

Global Vertical 5-Axis CNC Machine Tools Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Vertical 5-Axis CNC Machine Tools market size is expected to reach \$ 15803 million by 2032, rising at a market growth of 9.2% CAGR during the forecast period (2026-2032).

Vertical 5-Axis CNC Machine Tools are CNC metal-cutting systems characterized by a vertically oriented spindle, three linear motion axes and two controlled rotary axes, enabling five-sided positional machining or simultaneous five-axis contouring of complex components. The rotary axes may be integrated into a tilting rotary table, divided between a swiveling spindle head and rotary table, or arranged in head-head and add-on rotary-table configurations. The research scope focuses on standard enclosed vertical platforms with single-column, bridge-type, compact symmetrical or double-column structures, covering stand-alone machines and systems integrated with pallets, robots and flexible automation. Key technical parameters include rotary-table diameter, workpiece envelope and payload, linear-axis travel, rotary-axis range, spindle speed and torque, positioning and volumetric accuracy, thermal stability, tool capacity and automation compatibility. These machines perform milling, drilling, boring, tapping and complex surface machining in one setup, while selected platforms integrate turning, grinding, gear processing, inspection or other multitasking functions. Principal applications include aerospace components, dies and molds, automotive and electric-vehicle parts, medical devices, energy equipment, semiconductor-equipment components, precision machinery and other high-value parts requiring multi-angle accessibility, consistent surface quality and reduced workpiece repositioning.

Key Findings

Table–table architecture remains the principal configuration for standard Vertical 5-Axis CNC Machine Tools

Head–table systems provide greater accessibility and payload flexibility for medium and large complex components

Aerospace dies and molds automotive and precision manufacturing form the core application base

Automation and process integration are becoming as important as spindle performance and five-axis accuracy

Asia-Pacific provides the broadest manufacturing demand while Europe retains strong premium technology capabilities

Market Trends

The Vertical 5-Axis CNC Machine Tools market is evolving from stand-alone complex-part equipment toward digitally connected, automated and process-integrated manufacturing platforms. Product development increasingly focuses on direct-drive rotary axes, wider tilting ranges, higher spindle torque density, symmetrical machine structures, thermal-error compensation and collision-safe working envelopes. Table–table machines remain the mainstream solution for compact and medium-size platforms because they provide a short kinematic chain, high dynamic response and efficient use of floor space. Head–table configurations are gaining importance for larger workpieces, deep cavities and applications where workpiece tilting would restrict payload or machining accessibility. Manufacturers are also expanding pallet systems, robotic loading, tool-storage capacity and production-management software to support high-mix, low-volume unattended manufacturing. Selected platforms increasingly integrate milling with turning, grinding, gear processing, inspection and deburring. Purchasing decisions are therefore shifting from nominal axis travel, table diameter and spindle speed toward verified volumetric accuracy, process stability, post-processing quality, automation scalability, software integration, energy efficiency and lifecycle service. The long-term direction is toward compact platforms capable of completing a greater proportion of the component process chain in one clamping.

Market Dynamics

Drivers

Demand is driven by the need to manufacture increasingly complex and high-value components with fewer setups, shorter process chains and improved dimensional consistency. Five-axis motion provides continuous access to inclined surfaces, deep cavities, undercuts and free-form contours, reducing fixture changes, intermediate inspection and manual repositioning. Aerospace manufacturers require these capabilities for impellers, blisks, structural parts, engine cases and difficult-to-machine alloys, while die and mold producers use controlled tool orientation to shorten tool overhang, improve surface quality and reduce polishing requirements. Automotive and electric-vehicle manufacturers are expanding applications in electric-drive housings, battery-system components, thermal-management parts, lightweight structural components and precision tooling. Medical, semiconductor-equipment and precision-engineering users also value compact machine footprints, high contour accuracy and production flexibility. Labor shortages and rising manufacturing costs strengthen the economic case for pallet handling, robotic loading, in-process measurement and unattended operation. For high-value workpieces, lower setup error, reduced scrap exposure and improved process traceability can be more important than nominal cycle-time savings.

Restraints

The principal restraint is the high total cost of ownership associated with precision rotary axes, advanced CNC systems, high-performance spindles, thermal-control systems, probing, tooling and automation. Investment extends beyond the machine to fixtures, post-processors, simulation software, collision verification, operator training and process validation. In table–table designs, rotary-table diameter, payload and workpiece center of gravity impose practical limitations on usable component size. Complex fixtures may further reduce the effective machining envelope and increase collision risk during large-angle table movement. Five-axis programming, toolpath optimization and kinematic calibration require experienced personnel, while inadequate process preparation can prevent users from achieving the expected improvements in productivity and quality. Smaller manufacturers may struggle to maintain sufficient utilization when demand is project-based or cyclical, making indexed three-axis machining, 3+2 processing or outsourced five-axis production more economical. Maintenance of rotary axes, encoders, direct-drive motors and motor spindles adds lifecycle cost, while dependence

on high-precision components and control systems can lengthen equipment delivery and repair cycles.

Opportunities

The most attractive opportunities are concentrated in applications combining complex geometry, expensive materials and a strong requirement for process consolidation. Aerospace and space manufacturing continue to create demand for high-speed aluminum machining, high-torque cutting of titanium and nickel-based alloys, and precision production of engine and structural components. Electric mobility is expanding the opportunity set through electric-drive housings, inverter enclosures, thermal-management systems, lightweight chassis components and battery-production tooling. Medical implants, semiconductor-equipment components, optical structures and precision molds provide additional demand for compact high-accuracy machines with advanced measurement and automation. Scalable pallet systems, robotic loading and automated scheduling enable contract manufacturers to increase spindle utilization during nights and weekends while processing changing product mixes. Multitasking platforms integrating turning, grinding, gear processing or inspection can replace several production assets and reduce inter-operation handling. Digital twins, automated workpiece alignment, tool-condition monitoring and closed-loop compensation offer further software and service opportunities. Local application engineering, training, spare-parts availability and rapid accuracy restoration are especially important in markets seeking to reduce dependence on imported turnkey support.

Challenges

The industry must balance greater speed, payload and flexibility with the geometric and dynamic complexity created by two rotary axes. In table–table machines, workpiece mass, diameter and center-of-gravity height influence acceleration, contour accuracy and surface quality. Head–table structures reduce the need to tilt heavy workpieces but increase requirements for swiveling-head rigidity, thermal stability and kinematic compensation. Machine builders must validate the CNC, spindle, rotary axes, toolholders, fixtures, post-processors and software as one integrated manufacturing process. Customers increasingly expect one platform to machine aluminum, hardened steel, titanium, graphite and high-temperature alloys, although these materials require different spindle, cooling, filtration and tooling strategies. Competition from lower-cost regional manufacturers is intensifying, while established suppliers face pressure to improve accuracy, automation and service without proportionate price increases.

Shortages of experienced application engineers, programmers and maintenance personnel can delay production ramp-up. Cybersecurity, remote-service compliance and data interoperability are becoming additional challenges as machines connect to factory networks, tool databases, measurement systems and manufacturing-execution platforms.

Industry Chain Analysis

The upstream industry chain comprises cast and welded machine structures, guideways, ball screws, linear drives, tilting rotary tables, torque motors, precision bearings, motor spindles, encoders, CNC controls, tool magazines, probing systems, coolant and filtration equipment, fixtures, cutting tools and industrial software. CNC systems, rotary-axis assemblies, spindle units, precision bearings and measurement devices account for a significant portion of equipment cost and directly influence machine accuracy, reliability, serviceability and delivery time. Effective system design requires structural rigidity, moving mass, spindle characteristics, rotary-axis dynamics, workpiece capacity and thermal compensation to be matched with the intended materials, tolerances and production cycle.

Midstream manufacturers perform machine design, machining and assembly of major structures, control integration, geometric calibration, software configuration, cutting trials and automation commissioning. Value creation increasingly extends into process engineering, fixture design, post-processor development, tool planning, simulation, operator training and production ramp-up. Downstream customers include aerospace, automotive, die and mold, medical, energy, semiconductor-equipment, general machinery and precision contract-manufacturing companies. Suppliers with broad installed bases, responsive application support, spare-parts availability and the ability to restore five-axis accuracy can capture more lifecycle value. Customized applications, automation packages, digital functions and service contracts generally provide stronger value contribution, while standardized machine platforms face greater price competition.

Segment Insights

By rotary-axis architecture, table–table machines constitute the broadest standard product segment. Both rotary movements are located on the workpiece side, supporting compact machine design, high dynamic response and accurate simultaneous machining of small and medium components. Their practical limitations are workpiece payload,

diameter, height and center-of-gravity position. Head–table machines divide the rotary motion between a swiveling spindle head and rotary table, reducing the need to tilt heavier workpieces and improving access to deep cavities, side walls and larger parts. These systems generally carry higher unit value because of their more complex head structure, calibration requirements and wider application range. Head–head and add-on rotary-table configurations serve more specialized needs, including larger components, flexible conversion from three-axis machining and entry-level five-axis production.

By machine size, small platforms emphasize compact footprint, high spindle speed and precision production for medical, aerospace and electronic components. Medium-size machines cover molds, automotive parts, housings and general precision engineering and represent the broadest application range. Larger machines compete through table payload, workpiece envelope, spindle torque and structural rigidity. Pure milling systems account for the broadest unit demand, while mill-turn and multiprocess platforms carry higher average value because they consolidate additional operations. Automation-ready Vertical 5-Axis CNC Machine Tools equipped with pallet systems, robotic handling, probing and tool-management software are becoming strategically important as buyers place greater emphasis on utilization, labor productivity and repeatable process control.

Downstream Market Opportunities

Aerospace remains one of the most important downstream markets because it combines complex geometry, strict dimensional requirements, expensive materials and a strong need to reduce setup-related risk. Vertical 5-Axis CNC Machine Tools are used for impellers, blisks, engine cases, structural parts, landing-system components and aerospace tooling, with configurations differentiated between high-speed aluminum removal and high-torque cutting of titanium or nickel alloys. Die and mold production provides broad recurring demand for complex cavities, shortened tool overhang and improved surface quality. Automotive opportunities are expanding in electric-drive, battery, thermal-management and lightweight structural components, while conventional powertrain and tooling applications remain important. Medical implants, semiconductor-equipment components, optical parts and precision contract manufacturing offer attractive opportunities for smaller high-accuracy platforms. Applications in which one-setup machining, reduced fixture requirements, lower manual finishing and unattended production create sufficient operational value to offset higher capital and engineering requirements generally offer the strongest commercial potential.

Regional Insights

Asia-Pacific provides the broadest manufacturing demand base, supported by large automotive, electronics, aerospace, machinery, die and mold, and precision-component supply chains. China combines substantial machine-tool demand with rapidly improving domestic five-axis manufacturing capabilities, creating opportunities for both locally produced systems and imported premium platforms. Japan retains strong capabilities in precision engineering, thermal stability, automation and production-oriented machine design, while South Korea and Taiwan contribute competitive platforms and regional service networks. Demand within the region is highly segmented: multinational aerospace, semiconductor and advanced-manufacturing users emphasize validated process capability and lifecycle support, whereas general industrial customers place greater weight on purchase price, delivery time and localized customization.

Europe retains a strong premium supply position through advanced rotary-axis engineering, spindle technology, software integration and application expertise. Regional demand is concentrated in aerospace, automotive engineering, medical technology, precision machinery and high-value contract manufacturing. North American demand is supported by aerospace, defense, space, energy, medical manufacturing and investment in domestic automated production. Across all regions, local application engineering, training, spare parts and service response are becoming more influential because Vertical 5-Axis CNC Machine Tools require extensive commissioning, post-processor validation and long-term geometric management. Emerging manufacturing markets also present additional potential as industrial upgrading increases demand for flexible and high-accuracy machining capacity.

Competitive Landscape Analysis

The competitive landscape is segmented by machine size, rotary-axis architecture, spindle performance, accuracy level, automation capability and application specialization. DMG Mori, Yamazaki Mazak, Okuma, Makino, Hermle and GF Machining Solutions compete strongly in premium applications through differentiated machine structures, advanced control functions, high-speed or high-torque spindle packages and broad automation options. DN Solutions, Haas Automation, Hurco, Hwacheon and Fair Friend Group-related platforms broaden market access through standardized product ranges, competitive price-performance and automation-ready configurations. Starrag Group and Matsuura Machinery Corporation address specialized high-value requirements, with Starrag emphasizing demanding aerospace and precision

applications and Matsuura focusing on palletized, long-duration unattended production. Confirmed Chinese manufacturers, including Shenyang Machine Tool, Kede CNC, Rifa Precision Machinery, Haitian Precision, Yiteli and TopNC, are improving five-axis control, spindle capability, localized application engineering and delivery performance. Competitive differentiation is shifting from nominal travel, table diameter and spindle speed toward verified contour accuracy, thermal stability, cutting performance, automation uptime, software integration, commissioning quality and lifecycle service. Premium suppliers retain advantages in complex applications and international support, while regional manufacturers compete through cost, customization, shorter delivery cycles and local responsiveness.

Report Scope

This report studies the global Vertical 5-Axis CNC Machine Tools production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Vertical 5-Axis CNC Machine Tools and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Vertical 5-Axis CNC Machine Tools that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Vertical 5-Axis CNC Machine Tools total production and demand, 2021-2032, (K Units)

Global Vertical 5-Axis CNC Machine Tools total production value, 2021-2032, (USD Million)

Global Vertical 5-Axis CNC Machine Tools production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Vertical 5-Axis CNC Machine Tools consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Vertical 5-Axis CNC Machine Tools domestic production, consumption, key domestic manufacturers and share

Global Vertical 5-Axis CNC Machine Tools production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Vertical 5-Axis CNC Machine Tools production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Vertical 5-Axis CNC Machine Tools production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Vertical 5-Axis CNC Machine Tools market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include DMG Mori, Yamazaki Mazak, Okuma Corporation, DN Solutions, GF Machining Solutions, Hermle, Makino, Haas Automation, Starrag Group, Shenyang Machine Tool, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Vertical 5-Axis CNC Machine Tools market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Vertical 5-Axis CNC Machine Tools Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Vertical 5-Axis CNC Machine Tools Market, Segmentation by Type:

Double Rotary Table

Double Swivel Head

Swivel Head + Rotary Table

Global Vertical 5-Axis CNC Machine Tools Market, Segmentation by Structure:

Single-Column C-Type

Symmetrical Bridge Type

Other

Global Vertical 5-Axis CNC Machine Tools Market, Segmentation by Workbench Size:

≤400 mm

>400–650 mm

>650 mm

Global Vertical 5-Axis CNC Machine Tools Market, Segmentation by Application:

Aerospace

Automotive

Energy Equipment

Engineering and Heavy Machinery

Other

Companies Profiled:

DMG Mori

Yamazaki Mazak

Okuma Corporation

DN Solutions

GF Machining Solutions

Hermle

Makino

Haas Automation

Starrag Group

Shenyang Machine Tool

Hurco

Matsuura Machinery Corporation

Fair Friend Group

KEDE CNC

Hwacheon

Awea Mechantronic

RIFA Digital Precision Machinery

Haitian Precision Machinery

Yiteli

Top Numerical Control Technology

Key Questions Answered

1. How big is the global Vertical 5-Axis CNC Machine Tools market?
2. What is the demand of the global Vertical 5-Axis CNC Machine Tools market?
3. What is the year over year growth of the global Vertical 5-Axis CNC Machine Tools market?
4. What is the total value of the global Vertical 5-Axis CNC Machine Tools market?
5. Who are the Major Players in the global Vertical 5-Axis CNC Machine Tools market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 Vertical 5-Axis CNC Machine Tools Introduction

1.2 World Vertical 5-Axis CNC Machine Tools Supply & Forecast

1.2.1 World Vertical 5-Axis CNC Machine Tools Production Value (2021 & 2025 & 2032)

1.2.2 World Vertical 5-Axis CNC Machine Tools Production (2021-2032)

1.2.3 World Vertical 5-Axis CNC Machine Tools Pricing Trends (2021-2032)

1.3 World Vertical 5-Axis CNC Machine Tools Production by Region (Based on Production Site)

1.3.1 World Vertical 5-Axis CNC Machine Tools Production Value by Region (2021-2032)

1.3.2 World Vertical 5-Axis CNC Machine Tools Production by Region (2021-2032)

1.3.3 World Vertical 5-Axis CNC Machine Tools Average Price by Region (2021-2032)

1.3.4 North America Vertical 5-Axis CNC Machine Tools Production (2021-2032)

1.3.5 Europe Vertical 5-Axis CNC Machine Tools Production (2021-2032)

1.3.6 China Vertical 5-Axis CNC Machine Tools Production (2021-2032)

1.3.7 Japan Vertical 5-Axis CNC Machine Tools Production (2021-2032)

1.3.8 South Korea Vertical 5-Axis CNC Machine Tools Production (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 Vertical 5-Axis CNC Machine Tools Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Vertical 5-Axis CNC Machine Tools Major Market Trends

2 DEMAND SUMMARY

2.1 World Vertical 5-Axis CNC Machine Tools Demand (2021-2032)

2.2 World Vertical 5-Axis CNC Machine Tools Consumption by Region

2.2.1 World Vertical 5-Axis CNC Machine Tools Consumption by Region (2021-2026)

2.2.2 World Vertical 5-Axis CNC Machine Tools Consumption Forecast by Region (2027-2032)

2.3 United States Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

2.4 China Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

2.5 Europe Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

2.6 Japan Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

2.7 South Korea Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

2.8 ASEAN Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

2.9 India Vertical 5-Axis CNC Machine Tools Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Vertical 5-Axis CNC Machine Tools Production Value by Manufacturer (2021-2026)

3.2 World Vertical 5-Axis CNC Machine Tools Production by Manufacturer (2021-2026)

3.3 World Vertical 5-Axis CNC Machine Tools Average Price by Manufacturer (2021-2026)

3.4 Vertical 5-Axis CNC Machine Tools Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Vertical 5-Axis CNC Machine Tools Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Vertical 5-Axis CNC Machine Tools in 2025

3.5.3 Global Concentration Ratios (CR8) for Vertical 5-Axis CNC Machine Tools in 2025

3.6 Vertical 5-Axis CNC Machine Tools Market: Overall Company Footprint Analysis

3.6.1 Vertical 5-Axis CNC Machine Tools Market: Region Footprint

3.6.2 Vertical 5-Axis CNC Machine Tools Market: Company Product Type Footprint

3.6.3 Vertical 5-Axis CNC Machine Tools Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Vertical 5-Axis CNC Machine Tools Production Value Comparison

4.1.1 United States VS China: Vertical 5-Axis CNC Machine Tools Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Vertical 5-Axis CNC Machine Tools Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Vertical 5-Axis CNC Machine Tools Production Comparison

4.2.1 United States VS China: Vertical 5-Axis CNC Machine Tools Production

Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Vertical 5-Axis CNC Machine Tools Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Vertical 5-Axis CNC Machine Tools Consumption Comparison

4.3.1 United States VS China: Vertical 5-Axis CNC Machine Tools Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Vertical 5-Axis CNC Machine Tools Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Vertical 5-Axis CNC Machine Tools Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Vertical 5-Axis CNC Machine Tools Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value (2021-2026)

4.4.3 United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production (2021-2026)

4.5 China Based Vertical 5-Axis CNC Machine Tools Manufacturers and Market Share

4.5.1 China Based Vertical 5-Axis CNC Machine Tools Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value (2021-2026)

4.5.3 China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production (2021-2026)

4.6 Rest of World Based Vertical 5-Axis CNC Machine Tools Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Vertical 5-Axis CNC Machine Tools Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Vertical 5-Axis CNC Machine Tools Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Double Rotary Table

5.2.2 Double Swivel Head

5.2.3 Swivel Head + Rotary Table

5.3 Market Segment by Type

5.3.1 World Vertical 5-Axis CNC Machine Tools Production by Type (2021-2032)

5.3.2 World Vertical 5-Axis CNC Machine Tools Production Value by Type
(2021-2032)

5.3.3 World Vertical 5-Axis CNC Machine Tools Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY STRUCTURE

6.1 World Vertical 5-Axis CNC Machine Tools Market Size Overview by Structure: 2021
VS 2025 VS 2032

6.2 Segment Introduction by Structure

6.2.1 Single-Column C-Type

6.2.2 Symmetrical Bridge Type

6.2.3 Other

6.3 Market Segment by Structure

6.3.1 World Vertical 5-Axis CNC Machine Tools Production by Structure (2021-2032)

6.3.2 World Vertical 5-Axis CNC Machine Tools Production Value by Structure
(2021-2032)

6.3.3 World Vertical 5-Axis CNC Machine Tools Average Price by Structure
(2021-2032)

7 MARKET ANALYSIS BY WORKBENCH SIZE

7.1 World Vertical 5-Axis CNC Machine Tools Market Size Overview by Workbench
Size: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Workbench Size

7.2.1 ?400 mm

7.2.2 >400–650 mm

7.2.3 >650 mm

7.3 Market Segment by Workbench Size

7.3.1 World Vertical 5-Axis CNC Machine Tools Production by Workbench Size
(2021-2032)

7.3.2 World Vertical 5-Axis CNC Machine Tools Production Value by Workbench Size
(2021-2032)

7.3.3 World Vertical 5-Axis CNC Machine Tools Average Price by Workbench Size
(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Vertical 5-Axis CNC Machine Tools Market Size Overview by Application:
2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Aerospace

8.2.2 Automotive

8.2.3 Energy Equipment

8.2.4 Engineering and Heavy Machinery

8.2.5 Other

8.3 Market Segment by Application

8.3.1 World Vertical 5-Axis CNC Machine Tools Production by Application (2021-2032)

8.3.2 World Vertical 5-Axis CNC Machine Tools Production Value by Application
(2021-2032)

8.3.3 World Vertical 5-Axis CNC Machine Tools Average Price by Application
(2021-2032)

9 COMPANY PROFILES

9.1 DMG Mori

9.1.1 DMG Mori Details

9.1.2 DMG Mori Major Business

9.1.3 DMG Mori Vertical 5-Axis CNC Machine Tools Product and Services

9.1.4 DMG Mori Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross
Margin and Market Share (2021-2026)

9.1.5 DMG Mori Recent Developments/Updates

9.1.6 DMG Mori Competitive Strengths & Weaknesses

9.2 Yamazaki Mazak

9.2.1 Yamazaki Mazak Details

9.2.2 Yamazaki Mazak Major Business

9.2.3 Yamazaki Mazak Vertical 5-Axis CNC Machine Tools Product and Services

9.2.4 Yamazaki Mazak Vertical 5-Axis CNC Machine Tools Production, Price, Value,
Gross Margin and Market Share (2021-2026)

9.2.5 Yamazaki Mazak Recent Developments/Updates

9.2.6 Yamazaki Mazak Competitive Strengths & Weaknesses

9.3 Okuma Corporation

9.3.1 Okuma Corporation Details

9.3.2 Okuma Corporation Major Business

9.3.3 Okuma Corporation Vertical 5-Axis CNC Machine Tools Product and Services

9.3.4 Okuma Corporation Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Okuma Corporation Recent Developments/Updates

9.3.6 Okuma Corporation Competitive Strengths & Weaknesses

9.4 DN Solutions

9.4.1 DN Solutions Details

9.4.2 DN Solutions Major Business

9.4.3 DN Solutions Vertical 5-Axis CNC Machine Tools Product and Services

9.4.4 DN Solutions Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 DN Solutions Recent Developments/Updates

9.4.6 DN Solutions Competitive Strengths & Weaknesses

9.5 GF Machining Solutions

9.5.1 GF Machining Solutions Details

9.5.2 GF Machining Solutions Major Business

9.5.3 GF Machining Solutions Vertical 5-Axis CNC Machine Tools Product and Services

9.5.4 GF Machining Solutions Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 GF Machining Solutions Recent Developments/Updates

9.5.6 GF Machining Solutions Competitive Strengths & Weaknesses

9.6 Hermle

9.6.1 Hermle Details

9.6.2 Hermle Major Business

9.6.3 Hermle Vertical 5-Axis CNC Machine Tools Product and Services

9.6.4 Hermle Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Hermle Recent Developments/Updates

9.6.6 Hermle Competitive Strengths & Weaknesses

9.7 Makino

9.7.1 Makino Details

9.7.2 Makino Major Business

9.7.3 Makino Vertical 5-Axis CNC Machine Tools Product and Services

9.7.4 Makino Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Makino Recent Developments/Updates

9.7.6 Makino Competitive Strengths & Weaknesses

9.8 Haas Automation

9.8.1 Haas Automation Details

- 9.8.2 Haas Automation Major Business
- 9.8.3 Haas Automation Vertical 5-Axis CNC Machine Tools Product and Services
- 9.8.4 Haas Automation Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.8.5 Haas Automation Recent Developments/Updates
- 9.8.6 Haas Automation Competitive Strengths & Weaknesses
- 9.9 Starrag Group
 - 9.9.1 Starrag Group Details
 - 9.9.2 Starrag Group Major Business
 - 9.9.3 Starrag Group Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.9.4 Starrag Group Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Starrag Group Recent Developments/Updates
 - 9.9.6 Starrag Group Competitive Strengths & Weaknesses
- 9.10 Shenyang Machine Tool
 - 9.10.1 Shenyang Machine Tool Details
 - 9.10.2 Shenyang Machine Tool Major Business
 - 9.10.3 Shenyang Machine Tool Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.10.4 Shenyang Machine Tool Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Shenyang Machine Tool Recent Developments/Updates
 - 9.10.6 Shenyang Machine Tool Competitive Strengths & Weaknesses
- 9.11 Hurco
 - 9.11.1 Hurco Details
 - 9.11.2 Hurco Major Business
 - 9.11.3 Hurco Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.11.4 Hurco Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Hurco Recent Developments/Updates
 - 9.11.6 Hurco Competitive Strengths & Weaknesses
- 9.12 Matsuura Machinery Corporation
 - 9.12.1 Matsuura Machinery Corporation Details
 - 9.12.2 Matsuura Machinery Corporation Major Business
 - 9.12.3 Matsuura Machinery Corporation Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.12.4 Matsuura Machinery Corporation Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Matsuura Machinery Corporation Recent Developments/Updates

- 9.12.6 Matsuura Machinery Corporation Competitive Strengths & Weaknesses
- 9.13 Fair Friend Group
 - 9.13.1 Fair Friend Group Details
 - 9.13.2 Fair Friend Group Major Business
 - 9.13.3 Fair Friend Group Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.13.4 Fair Friend Group Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Fair Friend Group Recent Developments/Updates
 - 9.13.6 Fair Friend Group Competitive Strengths & Weaknesses
- 9.14 KEDE CNC
 - 9.14.1 KEDE CNC Details
 - 9.14.2 KEDE CNC Major Business
 - 9.14.3 KEDE CNC Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.14.4 KEDE CNC Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 KEDE CNC Recent Developments/Updates
 - 9.14.6 KEDE CNC Competitive Strengths & Weaknesses
- 9.15 Hwacheon
 - 9.15.1 Hwacheon Details
 - 9.15.2 Hwacheon Major Business
 - 9.15.3 Hwacheon Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.15.4 Hwacheon Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Hwacheon Recent Developments/Updates
 - 9.15.6 Hwacheon Competitive Strengths & Weaknesses
- 9.16 Awea Mechantronic
 - 9.16.1 Awea Mechantronic Details
 - 9.16.2 Awea Mechantronic Major Business
 - 9.16.3 Awea Mechantronic Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.16.4 Awea Mechantronic Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Awea Mechantronic Recent Developments/Updates
 - 9.16.6 Awea Mechantronic Competitive Strengths & Weaknesses
- 9.17 RIFA Digital Precision Machinery
 - 9.17.1 RIFA Digital Precision Machinery Details
 - 9.17.2 RIFA Digital Precision Machinery Major Business
 - 9.17.3 RIFA Digital Precision Machinery Vertical 5-Axis CNC Machine Tools Product and Services
 - 9.17.4 RIFA Digital Precision Machinery Vertical 5-Axis CNC Machine Tools

Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 RIFA Digital Precision Machinery Recent Developments/Updates

9.17.6 RIFA Digital Precision Machinery Competitive Strengths & Weaknesses

9.18 Haitian Precision Machinery

9.18.1 Haitian Precision Machinery Details

9.18.2 Haitian Precision Machinery Major Business

9.18.3 Haitian Precision Machinery Vertical 5-Axis CNC Machine Tools Product and Services

9.18.4 Haitian Precision Machinery Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Haitian Precision Machinery Recent Developments/Updates

9.18.6 Haitian Precision Machinery Competitive Strengths & Weaknesses

9.19 Yiteli

9.19.1 Yiteli Details

9.19.2 Yiteli Major Business

9.19.3 Yiteli Vertical 5-Axis CNC Machine Tools Product and Services

9.19.4 Yiteli Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 Yiteli Recent Developments/Updates

9.19.6 Yiteli Competitive Strengths & Weaknesses

9.20 Top Numerical Control Technology

9.20.1 Top Numerical Control Technology Details

9.20.2 Top Numerical Control Technology Major Business

9.20.3 Top Numerical Control Technology Vertical 5-Axis CNC Machine Tools Product and Services

9.20.4 Top Numerical Control Technology Vertical 5-Axis CNC Machine Tools Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Top Numerical Control Technology Recent Developments/Updates

9.20.6 Top Numerical Control Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Vertical 5-Axis CNC Machine Tools Industry Chain

10.2 Vertical 5-Axis CNC Machine Tools Upstream Analysis

10.2.1 Vertical 5-Axis CNC Machine Tools Core Raw Materials

10.2.2 Main Manufacturers of Vertical 5-Axis CNC Machine Tools Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Vertical 5-Axis CNC Machine Tools Production Mode

10.6 Vertical 5-Axis CNC Machine Tools Procurement Model

10.7 Vertical 5-Axis CNC Machine Tools Industry Sales Model and Sales Channels

10.7.1 Vertical 5-Axis CNC Machine Tools Sales Model

10.7.2 Vertical 5-Axis CNC Machine Tools Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Vertical 5-Axis CNC Machine Tools Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Vertical 5-Axis CNC Machine Tools Production Value by Region (2021-2026) & (USD Million)

Table 3. World Vertical 5-Axis CNC Machine Tools Production Value by Region (2027-2032) & (USD Million)

Table 4. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Region (2021-2026)

Table 5. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Region (2027-2032)

Table 6. World Vertical 5-Axis CNC Machine Tools Production by Region (2021-2026) & (K Units)

Table 7. World Vertical 5-Axis CNC Machine Tools Production by Region (2027-2032) & (K Units)

Table 8. World Vertical 5-Axis CNC Machine Tools Production Market Share by Region (2021-2026)

Table 9. World Vertical 5-Axis CNC Machine Tools Production Market Share by Region (2027-2032)

Table 10. World Vertical 5-Axis CNC Machine Tools Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Vertical 5-Axis CNC Machine Tools Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Vertical 5-Axis CNC Machine Tools Major Market Trends

Table 13. World Vertical 5-Axis CNC Machine Tools Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Vertical 5-Axis CNC Machine Tools Consumption by Region (2021-2026) & (K Units)

Table 15. World Vertical 5-Axis CNC Machine Tools Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Vertical 5-Axis CNC Machine Tools Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Vertical 5-Axis CNC Machine Tools Producers in 2025

Table 18. World Vertical 5-Axis CNC Machine Tools Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Vertical 5-Axis CNC Machine Tools Producers in 2025

Table 20. World Vertical 5-Axis CNC Machine Tools Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Vertical 5-Axis CNC Machine Tools Company Evaluation Quadrant

Table 22. World Vertical 5-Axis CNC Machine Tools Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Vertical 5-Axis CNC Machine Tools Production Site of Key Manufacturer

Table 24. Vertical 5-Axis CNC Machine Tools Market: Company Product Type Footprint

Table 25. Vertical 5-Axis CNC Machine Tools Market: Company Product Application Footprint

Table 26. Vertical 5-Axis CNC Machine Tools Competitive Factors

Table 27. Vertical 5-Axis CNC Machine Tools New Entrant and Capacity Expansion Plans

Table 28. Vertical 5-Axis CNC Machine Tools Mergers & Acquisitions Activity

Table 29. United States VS China Vertical 5-Axis CNC Machine Tools Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Vertical 5-Axis CNC Machine Tools Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Vertical 5-Axis CNC Machine Tools Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Vertical 5-Axis CNC Machine Tools Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Market Share (2021-2026)

Table 37. China Based Vertical 5-Axis CNC Machine Tools Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production,

(2021-2026) & (K Units)

Table 41. China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Market Share (2021-2026)

Table 42. Rest of World Based Vertical 5-Axis CNC Machine Tools Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Market Share (2021-2026)

Table 47. World Vertical 5-Axis CNC Machine Tools Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Vertical 5-Axis CNC Machine Tools Production by Type (2021-2026) & (K Units)

Table 49. World Vertical 5-Axis CNC Machine Tools Production by Type (2027-2032) & (K Units)

Table 50. World Vertical 5-Axis CNC Machine Tools Production Value by Type (2021-2026) & (USD Million)

Table 51. World Vertical 5-Axis CNC Machine Tools Production Value by Type (2027-2032) & (USD Million)

Table 52. World Vertical 5-Axis CNC Machine Tools Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Vertical 5-Axis CNC Machine Tools Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Vertical 5-Axis CNC Machine Tools Production Value by Structure, (USD Million), 2021 & 2025 & 2032

Table 55. World Vertical 5-Axis CNC Machine Tools Production by Structure (2021-2026) & (K Units)

Table 56. World Vertical 5-Axis CNC Machine Tools Production by Structure (2027-2032) & (K Units)

Table 57. World Vertical 5-Axis CNC Machine Tools Production Value by Structure (2021-2026) & (USD Million)

Table 58. World Vertical 5-Axis CNC Machine Tools Production Value by Structure (2027-2032) & (USD Million)

Table 59. World Vertical 5-Axis CNC Machine Tools Average Price by Structure (2021-2026) & (US\$/Unit)

Table 60. World Vertical 5-Axis CNC Machine Tools Average Price by Structure (2027-2032) & (US\$/Unit)

Table 61. World Vertical 5-Axis CNC Machine Tools Production Value by Workbench Size, (USD Million), 2021 & 2025 & 2032

Table 62. World Vertical 5-Axis CNC Machine Tools Production by Workbench Size (2021-2026) & (K Units)

Table 63. World Vertical 5-Axis CNC Machine Tools Production by Workbench Size (2027-2032) & (K Units)

Table 64. World Vertical 5-Axis CNC Machine Tools Production Value by Workbench Size (2021-2026) & (USD Million)

Table 65. World Vertical 5-Axis CNC Machine Tools Production Value by Workbench Size (2027-2032) & (USD Million)

Table 66. World Vertical 5-Axis CNC Machine Tools Average Price by Workbench Size (2021-2026) & (US\$/Unit)

Table 67. World Vertical 5-Axis CNC Machine Tools Average Price by Workbench Size (2027-2032) & (US\$/Unit)

Table 68. World Vertical 5-Axis CNC Machine Tools Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Vertical 5-Axis CNC Machine Tools Production by Application (2021-2026) & (K Units)

Table 70. World Vertical 5-Axis CNC Machine Tools Production by Application (2027-2032) & (K Units)

Table 71. World Vertical 5-Axis CNC Machine Tools Production Value by Application (2021-2026) & (USD Million)

Table 72. World Vertical 5-Axis CNC Machine Tools Production Value by Application (2027-2032) & (USD Million)

Table 73. World Vertical 5-Axis CNC Machine Tools Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Vertical 5-Axis CNC Machine Tools Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. DMG Mori Basic Information, Manufacturing Base and Competitors

Table 76. DMG Mori Major Business

Table 77. DMG Mori Vertical 5-Axis CNC Machine Tools Product and Services

Table 78. DMG Mori Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. DMG Mori Recent Developments/Updates

Table 80. DMG Mori Competitive Strengths & Weaknesses

Table 81. Yamazaki Mazak Basic Information, Manufacturing Base and Competitors

Table 82. Yamazaki Mazak Major Business

Table 83. Yamazaki Mazak Vertical 5-Axis CNC Machine Tools Product and Services

Table 84. Yamazaki Mazak Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Yamazaki Mazak Recent Developments/Updates

Table 86. Yamazaki Mazak Competitive Strengths & Weaknesses

Table 87. Okuma Corporation Basic Information, Manufacturing Base and Competitors

Table 88. Okuma Corporation Major Business

Table 89. Okuma Corporation Vertical 5-Axis CNC Machine Tools Product and Services

Table 90. Okuma Corporation Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Okuma Corporation Recent Developments/Updates

Table 92. Okuma Corporation Competitive Strengths & Weaknesses

Table 93. DN Solutions Basic Information, Manufacturing Base and Competitors

Table 94. DN Solutions Major Business

Table 95. DN Solutions Vertical 5-Axis CNC Machine Tools Product and Services

Table 96. DN Solutions Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. DN Solutions Recent Developments/Updates

Table 98. DN Solutions Competitive Strengths & Weaknesses

Table 99. GF Machining Solutions Basic Information, Manufacturing Base and Competitors

Table 100. GF Machining Solutions Major Business

Table 101. GF Machining Solutions Vertical 5-Axis CNC Machine Tools Product and Services

Table 102. GF Machining Solutions Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. GF Machining Solutions Recent Developments/Updates

Table 104. GF Machining Solutions Competitive Strengths & Weaknesses

Table 105. Hermle Basic Information, Manufacturing Base and Competitors

Table 106. Hermle Major Business

Table 107. Hermle Vertical 5-Axis CNC Machine Tools Product and Services

Table 108. Hermle Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Hermle Recent Developments/Updates
Table 110. Hermle Competitive Strengths & Weaknesses
Table 111. Makino Basic Information, Manufacturing Base and Competitors
Table 112. Makino Major Business
Table 113. Makino Vertical 5-Axis CNC Machine Tools Product and Services
Table 114. Makino Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Makino Recent Developments/Updates
Table 116. Makino Competitive Strengths & Weaknesses
Table 117. Haas Automation Basic Information, Manufacturing Base and Competitors
Table 118. Haas Automation Major Business
Table 119. Haas Automation Vertical 5-Axis CNC Machine Tools Product and Services
Table 120. Haas Automation Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Haas Automation Recent Developments/Updates
Table 122. Haas Automation Competitive Strengths & Weaknesses
Table 123. Starrag Group Basic Information, Manufacturing Base and Competitors
Table 124. Starrag Group Major Business
Table 125. Starrag Group Vertical 5-Axis CNC Machine Tools Product and Services
Table 126. Starrag Group Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Starrag Group Recent Developments/Updates
Table 128. Starrag Group Competitive Strengths & Weaknesses
Table 129. Shenyang Machine Tool Basic Information, Manufacturing Base and Competitors
Table 130. Shenyang Machine Tool Major Business
Table 131. Shenyang Machine Tool Vertical 5-Axis CNC Machine Tools Product and Services
Table 132. Shenyang Machine Tool Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Shenyang Machine Tool Recent Developments/Updates
Table 134. Shenyang Machine Tool Competitive Strengths & Weaknesses
Table 135. Hurco Basic Information, Manufacturing Base and Competitors
Table 136. Hurco Major Business
Table 137. Hurco Vertical 5-Axis CNC Machine Tools Product and Services

Table 138. Hurco Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Hurco Recent Developments/Updates

Table 140. Hurco Competitive Strengths & Weaknesses

Table 141. Matsuura Machinery Corporation Basic Information, Manufacturing Base and Competitors

Table 142. Matsuura Machinery Corporation Major Business

Table 143. Matsuura Machinery Corporation Vertical 5-Axis CNC Machine Tools Product and Services

Table 144. Matsuura Machinery Corporation Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Matsuura Machinery Corporation Recent Developments/Updates

Table 146. Matsuura Machinery Corporation Competitive Strengths & Weaknesses

Table 147. Fair Friend Group Basic Information, Manufacturing Base and Competitors

Table 148. Fair Friend Group Major Business

Table 149. Fair Friend Group Vertical 5-Axis CNC Machine Tools Product and Services

Table 150. Fair Friend Group Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Fair Friend Group Recent Developments/Updates

Table 152. Fair Friend Group Competitive Strengths & Weaknesses

Table 153. KEDE CNC Basic Information, Manufacturing Base and Competitors

Table 154. KEDE CNC Major Business

Table 155. KEDE CNC Vertical 5-Axis CNC Machine Tools Product and Services

Table 156. KEDE CNC Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. KEDE CNC Recent Developments/Updates

Table 158. KEDE CNC Competitive Strengths & Weaknesses

Table 159. Hwacheon Basic Information, Manufacturing Base and Competitors

Table 160. Hwacheon Major Business

Table 161. Hwacheon Vertical 5-Axis CNC Machine Tools Product and Services

Table 162. Hwacheon Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Hwacheon Recent Developments/Updates

Table 164. Hwacheon Competitive Strengths & Weaknesses

Table 165. Awea Mechantronic Basic Information, Manufacturing Base and Competitors

Table 166. Awea Mechantronic Major Business

Table 167. Awea Mechantronic Vertical 5-Axis CNC Machine Tools Product and Services

Table 168. Awea Mechantronic Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Awea Mechantronic Recent Developments/Updates

Table 170. Awea Mechantronic Competitive Strengths & Weaknesses

Table 171. RIFA Digital Precision Machinery Basic Information, Manufacturing Base and Competitors

Table 172. RIFA Digital Precision Machinery Major Business

Table 173. RIFA Digital Precision Machinery Vertical 5-Axis CNC Machine Tools Product and Services

Table 174. RIFA Digital Precision Machinery Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. RIFA Digital Precision Machinery Recent Developments/Updates

Table 176. RIFA Digital Precision Machinery Competitive Strengths & Weaknesses

Table 177. Haitian Precision Machinery Basic Information, Manufacturing Base and Competitors

Table 178. Haitian Precision Machinery Major Business

Table 179. Haitian Precision Machinery Vertical 5-Axis CNC Machine Tools Product and Services

Table 180. Haitian Precision Machinery Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Haitian Precision Machinery Recent Developments/Updates

Table 182. Haitian Precision Machinery Competitive Strengths & Weaknesses

Table 183. Yiteli Basic Information, Manufacturing Base and Competitors

Table 184. Yiteli Major Business

Table 185. Yiteli Vertical 5-Axis CNC Machine Tools Product and Services

Table 186. Yiteli Vertical 5-Axis CNC Machine Tools Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Yiteli Recent Developments/Updates

Table 188. Yiteli Competitive Strengths & Weaknesses

Table 189. Top Numerical Control Technology Basic Information, Manufacturing Base and Competitors

Table 190. Top Numerical Control Technology Major Business

Table 191. Top Numerical Control Technology Vertical 5-Axis CNC Machine Tools
Product and Services

Table 192. Top Numerical Control Technology Vertical 5-Axis CNC Machine Tools
Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin
and Market Share (2021-2026)

Table 193. Top Numerical Control Technology Recent Developments/Updates

Table 194. Top Numerical Control Technology Competitive Strengths & Weaknesses

Table 195. Global Key Players of Vertical 5-Axis CNC Machine Tools Upstream (Raw
Materials)

Table 196. Global Vertical 5-Axis CNC Machine Tools Typical Customers

Table 197. Vertical 5-Axis CNC Machine Tools Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Vertical 5-Axis CNC Machine Tools Picture

Figure 2. World Vertical 5-Axis CNC Machine Tools Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Vertical 5-Axis CNC Machine Tools Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Vertical 5-Axis CNC Machine Tools Production (2021-2032) & (K Units)

Figure 5. World Vertical 5-Axis CNC Machine Tools Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Region (2021-2032)

Figure 7. World Vertical 5-Axis CNC Machine Tools Production Market Share by Region (2021-2032)

Figure 8. North America Vertical 5-Axis CNC Machine Tools Production (2021-2032) & (K Units)

Figure 9. Europe Vertical 5-Axis CNC Machine Tools Production (2021-2032) & (K Units)

Figure 10. China Vertical 5-Axis CNC Machine Tools Production (2021-2032) & (K Units)

Figure 11. Japan Vertical 5-Axis CNC Machine Tools Production (2021-2032) & (K Units)

Figure 12. South Korea Vertical 5-Axis CNC Machine Tools Production (2021-2032) & (K Units)

Figure 13. Vertical 5-Axis CNC Machine Tools Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 16. World Vertical 5-Axis CNC Machine Tools Consumption Market Share by Region (2021-2032)

Figure 17. United States Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 18. China Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 19. Europe Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 20. Japan Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K

Units)

Figure 21. South Korea Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 22. ASEAN Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 23. India Vertical 5-Axis CNC Machine Tools Consumption (2021-2032) & (K Units)

Figure 24. Producer Shipments of Vertical 5-Axis CNC Machine Tools by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Vertical 5-Axis CNC Machine Tools Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Vertical 5-Axis CNC Machine Tools Markets in 2025

Figure 27. United States VS China: Vertical 5-Axis CNC Machine Tools Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Vertical 5-Axis CNC Machine Tools Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Vertical 5-Axis CNC Machine Tools Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Market Share 2025

Figure 31. China Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Vertical 5-Axis CNC Machine Tools Production Market Share 2025

Figure 33. World Vertical 5-Axis CNC Machine Tools Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Type in 2025

Figure 35. Double Rotary Table

Figure 36. Double Swivel Head

Figure 37. Swivel Head + Rotary Table

Figure 38. World Vertical 5-Axis CNC Machine Tools Production Market Share by Type (2021-2032)

Figure 39. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Type (2021-2032)

Figure 40. World Vertical 5-Axis CNC Machine Tools Average Price by Type (2021-2032) & (US\$/Unit)

Figure 41. World Vertical 5-Axis CNC Machine Tools Production Value by Structure,

(USD Million), 2021 & 2025 & 2032

Figure 42. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Structure in 2025

Figure 43. Single-Column C-Type

Figure 44. Symmetrical Bridge Type

Figure 45. Other

Figure 46. World Vertical 5-Axis CNC Machine Tools Production Market Share by Structure (2021-2032)

Figure 47. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Structure (2021-2032)

Figure 48. World Vertical 5-Axis CNC Machine Tools Average Price by Structure (2021-2032) & (US\$/Unit)

Figure 49. World Vertical 5-Axis CNC Machine Tools Production Value by Workbench Size, (USD Million), 2021 & 2025 & 2032

Figure 50. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Workbench Size in 2025

Figure 51. ≤400 mm

Figure 52. >400–650 mm

Figure 53. >650 mm

Figure 54. World Vertical 5-Axis CNC Machine Tools Production Market Share by Workbench Size (2021-2032)

Figure 55. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Workbench Size (2021-2032)

Figure 56. World Vertical 5-Axis CNC Machine Tools Average Price by Workbench Size (2021-2032) & (US\$/Unit)

Figure 57. World Vertical 5-Axis CNC Machine Tools Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 58. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Application in 2025

Figure 59. Aerospace

Figure 60. Automotive

Figure 61. Energy Equipment

Figure 62. Engineering and Heavy Machinery

Figure 63. Other

Figure 64. World Vertical 5-Axis CNC Machine Tools Production Market Share by Application (2021-2032)

Figure 65. World Vertical 5-Axis CNC Machine Tools Production Value Market Share by Application (2021-2032)

Figure 66. World Vertical 5-Axis CNC Machine Tools Average Price by Application

(2021-2032) & (US\$/Unit)

Figure 67. Vertical 5-Axis CNC Machine Tools Industry Chain

Figure 68. Vertical 5-Axis CNC Machine Tools Procurement Model

Figure 69. Vertical 5-Axis CNC Machine Tools Sales Model

Figure 70. Vertical 5-Axis CNC Machine Tools Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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