

Research Report on China Machine Tool Industry, 2010-2019

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Abstracts

Description

In recent years, the growth rate of fixed asset investment has kept dropping in China, reporting 15.7% in 2014 which decreased 8.8% compared with 2010. As the demand for machine tool is mainly driven by investment, the decrease mentioned above directly leads to the continuous decrease in the growth of the market size of machine tool.

In 2014, machine tool industry in China brought in sales revenue of CNY 819 billion which increased 2% year on year. Although its output holds a leading position in the world, there are increasingly serious structural problems in the whole industry. China's machine tool still lags behind its counterpart in developed countries in terms of manufacturing process, which results in the obvious deficiencies in the technical level and operating speed of core components, accuracy preservation as well as the reliability of machine tool despite its rising sales revenue. If core component can't be localized, it will constitute a huge obstacle to machine tool industry in China.

The numerical control rate of machine tool in China is lower than that in other countries like the US and Japan with despite its increase in recent years. For example, the numerical control rate of metal-cutting machine tool is about 30% and that of metal-forming machine tool is less than 10%.

In 2014, machine tool industry in China reported an export value of USD 11.63 billion with a year-on-year increase of 22.1%, among which USD 3.40 billion with a year-on-year increase of 18.8% came from metal-working machine tools, USD 2.27 billion with a year-on-year increase of 20.6% from metal-cutting machine tools and USD 1.12 billion from metal-forming machine tools, increasing 15.3% year on year. The Top 3 exports

are cutting tool (USD 2.62 billion), metal-cutting machine tool (USD 2.27 billion) as well as abrasive and grinding tool (USD 2.18 billion).

In 2014, machine tool industry in China reported an import value of USD 17.78 billion with a year-on-year increase of 10.8%, among which USD 10.83 billion with a year-on-year increase of 7.6% came from metal-working machine tools, USD 8.84 billion with a year-on-year increase of 11.1% from metal-cutting machine tools and USD 1.99 billion from metal-forming machine tools, decreasing 5.8% year on year. The Top 3 imports are metal-cutting machine tool (USD 8.84 billion), metal-forming machine tool (USD 1.99 billion) as well as CNC device (USD 1.65 billion).

Among the sources of import, Japan ranks first with USD 5.16 billion which increases 23.6% year on year, Germany comes next with USD 4.29 billion which decreases 0.8% year on year and Taiwan ranks third with USD 2.31 billion, increasing 18.0% year on year.

The rapid development of heavy chemical industry is going to end and the growth in fixed asset investment keeps dropping, which has influenced the sales of machine tools oriented towards this area. A good case in point is the drop in the production and import of heavy machine tool since 2011. In 2014, the average production and sales of heavy machine tool manufacturers in China was only 51.0% of that in 2011 and the import value of heavy machine tool in 2014 equaled 75.0% of that in 2011.

As the driving force of Chinese economy has changed from investment to consumption since 2011, machine tool oriented towards commodity manufacturing reports a better production and consumption than that related with investment. For instance, the consumption of metal-cutting machine tool has decreased while that of metal-forming machine tool keeps growing. Besides, the import and domestic output of vertical machining center which serves the manufacturing of such consumer electronics as smart phone and pad grew fast in 2014, respectively increasing 141.0% and 37.3% year on year. The rise of industrial robot industry is worthy of attention because it has become popular now for machine tool enterprises to enter the field of robot manufacturing.

The sales revenue of machine tool industry in China is expected to keep growing in the next few years with a rate not exceeding 5%. Besides, due to the industrial upgrading and technical transformation of downstream industry, there will be a large demand for high-end machine tools whose import will increase despite the weak growth in overall import of machine tools.

Readers can get at least the following information through this report:

government policy for machine tool industry in China

supply and demand of machine tool industry in China

factors affecting the development of machine tool industry

import and export of machine tool in China

competition in machine tool market

development forecast of machine tool industry

The author suggests the following groups of people purchase this report:

enterprises engaged in machine tool manufacturing and trade

relevant enterprises in industrial chain of machine tool industry

investors/research institutions interested in machine tool industry in China

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COMPANIES MENTIONED

Shenyang Machine Tools Co., Ltd; Qinchuan Machinery Development Co., Ltd; Shenji Group Kunming Machine Tool Co., Ltd; Tontec Technology Investment Group Co., Ltd; Weihai Huadong Automation Co., Ltd; Shandong Fin Cnc Machine Co., Ltd; Wuhan Huazhong Numerical Control Co., Ltd; Jiangsu Yawei Machine Tool Co., Ltd; Rifa Precision Machinery Co., Ltd; Qinghai Huading Industries Co., Ltd

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