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Global 5-Axis Gantry Machines Market Growth 2026-2032

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Abstracts

The global 5-Axis Gantry Machines market size is predicted to grow from US$ 385 million in 2025 to US$ 765 million in 2032; it is expected to grow at a CAGR of 10.1% from 2026 to 2032.

5-Axis Gantry Machines are CNC metal-cutting systems that combine a gantry, bridge-type or double-column load-bearing structure with three linear axes and two rotary axes to perform five-sided positioning or simultaneous five-axis machining of large and geometrically complex components. The rotary motion may be concentrated in a two-axis universal spindle head, divided between a swiveling head and rotary table, or integrated into a tilting rotary worktable on compact modified-gantry platforms. The market covers fixed-gantry moving-table machines, moving-gantry fixed-table systems, overhead gantry platforms, double-column machines and compact symmetrical gantry machining centers. Key technical parameters include axis travel, distance between columns, table load, spindle speed and torque, rotary-axis range, volumetric accuracy, thermal stability, material-removal capability and automation compatibility. These machines support milling, drilling, boring, tapping and, on selected platforms, turning, grinding, measuring or additive-subtractive process integration in one setup. Primary applications include aerostructures, large dies and molds, automotive structural components, energy equipment, rail and marine parts, composite tooling and other high-value components requiring multi-surface access, reduced repositioning and controlled machining accuracy.

Key Findings

5-Axis Gantry Machines enable one-setup machining of large complex components through coordinated linear and rotary motion

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Moving-gantry fixed-table and double-column moving-table platforms form the two principal large-format architectures

Aerospace structures, large molds, energy equipment and transportation components constitute the core demand base

Asia-Pacific provides the broadest volume demand while Europe retains a strong concentration of high-end gantry technologies

Automation, thermal compensation and digital process control are becoming decisive purchasing criteria alongside accuracy and spindle capability

Market Trends

The 5-Axis Gantry Machines market is shifting from stand-alone large-format milling equipment toward digitally controlled, process-integrated manufacturing platforms. Machine builders are improving structural symmetry, thermal management, direct-drive rotary axes, high-speed universal heads and automatic compensation to maintain accuracy across large working envelopes. At the same time, product development is separating into two technical directions: high-speed platforms for aluminum aerostructures, composite tooling and large molds, and high-torque machines for titanium, high-temperature alloys, cast iron and energy components. Modular spindle heads, automatic attachment changing and selectable spindle packages allow one base machine to cover roughing, finishing and multi-face machining. Selected systems are adding mill-turn, measuring and hybrid functions to reduce transfers between machines. Automation is also expanding beyond conventional pallet handling toward robotic loading, large tool magazines, process monitoring and unattended production. Buyers increasingly evaluate machines by complete process performance—including programming, collision avoidance, volumetric compensation, tool management, service response and output per unit of floor space—rather than by travel and spindle power alone.

Market Dynamics

Drivers

Demand is supported by the growing need to machine large components with complex contours, deep cavities and multiple functional surfaces in fewer setups. Aerospace

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manufacturers require simultaneous five-axis capability for airframe structures, tooling and difficult-to-machine materials, while mold producers use 5-Axis Gantry Machines to combine heavy roughing with high-quality free-form finishing. Energy, marine, rail and heavy-equipment customers require rigid platforms capable of carrying large workpieces without repeated repositioning. Automotive investment is also expanding the addressable market through larger casting dies, integrated structural castings, battery trays and lightweight body components. Rising labor costs and shortages of experienced operators strengthen the economic case for automated five-axis machining, in-process measurement and longer unattended production. The ability to consolidate operations, reduce fixture changes and improve geometric consistency can justify investment even where annual unit volumes are limited.

Restraints

The principal restraint is the high total cost of ownership. Large castings, precision guideways, multi-axis heads, high-performance spindles, CNC systems, foundation preparation, environmental controls and calibration create a substantial initial investment. Operating costs are also influenced by tooling, electricity, coolant management, preventive maintenance and periodic geometric verification. Five-axis programming, post-processing, simulation and collision management require specialized skills, while insufficient process preparation can prevent users from realizing the theoretical productivity advantage. Large machines generally have longer manufacturing and installation cycles, and their customized configurations limit standardization. Demand is consequently sensitive to capital-expenditure cycles in aerospace, automotive, die and mold, and heavy industry. Small and medium-sized manufacturers may continue using three-axis gantry machines, indexed heads or outsourced five-axis machining when utilization cannot support dedicated investment.

Opportunities

The strongest opportunities are emerging where component size is increasing faster than the capabilities of conventional vertical five-axis centers. These areas include large aerostructures, composite molds, integrated vehicle castings, energy-system housings, turbine components and high-value contract manufacturing. Retrofittable automation, modular universal heads and application-specific spindle packages can broaden the customer base by allowing staged investment. Localized production and service networks offer additional potential in markets seeking shorter delivery times, domestic maintenance capability and reduced dependence on imported turnkey systems. Digital twins, automated workpiece alignment, tool-condition monitoring and closed-loop geometric compensation can generate recurring software and service revenue while

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improving machine utilization. Compact symmetrical or modified-gantry machines also provide an opportunity to serve precision users that need five-axis performance and automation but do not require a traditional large moving-gantry platform.

Challenges

Long-term challenges center on maintaining accuracy over large travels, managing the thermal and dynamic behavior of heavy moving structures, and ensuring that rotary-axis performance remains stable under changing spindle loads. The supplier must coordinate mechanical design, CNC functions, compensation models, tooling and process software as a single system, making engineering complexity substantially higher than for conventional three-axis equipment. Customer acceptance also depends on reliable post-processors, validated machining strategies and local application support. Supply-chain disruptions involving CNC controls, encoders, bearings, torque motors, spindles and precision castings can extend lead times. Competition from lower-priced regional suppliers increases pressure on established manufacturers, while customers increasingly demand premium accuracy, automation and service without accepting equivalent increases in price. Cybersecurity, remote-service compliance and data interoperability are becoming additional requirements as machines are connected to plant-level production systems.

Industry Chain Analysis

The upstream chain consists of large castings and welded structures, linear guideways, hydrostatic or rolling guide systems, ball screws or linear drives, bearings, direct-drive torque motors, motor spindles, encoders, CNC controls, tool magazines, universal heads, coolant systems, measurement equipment and industrial software. The performance of 5-Axis Gantry Machines depends on the integration of these components rather than on any single specification. Structural rigidity, moving mass, spindle characteristics, rotary-axis geometry and thermal compensation must be matched to the intended material and workpiece size. High-value purchased components—particularly CNC systems, spindle assemblies, precision bearings, feedback devices and two-axis heads—represent a significant share of machine cost and can influence production lead time.

Midstream manufacturers undertake structural design, machining and assembly of major components, system integration, geometric calibration, software configuration and application validation. Value creation increasingly extends into process engineering, post-processor development, fixture design, cutting tests, automation and lifecycle

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service. Downstream customers include aerospace, automotive and mold manufacturers, energy-equipment producers, shipbuilding and rail companies, heavy-machinery groups and specialized machining contractors. Profitability is generally stronger where manufacturers supply application engineering, automation, digital functions and long-term service rather than competing only on the mechanical machine platform. Installed-base support, spare-parts availability and the ability to restore volumetric accuracy are therefore central elements of the value chain.

Segment Insights

By structural configuration, large moving-gantry fixed-table machines are primarily selected for long, heavy or difficult-to-move components because the workpiece remains stationary while the gantry traverses the machining area. Fixed-gantry or double-column machines with moving tables remain important for molds, dies, castings and general large-part machining where their mature structure provides rigidity and process stability. Overhead gantry systems address exceptionally long workpieces and production layouts requiring open access, while compact symmetrical or modified-gantry centers extend the market into precision parts, smaller molds and automated production cells.

By rotary-axis arrangement, two-axis universal-head machines generate a substantial share of large-format market value because they allow heavy workpieces to remain fixed and provide multi-angle access without a large tilting table. Swiveling-head and rotary-table configurations offer a balance between accessibility and rotary accuracy, while two-axis tilting-table designs are concentrated in compact machines with lower workpiece-size requirements. High-speed machines are differentiated by spindle speed, acceleration and aluminum or composite removal rates; heavy-duty systems compete through torque, ram rigidity and cutting stability. The most visible product opportunities lie in platforms that combine these mechanical capabilities with automatic head changing, measurement, process monitoring and scalable automation.

Downstream Market Opportunities

Aerospace remains a strategic application because large structural parts, composite tools and complex thin-wall components benefit directly from simultaneous five-axis machining and reduced reclamping. Die and mold customers require a combination of roughing capability, surface quality and geometric stability, making them a broad recurring demand group. Energy applications create opportunities in turbine, hydroelectric, nuclear and power-generation components that require large working

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envelopes and difficult-material machining. In transportation, larger aluminum castings, integrated vehicle structures, battery-system components, rail parts and marine structures are increasing the need for long-travel, multi-face machining. Contract manufacturers represent an additional opportunity because a configurable 5-Axis Gantry Machine can support multiple end markets and improve bidding capability for high-mix, low-volume projects. The most attractive projects are generally those where setup reduction, part-value protection and delivery-time improvement outweigh the machine's higher capital cost.

Regional Insights

Asia-Pacific represents the broadest volume opportunity, supported by large automotive, aerospace, mold, electronics, shipbuilding and general machinery supply chains. China accounted for approximately 32% of worldwide machine-tool consumption and 37% of production in 2025, providing a substantial industrial base for both imported high-end 5-Axis Gantry Machines and locally manufactured equipment. Japan and South Korea retain strong capabilities in double-column design, thermal control and production engineering, while Taiwan and mainland China continue to expand the availability of competitively priced and customized long-travel machines. The regional market nevertheless remains segmented: multinational aerospace and precision users prioritize validated process performance, while general industrial buyers place greater emphasis on investment cost, delivery time and local service.

Europe maintains a strong position in premium 5-Axis Gantry Machine technology, particularly in high-dynamic gantry platforms, universal-head engineering, aerospace machining and integrated production solutions. European manufacturers represented approximately 31.5% of global machine-tool production in 2025, although regional consumption was under pressure. North American demand is driven by aerospace, defense, composite tooling, energy and specialized contract machining, with purchasing decisions strongly influenced by local application support and service coverage. Future regional growth will therefore depend not only on end-user investment but also on manufacturers' ability to localize engineering, spare parts, training and lifecycle support.

Competitive Landscape Analysis

The competitive landscape is segmented by machine scale, accuracy level, process capability and service model rather than by one uniform product category. DMG Mori, Yamazaki Mazak, Okuma and Starrag participate strongly in premium large-format

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applications through rigid structures, advanced universal heads, broad spindle options and established support for aerospace, mold and energy customers. DN Solutions and Fair Friend Group-related platforms compete through wide double-column product coverage and flexible configurations, while Haas addresses selected large-part users with a comparatively standardized 5-Axis Gantry Machine offering. Hermle and GF Machining Solutions occupy the compact modified- or symmetrical-gantry segment, where dynamic accuracy, automation density and output per unit of floor space are central. Chinese manufacturers, including the confirmed domestic supplier group, are improving long-travel design, localized customization and delivery capability, creating stronger competition in domestic and selected export projects. Competitive differentiation is increasingly shifting from nominal travel and spindle specifications toward verified accuracy, material-specific cutting performance, automation integration, software, commissioning quality and lifecycle response. Manufacturers with proven application engineering and a geographically distributed service network generally have an advantage in high-value projects, while price-performance and customization remain decisive in more cost-sensitive segments.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “5-Axis Gantry Machines Industry Forecast” looks at past sales and reviews total world 5-Axis Gantry Machines sales in 2025, providing a comprehensive analysis by region and market sector of projected 5-Axis Gantry Machines sales for 2026 through 2032. With 5-Axis Gantry Machines sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world 5-Axis Gantry Machines industry.

This Insight Report provides a comprehensive analysis of the global 5-Axis Gantry Machines landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on 5-Axis Gantry Machines portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global 5-Axis Gantry Machines market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 5-Axis Gantry Machines and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up

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qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 5-Axis Gantry Machines.

This report presents a comprehensive overview, market shares, and growth opportunities of 5-Axis Gantry Machines market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Fixed Gantry

Moving Gantry

Segmentation by Five-axis Motion:

Double Rotary Table

Double Swivel Head

Swivel Head + Rotary Table

Others

Segmentation by Beam Structure:

Fixed Beam

Lifting Beam

Segmentation by Application:

Mold Manufacturing

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Aerospace

Energy Equipment

Automobile

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

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France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

DMG Mori

Yamazaki Mazak

GROB-WERKE

Okuma Corporation

DN Solutions

GF Machining Solutions

Hermle

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Haas Automation

Starrag Group

Shenyang Machine Tool

Fair Friend Group

KEDE CNC

Hwacheon

Ken Ichi Machine

Awea Mechantronic

RIFA Digital Precision Machinery

Haitian Precision Machinery

Yiteli

Top Numerical Control Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global 5-Axis Gantry Machines market?

What factors are driving 5-Axis Gantry Machines market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 5-Axis Gantry Machines market opportunities vary by end market size?

How does 5-Axis Gantry Machines break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global 5-Axis Gantry Machines Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for 5-Axis Gantry Machines by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for 5-Axis Gantry Machines by Country/Region, 2021, 2025 & 2032
2.2 5-Axis Gantry Machines Segment by Type
  2.2.1 Fixed Gantry
  2.2.2 Moving Gantry
  2.2.3 5-Axis Gantry Machines Sales by Type
    2.2.3.1 Global 5-Axis Gantry Machines Sales Market Share by Type (2021-2026)
    2.2.3.2 Global 5-Axis Gantry Machines Revenue and Market Share by Type (2021-2026)
    2.2.3.3 Global 5-Axis Gantry Machines Sale Price by Type (2021-2026)
2.3 5-Axis Gantry Machines Segment by Five-axis Motion
  2.3.1 Double Rotary Table
  2.3.2 Double Swivel Head
  2.3.3 Swivel Head + Rotary Table
  2.3.4 Others
  2.3.5 5-Axis Gantry Machines Sales by Five-axis Motion
    2.3.5.1 Global 5-Axis Gantry Machines Sales Market Share by Five-axis Motion (2021-2026)
    2.3.5.2 Global 5-Axis Gantry Machines Revenue and Market Share by Five-axis Motion (2021-2026)

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2.3.5.3 Global 5-Axis Gantry Machines Sale Price by Five-axis Motion (2021-2026)
2.4 5-Axis Gantry Machines Segment by Beam Structure
2.4.1 Fixed Beam
2.4.2 Lifting Beam
2.4.3 5-Axis Gantry Machines Sales by Beam Structure
2.4.3.1 Global 5-Axis Gantry Machines Sales Market Share by Beam Structure (2021-2026)
2.4.3.2 Global 5-Axis Gantry Machines Revenue and Market Share by Beam Structure (2021-2026)
2.4.3.3 Global 5-Axis Gantry Machines Sale Price by Beam Structure (2021-2026)
2.5 5-Axis Gantry Machines Segment by Application
2.5.1 Mold Manufacturing
2.5.2 Aerospace
2.5.3 Energy Equipment
2.5.4 Automobile
2.5.5 Others
2.5.6 5-Axis Gantry Machines Sales by Application
2.5.6.1 Global 5-Axis Gantry Machines Sale Market Share by Application (2021-2026)
2.5.6.2 Global 5-Axis Gantry Machines Revenue and Market Share by Application (2021-2026)
2.5.6.3 Global 5-Axis Gantry Machines Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global 5-Axis Gantry Machines Breakdown Data by Company
3.1.1 Global 5-Axis Gantry Machines Annual Sales by Company (2021-2026)
3.1.2 Global 5-Axis Gantry Machines Sales Market Share by Company (2021-2026)
3.2 Global 5-Axis Gantry Machines Annual Revenue by Company (2021-2026)
3.2.1 Global 5-Axis Gantry Machines Revenue by Company (2021-2026)
3.2.2 Global 5-Axis Gantry Machines Revenue Market Share by Company (2021-2026)
3.3 Global 5-Axis Gantry Machines Sale Price by Company
3.4 Key Manufacturers 5-Axis Gantry Machines Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers 5-Axis Gantry Machines Product Location Distribution
3.4.2 Players 5-Axis Gantry Machines Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis

+357 96 030922
info@marketpublishers.com

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR 5-AXIS GANTRY MACHINES BY GEOGRAPHIC REGION

4.1 World Historic 5-Axis Gantry Machines Market Size by Geographic Region (2021-2026)
4.1.1 Global 5-Axis Gantry Machines Annual Sales by Geographic Region (2021-2026)
4.1.2 Global 5-Axis Gantry Machines Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic 5-Axis Gantry Machines Market Size by Country/Region (2021-2026)
4.2.1 Global 5-Axis Gantry Machines Annual Sales by Country/Region (2021-2026)
4.2.2 Global 5-Axis Gantry Machines Annual Revenue by Country/Region (2021-2026)
4.3 Americas 5-Axis Gantry Machines Sales Growth
4.4 APAC 5-Axis Gantry Machines Sales Growth
4.5 Europe 5-Axis Gantry Machines Sales Growth
4.6 Middle East & Africa 5-Axis Gantry Machines Sales Growth

5 AMERICAS

5.1 Americas 5-Axis Gantry Machines Sales by Country
5.1.1 Americas 5-Axis Gantry Machines Sales by Country (2021-2026)
5.1.2 Americas 5-Axis Gantry Machines Revenue by Country (2021-2026)
5.2 Americas 5-Axis Gantry Machines Sales by Type (2021-2026)
5.3 Americas 5-Axis Gantry Machines Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC 5-Axis Gantry Machines Sales by Region
6.1.1 APAC 5-Axis Gantry Machines Sales by Region (2021-2026)
6.1.2 APAC 5-Axis Gantry Machines Revenue by Region (2021-2026)
6.2 APAC 5-Axis Gantry Machines Sales by Type (2021-2026)
6.3 APAC 5-Axis Gantry Machines Sales by Application (2021-2026)

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6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe 5-Axis Gantry Machines by Country
  7.1.1 Europe 5-Axis Gantry Machines Sales by Country (2021-2026)
  7.1.2 Europe 5-Axis Gantry Machines Revenue by Country (2021-2026)
7.2 Europe 5-Axis Gantry Machines Sales by Type (2021-2026)
7.3 Europe 5-Axis Gantry Machines Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa 5-Axis Gantry Machines by Country
  8.1.1 Middle East & Africa 5-Axis Gantry Machines Sales by Country (2021-2026)
  8.1.2 Middle East & Africa 5-Axis Gantry Machines Revenue by Country (2021-2026)
8.2 Middle East & Africa 5-Axis Gantry Machines Sales by Type (2021-2026)
8.3 Middle East & Africa 5-Axis Gantry Machines Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

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info@marketpublishers.com

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of 5-Axis Gantry Machines
10.3 Manufacturing Process Analysis of 5-Axis Gantry Machines
10.4 Industry Chain Structure of 5-Axis Gantry Machines

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 5-Axis Gantry Machines Distributors
11.3 5-Axis Gantry Machines Customer

12 WORLD FORECAST REVIEW FOR 5-AXIS GANTRY MACHINES BY GEOGRAPHIC REGION

12.1 Global 5-Axis Gantry Machines Market Size Forecast by Region
  12.1.1 Global 5-Axis Gantry Machines Forecast by Region (2027-2032)
  12.1.2 Global 5-Axis Gantry Machines Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global 5-Axis Gantry Machines Forecast by Type (2027-2032)
12.7 Global 5-Axis Gantry Machines Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 DMG Mori
  13.1.1 DMG Mori Company Information
  13.1.2 DMG Mori 5-Axis Gantry Machines Product Portfolios and Specifications
  13.1.3 DMG Mori 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 DMG Mori Main Business Overview
  13.1.5 DMG Mori Latest Developments

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info@marketpublishers.com

13.2 Yamazaki Mazak
13.2.1 Yamazaki Mazak Company Information
13.2.2 Yamazaki Mazak 5-Axis Gantry Machines Product Portfolios and Specifications
13.2.3 Yamazaki Mazak 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Yamazaki Mazak Main Business Overview
13.2.5 Yamazaki Mazak Latest Developments
13.3 GROB-WERKE
13.3.1 GROB-WERKE Company Information
13.3.2 GROB-WERKE 5-Axis Gantry Machines Product Portfolios and Specifications
13.3.3 GROB-WERKE 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 GROB-WERKE Main Business Overview
13.3.5 GROB-WERKE Latest Developments
13.4 Okuma Corporation
13.4.1 Okuma Corporation Company Information
13.4.2 Okuma Corporation 5-Axis Gantry Machines Product Portfolios and Specifications
13.4.3 Okuma Corporation 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Okuma Corporation Main Business Overview
13.4.5 Okuma Corporation Latest Developments
13.5 DN Solutions
13.5.1 DN Solutions Company Information
13.5.2 DN Solutions 5-Axis Gantry Machines Product Portfolios and Specifications
13.5.3 DN Solutions 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 DN Solutions Main Business Overview
13.5.5 DN Solutions Latest Developments
13.6 GF Machining Solutions
13.6.1 GF Machining Solutions Company Information
13.6.2 GF Machining Solutions 5-Axis Gantry Machines Product Portfolios and Specifications
13.6.3 GF Machining Solutions 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 GF Machining Solutions Main Business Overview
13.6.5 GF Machining Solutions Latest Developments
13.7 Hermle
13.7.1 Hermle Company Information

+357 96 030922
info@marketpublishers.com

13.7.2 Hermle 5-Axis Gantry Machines Product Portfolios and Specifications
13.7.3 Hermle 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Hermle Main Business Overview
13.7.5 Hermle Latest Developments
13.8 Haas Automation
13.8.1 Haas Automation Company Information
13.8.2 Haas Automation 5-Axis Gantry Machines Product Portfolios and Specifications
13.8.3 Haas Automation 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Haas Automation Main Business Overview
13.8.5 Haas Automation Latest Developments
13.9 Starrag Group
13.9.1 Starrag Group Company Information
13.9.2 Starrag Group 5-Axis Gantry Machines Product Portfolios and Specifications
13.9.3 Starrag Group 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Starrag Group Main Business Overview
13.9.5 Starrag Group Latest Developments
13.10 Shenyang Machine Tool
13.10.1 Shenyang Machine Tool Company Information
13.10.2 Shenyang Machine Tool 5-Axis Gantry Machines Product Portfolios and Specifications
13.10.3 Shenyang Machine Tool 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Shenyang Machine Tool Main Business Overview
13.10.5 Shenyang Machine Tool Latest Developments
13.11 Fair Friend Group
13.11.1 Fair Friend Group Company Information
13.11.2 Fair Friend Group 5-Axis Gantry Machines Product Portfolios and Specifications
13.11.3 Fair Friend Group 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Fair Friend Group Main Business Overview
13.11.5 Fair Friend Group Latest Developments
13.12 KEDE CNC
13.12.1 KEDE CNC Company Information
13.12.2 KEDE CNC 5-Axis Gantry Machines Product Portfolios and Specifications
13.12.3 KEDE CNC 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin

+357 96 030922
info@marketpublishers.com

(2021-2026)
13.12.4 KEDE CNC Main Business Overview
13.12.5 KEDE CNC Latest Developments
13.13 Hwacheon
13.13.1 Hwacheon Company Information
13.13.2 Hwacheon 5-Axis Gantry Machines Product Portfolios and Specifications
13.13.3 Hwacheon 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Hwacheon Main Business Overview
13.13.5 Hwacheon Latest Developments
13.14 Ken Ichi Machine
13.14.1 Ken Ichi Machine Company Information
13.14.2 Ken Ichi Machine 5-Axis Gantry Machines Product Portfolios and Specifications
13.14.3 Ken Ichi Machine 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Ken Ichi Machine Main Business Overview
13.14.5 Ken Ichi Machine Latest Developments
13.15 Awea Mechantronic
13.15.1 Awea Mechantronic Company Information
13.15.2 Awea Mechantronic 5-Axis Gantry Machines Product Portfolios and Specifications
13.15.3 Awea Mechantronic 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Awea Mechantronic Main Business Overview
13.15.5 Awea Mechantronic Latest Developments
13.16 RIFA Digital Precision Machinery
13.16.1 RIFA Digital Precision Machinery Company Information
13.16.2 RIFA Digital Precision Machinery 5-Axis Gantry Machines Product Portfolios and Specifications
13.16.3 RIFA Digital Precision Machinery 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 RIFA Digital Precision Machinery Main Business Overview
13.16.5 RIFA Digital Precision Machinery Latest Developments
13.17 Haitian Precision Machinery
13.17.1 Haitian Precision Machinery Company Information
13.17.2 Haitian Precision Machinery 5-Axis Gantry Machines Product Portfolios and Specifications
13.17.3 Haitian Precision Machinery 5-Axis Gantry Machines Sales, Revenue, Price

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and Gross Margin (2021-2026)
13.17.4 Haitian Precision Machinery Main Business Overview
13.17.5 Haitian Precision Machinery Latest Developments
13.18 Yiteli
13.18.1 Yiteli Company Information
13.18.2 Yiteli 5-Axis Gantry Machines Product Portfolios and Specifications
13.18.3 Yiteli 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Yiteli Main Business Overview
13.18.5 Yiteli Latest Developments
13.19 Top Numerical Control Technology
13.19.1 Top Numerical Control Technology Company Information
13.19.2 Top Numerical Control Technology 5-Axis Gantry Machines Product Portfolios and Specifications
13.19.3 Top Numerical Control Technology 5-Axis Gantry Machines Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Top Numerical Control Technology Main Business Overview
13.19.5 Top Numerical Control Technology Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. 5-Axis Gantry Machines Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. 5-Axis Gantry Machines Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Fixed Gantry
Table 4. Major Players of Moving Gantry
Table 5. Global 5-Axis Gantry Machines Sales by Type (2021-2026) & (Units)
Table 6. Global 5-Axis Gantry Machines Sales Market Share by Type (2021-2026)
Table 7. Global 5-Axis Gantry Machines Revenue by Type (2021-2026) & ($ million)
Table 8. Global 5-Axis Gantry Machines Revenue Market Share by Type (2021-2026)
Table 9. Global 5-Axis Gantry Machines Sale Price by Type (2021-2026) & (K US$/Unit)
Table 10. Major Players of Double Rotary Table
Table 11. Major Players of Double Swivel Head
Table 12. Major Players of Swivel Head + Rotary Table
Table 13. Major Players of Others
Table 14. Global 5-Axis Gantry Machines Sales by Five-axis Motion (2021-2026) & (Units)
Table 15. Global 5-Axis Gantry Machines Sales Market Share by Five-axis Motion (2021-2026)
Table 16. Global 5-Axis Gantry Machines Revenue by Five-axis Motion (2021-2026) & ($ million)
Table 17. Global 5-Axis Gantry Machines Revenue Market Share by Five-axis Motion (2021-2026)
Table 18. Global 5-Axis Gantry Machines Sale Price by Five-axis Motion (2021-2026) & (K US$/Unit)
Table 19. Major Players of Fixed Beam
Table 20. Major Players of Lifting Beam
Table 21. Global 5-Axis Gantry Machines Sales by Beam Structure (2021-2026) & (Units)
Table 22. Global 5-Axis Gantry Machines Sales Market Share by Beam Structure (2021-2026)
Table 23. Global 5-Axis Gantry Machines Revenue by Beam Structure (2021-2026) & ($ million)
Table 24. Global 5-Axis Gantry Machines Revenue Market Share by Beam Structure (2021-2026)

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Table 25. Global 5-Axis Gantry Machines Sale Price by Beam Structure (2021-2026) & (K US$/Unit)
Table 26. Global 5-Axis Gantry Machines Sale by Application (2021-2026) & (Units)
Table 27. Global 5-Axis Gantry Machines Sale Market Share by Application (2021-2026)
Table 28. Global 5-Axis Gantry Machines Revenue by Application (2021-2026) & ($ million)
Table 29. Global 5-Axis Gantry Machines Revenue Market Share by Application (2021-2026)
Table 30. Global 5-Axis Gantry Machines Sale Price by Application (2021-2026) & (K US$/Unit)
Table 31. Global 5-Axis Gantry Machines Sales by Company (2021-2026) & (Units)
Table 32. Global 5-Axis Gantry Machines Sales Market Share by Company (2021-2026)
Table 33. Global 5-Axis Gantry Machines Revenue by Company (2021-2026) & ($ millions)
Table 34. Global 5-Axis Gantry Machines Revenue Market Share by Company (2021-2026)
Table 35. Global 5-Axis Gantry Machines Sale Price by Company (2021-2026) & (K US$/Unit)
Table 36. Key Manufacturers 5-Axis Gantry Machines Producing Area Distribution and Sales Area
Table 37. Players 5-Axis Gantry Machines Products Offered
Table 38. 5-Axis Gantry Machines Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 39. New Products and Potential Entrants
Table 40. Market M&A Activity & Strategy
Table 41. Global 5-Axis Gantry Machines Sales by Geographic Region (2021-2026) & (Units)
Table 42. Global 5-Axis Gantry Machines Sales Market Share Geographic Region (2021-2026)
Table 43. Global 5-Axis Gantry Machines Revenue by Geographic Region (2021-2026) & ($ millions)
Table 44. Global 5-Axis Gantry Machines Revenue Market Share by Geographic Region (2021-2026)
Table 45. Global 5-Axis Gantry Machines Sales by Country/Region (2021-2026) & (Units)
Table 46. Global 5-Axis Gantry Machines Sales Market Share by Country/Region (2021-2026)
Table 47. Global 5-Axis Gantry Machines Revenue by Country/Region (2021-2026) & ($

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millions)
Table 48. Global 5-Axis Gantry Machines Revenue Market Share by Country/Region (2021-2026)
Table 49. Americas 5-Axis Gantry Machines Sales by Country (2021-2026) & (Units)
Table 50. Americas 5-Axis Gantry Machines Sales Market Share by Country (2021-2026)
Table 51. Americas 5-Axis Gantry Machines Revenue by Country (2021-2026) & ($ millions)
Table 52. Americas 5-Axis Gantry Machines Sales by Type (2021-2026) & (Units)
Table 53. Americas 5-Axis Gantry Machines Sales by Application (2021-2026) & (Units)
Table 54. APAC 5-Axis Gantry Machines Sales by Region (2021-2026) & (Units)
Table 55. APAC 5-Axis Gantry Machines Sales Market Share by Region (2021-2026)
Table 56. APAC 5-Axis Gantry Machines Revenue by Region (2021-2026) & ($ millions)
Table 57. APAC 5-Axis Gantry Machines Sales by Type (2021-2026) & (Units)
Table 58. APAC 5-Axis Gantry Machines Sales by Application (2021-2026) & (Units)
Table 59. Europe 5-Axis Gantry Machines Sales by Country (2021-2026) & (Units)
Table 60. Europe 5-Axis Gantry Machines Revenue by Country (2021-2026) & ($ millions)
Table 61. Europe 5-Axis Gantry Machines Sales by Type (2021-2026) & (Units)
Table 62. Europe 5-Axis Gantry Machines Sales by Application (2021-2026) & (Units)
Table 63. Middle East & Africa 5-Axis Gantry Machines Sales by Country (2021-2026) & (Units)
Table 64. Middle East & Africa 5-Axis Gantry Machines Revenue Market Share by Country (2021-2026)
Table 65. Middle East & Africa 5-Axis Gantry Machines Sales by Type (2021-2026) & (Units)
Table 66. Middle East & Africa 5-Axis Gantry Machines Sales by Application (2021-2026) & (Units)
Table 67. Key Market Drivers & Growth Opportunities of 5-Axis Gantry Machines
Table 68. Key Market Challenges & Risks of 5-Axis Gantry Machines
Table 69. Key Industry Trends of 5-Axis Gantry Machines
Table 70. 5-Axis Gantry Machines Raw Material
Table 71. Key Suppliers of Raw Materials
Table 72. 5-Axis Gantry Machines Distributors List
Table 73. 5-Axis Gantry Machines Customer List
Table 74. Global 5-Axis Gantry Machines Sales Forecast by Region (2027-2032) & (Units)
Table 75. Global 5-Axis Gantry Machines Revenue Forecast by Region (2027-2032) & ($ millions)

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Table 76. Americas 5-Axis Gantry Machines Sales Forecast by Country (2027-2032) & (Units)
Table 77. Americas 5-Axis Gantry Machines Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. APAC 5-Axis Gantry Machines Sales Forecast by Region (2027-2032) & (Units)
Table 79. APAC 5-Axis Gantry Machines Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 80. Europe 5-Axis Gantry Machines Sales Forecast by Country (2027-2032) & (Units)
Table 81. Europe 5-Axis Gantry Machines Revenue Forecast by Country (2027-2032) & ($ millions)
Table 82. Middle East & Africa 5-Axis Gantry Machines Sales Forecast by Country (2027-2032) & (Units)
Table 83. Middle East & Africa 5-Axis Gantry Machines Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. Global 5-Axis Gantry Machines Sales Forecast by Type (2027-2032) & (Units)
Table 85. Global 5-Axis Gantry Machines Revenue Forecast by Type (2027-2032) & ($ millions)
Table 86. Global 5-Axis Gantry Machines Sales Forecast by Application (2027-2032) & (Units)
Table 87. Global 5-Axis Gantry Machines Revenue Forecast by Application (2027-2032) & ($ millions)
Table 88. DMG Mori Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 89. DMG Mori 5-Axis Gantry Machines Product Portfolios and Specifications
Table 90. DMG Mori 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 91. DMG Mori Main Business
Table 92. DMG Mori Latest Developments
Table 93. Yamazaki Mazak Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 94. Yamazaki Mazak 5-Axis Gantry Machines Product Portfolios and Specifications
Table 95. Yamazaki Mazak 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 96. Yamazaki Mazak Main Business
Table 97. Yamazaki Mazak Latest Developments
Table 98. GROB-WERKE Basic Information, 5-Axis Gantry Machines Manufacturing

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Base, Sales Area and Its Competitors
Table 99. GROB-WERKE 5-Axis Gantry Machines Product Portfolios and Specifications
Table 100. GROB-WERKE 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 101. GROB-WERKE Main Business
Table 102. GROB-WERKE Latest Developments
Table 103. Okuma Corporation Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 104. Okuma Corporation 5-Axis Gantry Machines Product Portfolios and Specifications
Table 105. Okuma Corporation 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 106. Okuma Corporation Main Business
Table 107. Okuma Corporation Latest Developments
Table 108. DN Solutions Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 109. DN Solutions 5-Axis Gantry Machines Product Portfolios and Specifications
Table 110. DN Solutions 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 111. DN Solutions Main Business
Table 112. DN Solutions Latest Developments
Table 113. GF Machining Solutions Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 114. GF Machining Solutions 5-Axis Gantry Machines Product Portfolios and Specifications
Table 115. GF Machining Solutions 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 116. GF Machining Solutions Main Business
Table 117. GF Machining Solutions Latest Developments
Table 118. Hermle Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 119. Hermle 5-Axis Gantry Machines Product Portfolios and Specifications
Table 120. Hermle 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 121. Hermle Main Business
Table 122. Hermle Latest Developments
Table 123. Haas Automation Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 124. Haas Automation 5-Axis Gantry Machines Product Portfolios and

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Specifications
Table 125. Haas Automation 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 126. Haas Automation Main Business
Table 127. Haas Automation Latest Developments
Table 128. Starrag Group Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 129. Starrag Group 5-Axis Gantry Machines Product Portfolios and Specifications
Table 130. Starrag Group 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 131. Starrag Group Main Business
Table 132. Starrag Group Latest Developments
Table 133. Shenyang Machine Tool Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 134. Shenyang Machine Tool 5-Axis Gantry Machines Product Portfolios and Specifications
Table 135. Shenyang Machine Tool 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 136. Shenyang Machine Tool Main Business
Table 137. Shenyang Machine Tool Latest Developments
Table 138. Fair Friend Group Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 139. Fair Friend Group 5-Axis Gantry Machines Product Portfolios and Specifications
Table 140. Fair Friend Group 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 141. Fair Friend Group Main Business
Table 142. Fair Friend Group Latest Developments
Table 143. KEDE CNC Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 144. KEDE CNC 5-Axis Gantry Machines Product Portfolios and Specifications
Table 145. KEDE CNC 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 146. KEDE CNC Main Business
Table 147. KEDE CNC Latest Developments
Table 148. Hwacheon Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 149. Hwacheon 5-Axis Gantry Machines Product Portfolios and Specifications
Table 150. Hwacheon 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price

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(K US$/Unit) and Gross Margin (2021-2026)
Table 151. Hwacheon Main Business
Table 152. Hwacheon Latest Developments
Table 153. Ken Ichi Machine Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 154. Ken Ichi Machine 5-Axis Gantry Machines Product Portfolios and Specifications
Table 155. Ken Ichi Machine 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 156. Ken Ichi Machine Main Business
Table 157. Ken Ichi Machine Latest Developments
Table 158. Awea Mechantronic Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 159. Awea Mechantronic 5-Axis Gantry Machines Product Portfolios and Specifications
Table 160. Awea Mechantronic 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 161. Awea Mechantronic Main Business
Table 162. Awea Mechantronic Latest Developments
Table 163. RIFA Digital Precision Machinery Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 164. RIFA Digital Precision Machinery 5-Axis Gantry Machines Product Portfolios and Specifications
Table 165. RIFA Digital Precision Machinery 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 166. RIFA Digital Precision Machinery Main Business
Table 167. RIFA Digital Precision Machinery Latest Developments
Table 168. Haitian Precision Machinery Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 169. Haitian Precision Machinery 5-Axis Gantry Machines Product Portfolios and Specifications
Table 170. Haitian Precision Machinery 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 171. Haitian Precision Machinery Main Business
Table 172. Haitian Precision Machinery Latest Developments
Table 173. Yiteli Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 174. Yiteli 5-Axis Gantry Machines Product Portfolios and Specifications
Table 175. Yiteli 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K

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US$/Unit) and Gross Margin (2021-2026)
Table 176. Yiteli Main Business
Table 177. Yiteli Latest Developments
Table 178. Top Numerical Control Technology Basic Information, 5-Axis Gantry Machines Manufacturing Base, Sales Area and Its Competitors
Table 179. Top Numerical Control Technology 5-Axis Gantry Machines Product Portfolios and Specifications
Table 180. Top Numerical Control Technology 5-Axis Gantry Machines Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 181. Top Numerical Control Technology Main Business
Table 182. Top Numerical Control Technology Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of 5-Axis Gantry Machines
Figure 2. 5-Axis Gantry Machines Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global 5-Axis Gantry Machines Sales Growth Rate 2021-2032 (Units)
Figure 7. Global 5-Axis Gantry Machines Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. 5-Axis Gantry Machines Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. 5-Axis Gantry Machines Sales Market Share by Country/Region (2025)
Figure 10. 5-Axis Gantry Machines Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Fixed Gantry
Figure 12. Product Picture of Moving Gantry
Figure 13. Global 5-Axis Gantry Machines Sales Market Share by Type in 2026
Figure 14. Global 5-Axis Gantry Machines Revenue Market Share by Type (2021-2026)
Figure 15. Product Picture of Double Rotary Table
Figure 16. Product Picture of Double Swivel Head
Figure 17. Product Picture of Swivel Head + Rotary Table
Figure 18. Product Picture of Others
Figure 19. Global 5-Axis Gantry Machines Sales Market Share by Five-axis Motion in 2026
Figure 20. Global 5-Axis Gantry Machines Revenue Market Share by Five-axis Motion (2021-2026)
Figure 21. Product Picture of Fixed Beam
Figure 22. Product Picture of Lifting Beam
Figure 23. Global 5-Axis Gantry Machines Sales Market Share by Beam Structure in 2026
Figure 24. Global 5-Axis Gantry Machines Revenue Market Share by Beam Structure (2021-2026)
Figure 25. 5-Axis Gantry Machines Consumed in Mold Manufacturing
Figure 26. Global 5-Axis Gantry Machines Market: Mold Manufacturing (2021-2026) & (Units)
Figure 27. 5-Axis Gantry Machines Consumed in Aerospace
Figure 28. Global 5-Axis Gantry Machines Market: Aerospace (2021-2026) & (Units)

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Figure 29. 5-Axis Gantry Machines Consumed in Energy Equipment
Figure 30. Global 5-Axis Gantry Machines Market: Energy Equipment (2021-2026) & (Units)
Figure 31. 5-Axis Gantry Machines Consumed in Automobile
Figure 32. Global 5-Axis Gantry Machines Market: Automobile (2021-2026) & (Units)
Figure 33. 5-Axis Gantry Machines Consumed in Others
Figure 34. Global 5-Axis Gantry Machines Market: Others (2021-2026) & (Units)
Figure 35. Global 5-Axis Gantry Machines Sale Market Share by Application (2025)
Figure 36. Global 5-Axis Gantry Machines Revenue Market Share by Application in 2025
Figure 37. 5-Axis Gantry Machines Sales by Company in 2025 (Units)
Figure 38. Global 5-Axis Gantry Machines Sales Market Share by Company in 2025
Figure 39. 5-Axis Gantry Machines Revenue by Company in 2025 ($ millions)
Figure 40. Global 5-Axis Gantry Machines Revenue Market Share by Company in 2025
Figure 41. Global 5-Axis Gantry Machines Sales Market Share by Geographic Region (2021-2026)
Figure 42. Global 5-Axis Gantry Machines Revenue Market Share by Geographic Region in 2025
Figure 43. Americas 5-Axis Gantry Machines Sales 2021-2026 (Units)
Figure 44. Americas 5-Axis Gantry Machines Revenue 2021-2026 ($ millions)
Figure 45. APAC 5-Axis Gantry Machines Sales 2021-2026 (Units)
Figure 46. APAC 5-Axis Gantry Machines Revenue 2021-2026 ($ millions)
Figure 47. Europe 5-Axis Gantry Machines Sales 2021-2026 (Units)
Figure 48. Europe 5-Axis Gantry Machines Revenue 2021-2026 ($ millions)
Figure 49. Middle East & Africa 5-Axis Gantry Machines Sales 2021-2026 (Units)
Figure 50. Middle East & Africa 5-Axis Gantry Machines Revenue 2021-2026 ($ millions)
Figure 51. Americas 5-Axis Gantry Machines Sales Market Share by Country in 2025
Figure 52. Americas 5-Axis Gantry Machines Revenue Market Share by Country (2021-2026)
Figure 53. Americas 5-Axis Gantry Machines Sales Market Share by Type (2021-2026)
Figure 54. Americas 5-Axis Gantry Machines Sales Market Share by Application (2021-2026)
Figure 55. United States 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 56. Canada 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 57. Mexico 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 58. Brazil 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 59. APAC 5-Axis Gantry Machines Sales Market Share by Region in 2025

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Figure 60. APAC 5-Axis Gantry Machines Revenue Market Share by Region (2021-2026)
Figure 61. APAC 5-Axis Gantry Machines Sales Market Share by Type (2021-2026)
Figure 62. APAC 5-Axis Gantry Machines Sales Market Share by Application (2021-2026)
Figure 63. China 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 64. Japan 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 65. South Korea 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 66. Southeast Asia 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 67. India 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 68. Australia 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 69. China Taiwan 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 70. Europe 5-Axis Gantry Machines Sales Market Share by Country in 2025
Figure 71. Europe 5-Axis Gantry Machines Revenue Market Share by Country (2021-2026)
Figure 72. Europe 5-Axis Gantry Machines Sales Market Share by Type (2021-2026)
Figure 73. Europe 5-Axis Gantry Machines Sales Market Share by Application (2021-2026)
Figure 74. Germany 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 75. France 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 76. UK 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 77. Italy 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 78. Russia 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 79. Middle East & Africa 5-Axis Gantry Machines Sales Market Share by Country (2021-2026)
Figure 80. Middle East & Africa 5-Axis Gantry Machines Sales Market Share by Type (2021-2026)
Figure 81. Middle East & Africa 5-Axis Gantry Machines Sales Market Share by Application (2021-2026)
Figure 82. Egypt 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 83. South Africa 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 84. Israel 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 85. Turkey 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)
Figure 86. GCC Countries 5-Axis Gantry Machines Revenue Growth 2021-2026 ($ millions)

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Figure 87. Manufacturing Cost Structure Analysis of 5-Axis Gantry Machines in 2026
Figure 88. Manufacturing Process Analysis of 5-Axis Gantry Machines
Figure 89. Industry Chain Structure of 5-Axis Gantry Machines
Figure 90. Channels of Distribution
Figure 91. Global 5-Axis Gantry Machines Sales Market Forecast by Region (2027-2032)
Figure 92. Global 5-Axis Gantry Machines Revenue Market Share Forecast by Region (2027-2032)
Figure 93. Global 5-Axis Gantry Machines Sales Market Share Forecast by Type (2027-2032)
Figure 94. Global 5-Axis Gantry Machines Revenue Market Share Forecast by Type (2027-2032)
Figure 95. Global 5-Axis Gantry Machines Sales Market Share Forecast by Application (2027-2032)
Figure 96. Global 5-Axis Gantry Machines Revenue Market Share Forecast by Application (2027-2032)

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