

dedicated punching and bending machines and increasingly automated processing lines. Chinese manufacturers benefit from extensive domestic electrical-equipment production, competitive manufacturing costs, short customization cycles and expanding export channels. However, software maturity, international certification, overseas service and separation of actual manufacturers from private-label sellers remain important differentiators. China is therefore both the most fragmented supply region and the primary source of price-based competition.

Europe has fewer suppliers but maintains a strong position in premium CNC punching, shearing, bending and automotive busbar-forming technologies. European specialists compete through precision, repeatability, tooling flexibility, automated angle correction, software and established service networks. South Korea and Poland retain smaller specialist clusters, while India combines local hydraulic-equipment production with imported and private-label machines. North America, Japan, Southeast Asia and other regions rely more heavily on imported equipment, local distribution and system integration because verifiable domestic specialist OEM capacity remains limited.

## Competitive Landscape Analysis

The competitive landscape combines a relatively fragmented manufacturer pool with a more concentrated premium-revenue segment. EHRT, Boschert and Stierli-Bieger occupy established positions in high-precision processing, automation, software and global service, while leading Chinese suppliers such as Shandong Gaoji and Shandong Lijian compete through broad product portfolios, manufacturing scale, customization and cost efficiency. The second tier consists of regional specialists offering differentiated punching, bending, integrated processing or busway-oriented equipment. Smaller manufacturers primarily compete on price, delivery time and non-standard tooling, but generally have weaker international service and software ecosystems. The verified core list reflects companies with strong product and manufacturing evidence, whereas the extended pool includes adjacent automotive busbar-forming specialists and suppliers whose products do not fully match the traditional distribution-grade revenue scope. Future competition will increasingly depend on automated material handling, low-scrap production, closed-loop process control, factory-software connectivity and lifecycle service. Industry consolidation through major acquisitions is not yet the principal structural force; product partnerships, channel integration and the consolidation of brands with actual manufacturing entities remain more common.

## Report Scope

This report is a detailed and comprehensive analysis for global CNC Busbar Processing Machine market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global CNC Busbar Processing Machine market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global CNC Busbar Processing Machine market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global CNC Busbar Processing Machine market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global CNC Busbar Processing Machine market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

## The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for CNC Busbar Processing Machine
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global CNC Busbar Processing Machine market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EHRT Maschinenbau GmbH & Co. KG, Boschert GmbH & Co. KG, Shandong Gaoji Industry Machinery Co., Ltd., Shandong Lijian CNC Machinery Co., Ltd., Stierli-Bieger AG, Beiene Intelligent Equipment Co., Ltd., Jinan Moti Industrial Co., Ltd., PAYAPRESS, NAMSUNG INDUSTRIES CO., ERKO sp. z o.o. sp. k., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

CNC Busbar Processing Machine market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

## **Market Segmentation**

### **Market segment by Type**

Integrated CNC Busbar Processing Machine

Dedicated CNC Punching and Shearing Center

Dedicated CNC Bending Center

Others

### **Market segment by Busbar Capacity**

Up to 160 mm Width

161–200 mm Width

Above 200 mm Width

Others

## **Market segment by Processing Function**

Punching and Forming

Shearing and Cut-to-Length

Flatwise and Edgewise Bending

Others

## **Market segment by Application**

Switchgear and Control Panels

Transformers

Busway and Busduct

Others

## **Major players covered**

EHRT Maschinenbau GmbH & Co. KG

Boschert GmbH & Co. KG

Shandong Gaoji Industry Machinery Co., Ltd.

Shandong Lijian CNC Machinery Co., Ltd.

Stierli-Bieger AG

Beiene Intelligent Equipment Co., Ltd.

Jinan Moti Industrial Co., Ltd.

PAYAPRESS

NAMSUNG INDUSTRIES CO.

ERKO sp. z o.o. sp. k.

Suzhou Kiande Electric Co., Ltd.

EUROMAC S.p.A.

Shandong Juhui Intelligent Technology Co., Ltd.

Zhejiang Zhongyan Machinery Manufacturing Co., Ltd.

Shandong Jingchuang CNC Equipment Co., Ltd.

Jinan Huahao CNC Equipment Co., Ltd.

Jinan Hengyueda CNC Equipment Co., Ltd.

Shandong Huanyi CNC Machinery Co., Ltd.

## **Market segment by region, regional analysis covers**

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of

Middle East & Africa)

## Chapter Outline

Chapter 1, to describe CNC Busbar Processing Machine product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of CNC Busbar Processing Machine, with price, sales quantity, revenue, and global market share of CNC Busbar Processing Machine from 2021 to 2026.

Chapter 3, the CNC Busbar Processing Machine competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the CNC Busbar Processing Machine breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and CNC Busbar Processing Machine market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of CNC Busbar Processing Machine.

Chapter 14 and 15, to describe CNC Busbar Processing Machine sales channel, distributors, customers, research findings and conclusion.

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