

Research Report on Chinese Machine Tool Industry, 2012



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In 2011, China's machine tool industry realized total output value of CNY 760.390 billion, increasing by 32.5% YOY. Under the obstinately high pressure of import, the market share occupied by domestic machine tools was 66.1% in 2011, decreasing by 0.8 percentage point compared to that in last year. In 2011, the import growth rate of China's metalworking machine tools reached as high as 40.6%, 11.2 percentage points higher than the growth rate of China's machine tools' output value of the same category, which reflects the acceleration of upgrading of market demand structure and the evident increase of users' demand for medium and high-end products. It also reflects that domestic medium and high-end products are still unsatisfying in terms of technology, industrialization, market adaptability, overall service and so on as the situation changing.

Since 2011, the raw material price and labor costs of China's steel and non-ferrous metal rapidly increase. Meanwhile, the proportion of CNC machine tools with relatively high unit price is generally increasing in the products, and the overall price index of China's machine tool industry is on the rise. However, the overall average price of metal-cutting machine tools and metal-forming machine tools doesn't rapidly increase, while the price of related products, e.g. machine tool accessories, rapidly rises.

In 2011, although the demand for China's large and heavy machine tools and low-end machine tool products appeared to decrease, most industries and enterprises still enjoy a rapid increase of sales revenue and profit, relying on relatively sufficient backup orders (mainly low-end machine tools). In 2011, the sales revenue of China's machine tool industry surmounted CNY 400 billion, increasing by 28.08% YOY.

In 2012, analyzed by demand, the price of machine tools is influenced by the raw material price, such as the price of steel and so on. The price of machine tools will fall in different degrees, for the reason that the raw material price is predicted to fall. In addition, machine tool industry is a technology-intensive industry, and the decrease of products' price is an inevitable long-term trend with the continuous development of technology.

Currently, the CNC rate of China's machine tools is relatively low, with the imbalance of regional and industrial development, and the long-term coexistence of multi economic forms, which all lead to the long-term coexistence of low, medium and high demand of China's machine tool industry in the future. In 2012, the supply structure of machine tool products will further accelerate upgrading, and the growth rate of CNC machine tool output will be much higher than that of the total output of machine tools. Medium and high-level CNC machine tools and professional machine will continue to sell well, while the output value of low-level machine tools, especially common machine tools, may appear a negative growth, and the demand for heavy and large machine tool market may still be in depression.

In 2012 and 2013, many opportunities lie in the development of China's machine tool industry, while meantime while there are corresponding risks, generally, more opportunities than risks. The major risks are: uncertainty of economic environment at home and abroad; excess supply and imbalance of supply and demand; less downstream demand; increasing price of raw materials; fluctuation of product prices; unreasonable product structure; depressive export market; RMB exchange rate fluctuations; acceleration of industrial integration; lack of technology innovation, low extent of industrialization and so on.

In 2012 and 2013, it is predicted that the sales revenue of China's machine tool industry will continue to increase. However, the annual growth rate is predicted to fall back to 10% to 20%. In 2012, the industrial upgrade and technology alteration of downstream industries has great demand for machine tool mold products, and the demand obviously develops towards the high end. It is predicted that the import of China's high-end machine tools and molds will remain an increasing trend.

More following information can be acquired through this report:

- Supply and Demand of China's Machine Tool Industry
- Factors Influencing the Development of Machine Tool Industry
- Competition in Machine Tool Market
- Prediction on Development Trend of Machine Tool Industry

Following people are recommended to buy this report:

- Machine Tool Manufacturers and Trade Enterprises
- Machinery Manufacturers
- Investors and Research Institutions Focusing on China's Machine Tool Industry

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