

Research Report on Machine Tool Industry in China, 2014-2018

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Date: May 2014

Pages: 50

Price: US\$ 2,400.00 (Single User License)

ID: RDEFFE62BFFEN

Abstracts

Description

The sales revenue of machine tool industry was CNY 802.63 billion in China in 2013, up by 13.7% YOY. The numerical control rate of machine tool production in China is lower than that in countries like the U.S. and Japan though the rate increases in recent years. The numerical control rate of metal-cutting machine tools and metal forming machine tools was 30% and 10% respectively.

Excess capacity becomes an obvious problem in Chinese machine tool industry. In 2011-2013, the amount of enterprises increased by 20.4% and the production volume increased by 137.5%. The rate of capacity utilization of heavy-duty machine tools was the lowest while the earnings decreased by 45%-50% in 2 consecutive years. The overall rate of capacity utilization was low though that of other products might be higher.

The import value of machine tools was USD 16.09 billion in China in 2013, down by 20.2% YOY. The import value of metal work machine tools was USD 10.1 billion, down by 26.0% YOY. The import value of numerically-controlled machine tools was USD 8.21 billion, down by 26.5% YOY. Among the metal work machine tools, the import value of metal-cutting machine tools was USD 7.99 billion, down by 28.4% YOY while that of numerically-controlled metal-cutting machine tools was USD 7.03 billion, down by 28.3% YOY. The import value of metal forming machine tools was USD 2.11 billion, down by 15.5% YOY while that of numerically-controlled metal forming machine tools was USD 1.18 billion, down by 13.9% YOY.

After years of rapid growth in import, problems occurred as downstream industries raised the production capacity and adopted the high-end products. The import of

machine tools fell sharply in China in 2013 while downstream industries tried to solve the problems. Unlike the decline of import in 2009, the import of machine tools will not experience long-lasting and rapid growth in the future.

The export value of machine tool products was USD 9.53 billion in China in 2013, up by 3.2% YOY.

The import of machine tools declined significantly in 2013, which symbolized decreasing investment in fixed assets in China. Some industries with demand for the equipment were saturated after the peak of investment in fixed assets. The market demand for machine tools inclined to high-end products in China in 2013. According to the import statistics, the average unit price of imported numerically-controlled machine tools increased by 28.8% YOY in 2013.

The prospering industrial robot market in China is noteworthy. It becomes a trend for machine tool enterprises to enter robot manufacture field using manufacture advantages.

Problems and risks exist in the machine tool industry though the market has huge potential in China in 2014-2018, including uncertainty of domestic and international economic environment, excess supply, decreasing demand in downstream, increasing costs of labors and raw materials, fluctuations of CNY exchange rate and insufficient technical innovation. Generally, opportunities surpass risks.

The sales revenue of machine tool industry will continue to increase in China in 2014-2018 while the annual growth rate will decline to 10%. The industry upgrading and technical innovation of downstream industries stimulate a large demand for machine tool products with an obvious trend toward high-end products. The import of high-end machine tools and moulds will continue to grow though the overall import of machine tools suffers sluggish growth in China.

Through this report, the readers can acquire the following information:

Government Policies of Machine Tool Industry in China

Supply and Demand Status of Machine Tool Industry in China

Factors Influencing the Development of Machine Tool Industry

Import and Export of Machine Tools in China

Competition status of Machine Tool Market

Forecast on Development of Machine Tool Industry

The following enterprises and people are recommended to purchase this report:

Manufacturers and Trading Enterprises of Machine Tools

Enterprises Related to Industry Chain of Machine Tools

Investors/Research Institutes Concerned about China Machine Tool Industry

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