

Global and China Machine Tool Report, 2014-2016

<https://marketpublishers.com/r/G30253B58B6EN.html>

Date: January 2015

Pages: 121

Price: US\$ 2,250.00 (Single User License)

ID: G30253B58B6EN

Abstracts

Affected by the factors such as the slowdown in macro-economic growth, the decelerated growth of fixed-assets investment, and rapid capacity expansion of downstream sectors in the early stage, China's machine tool industry has showed a significant decline since 2011. In 2012-2013, the output of metal working machine tools in China dropped by respectively 7.0% and 6.1%. This is particularly true of metal cutting machine tools, whose output fell by 7.3% and 8.9%, respectively.

In the past two years, the weakened demand from the domestic market has led to a decline in imports, with the import volume of metal working machine tools in 2013 falling by 31.4% from a year ago, the first double-digit decline in China's machine tool imports for the past decade except the 2009 financial crisis.

Meanwhile, the import structure of China's machine tool products also changed significantly. The demand for high-precision, high-speed, highly efficient, and intelligent medium and high-end CNC machine tools has increased remarkably. In 2013, this kind of machine tool was largely imported by machining centers (horizontal-type, vertical-type, and gantry-type), with the full-year import value amounting to USD3.38 billion. That was followed by laser process machines and CNC horizontal lathes, etc.

In the first half of 2014, China's machine tool industry continued to present low growth, but the output rose considerably and the exports turned from negative to positive. It is predicted that machine tool industry for the whole year will return to 2011 levels.

Amid sluggish recovery of the global economy and downturn of China's machine tool market, many foreign companies are stepping up the layout in China. In 2013, Yamazaki Mazak's new plant in Dalian was completed and put into production; DMG MORI SEIKI's plant in Tianjin was opened; the German company Trumpf acquired a 72% interest in Jiangsu Jinfangyuan CNC Machine Co.,Ltd. In 2014, ROTTLER worked

with Shandong Yonghua Machinery Co. Ltd. to jointly build precision machine tools under the brand name of ROTTLER?YONGHUA in an attempt to develop China's high-end machine tool market, such as aerospace, shipbuilding, automobiles, and rail transit.

On the other hand, the domestic machine tool enterprises have accomplished transformation and upgrading by adjusting product structure, extending industrial chain, expanding overseas market, and innovating technologies. In 2014, DMTG, together with a third party, established a CNC machine tool company in Russia; SMTCL independently developed i5 numerical control system and achieved mass production; Qinchuan Machine Tool Group completed overall listing; Spark Machine Tool proposed to bring in AVIC's equity investment.

Global and China Machine Tool Industry Report, 2014-2016 compiled by ResearchInChina mainly focuses on the following:

Production and marketing, import and export, and corporate landscape of machine tools worldwide;

Policies, operation, import & export, and competition of machine tool industry in China;

Production, sales, import & export, and key enterprises of metal cutting machine tool, metal forming machine tool, and CNC machine tool industries in China;

Operation of 8 global key enterprises and their business in China, etc.;

Operation, revenue structure, development strategy, etc. of 18 key enterprises in China.

Contents

1 OVERVIEW OF MACHINE TOOL INDUSTRY

- 1.1 Definition and Classification
- 1.2 Status in National Economy
- 1.3 Industry Chain

2 STATUS QUO OF GLOBAL MACHINE TOOL INDUSTRY

- 2.1 Development
- 2.2 Production
- 2.3 Consumption
- 2.4 Import and Export
 - 2.4.1 Import
 - 2.4.2 Export
 - 2.4.3 Trade Balance Analysis
- 2.5 Key Enterprises

3 DEVELOPMENT ENVIRONMENT OF MACHINE TOOL INDUSTRY IN CHINA

- 3.1 Macro-environment
 - 3.1.1 GDP
 - 3.1.2 Fixed-asset Investment
- 3.2 Policy Environment

4 DEVELOPMENT OF MACHINE TOOL INDUSTRY IN CHINA

- 4.1 International Status
- 4.2 Industry Operation
- 4.3 Import and Export
 - 4.3.1 Export
 - 4.3.2 Imports
- 4.4 Competition Pattern
 - 4.4.1 Enterprise Pattern
 - 4.4.2 Regional Pattern

5 STATUS QUO OF MAJOR MACHINE TOOL MARKET IN CHINA

5.1 Metal Cutting Machine Tools

5.1.1 Production and Marketing

5.1.2 Import and Export

5.1.3 Major Product Market

5.1.4 Key Enterprises

5.2 Metal Forming Machine Tools

5.2.1 Production

5.2.2 Import and Export

5.2.3 Key Enterprises

5.3 CNC Machine Tools

5.3.1 Overview

5.3.2 Production

5.3.3 Import and Export

5.3.4 Key Enterprises

6 MAJOR GLOBAL MACHINE TOOL MANUFACTURERS

6.1 Yamazaki Mazak

6.1.1 Profile

6.1.2 Operation

6.1.3 Development in China

6.2 Trumpf

6.2.1 Profile

6.2.2 Operation

6.2.3 Development in China

6.3 Amada

6.3.1 Profile

6.3.2 Operation

6.3.3 Development in China

6.4 Komatsu

6.4.1 Profile

6.4.2 Operation

6.4.3 Development in China

6.5 DMG MORI SEIKI AKTIENGESELLSCHAFT

6.5.1 Profile

6.5.2 Operation

6.5.3 Development in China

6.6 DMG MORI SEIKI

6.6.1 Profile

- 6.6.2 Operation
- 6.6.3 Development in China
- 6.7 Jtekt
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Development in China
- 6.8 Okuma
 - 6.8.1 Profile
 - 6.8.2 Operation
 - 6.8.3 Development in China

7 MAJOR CHINESE MACHINE TOOL MANUFACTURERS

- 7.1 SMTCL
 - 7.1.1 Profile
 - 7.1.2 Operation
 - 7.1.3 Revenue Structure
 - 7.1.4 Gross Margin
 - 7.1.5 Development Strategy
- 7.2 Shenji Group Kunming Machine Tool Co., Ltd.
 - 7.2.1 Profile
 - 7.2.2 Operation
 - 7.2.3 Revenue Structure
 - 7.2.4 Gross Margin
 - 7.2.5 Development Strategy
- 7.3 Qinchuan Machine Tool & Tool Group Share Co., Ltd
 - 7.3.1 Profile
 - 7.3.2 Operation
 - 7.3.3 Revenue Structure
 - 7.3.4 Gross Margin
 - 7.3.5 Development Strategy
- 7.4 Jiangsu Yawei Machine Tool Co., Ltd.
 - 7.4.1 Profile
 - 7.4.2 Operation
 - 7.4.3 Revenue Structure
 - 7.4.4 Gross Margin
 - 7.4.5 Development Strategy
- 7.5 NHNC
 - 7.5.1 Profile

- 7.5.2 Operation
- 7.5.3 Revenue Structure
- 7.5.4 Gross Margin
- 7.5.5 R&D
- 7.5.6 Development Strategy
- 7.6 Qinghai Huading Industries Co., Ltd.
 - 7.6.1 Profile
 - 7.6.2 Operation
 - 7.6.3 Revenue Structure
 - 7.6.4 Key Projects
 - 7.6.5 Development Strategy
- 7.7 Weihai Huadong CNC Incorporated Company
 - 7.7.1 Profile
 - 7.7.2 Operation
 - 7.7.3 Revenue Structure
 - 7.7.4 Gross Margin
- 7.8 TONTEC Technology Investment Group Co Ltd
 - 7.8.1 Profile
 - 7.8.2 Operation
 - 7.8.3 Revenue Structure
 - 7.8.4 Gross Margin
 - 7.8.5 Development Strategy
- 7.9 Zhejiang RIFA Digital Precision Machinery Company Ltd.
 - 7.9.1 Profile
 - 7.9.2 Operation
 - 7.9.3 Revenue Structure
 - 7.9.4 Gross Margin
 - 7.9.5 Development Strategy
- 7.10 Unlisted Companies
 - 7.10.1 DMTG
 - 7.10.2 Qiqihar Heavy CNC Equipment Co., Ltd.
 - 7.10.3 BYJC
 - 7.10.4 Qier Machine Tool Group Co., Ltd.
 - 7.10.5 JIER Machine-Tool Group Co., Ltd.
 - 7.10.6 CHMTI
 - 7.10.7 Spark Machine Tool Co., Ltd.
 - 7.10.8 Yunnan CY Group Co., Ltd.
 - 7.10.9 Shanghai Machine Tool Works Ltd.

8 SUMMARY AND FORECAST

8.1 Market

8.3 Enterprise

8.3.1 Overseas enterprises

8.3.2 Domestic enterprises

Selected Charts

SELECTED CHARTS

Classification of Machine Tools

Demand for Machine Tool from Major Industries

Machine Tool Industry Chain

Major Economic Indicators for Machine Tool (Metal Working Machine) Worldwide, 2011-2013

Total Output Value of Machine Tools Worldwide, 2008-2015E

Output Value of Machine Tools Worldwide (by Country/Region), 2013

Output Value of Machine Tools (by Continent) and % of Total Worldwide, 2013

Consumption of Machine Tools Worldwide, 2008-2015E

Consumption of Machine Tools Worldwide (by Country/Region), 2012-2014

Per Capita Machine Tool Consumption in Major Countries/Regions, 2013

Import Value and YoY Growth of Machine Tools Worldwide (by Country/Region), 2013

Export Value and YoY Growth of Machine Tools Worldwide (by Country/Region), 2013

Top 10 Global Machine Tool Manufacturers by Output Value, 2012

China's GDP Growth Rate, 2011-2014

Growth Rate of Fixed-asset Investment in China's Machinery Industry, 2009-2014

Growth Rate of Fixed-asset Investment in China's Machine Tool Industry, 2009-2014

Main Policies on Machine Tool Industry in China, 2011-2014

China's Global Ranking in Machine Tool Industry, 2013

Major Economic Indicators for Machine Tool Industry in China, 2012-2014

Major Economic Indicators for Metal Cutting Machine Tool and Metal Forming Machine Tool Industries, 2010-2014

Import and Export Value of Machine Tools in China, 2009-2014

Export Volume and Value of Metal Working Machine Tools in China, 2008-2014

Export Value and YoY Growth of Machine Tools in China (by Product), 2013

Import Value of Metal Working Machine Tools in China, 2008-2014

Import Value and YoY Growth of Machine Tools in China (by Product), 2013

Output and Sales Volume of Metal Cutting Machine Tools in China, 2009-2014

Output of Metal Cutting Machine Tools in China (by Province/Municipality), 2012-2014

Import and Export Value of Metal Cutting Machine Tools in China, 2007-2013

Import and Export Value of Metal Cutting Machine Tool Products in China, 2011-2013

Output and Output Value of Major Metal Cutting Machine Tool Products in China, 2012

TOP10 Metal Cutting Machine Tool Enterprises in China by Output Value, 2014H1

Output and YoY Growth of Metal Forming Machine Tools in China, 2009-2014

Output of Metal Forming Machine Tools (by Province/Municipality), 2012-2014

Import and Export Value of Metal Forming Machine Tools in China, 2007-2013
Output of CNC Machine Tools in China, 2008-2014
CNC Proportion of CNC Metal Cutting Machine Tools in China, 2006-2015E
Output of CNC Metal Cutting Machine Tools in China (by Province/Municipality) and % of Nationwide Total, 2013
Import and Export Value of CNC Machine Tools (Metal Working Machine) in China, 2010-2013
Import and Export Value of CNC Metal Cutting Machine Tools in China (by Product), 2010-2013
Yamazaki Mazak's Production Base Distribution Worldwide, 2014
Yamazaki Mazak's Enterprise Distribution in China, 2014
Trumpf's Sales Value, FY2008/2009-FY2013/2014
Trumpf's Order Amount, FY2008/2009-FY2013/2014
Trumpf's Enterprise Distribution in China, 2014
Amada's Revenue and Net Income, FY2009-FY2014
Amada's Order Amount (by Product), FY2012-FY2014
Amada's Revenue (by Product), FY2010-FY2014
Amada's Revenue (by Region), FY2010-FY2014
Amada's Enterprise Distribution in China, 2014
Komatsu's Revenue and Net Income, FY2007-FY2014
Komatsu's Revenue (by Segment), FY2007-FY2013
Revenue Structure of Komatsu (by Region), FY2013
Business Structure of Dmg Mori Seiki Aktiengesellschaft
Main Business Indicators of Dmg Mori Seiki Aktiengesellschaft, 2008-2014
Revenue of Dmg Mori Seiki Aktiengesellschaft (by Segment), 2008-2014
Order Amount of Dmg Mori Seiki Aktiengesellschaft (by Segment), 2008-2014
Machine Tool Revenue and Order Amount of Dmg Mori Seiki Aktiengesellschaft (by Region), 2012-2014
Major Machine Tool Companies of Dmg Mori Seiki Aktiengesellschaft, 2014
Net Sales and Net Income of DMG MORI SEIKI, FY2008-FY2014
Revenue Structure of DMG MORI SEIKI (by Region), FY2009-FY2014
Machine Tool Order Amount and Structure of DMG MORI SEIKI, FY2009-FY2013
DMG MORI SEIKI's Plant in Tianjin
Jtekt's Revenue and Net Income, FY2010-FY2014
Jtekt's Revenue (by Segment), FY2014
Jtekt's Revenue (by Region), FY2010-FY2014
Jtekt's Enterprise Distribution in China,
Okuma's New Order Amount, FY2008-FY2014
Okuma's Revenue and Net Income, FY2008-FY2014

Okuma's Revenue (by Region), FY2012-FY2013
Okuma's Revenue (by Product), 2008-2013
Okuma's Machine Tool Market Structure, FY2013
Okuma's Sales Outlet Distribution in China
SMTCL's Revenue and Net Income, 2008-2014
SMTCL's Operating Revenue (by Product), 2010-2014
SMTCL's Operating Revenue (by Region), 2010-2014
SMTCL's Gross Margin, 2008-2014
SMTCL's Gross Margin (by Product), 2010-2014
Revenue and Net Income of Kunming Machine Tool, 2008-2014
Kunming Machine Tool's Order Amount and CNC Proportion, 2007-2014
Operating Revenue of Kunming Machine Tool (by Product), 2010-2014
Kunming Machine Tool's Gross Margin, 2008-2014
Revenue and Net Income of Qinchuan Machine Tool Group, 2008-2014
Operating Revenue of Qinchuan Machine Tool Group (by Segment), 2010-2014
Main Business Structure of Qinchuan Machine Tool Group (by Region), 2010-2014
Gross Margin of Qinchuan Machine Tool Group (by Segment), 2012-2014
Revenue and Net Income of Jiangsu Yawei Machine Tool, 2009-2014
Operating Revenue of Jiangsu Yawei Machine Tool (by Region), 2008-2014
Gross Margin of Jiangsu Yawei Machine Tool, 2008-2014
NHNC's Revenue and Net Income, 2008-2014
NHNC's Operating Revenue (by Product), 2009-2014
NHNC's Operating Revenue (by Region), 2010-2014
NHNC's Gross Margin, 2008-2014
NHNC's Gross Margin (by Product), 2009-2014
NHNC's R&D Costs and % of Total Revenue, 2011-2014
Revenue and Net Income of Qinghai Huading, 2008-2014
Operating Revenue of Qinghai Huading (by Segment), 2011-2014
Revenue of Qinghai Huading's Major Machine Tool Subsidiaries, 2011-2014
Operating Revenue of Qinghai Huading (by Region), 2011-2014
Revenue and Net Income of Huadong CNC, 2008-2014
Operating Revenue of Huadong CNC (by Product), 2011-2014
Operating Revenue of Huadong CNC (by Region), 2011-2014
NHNC's Gross Margin, 2008-2014
NHNC's Gross Margin (by Product), 2011-2014
Revenue and Net Income of TONTEC, 2009-2014
Operating Revenue of TONTEC (by Product), 2011-2013
Operating Revenue of TONTEC (by Region), 2011-2014
TONTEC's Gross Margin for Machine Tool, 2010-2014

Revenue and Net Income of RIFA Digital Precision Machinery, 2008-2014
Operating Revenue of RIFA Digital Precision Machinery (by Product), 2011-2014
Operating Revenue of RIFA Digital Precision Machinery (by Region), 2011-2014
Gross Margin of RIFA Digital Precision Machinery, 2010-2014
Gross Margin of RIFA Digital Precision Machinery (by Product), 2011-2014
DMTG's Major Product Production Modes and Production Subsidiaries
Main Operating Indicators of DMTG, 2010-2014
DMTG's Operating Revenue and Gross Margin (by Product), 2012-2014
Main Economic Indicators of Qiqihar Heavy CNC Equipment, 2010-2014
BYJC's Main Subsidiaries
JIER Machine-Tool's Major Clients
Spark Machine Tool's Revenue, 2004-2014
Output and YoY Growth of Metal Cutting Machine Tool in China, 2011-2016E
Revenue and Market Share of Major Metal Cutting Machine Tool Manufacturers in China, 2013

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