

China CNC System Industry Report, 2011

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Abstracts

The penetration of CNC machine tools has kept rising since 2002 and reached 29.9% in China in 2011. At present, economical CNC systems are the mainstream products in the Chinese CNC system market, while mid to high-end CNC systems occupy a smaller proportion. In the future, with the increasing requirement on the performance of CNC system products by various industries, the demand for mid to high-end CNC systems will increase gradually.

In the field of economical CNC system, domestic products have formed competitive advantages in price and scale, and occupied 95% of the Chinese market. GSK occupies the largest market share, and other leading companies include Beijing KND, Nanjing Washing, and Dalian Dasen.

Mid to high-end CNC system products are mainly dependent on imports, but some companies such as Huazhong CNC have emerged, and by virtue of advantages in price and service, continued to grab over the market share of imports. Huazhong CNC is the largest domestic enterprise in the field of mid-end CNC system, and occupied about 30% of the market in 2010.

In the field of high-end CNC system, the market is basically occupied by imports. Japan's Fanuc occupies about 50% of the market. Local enterprises in the high-end market mainly include Huazhong CNC and Shenyang Golding NC Tech.

The report outlines the development of China's machine tool industry, the supply and demand of the CNC system industry, the competition and import & export of economical and mid to high-end CNC system market segments. In addition, the report sheds light on key enterprises in China's CNC system industry, including Fanuc, Siemens, Mitsubishi, Huazhong CNC and GSK.

Huazhong CNC is the largest domestic manufacturer of mid to high-end CNC systems. Its CNC system business achieved revenue of RMB 89 million in H1 2011, accounting for 45% of the company's total revenue. In 2011, Huazhong CNC acquired stake in servo motor manufacturers Huada Motor and Wuhan Golden Age Motor Technology to complete its CNC system industry chain. After its fundraising and investment projects put into production, its CNC system production capacity will reach 15,000 sets per year in 2012.

GSK has obvious advantages in the economical CNC system production area. In 2010, it produced over 100,000 sets of CNC systems, and achieved operating revenue of about RMB 1.2 billion. While consolidating the field of economical CNC system, GSK has begun to set foot in the mid-end CNC system market.

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