

A-share Listed Machine Tool Companies - Profiles and Financial Data

<https://marketpublishers.com/r/A42C2D2DA56EN.html>

Date: March 2017

Pages: 60

Price: US\$ 600.00 (Single User License)

ID: A42C2D2DA56EN

Abstracts

Stimulated by the rapid growth of fixed asset investment in China from 2007 to 2010, the gross industrial production value of the machine tool industry has increased fast. In 2011, affected by government's strategy of "optimizing structure and reducing capacity" and global overcapacity, the growth trend of machine industry slows down from the second year of 2011 but it remains increasing.

It is estimated that the global consumption market of machine tool will flatten and have a modest upturn from 2017 to 2021. For example, the strategy of re-industrialization in Germany will bring new developments to the aviation, electric equipment and automobile industries. The Indian market also benefits from global industrial transfer, fast-growing infrastructure investment and the development of automobile industry. Besides, US consumption demands for high-end machine tool will be stimulated by protectionism and manufacturing revival. Judging from the investment of the global major consumption areas, such as aviation, electric equipment, precision optical instruments and automobiles, the future consumption volume is expected to increase.

According to CRI, the industrialization and urbanization are proceeding in China. The increased labor cost will quickly blow out of low-efficient production mode, leading to the increased percentage of numerical control machine tools.

In 2016, the export value of machine tool in China was USD 2.9 billion, down by 9.4% YOY. Among them, the export value of metal-cutting machine tool was about USD 1.9 billion, down by 9.5% YOY; the export value of metal-forming machine tool was about USD 1 million, down by 9.1% YOY. In 2016, the total export value of tools reached USD 2.6 billion, unchanged over the previous year. The import value of machine tool in China was USD 7.5 billion, down by 12.8% YOY. The import value of metal-cutting machine

tool was USD 6.1 billion, down by 12.9% YOY; the import of metal forming machine tool was USD 1.4 billion, down by 12.5% YOY. In 2016, the import value of tools in China was about USD 1.5 billion, unchanged over the previous year.

In recent years, the Chinese government has issued a series of economic and industrial policies in order to boost the economy. Machine tools are involved in these policies, such as National Development Program of Strategic Emerging Industries During the 13th Five-Year Plan Period (2016-2020), One Belt and One Road and Made in China 2015. These policies all promote the development of Chinese machine tool industry.

In this report, CRI analyzes 14 machine tool manufacturing enterprises listed in A-share market in China.

The report is composed of two parts: the first part is enterprise profiles and the second part is the operation status of these enterprises in the recent decade (presently 2006 to 2016, we will update it to the latest as time goes by).

The operation status is demonstrated from the following perspectives: (1) financial indexes, such as earnings per share, book value per share (BPS), sales per share, net cash flow per share, return on net worth and debt to asset ratio; (2) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (3) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (4) indexes on the balance sheet, such as liquid asset, fixed asset, current liability, non-current liability, capital reserve and shareholders' equity.

(1) Financial Indexes

Earnings per Share

Book Value per Share (BPS)

Sales per Share (SPS)

Net Cash Flow per Share from Operations

Net Cash Flow per Share (CNY)

Return on Net Worth

Net Profit Margin on Total Assets

Return on Invested Capital (ROIC) (%)

Gross Profit Margin on Sales (%)

Net Profit Margin on Sales (%)

EBIT Margin (%)

EBITDA Margin (%)

Debt to Asset Ratio (%)

Total Asset Turnover (times)

Cash/Operating Income Received from Sales of Goods or Services

YOY Growth Rate of Operating Revenue (%)

YOY Growth Rate of Operating Profit (%)

YOY Growth Rate of Net Profit Attributable to Shareholders of Parent Company (%)

(2) Summary of Income Statement

Gross Revenue (CNY, million)

Total Operating Costs (CNY, million)

Revenue (CNY, million)

Operating Profit (CNY, million)

Total Profit (CNY, million)

Net Profit (CNY, million)

Net Profit Attributable to Shareholders of Parent Company (CNY, million)

Non-recurring Items (CNY, million)

Net Profit Deducting Non-recurring Items (CNY, million)

R&D Costs (CNY, million)

Earnings Before Interest and Tax (EBIT)(CNY, million)

Earnings Before Interest, Taxes, Depreciation and Amortization (EBITDA) (CNY, million)

(3) Summary of Balance Sheet

Liquid Asset (CNY, million)

Fixed Asset (CNY, million)

Long-term Equity Investment

Total Assets (CNY, million)

Liquid Liability (CNY, million)

Non-current Liability (CNY, million)

Total Liability (CNY, million)

Capital Reserve (CNY, million)

Surplus Reserve (CNY, million)

Undistributed Profit (CNY, million)

Shareholders' Equity (CNY, million)

Equity Attributable to Shareholders of Parent Company (CNY, million)

(4) Summary of Cash Flow Statement

Cash Received from Sales of Goods and Services (CNY, million)

Cash Flow from Operations (CNY, million)

Cash Paid to Purchase Fixed Assets, Intangible Assets and Other Long-term Assets (CNY, million)

Cash Paid for Investments (CNY, million)

Cash Flow from Investments (CNY, million)

Cash Received from Investors (CNY, million)

Cash Received from Borrowings (CNY, million)

Cash Flow from Financing (CNY, million)

Net Increase of Cash and Cash Equivalents (CNY, million)

Cash and Cash Equivalents, End of Period (CNY, million)

Depreciation and Amortization (CNY, million)

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- 4 Hefei Metalforming Intelligent Manufacturing Co., Ltd. (603011.SH)
- 5 JDM Jingda Machine (Ningbo) Co., Ltd. (603088.SH)
- 6 Shenyang Machine Tool Co., Ltd. (000410.SZ)
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