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Global Precision Small Hole Drilling EDM Machine Market Growth 2026-2032

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Abstracts

The global Precision Small Hole Drilling EDM Machine market size is predicted to grow from US$ 379 million in 2025 to US$ 593 million in 2032; it is expected to grow at a CAGR of 6.6% from 2026 to 2032.

Precision Small Hole Drilling EDM Machine is a specialized electrical discharge machining system designed to produce small-diameter, deep and high-aspect-ratio holes in electrically conductive materials through controlled pulsed electrical discharges between a tubular electrode and the workpiece. During machining, the electrode is continuously fed toward the workpiece while dielectric fluid is typically delivered through the hollow electrode to remove debris, stabilize discharge conditions and support repeatable hole formation. The machine generally integrates a pulse power supply, CNC motion control, electrode feeding and rotation mechanisms, dielectric circulation and filtration, discharge-monitoring functions and dedicated machining software, while higher-end configurations may incorporate automatic electrode changing, rotary and tilting axes, robotic handling and automated production cells. Precision Small Hole Drilling EDM Machines are differentiated primarily by achievable hole diameter, positioning and geometric accuracy, multi-axis capability, electrode-management automation and process stability. The research scope covers commercial standard CNC, automatic electrode change and automated integrated systems used for precision hole machining in aerospace, automotive manufacturing, mold manufacturing, energy equipment, precision machinery and related industrial applications.

Key Findings

Global 2025 sales of Precision Small Hole Drilling EDM Machines are estimated at approximately 3,100 units

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The 2025 global average selling price is estimated at approximately USD 125,000 per machine

Average gross margin is estimated at approximately 32%, reflecting meaningful process know-how and system integration value

East Asia has the densest confirmed manufacturer cluster across the current supplier base

Market Trends

The Precision Small Hole Drilling EDM Machine market is evolving toward smaller hole diameters, higher aspect ratios, tighter positional accuracy and greater automation. Development of pulse power supplies, discharge monitoring, electrode wear compensation and dielectric flushing control is improving machining stability for difficult conductive materials, while multi-axis motion is expanding the ability to process inclined holes and complex three-dimensional surfaces. At the equipment level, automatic electrode magazines, automatic electrode change, rotary-tilting worktables and unattended machining functions are becoming increasingly important for customers seeking higher utilization and lower operator dependence. High-end systems are also moving toward integrated production cells that combine workpiece handling, machining process databases, breakthrough detection and production data management. This transition is widening the technological gap between general-purpose CNC hole drilling EDM machines and application-specific automated systems designed for aerospace, energy and other high-value precision components.

Market Dynamics

Drivers

Demand is driven primarily by the increasing machining requirements for small and precision holes in difficult-to-machine conductive materials. Aerospace engines and turbine components require numerous cooling and functional holes in nickel-based superalloys and other heat-resistant materials, while automotive manufacturing requires precision orifices in selected fuel-system and functional components. Mold manufacturing relies on EDM drilling for small holes, venting features and starter-hole operations, and energy equipment increasingly uses complex high-temperature components with demanding hole geometry. Because EDM machining is largely

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independent of material hardness and does not require conventional cutting forces, it remains particularly suitable for hardened steels, superalloys, carbide and other conductive materials that are difficult to process mechanically.

Restraints

The principal constraints are relatively high equipment investment, consumable electrode requirements and lower machining productivity in applications where conventional drilling or laser processing can achieve sufficient quality. Hole accuracy and throughput are also sensitive to electrode wear, dielectric flushing, discharge stability, workpiece thickness and aspect ratio. Extremely small holes increase the difficulty of debris removal and electrode control, while recast layers, entrance and exit quality and hole taper may require additional process optimization. In addition, electrical discharge machining is fundamentally limited to electrically conductive materials. These characteristics mean that Precision Small Hole Drilling EDM Machines compete with laser drilling, mechanical micro-drilling and other precision-hole technologies according to material, hole geometry, productivity and surface-quality requirements.

Opportunities

The strongest opportunities are concentrated in sub-0.10 mm precision holes, complex angled holes, automated multi-axis machining and unattended production. As aerospace and energy components become more geometrically complex, demand is increasing for systems that combine four-, five- or six-axis positioning with automatic electrode management and stable drilling on curved surfaces. Automated electrode change can materially improve productivity in components requiring large numbers of holes, while robotic loading and integrated machining cells create opportunities for batch production. Digital process libraries, adaptive pulse control, automatic breakthrough recognition and closed-loop monitoring can further reduce dependence on experienced operators. In China and other expanding manufacturing regions, localization of high-precision EDM equipment, CNC systems and automation modules also creates opportunities for domestic suppliers to penetrate applications previously dependent on imported high-end equipment.

Challenges

The key technical challenge is achieving consistent hole quality while simultaneously improving machining speed. Electrode wear can influence diameter, taper and dimensional repeatability, particularly in microholes and deep holes, while unstable flushing can cause short circuits, secondary discharge and reduced productivity.

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Complex angled holes and curved workpieces place additional demands on axis synchronization, collision prevention and electrode positioning. Customers in aerospace and other high-reliability industries also require extensive process qualification, repeatability verification and long-term equipment stability. Manufacturers therefore need to balance minimum achievable hole diameter, machining speed, accuracy, automation and operating cost rather than optimize a single performance parameter. Application engineering and after-sales process support remain important capabilities because identical machines can deliver materially different results depending on electrode selection, electrical parameters and flushing strategy.

Industry Chain Analysis

The upstream industry chain includes CNC controllers, pulse power supplies, servo motors and drives, precision linear guides and ball screws, rotary and tilting axes, electrode spindles, dielectric pumps and filtration systems, tubular electrodes, sensors, machine structures, industrial computers and control software. High-end equipment places particularly stringent requirements on high-frequency pulse control, micro-feed stability, low-runout electrode rotation, multi-axis positioning accuracy and dielectric management. Tubular electrodes are recurring consumables, while CNC systems, precision motion components and pulse power technology materially influence equipment performance and cost.

Midstream manufacturers create value through machine structure design, electrical discharge technology, motion-control integration, machining databases, electrode-management systems and application-specific engineering. Downstream customers are concentrated in aerospace, automotive manufacturing, mold manufacturing, energy equipment and precision machinery. The estimated average gross margin of approximately 32% in 2025 indicates a business model combining precision mechanical hardware with process technology, software and application support. Standard machines face stronger price competition, while automatic electrode change, multi-axis systems and automated production cells generally contain more engineering and integration value, making software, application databases and service capability increasingly important parts of supplier differentiation.

Segment Insights

By product type, standard CNC systems address a broad base of precision drilling and toolroom requirements and emphasize machining reliability, ease of operation and cost efficiency. Automatic electrode change systems are better suited to components

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requiring multiple electrode diameters or large numbers of repeated holes, reducing manual intervention and improving machine utilization. Automated integrated systems add workpiece handling, multi-axis positioning, automatic electrode management and process control, targeting higher-value serial production and complex component applications. The market is therefore developing along a clear progression from standalone machining capability toward automated manufacturing cells.

By hole diameter, systems capable of machining holes of 0.10 mm or below represent the highest-precision technical segment and place greater demands on electrode manufacture, pulse control, spindle runout and debris removal. The >0.10–0.50 mm range addresses a broad spectrum of precision industrial hole-making requirements, while machines above 0.50 mm increasingly compete with alternative drilling technologies depending on material and productivity requirements. Axis configuration is another important differentiator: three-axis equipment is suitable for comparatively straightforward hole positions, four- and five-axis systems support inclined holes and complex surfaces, and systems with six or more controlled axes increasingly serve automated processing of complex aerospace and energy components.

Downstream Market Opportunities

Aerospace remains one of the most technically demanding opportunities because turbine and engine components combine heat-resistant conductive materials, complex surfaces, high aspect-ratio holes and stringent repeatability requirements. Energy equipment presents similar opportunities in turbine and other high-temperature components. Automotive manufacturing provides demand for precision orifices and small-hole machining in selected functional parts, while mold manufacturing requires flexible EDM drilling for small holes, starter holes and other precision features. Precision machinery provides a diversified demand base involving hardened materials and difficult geometries. The highest-value downstream opportunities are generally found where conventional cutting is constrained by material hardness, hole depth, geometry or required positional accuracy and where multi-axis automation can materially improve production economics.

Regional Insights

East Asia forms the most concentrated manufacturing cluster in the confirmed supplier base. Japan has a long-established EDM machine-tool industry and remains important in high-precision CNC and automated systems, while South Korea and Taiwan have developed specialized small-hole EDM manufacturers serving regional and export

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markets. China has built a broader domestic supplier base covering conventional CNC machines, precision small-hole systems and increasingly automated configurations, creating substantial room for localization in both general industrial and higher-end applications.

Europe and North America remain important high-value demand and technology-development regions, particularly for aerospace, turbine, energy and precision engineering applications. Switzerland and Germany have specialist suppliers focused on precision and micro-EDM technologies, while the United Kingdom, Spain and the United States contain manufacturers with application-oriented capabilities in aerospace and industrial EDM. Regional competition therefore reflects different strengths: East Asia combines a dense manufacturing base and broad machine-tool demand, while European and North American markets place greater emphasis on specialized applications, automation, process qualification and high-value engineering support.

Competitive Landscape Analysis

The Precision Small Hole Drilling EDM Machine market combines established full-line EDM machine-tool manufacturers with specialized small-hole and micro-EDM equipment suppliers, resulting in a competitive structure that is technically differentiated rather than purely price driven. Key competitive factors include minimum achievable hole diameter, drilling speed, depth-to-diameter capability, hole straightness and taper control, axis configuration, electrode change automation, discharge stability, dielectric flushing, process databases and long-term machine accuracy. Japanese and Swiss suppliers generally compete through precision, control technology and established high-end application experience, while specialist European and North American manufacturers often focus on aerospace, turbine and other demanding niches. Chinese, Taiwanese and Korean suppliers increasingly compete through localized engineering, cost efficiency, shorter delivery cycles and expanding automation capability. As equipment moves from standard three-axis CNC machines toward automatic electrode change and multi-axis integrated systems, application know-how, automation integration and service capability become more important barriers to entry than mechanical machine construction alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Precision Small Hole Drilling EDM Machine Industry Forecast” looks at past sales and reviews total world Precision Small Hole Drilling EDM Machine sales in 2025, providing a comprehensive analysis by

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region and market sector of projected Precision Small Hole Drilling EDM Machine sales for 2026 through 2032. With Precision Small Hole Drilling EDM Machine sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Precision Small Hole Drilling EDM Machine industry.

This Insight Report provides a comprehensive analysis of the global Precision Small Hole Drilling EDM Machine 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 Precision Small Hole Drilling EDM Machine portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Precision Small Hole Drilling EDM Machine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Precision Small Hole Drilling EDM Machine 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 qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Precision Small Hole Drilling EDM Machine.

This report presents a comprehensive overview, market shares, and growth opportunities of Precision Small Hole Drilling EDM Machine market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Standard CNC

Automatic Electrode Change

Automated Integrated

Segmentation by Hole Diameter:

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?0.10 mm

?0.10–0.50 mm

?0.50 mm

Segmentation by Number of Controlled Axes:

3-Axis

4–5-Axis

?6-Axis

Segmentation by Application:

Aerospace

Automotive Manufacturing

Mold Manufacturing

Energy Equipment

Precision Machinery

Other

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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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.

Sodick

Makino

Mitsubishi Electric

ELENIX

SARIX

Posalux

UNITED MACHINING

ONA

AGEMA

Winbro Group Technologies

Beaumont Machine

Current EDM

HANKOOK NSD

Yougar M&T

Heun Funkenerosion

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Excetek Technologies

Ocean Technologies

Yan Yang Precision

Beijing Dimon CNC Technology

Beijing Institute of Electro-Machining

Suzhou Baoma CNC Equipment

Suzhou Sojdio Mechanical Technology

Suzhou Zhonggu Industry

Suzhou Yamason Machine Tool

SUZHOU SEJ TECHNOLOGY

Jiangsu Dongqing CNC Machine Tool

Key Questions Addressed in this Report

What is the 10-year outlook for the global Precision Small Hole Drilling EDM Machine market?

What factors are driving Precision Small Hole Drilling EDM Machine market growth, globally and by region?

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

How do Precision Small Hole Drilling EDM Machine market opportunities vary by end market size?

How does Precision Small Hole Drilling EDM Machine 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 Precision Small Hole Drilling EDM Machine Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Precision Small Hole Drilling EDM Machine by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Precision Small Hole Drilling EDM Machine by Country/Region, 2021, 2025 & 2032
2.2 Precision Small Hole Drilling EDM Machine Segment by Type
  2.2.1 Standard CNC
  2.2.2 Automatic Electrode Change
  2.2.3 Automated Integrated
  2.2.4 Precision Small Hole Drilling EDM Machine Sales by Type
    2.2.4.1 Global Precision Small Hole Drilling EDM Machine Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Precision Small Hole Drilling EDM Machine Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Precision Small Hole Drilling EDM Machine Sale Price by Type (2021-2026)
2.3 Precision Small Hole Drilling EDM Machine Segment by Hole Diameter
  2.3.1 ?0.10 mm
  2.3.2 ?0.10–0.50 mm
  2.3.3 ?0.50 mm
  2.3.4 Precision Small Hole Drilling EDM Machine Sales by Hole Diameter
    2.3.4.1 Global Precision Small Hole Drilling EDM Machine Sales Market Share by Hole Diameter (2021-2026)

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2.3.4.2 Global Precision Small Hole Drilling EDM Machine Revenue and Market Share by Hole Diameter (2021-2026)
2.3.4.3 Global Precision Small Hole Drilling EDM Machine Sale Price by Hole Diameter (2021-2026)
2.4 Precision Small Hole Drilling EDM Machine Segment by Number of Controlled Axes
2.4.1 3-Axis
2.4.2 4–5-Axis
2.4.3 ?6-Axis
2.4.4 Precision Small Hole Drilling EDM Machine Sales by Number of Controlled Axes
2.4.4.1 Global Precision Small Hole Drilling EDM Machine Sales Market Share by Number of Controlled Axes (2021-2026)
2.4.4.2 Global Precision Small Hole Drilling EDM Machine Revenue and Market Share by Number of Controlled Axes (2021-2026)
2.4.4.3 Global Precision Small Hole Drilling EDM Machine Sale Price by Number of Controlled Axes (2021-2026)
2.5 Precision Small Hole Drilling EDM Machine Segment by Application
2.5.1 Aerospace
2.5.2 Automotive Manufacturing
2.5.3 Mold Manufacturing
2.5.4 Energy Equipment
2.5.5 Precision Machinery
2.5.6 Other
2.5.7 Precision Small Hole Drilling EDM Machine Sales by Application
2.5.7.1 Global Precision Small Hole Drilling EDM Machine Sale Market Share by Application (2021-2026)
2.5.7.2 Global Precision Small Hole Drilling EDM Machine Revenue and Market Share by Application (2021-2026)
2.5.7.3 Global Precision Small Hole Drilling EDM Machine Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Precision Small Hole Drilling EDM Machine Breakdown Data by Company
3.1.1 Global Precision Small Hole Drilling EDM Machine Annual Sales by Company (2021-2026)
3.1.2 Global Precision Small Hole Drilling EDM Machine Sales Market Share by Company (2021-2026)
3.2 Global Precision Small Hole Drilling EDM Machine Annual Revenue by Company (2021-2026)

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info@marketpublishers.com

3.2.1 Global Precision Small Hole Drilling EDM Machine Revenue by Company (2021-2026)
3.2.2 Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Company (2021-2026)
3.3 Global Precision Small Hole Drilling EDM Machine Sale Price by Company
3.4 Key Manufacturers Precision Small Hole Drilling EDM Machine Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Precision Small Hole Drilling EDM Machine Product Location Distribution
3.4.2 Players Precision Small Hole Drilling EDM Machine Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
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 PRECISION SMALL HOLE DRILLING EDM MACHINE BY GEOGRAPHIC REGION

4.1 World Historic Precision Small Hole Drilling EDM Machine Market Size by Geographic Region (2021-2026)
4.1.1 Global Precision Small Hole Drilling EDM Machine Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Precision Small Hole Drilling EDM Machine Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Precision Small Hole Drilling EDM Machine Market Size by Country/Region (2021-2026)
4.2.1 Global Precision Small Hole Drilling EDM Machine Annual Sales by Country/Region (2021-2026)
4.2.2 Global Precision Small Hole Drilling EDM Machine Annual Revenue by Country/Region (2021-2026)
4.3 Americas Precision Small Hole Drilling EDM Machine Sales Growth
4.4 APAC Precision Small Hole Drilling EDM Machine Sales Growth
4.5 Europe Precision Small Hole Drilling EDM Machine Sales Growth
4.6 Middle East & Africa Precision Small Hole Drilling EDM Machine Sales Growth

5 AMERICAS

5.1 Americas Precision Small Hole Drilling EDM Machine Sales by Country

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5.1.1 Americas Precision Small Hole Drilling EDM Machine Sales by Country (2021-2026)
5.1.2 Americas Precision Small Hole Drilling EDM Machine Revenue by Country (2021-2026)
5.2 Americas Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026)
5.3 Americas Precision Small Hole Drilling EDM Machine Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Precision Small Hole Drilling EDM Machine Sales by Region
6.1.1 APAC Precision Small Hole Drilling EDM Machine Sales by Region (2021-2026)
6.1.2 APAC Precision Small Hole Drilling EDM Machine Revenue by Region (2021-2026)
6.2 APAC Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026)
6.3 APAC Precision Small Hole Drilling EDM Machine Sales by Application (2021-2026)
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 Precision Small Hole Drilling EDM Machine by Country
7.1.1 Europe Precision Small Hole Drilling EDM Machine Sales by Country (2021-2026)
7.1.2 Europe Precision Small Hole Drilling EDM Machine Revenue by Country (2021-2026)
7.2 Europe Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026)
7.3 Europe Precision Small Hole Drilling EDM Machine Sales by Application (2021-2026)
7.4 Germany

+357 96 030922
info@marketpublishers.com

7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Precision Small Hole Drilling EDM Machine by Country
8.1.1 Middle East & Africa Precision Small Hole Drilling EDM Machine Sales by Country (2021-2026)
8.1.2 Middle East & Africa Precision Small Hole Drilling EDM Machine Revenue by Country (2021-2026)
8.2 Middle East & Africa Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026)
8.3 Middle East & Africa Precision Small Hole Drilling EDM Machine 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

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Precision Small Hole Drilling EDM Machine
10.3 Manufacturing Process Analysis of Precision Small Hole Drilling EDM Machine
10.4 Industry Chain Structure of Precision Small Hole Drilling EDM Machine

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

+357 96 030922
info@marketpublishers.com

11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Precision Small Hole Drilling EDM Machine Distributors
11.3 Precision Small Hole Drilling EDM Machine Customer

12 WORLD FORECAST REVIEW FOR PRECISION SMALL HOLE DRILLING EDM MACHINE BY GEOGRAPHIC REGION

12.1 Global Precision Small Hole Drilling EDM Machine Market Size Forecast by Region
12.1.1 Global Precision Small Hole Drilling EDM Machine Forecast by Region (2027-2032)
12.1.2 Global Precision Small Hole Drilling EDM Machine 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 Precision Small Hole Drilling EDM Machine Forecast by Type (2027-2032)
12.7 Global Precision Small Hole Drilling EDM Machine Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Sodick
13.1.1 Sodick Company Information
13.1.2 Sodick Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.1.3 Sodick Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Sodick Main Business Overview
13.1.5 Sodick Latest Developments
13.2 Makino
13.2.1 Makino Company Information
13.2.2 Makino Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.2.3 Makino Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Makino Main Business Overview

+357 96 030922
info@marketpublishers.com

13.2.5 Makino Latest Developments
13.3 Mitsubishi Electric
13.3.1 Mitsubishi Electric Company Information
13.3.2 Mitsubishi Electric Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.3.3 Mitsubishi Electric Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Mitsubishi Electric Main Business Overview
13.3.5 Mitsubishi Electric Latest Developments
13.4 ELENIX
13.4.1 ELENIX Company Information
13.4.2 ELENIX Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.4.3 ELENIX Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 ELENIX Main Business Overview
13.4.5 ELENIX Latest Developments
13.5 SARIX
13.5.1 SARIX Company Information
13.5.2 SARIX Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.5.3 SARIX Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 SARIX Main Business Overview
13.5.5 SARIX Latest Developments
13.6 Posalux
13.6.1 Posalux Company Information
13.6.2 Posalux Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.6.3 Posalux Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Posalux Main Business Overview
13.6.5 Posalux Latest Developments
13.7 UNITED MACHINING
13.7.1 UNITED MACHINING Company Information
13.7.2 UNITED MACHINING Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.7.3 UNITED MACHINING Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

13.7.4 UNITED MACHINING Main Business Overview
13.7.5 UNITED MACHINING Latest Developments
13.8 ONA
13.8.1 ONA Company Information
13.8.2 ONA Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.8.3 ONA Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 ONA Main Business Overview
13.8.5 ONA Latest Developments
13.9 AGEMA
13.9.1 AGEMA Company Information
13.9.2 AGEMA Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.9.3 AGEMA Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 AGEMA Main Business Overview
13.9.5 AGEMA Latest Developments
13.10 Winbro Group Technologies
13.10.1 Winbro Group Technologies Company Information
13.10.2 Winbro Group Technologies Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.10.3 Winbro Group Technologies Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Winbro Group Technologies Main Business Overview
13.10.5 Winbro Group Technologies Latest Developments
13.11 Beaumont Machine
13.11.1 Beaumont Machine Company Information
13.11.2 Beaumont Machine Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.11.3 Beaumont Machine Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Beaumont Machine Main Business Overview
13.11.5 Beaumont Machine Latest Developments
13.12 Current EDM
13.12.1 Current EDM Company Information
13.12.2 Current EDM Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.12.3 Current EDM Precision Small Hole Drilling EDM Machine Sales, Revenue,

+357 96 030922
info@marketpublishers.com

Price and Gross Margin (2021-2026)
13.12.4 Current EDM Main Business Overview
13.12.5 Current EDM Latest Developments
13.13 HANKOOK NSD
13.13.1 HANKOOK NSD Company Information
13.13.2 HANKOOK NSD Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.13.3 HANKOOK NSD Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 HANKOOK NSD Main Business Overview
13.13.5 HANKOOK NSD Latest Developments
13.14 Yougar M&T
13.14.1 Yougar M&T Company Information
13.14.2 Yougar M&T Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.14.3 Yougar M&T Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Yougar M&T Main Business Overview
13.14.5 Yougar M&T Latest Developments
13.15 Heun Funkenerosion
13.15.1 Heun Funkenerosion Company Information
13.15.2 Heun Funkenerosion Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.15.3 Heun Funkenerosion Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Heun Funkenerosion Main Business Overview
13.15.5 Heun Funkenerosion Latest Developments
13.16 Excetek Technologies
13.16.1 Excetek Technologies Company Information
13.16.2 Excetek Technologies Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.16.3 Excetek Technologies Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Excetek Technologies Main Business Overview
13.16.5 Excetek Technologies Latest Developments
13.17 Ocean Technologies
13.17.1 Ocean Technologies Company Information
13.17.2 Ocean Technologies Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications

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13.17.3 Ocean Technologies Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Ocean Technologies Main Business Overview
13.17.5 Ocean Technologies Latest Developments
13.18 Yan Yang Precision
13.18.1 Yan Yang Precision Company Information
13.18.2 Yan Yang Precision Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.18.3 Yan Yang Precision Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Yan Yang Precision Main Business Overview
13.18.5 Yan Yang Precision Latest Developments
13.19 Beijing Dimon CNC Technology
13.19.1 Beijing Dimon CNC Technology Company Information
13.19.2 Beijing Dimon CNC Technology Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.19.3 Beijing Dimon CNC Technology Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Beijing Dimon CNC Technology Main Business Overview
13.19.5 Beijing Dimon CNC Technology Latest Developments
13.20 Beijing Institute of Electro-Machining
13.20.1 Beijing Institute of Electro-Machining Company Information
13.20.2 Beijing Institute of Electro-Machining Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.20.3 Beijing Institute of Electro-Machining Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Beijing Institute of Electro-Machining Main Business Overview
13.20.5 Beijing Institute of Electro-Machining Latest Developments
13.21 Suzhou Baoma CNC Equipment
13.21.1 Suzhou Baoma CNC Equipment Company Information
13.21.2 Suzhou Baoma CNC Equipment Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.21.3 Suzhou Baoma CNC Equipment Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 Suzhou Baoma CNC Equipment Main Business Overview
13.21.5 Suzhou Baoma CNC Equipment Latest Developments
13.22 Suzhou Sojdio Mechanical Technology
13.22.1 Suzhou Sojdio Mechanical Technology Company Information
13.22.2 Suzhou Sojdio Mechanical Technology Precision Small Hole Drilling EDM

+357 96 030922
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Machine Product Portfolios and Specifications
13.22.3 Suzhou Sojdio Mechanical Technology Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Suzhou Sojdio Mechanical Technology Main Business Overview
13.22.5 Suzhou Sojdio Mechanical Technology Latest Developments
13.23 Suzhou Zhonggu Industry
13.23.1 Suzhou Zhonggu Industry Company Information
13.23.2 Suzhou Zhonggu Industry Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.23.3 Suzhou Zhonggu Industry Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 Suzhou Zhonggu Industry Main Business Overview
13.23.5 Suzhou Zhonggu Industry Latest Developments
13.24 Suzhou Yamason Machine Tool
13.24.1 Suzhou Yamason Machine Tool Company Information
13.24.2 Suzhou Yamason Machine Tool Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.24.3 Suzhou Yamason Machine Tool Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 Suzhou Yamason Machine Tool Main Business Overview
13.24.5 Suzhou Yamason Machine Tool Latest Developments
13.25 SUZHOU SEJ TECHNOLOGY
13.25.1 SUZHOU SEJ TECHNOLOGY Company Information
13.25.2 SUZHOU SEJ TECHNOLOGY Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.25.3 SUZHOU SEJ TECHNOLOGY Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 SUZHOU SEJ TECHNOLOGY Main Business Overview
13.25.5 SUZHOU SEJ TECHNOLOGY Latest Developments
13.26 Jiangsu Dongqing CNC Machine Tool
13.26.1 Jiangsu Dongqing CNC Machine Tool Company Information
13.26.2 Jiangsu Dongqing CNC Machine Tool Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
13.26.3 Jiangsu Dongqing CNC Machine Tool Precision Small Hole Drilling EDM Machine Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 Jiangsu Dongqing CNC Machine Tool Main Business Overview
13.26.5 Jiangsu Dongqing CNC Machine Tool Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Precision Small Hole Drilling EDM Machine Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Precision Small Hole Drilling EDM Machine Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Standard CNC
Table 4. Major Players of Automatic Electrode Change
Table 5. Major Players of Automated Integrated
Table 6. Global Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026) & (Units)
Table 7. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Type (2021-2026)
Table 8. Global Precision Small Hole Drilling EDM Machine Revenue by Type (2021-2026) & ($ million)
Table 9. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Type (2021-2026)
Table 10. Global Precision Small Hole Drilling EDM Machine Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of ?0.10 mm
Table 12. Major Players of ?0.10–0.50 mm
Table 13. Major Players of ?0.50 mm
Table 14. Global Precision Small Hole Drilling EDM Machine Sales by Hole Diameter (2021-2026) & (Units)
Table 15. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Hole Diameter (2021-2026)
Table 16. Global Precision Small Hole Drilling EDM Machine Revenue by Hole Diameter (2021-2026) & ($ million)
Table 17. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Hole Diameter (2021-2026)
Table 18. Global Precision Small Hole Drilling EDM Machine Sale Price by Hole Diameter (2021-2026) & (US$/Unit)
Table 19. Major Players of 3-Axis
Table 20. Major Players of 4–5-Axis
Table 21. Major Players of ?6-Axis
Table 22. Global Precision Small Hole Drilling EDM Machine Sales by Number of Controlled Axes (2021-2026) & (Units)

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Table 23. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Number of Controlled Axes (2021-2026)
Table 24. Global Precision Small Hole Drilling EDM Machine Revenue by Number of Controlled Axes (2021-2026) & ($ million)
Table 25. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Number of Controlled Axes (2021-2026)
Table 26. Global Precision Small Hole Drilling EDM Machine Sale Price by Number of Controlled Axes (2021-2026) & (US$/Unit)
Table 27. Global Precision Small Hole Drilling EDM Machine Sale by Application (2021-2026) & (Units)
Table 28. Global Precision Small Hole Drilling EDM Machine Sale Market Share by Application (2021-2026)
Table 29. Global Precision Small Hole Drilling EDM Machine Revenue by Application (2021-2026) & ($ million)
Table 30. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Application (2021-2026)
Table 31. Global Precision Small Hole Drilling EDM Machine Sale Price by Application (2021-2026) & (US$/Unit)
Table 32. Global Precision Small Hole Drilling EDM Machine Sales by Company (2021-2026) & (Units)
Table 33. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Company (2021-2026)
Table 34. Global Precision Small Hole Drilling EDM Machine Revenue by Company (2021-2026) & ($ millions)
Table 35. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Company (2021-2026)
Table 36. Global Precision Small Hole Drilling EDM Machine Sale Price by Company (2021-2026) & (US$/Unit)
Table 37. Key Manufacturers Precision Small Hole Drilling EDM Machine Producing Area Distribution and Sales Area
Table 38. Players Precision Small Hole Drilling EDM Machine Products Offered
Table 39. Precision Small Hole Drilling EDM Machine Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 40. New Products and Potential Entrants
Table 41. Market M&A Activity & Strategy
Table 42. Global Precision Small Hole Drilling EDM Machine Sales by Geographic Region (2021-2026) & (Units)
Table 43. Global Precision Small Hole Drilling EDM Machine Sales Market Share Geographic Region (2021-2026)

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Table 44. Global Precision Small Hole Drilling EDM Machine Revenue by Geographic Region (2021-2026) & ($ millions)
Table 45. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Geographic Region (2021-2026)
Table 46. Global Precision Small Hole Drilling EDM Machine Sales by Country/Region (2021-2026) & (Units)
Table 47. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Country/Region (2021-2026)
Table 48. Global Precision Small Hole Drilling EDM Machine Revenue by Country/Region (2021-2026) & ($ millions)
Table 49. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Country/Region (2021-2026)
Table 50. Americas Precision Small Hole Drilling EDM Machine Sales by Country (2021-2026) & (Units)
Table 51. Americas Precision Small Hole Drilling EDM Machine Sales Market Share by Country (2021-2026)
Table 52. Americas Precision Small Hole Drilling EDM Machine Revenue by Country (2021-2026) & ($ millions)
Table 53. Americas Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026) & (Units)
Table 54. Americas Precision Small Hole Drilling EDM Machine Sales by Application (2021-2026) & (Units)
Table 55. APAC Precision Small Hole Drilling EDM Machine Sales by Region (2021-2026) & (Units)
Table 56. APAC Precision Small Hole Drilling EDM Machine Sales Market Share by Region (2021-2026)
Table 57. APAC Precision Small Hole Drilling EDM Machine Revenue by Region (2021-2026) & ($ millions)
Table 58. APAC Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026) & (Units)
Table 59. APAC Precision Small Hole Drilling EDM Machine Sales by Application (2021-2026) & (Units)
Table 60. Europe Precision Small Hole Drilling EDM Machine Sales by Country (2021-2026) & (Units)
Table 61. Europe Precision Small Hole Drilling EDM Machine Revenue by Country (2021-2026) & ($ millions)
Table 62. Europe Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026) & (Units)
Table 63. Europe Precision Small Hole Drilling EDM Machine Sales by Application

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(2021-2026) & (Units)
Table 64. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales by Country (2021-2026) & (Units)
Table 65. Middle East & Africa Precision Small Hole Drilling EDM Machine Revenue Market Share by Country (2021-2026)
Table 66. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales by Type (2021-2026) & (Units)
Table 67. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales by Application (2021-2026) & (Units)
Table 68. Key Market Drivers & Growth Opportunities of Precision Small Hole Drilling EDM Machine
Table 69. Key Market Challenges & Risks of Precision Small Hole Drilling EDM Machine
Table 70. Key Industry Trends of Precision Small Hole Drilling EDM Machine
Table 71. Precision Small Hole Drilling EDM Machine Raw Material
Table 72. Key Suppliers of Raw Materials
Table 73. Precision Small Hole Drilling EDM Machine Distributors List
Table 74. Precision Small Hole Drilling EDM Machine Customer List
Table 75. Global Precision Small Hole Drilling EDM Machine Sales Forecast by Region (2027-2032) & (Units)
Table 76. Global Precision Small Hole Drilling EDM Machine Revenue Forecast by Region (2027-2032) & ($ millions)
Table 77. Americas Precision Small Hole Drilling EDM Machine Sales Forecast by Country (2027-2032) & (Units)
Table 78. Americas Precision Small Hole Drilling EDM Machine Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 79. APAC Precision Small Hole Drilling EDM Machine Sales Forecast by Region (2027-2032) & (Units)
Table 80. APAC Precision Small Hole Drilling EDM Machine Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 81. Europe Precision Small Hole Drilling EDM Machine Sales Forecast by Country (2027-2032) & (Units)
Table 82. Europe Precision Small Hole Drilling EDM Machine Revenue Forecast by Country (2027-2032) & ($ millions)
Table 83. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales Forecast by Country (2027-2032) & (Units)
Table 84. Middle East & Africa Precision Small Hole Drilling EDM Machine Revenue Forecast by Country (2027-2032) & ($ millions)
Table 85. Global Precision Small Hole Drilling EDM Machine Sales Forecast by Type (2027-2032) & (Units)

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Table 86. Global Precision Small Hole Drilling EDM Machine Revenue Forecast by Type (2027-2032) & ($ millions)
Table 87. Global Precision Small Hole Drilling EDM Machine Sales Forecast by Application (2027-2032) & (Units)
Table 88. Global Precision Small Hole Drilling EDM Machine Revenue Forecast by Application (2027-2032) & ($ millions)
Table 89. Sodick Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 90. Sodick Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 91. Sodick Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 92. Sodick Main Business
Table 93. Sodick Latest Developments
Table 94. Makino Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 95. Makino Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 96. Makino Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 97. Makino Main Business
Table 98. Makino Latest Developments
Table 99. Mitsubishi Electric Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 100. Mitsubishi Electric Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 101. Mitsubishi Electric Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 102. Mitsubishi Electric Main Business
Table 103. Mitsubishi Electric Latest Developments
Table 104. ELENIX Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 105. ELENIX Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 106. ELENIX Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 107. ELENIX Main Business
Table 108. ELENIX Latest Developments
Table 109. SARIX Basic Information, Precision Small Hole Drilling EDM Machine

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Manufacturing Base, Sales Area and Its Competitors
Table 110. SARIX Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 111. SARIX Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 112. SARIX Main Business
Table 113. SARIX Latest Developments
Table 114. Posalux Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 115. Posalux Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 116. Posalux Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 117. Posalux Main Business
Table 118. Posalux Latest Developments
Table 119. UNITED MACHINING Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 120. UNITED MACHINING Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 121. UNITED MACHINING Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 122. UNITED MACHINING Main Business
Table 123. UNITED MACHINING Latest Developments
Table 124. ONA Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 125. ONA Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 126. ONA Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 127. ONA Main Business
Table 128. ONA Latest Developments
Table 129. AGEMA Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 130. AGEMA Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 131. AGEMA Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 132. AGEMA Main Business
Table 133. AGEMA Latest Developments

+357 96 030922
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Table 134. Winbro Group Technologies Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 135. Winbro Group Technologies Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 136. Winbro Group Technologies Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 137. Winbro Group Technologies Main Business
Table 138. Winbro Group Technologies Latest Developments
Table 139. Beaumont Machine Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 140. Beaumont Machine Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 141. Beaumont Machine Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 142. Beaumont Machine Main Business
Table 143. Beaumont Machine Latest Developments
Table 144. Current EDM Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 145. Current EDM Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 146. Current EDM Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 147. Current EDM Main Business
Table 148. Current EDM Latest Developments
Table 149. HANKOOK NSD Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 150. HANKOOK NSD Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 151. HANKOOK NSD Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 152. HANKOOK NSD Main Business
Table 153. HANKOOK NSD Latest Developments
Table 154. Yougar M&T Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 155. Yougar M&T Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 156. Yougar M&T Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 157. Yougar M&T Main Business

+357 96 030922
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Table 158. Yougar M&T Latest Developments
Table 159. Heun Funkenerosion Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 160. Heun Funkenerosion Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 161. Heun Funkenerosion Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 162. Heun Funkenerosion Main Business
Table 163. Heun Funkenerosion Latest Developments
Table 164. Excetek Technologies Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 165. Excetek Technologies Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 166. Excetek Technologies Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 167. Excetek Technologies Main Business
Table 168. Excetek Technologies Latest Developments
Table 169. Ocean Technologies Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 170. Ocean Technologies Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 171. Ocean Technologies Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 172. Ocean Technologies Main Business
Table 173. Ocean Technologies Latest Developments
Table 174. Yan Yang Precision Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 175. Yan Yang Precision Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 176. Yan Yang Precision Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 177. Yan Yang Precision Main Business
Table 178. Yan Yang Precision Latest Developments
Table 179. Beijing Dimon CNC Technology Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 180. Beijing Dimon CNC Technology Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 181. Beijing Dimon CNC Technology Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 182. Beijing Dimon CNC Technology Main Business
Table 183. Beijing Dimon CNC Technology Latest Developments
Table 184. Beijing Institute of Electro-Machining Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 185. Beijing Institute of Electro-Machining Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 186. Beijing Institute of Electro-Machining Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 187. Beijing Institute of Electro-Machining Main Business
Table 188. Beijing Institute of Electro-Machining Latest Developments
Table 189. Suzhou Baoma CNC Equipment Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 190. Suzhou Baoma CNC Equipment Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 191. Suzhou Baoma CNC Equipment Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 192. Suzhou Baoma CNC Equipment Main Business
Table 193. Suzhou Baoma CNC Equipment Latest Developments
Table 194. Suzhou Sojdio Mechanical Technology Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 195. Suzhou Sojdio Mechanical Technology Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 196. Suzhou Sojdio Mechanical Technology Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 197. Suzhou Sojdio Mechanical Technology Main Business
Table 198. Suzhou Sojdio Mechanical Technology Latest Developments
Table 199. Suzhou Zhonggu Industry Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 200. Suzhou Zhonggu Industry Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 201. Suzhou Zhonggu Industry Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 202. Suzhou Zhonggu Industry Main Business
Table 203. Suzhou Zhonggu Industry Latest Developments
Table 204. Suzhou Yamason Machine Tool Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 205. Suzhou Yamason Machine Tool Precision Small Hole Drilling EDM Machine

+357 96 030922
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Product Portfolios and Specifications
Table 206. Suzhou Yamason Machine Tool Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 207. Suzhou Yamason Machine Tool Main Business
Table 208. Suzhou Yamason Machine Tool Latest Developments
Table 209. SUZHOU SEJ TECHNOLOGY Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 210. SUZHOU SEJ TECHNOLOGY Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 211. SUZHOU SEJ TECHNOLOGY Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 212. SUZHOU SEJ TECHNOLOGY Main Business
Table 213. SUZHOU SEJ TECHNOLOGY Latest Developments
Table 214. Jiangsu Dongqing CNC Machine Tool Basic Information, Precision Small Hole Drilling EDM Machine Manufacturing Base, Sales Area and Its Competitors
Table 215. Jiangsu Dongqing CNC Machine Tool Precision Small Hole Drilling EDM Machine Product Portfolios and Specifications
Table 216. Jiangsu Dongqing CNC Machine Tool Precision Small Hole Drilling EDM Machine Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 217. Jiangsu Dongqing CNC Machine Tool Main Business
Table 218. Jiangsu Dongqing CNC Machine Tool Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Precision Small Hole Drilling EDM Machine
Figure 2. Precision Small Hole Drilling EDM Machine Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Precision Small Hole Drilling EDM Machine Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Precision Small Hole Drilling EDM Machine Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Precision Small Hole Drilling EDM Machine Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Precision Small Hole Drilling EDM Machine Sales Market Share by Country/Region (2025)
Figure 10. Precision Small Hole Drilling EDM Machine Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Standard CNC
Figure 12. Product Picture of Automatic Electrode Change
Figure 13. Product Picture of Automated Integrated
Figure 14. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Type in 2026
Figure 15. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of ?0.10 mm
Figure 17. Product Picture of ?0.10–0.50 mm
Figure 18. Product Picture of ?0.50 mm
Figure 19. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Hole Diameter in 2026
Figure 20. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Hole Diameter (2021-2026)
Figure 21. Product Picture of 3-Axis
Figure 22. Product Picture of 4–5-Axis
Figure 23. Product Picture of ?6-Axis
Figure 24. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Number of Controlled Axes in 2026
Figure 25. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by

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Number of Controlled Axes (2021-2026)
Figure 26. Precision Small Hole Drilling EDM Machine Consumed in Aerospace
Figure 27. Global Precision Small Hole Drilling EDM Machine Market: Aerospace (2021-2026) & (Units)
Figure 28. Precision Small Hole Drilling EDM Machine Consumed in Automotive Manufacturing
Figure 29. Global Precision Small Hole Drilling EDM Machine Market: Automotive Manufacturing (2021-2026) & (Units)
Figure 30. Precision Small Hole Drilling EDM Machine Consumed in Mold Manufacturing
Figure 31. Global Precision Small Hole Drilling EDM Machine Market: Mold Manufacturing (2021-2026) & (Units)
Figure 32. Precision Small Hole Drilling EDM Machine Consumed in Energy Equipment
Figure 33. Global Precision Small Hole Drilling EDM Machine Market: Energy Equipment (2021-2026) & (Units)
Figure 34. Precision Small Hole Drilling EDM Machine Consumed in Precision Machinery
Figure 35. Global Precision Small Hole Drilling EDM Machine Market: Precision Machinery (2021-2026) & (Units)
Figure 36. Precision Small Hole Drilling EDM Machine Consumed in Other
Figure 37. Global Precision Small Hole Drilling EDM Machine Market: Other (2021-2026) & (Units)
Figure 38. Global Precision Small Hole Drilling EDM Machine Sale Market Share by Application (2025)
Figure 39. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Application in 2025
Figure 40. Precision Small Hole Drilling EDM Machine Sales by Company in 2025 (Units)
Figure 41. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Company in 2025
Figure 42. Precision Small Hole Drilling EDM Machine Revenue by Company in 2025 ($ millions)
Figure 43. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Company in 2025
Figure 44. Global Precision Small Hole Drilling EDM Machine Sales Market Share by Geographic Region (2021-2026)
Figure 45. Global Precision Small Hole Drilling EDM Machine Revenue Market Share by Geographic Region in 2025
Figure 46. Americas Precision Small Hole Drilling EDM Machine Sales 2021-2026

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(Units)
Figure 47. Americas Precision Small Hole Drilling EDM Machine Revenue 2021-2026 ($ millions)
Figure 48. APAC Precision Small Hole Drilling EDM Machine Sales 2021-2026 (Units)
Figure 49. APAC Precision Small Hole Drilling EDM Machine Revenue 2021-2026 ($ millions)
Figure 50. Europe Precision Small Hole Drilling EDM Machine Sales 2021-2026 (Units)
Figure 51. Europe Precision Small Hole Drilling EDM Machine Revenue 2021-2026 ($ millions)
Figure 52. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales 2021-2026 (Units)
Figure 53. Middle East & Africa Precision Small Hole Drilling EDM Machine Revenue 2021-2026 ($ millions)
Figure 54. Americas Precision Small Hole Drilling EDM Machine Sales Market Share by Country in 2025
Figure 55. Americas Precision Small Hole Drilling EDM Machine Revenue Market Share by Country (2021-2026)
Figure 56. Americas Precision Small Hole Drilling EDM Machine Sales Market Share by Type (2021-2026)
Figure 57. Americas Precision Small Hole Drilling EDM Machine Sales Market Share by Application (2021-2026)
Figure 58. United States Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 59. Canada Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 60. Mexico Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 61. Brazil Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 62. APAC Precision Small Hole Drilling EDM Machine Sales Market Share by Region in 2025
Figure 63. APAC Precision Small Hole Drilling EDM Machine Revenue Market Share by Region (2021-2026)
Figure 64. APAC Precision Small Hole Drilling EDM Machine Sales Market Share by Type (2021-2026)
Figure 65. APAC Precision Small Hole Drilling EDM Machine Sales Market Share by Application (2021-2026)
Figure 66. China Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)

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Figure 67. Japan Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 68. South Korea Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 69. Southeast Asia Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 70. India Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 71. Australia Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 72. China Taiwan Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 73. Europe Precision Small Hole Drilling EDM Machine Sales Market Share by Country in 2025
Figure 74. Europe Precision Small Hole Drilling EDM Machine Revenue Market Share by Country (2021-2026)
Figure 75. Europe Precision Small Hole Drilling EDM Machine Sales Market Share by Type (2021-2026)
Figure 76. Europe Precision Small Hole Drilling EDM Machine Sales Market Share by Application (2021-2026)
Figure 77. Germany Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 78. France Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 79. UK Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 80. Italy Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 81. Russia Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 82. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales Market Share by Country (2021-2026)
Figure 83. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales Market Share by Type (2021-2026)
Figure 84. Middle East & Africa Precision Small Hole Drilling EDM Machine Sales Market Share by Application (2021-2026)
Figure 85. Egypt Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 86. South Africa Precision Small Hole Drilling EDM Machine Revenue Growth

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2021-2026 ($ millions)
Figure 87. Israel Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 88. Turkey Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 89. GCC Countries Precision Small Hole Drilling EDM Machine Revenue Growth 2021-2026 ($ millions)
Figure 90. Manufacturing Cost Structure Analysis of Precision Small Hole Drilling EDM Machine in 2026
Figure 91. Manufacturing Process Analysis of Precision Small Hole Drilling EDM Machine
Figure 92. Industry Chain Structure of Precision Small Hole Drilling EDM Machine
Figure 93. Channels of Distribution
Figure 94. Global Precision Small Hole Drilling EDM Machine Sales Market Forecast by Region (2027-2032)
Figure 95. Global Precision Small Hole Drilling EDM Machine Revenue Market Share Forecast by Region (2027-2032)
Figure 96. Global Precision Small Hole Drilling EDM Machine Sales Market Share Forecast by Type (2027-2032)
Figure 97. Global Precision Small Hole Drilling EDM Machine Revenue Market Share Forecast by Type (2027-2032)
Figure 98. Global Precision Small Hole Drilling EDM Machine Sales Market Share Forecast by Application (2027-2032)
Figure 99. Global Precision Small Hole Drilling EDM Machine Revenue Market Share Forecast by Application (2027-2032)

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