

Computer Numerical Control Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Machine Type (Lathe Machine, Miller Machine, Laser, Welding Machine, and Winding Machine), By End User (Automotive, Industrial, Power and Energy, and Aerospace and Defense) By Region, and By Competition

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Abstracts

Global Computer Numerical Control Market has valued at USD 78.4 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.4% through 2028. The Global Computer Numerical Control (CNC) Market is experiencing robust growth, driven by several key factors that underline its significance in modern manufacturing. CNC technology has become increasingly vital as industries seek enhanced precision, efficiency, and automation in their processes. One of the primary drivers of this market's expansion is the ever-growing demand for highly precise and complex parts across various sectors, including aerospace, automotive, healthcare, and electronics. CNC machines offer unparalleled accuracy and repeatability, making them indispensable for tasks ranging from prototyping to mass production. Furthermore, ongoing technological advancements, such as the integration of artificial intelligence and the Internet of Things (IoT), are elevating CNC machines to new levels of sophistication. This convergence enables real-time monitoring, predictive maintenance, and adaptive machining, enhancing overall productivity while minimizing downtime. Additionally, CNC machines contribute to sustainability efforts by optimizing material usage and minimizing waste. In a globally interconnected manufacturing landscape, the CNC market's growth is poised to continue its upward trajectory, as industries seek to remain competitive by embracing the precision and efficiency offered by CNC technology. This market's future holds promise for both manufacturers and end-users

seeking to stay at the forefront of modern manufacturing practices.

Key Market Drivers

Demand for Precision Manufacturing

The surging demand for precision manufacturing is a paramount driver behind the remarkable growth of the Global Computer Numerical Control (CNC) Market. Industries such as aerospace, automotive, healthcare, and electronics are increasingly reliant on CNC technology to meet stringent requirements for accuracy and consistency. CNC machines excel in producing intricate, high-tolerance components with unmatched precision, ensuring that parts fit together seamlessly and perform flawlessly. This level of precision is critical in aerospace, where safety is paramount, and in healthcare, where medical devices must meet exacting standards. Additionally, the automotive industry relies on CNC machining for engine components and intricate parts that contribute to fuel efficiency and performance. Furthermore, the electronics sector demands micro-components with precise tolerances, which CNC machines deliver with utmost accuracy. As globalization spurs competition, the demand for precision manufacturing escalates, making CNC technology indispensable for meeting these exacting standards. The Global CNC Market, therefore, experiences sustained growth as industries recognize the pivotal role of CNC machines in ensuring the highest levels of quality and precision, positioning them at the forefront of modern manufacturing practices. Companies that leverage CNC technology gain a competitive edge by delivering superior products that meet the stringent demands of today's discerning markets.

Automation and Efficiency

Automation and efficiency are driving forces propelling the Global Computer Numerical Control (CNC) Market to remarkable growth. In today's fiercely competitive industrial landscape, businesses are relentlessly pursuing ways to optimize their manufacturing processes, reduce costs, and enhance product quality. CNC technology has emerged as a transformative solution by automating intricate machining tasks with unparalleled precision and repeatability. By eliminating the variability associated with manual labor, CNC machines minimize human error, resulting in fewer defects and reduced scrap rates. This not only translates into substantial cost savings but also ensures consistent, high-quality outputs. Moreover, CNC machines can operate continuously, 24/7, further boosting production efficiency. Integration with advanced software and IoT connectivity enables real-time monitoring and remote control, facilitating predictive maintenance and

adaptive machining. These capabilities reduce downtime, increase machine utilization rates, and enhance overall operational efficiency. As industries across the globe recognize the indispensable role of CNC technology in achieving cost-effectiveness, precision, and productivity, the Global CNC Market continues to thrive, with automation and efficiency as its driving engines of growth. Businesses that harness these attributes gain a competitive edge, meeting market demands with streamlined, error-free production processes.

Technological Advancement

Technological advancements are the driving force behind the continual growth and evolution of the Global Computer Numerical Control (CNC) Market. Innovations in CNC technology have been instrumental in enhancing precision, efficiency, and flexibility in manufacturing processes. Integration with artificial intelligence (AI) and the Internet of Things (IoT) has allowed CNC machines to operate smarter, enabling real-time monitoring, predictive maintenance, and adaptive machining. These capabilities minimize downtime, improve productivity, and reduce operational costs. Additionally, advancements in CAD/CAM (Computer-Aided Design/Computer-Aided Manufacturing) software have streamlined the programming and operation of CNC machines, making them more accessible to a broader range of industries and applications. Furthermore, the development of multi-axis machining and 3D printing technologies within the CNC realm has opened up new possibilities for complex and intricate part production. As CNC technology continues to evolve and become increasingly sophisticated, it remains at the forefront of modern manufacturing, driving the adoption of CNC solutions across industries and propelling the Global CNC Market to new heights. Businesses that embrace these technological advancements gain a competitive edge by staying agile, efficient, and capable of meeting the ever-growing demands of precision manufacturing.

Globalization of Manufacturing

The globalization of manufacturing plays a pivotal role in driving the Global Computer Numerical Control (CNC) Market. As businesses expand their operations across borders and seek to tap into diverse markets, the need for standardized, high-precision manufacturing processes becomes paramount. CNC technology offers a solution by ensuring consistency, accuracy, and efficiency in production irrespective of geographical location. Manufacturers can establish uniform quality standards and seamlessly replicate production processes worldwide, thereby reducing operational risks and ensuring product reliability. Additionally, the ability to remotely monitor and control CNC machines through the Internet of Things (IoT) facilitates real-time

production oversight and quick response to potential issues, making it feasible to manage manufacturing facilities across the globe from a centralized location. Furthermore, CNC machines allow companies to adapt swiftly to changing market demands by facilitating the production of customized or small-batch products efficiently. Consequently, the globalization of manufacturing fuels the demand for CNC technology, making it an indispensable component in the pursuit of global competitiveness and market expansion. This trend is likely to continue driving the growth of the Global CNC Market as businesses increasingly recognize its pivotal role in achieving consistent, high-quality production on a global scale.

Key Market Challenges

Lack of Standardization Hinders Interoperability

The Global Computer Numerical Control (CNC) Market grapples with a significant challenge related to standardization. As CNC technology evolves and diversifies across industries, the absence of standardized protocols and frameworks for seamless interoperability poses a hurdle to effective implementation. Users often face difficulties when attempting to integrate and synchronize diverse CNC systems from different manufacturers, resulting in fragmented processes and potential inefficiencies. This lack of standardization impedes the market's growth potential, as businesses and manufacturers may hesitate to invest in CNC solutions that do not seamlessly integrate with their existing equipment and production lines.

Scalability and Complexity Issues

Complexity and scalability present another key challenge in the Global CNC Market. As manufacturing demands continue to evolve, companies require CNC solutions that can adapt and scale according to their specific needs. However, configuring and managing a diverse range of CNC machines and applications can be intricate and resource-intensive. This complexity can pose challenges, particularly for users with limited technical expertise. The challenge of scalability and complexity can deter potential users from adopting CNC technology, limiting its market expansion.

Rapid Technological Advancements

The ever-evolving nature of technological advancements in CNC machines poses a continuous challenge for the Global CNC Market. Manufacturers must stay updated with the latest CNC innovations to remain competitive and meet industry demands for

precision and efficiency. Rapid changes in CNC software and hardware can necessitate significant investments in equipment upgrades and employee training. Failure to address these dynamic technological requirements adequately can undermine the market's growth potential, as users seek CNC solutions that provide state-of-the-art capabilities to enhance their manufacturing processes.

Data Security and Intellectual Property Concerns

Data security and intellectual property protection are critical concerns in the Global CNC Market. CNC systems often involve the exchange of proprietary design and manufacturing data, which must be safeguarded against theft, hacking, or unauthorized access. Manufacturers and businesses must implement robust cybersecurity measures and intellectual property safeguards to protect their valuable CNC programs and processes. Failure to address these concerns adequately can lead to data breaches, intellectual property theft, and reputational damage within the CNC industry.

Key Market Trends

Rise in Adoption of Computer Numerical Control (CNC) Technology

The global computer numerical control (CNC) market is experiencing a rise in adoption as industries recognize the value of CNC technology in enhancing productivity and efficiency. CNC technology enables businesses to automate and control the operation of machine tools through computer programs, resulting in precise and accurate manufacturing processes. With the increasing demand for high-quality and complex products, CNC technology offers advantages such as improved speed, accuracy, and repeatability, leading to reduced production costs and enhanced product quality. Industries such as automotive, aerospace, electronics, and healthcare are increasingly adopting CNC technology to streamline their manufacturing processes and gain a competitive edge in the market.

Integration of CNC Technology with Advanced Manufacturing Technologies

The integration of CNC technology with advanced manufacturing technologies is a significant trend in the global CNC market. CNC systems are being combined with technologies such as additive manufacturing, robotics, and artificial intelligence (AI) to unlock new possibilities and create innovative solutions. Additive manufacturing, also known as 3D printing, can be integrated with CNC machines to produce complex and customized parts with high precision. Robotics can be used in conjunction with CNC

technology to automate material handling, tool changing, and other repetitive tasks, improving overall production efficiency. AI algorithms can optimize CNC machining processes by analyzing data, predicting tool wear, and adjusting machining parameters in real-time. The integration of CNC technology with advanced manufacturing technologies is expected to drive the growth of the global CNC market as industries strive for increased automation and efficiency.

Growing Demand for Multi-Axis CNC Machines

The demand for multi-axis CNC machines is growing in the global CNC market. Multi-axis CNC machines offer enhanced capabilities compared to traditional three-axis machines, allowing for more complex and intricate machining operations. By adding additional axes of movement, such as rotary or tilting axes, multi-axis CNC machines can produce parts with curved surfaces, undercuts, and complex geometries. This enables industries to manufacture highly precise and intricate components, such as aerospace turbine blades, medical implants, and automotive engine parts. The growing demand for multi-axis CNC machines is driven by the need for increased manufacturing flexibility, improved product design capabilities, and the ability to reduce production time and costs.

Focus on Industry 4.0 and Smart Manufacturing

Industry 4.0 and smart manufacturing concepts are gaining prominence in the global CNC market. Industry 4.0 refers to the integration of digital technologies, such as IoT, cloud computing, and big data analytics, with traditional manufacturing processes to create smart factories. CNC machines play a crucial role in enabling smart manufacturing by providing real-time data on machine performance, production status, and quality metrics. This data can be analyzed to optimize production processes, predict maintenance needs, and improve overall operational efficiency. The adoption of Industry 4.0 principles and smart manufacturing practices is expected to drive the demand for CNC machines that are capable of seamless integration with digital technologies.

Focus on Sustainability and Energy Efficiency

As environmental concerns continue to grow, there is an increasing focus on sustainability and energy efficiency in the global CNC market. CNC machines are being designed and optimized to minimize energy consumption, reduce waste, and lower carbon emissions. Manufacturers are incorporating energy-saving features, such as

regenerative braking systems, variable frequency drives, and intelligent power management, into CNC machines to improve energy efficiency. Additionally, the use of sustainable materials and recycling practices are being emphasized to minimize the environmental impact of CNC machining processes. By prioritizing sustainability and energy efficiency, businesses aim to meet regulatory requirements, reduce operating costs, and contribute to a greener future.

Segmental Insights

Machine Type Insights

In 2022, the Lathe Machine segment dominated the Global Computer Numerical Control (CNC) Market and is expected to maintain its dominance during the forecast period. Lathe machines are widely used in various industries, including automotive, aerospace, and general manufacturing, for turning, drilling, and cutting operations. The dominance of the Lathe Machine segment can be attributed to several factors. Firstly, lathe machines are versatile and can handle a wide range of materials, from metals to plastics, making them suitable for diverse manufacturing applications. Secondly, lathe machines offer high precision and accuracy, enabling the production of complex and intricate components with tight tolerances. This is particularly important in industries such as aerospace and automotive, where precision is crucial for safety and performance. Additionally, lathe machines are known for their reliability and durability, ensuring consistent performance and minimizing downtime. Furthermore, advancements in CNC technology have further enhanced the capabilities of lathe machines, with features such as multi-axis control, live tooling, and automatic tool changers, enabling increased productivity and efficiency. The growing adoption of Industry 4.0 and smart manufacturing practices has also contributed to the dominance of the Lathe Machine segment, as lathe machines can seamlessly integrate with digital technologies and enable real-time data monitoring and optimization. Overall, the Lathe Machine segment is expected to maintain its dominance in the Global CNC Market due to its versatility, precision, reliability, and compatibility with advanced manufacturing technologies.

End User Insights

In 2022, the Automotive segment dominated the Global Computer Numerical Control (CNC) Market and is expected to maintain its dominance during the forecast period. The automotive industry has been a major driver of the CNC market due to its high demand for precision components and the need for efficient and automated manufacturing

processes. CNC machines play a crucial role in automotive manufacturing, enabling the production of complex parts with tight tolerances, such as engine components, transmission parts, and body panels. The dominance of the Automotive segment can be attributed to several factors. Firstly, the automotive industry is characterized by high-volume production, and CNC machines offer the speed, accuracy, and repeatability required for mass production. CNC machines can operate continuously, ensuring consistent quality and reducing production time and costs. Secondly, the automotive industry is constantly evolving, with the introduction of new models, technologies, and materials. CNC machines provide the flexibility to adapt to these changes, allowing manufacturers to quickly reprogram and reconfigure the machines for different production requirements. Additionally, the automotive industry is increasingly adopting advanced manufacturing technologies, such as additive manufacturing and robotics, which can be seamlessly integrated with CNC machines to further enhance productivity and efficiency. Furthermore, the growing focus on electric vehicles and lightweight materials in the automotive industry presents new opportunities for CNC machines, as they can handle the machining of complex battery components and lightweight structures. Overall, the Automotive segment is expected to maintain its dominance in the Global CNC Market due to the industry's continuous demand for precision, efficiency, and adaptability in manufacturing processes.

Regional Insights

In 2022, the Asia-Pacific region dominated the Global Computer Numerical Control (CNC) Market and is expected to maintain its dominance during the forecast period. The Asia-Pacific region has emerged as a manufacturing hub, with countries such as China, Japan, South Korea, and India playing a significant role in the global CNC market. The dominance of the Asia-Pacific region can be attributed to several factors. Firstly, the region has a strong presence in industries such as automotive, electronics, and aerospace, which are major consumers of CNC machines. The rapid industrialization and economic growth in countries like China and India have fueled the demand for CNC machines to support their manufacturing sectors. Secondly, the Asia-Pacific region benefits from a large pool of skilled labor and a competitive manufacturing ecosystem. The availability of skilled operators and technicians, coupled with favorable government initiatives and investments in advanced manufacturing technologies, has contributed to the growth of the CNC market in the region. Additionally, the Asia-Pacific region is home to several leading CNC machine manufacturers, providing a strong supply chain and technological expertise. This has further boosted the adoption of CNC machines in the region. Furthermore, the increasing focus on automation, efficiency, and quality in manufacturing processes has driven the demand for CNC machines in the Asia-Pacific

region. The automotive and electronics industries, in particular, have witnessed significant growth, driving the need for CNC machines for precision machining and mass production. Overall, the Asia-Pacific region is expected to maintain its dominance in the Global CNC Market due to its robust manufacturing sector, skilled labor force, technological advancements, and favorable government support.

Key Market Players

Siemens AG

Fanuc Corporation

Mitsubishi Electric Corporation

Haas Automation, Inc.

DMG Mori Co., Ltd.

Hurco Companies, Inc.

Yamazaki Mazak Corporation

Okuma Corporation

Amada Co., Ltd.

Makino Milling Machine Co., Ltd.

Doosan Machine Tools Co., Ltd.

Trumpf GmbH + Co. KG

JTEKT Corporation

Brother Industries, Ltd.

Report Scope:

In this report, the Global Computer Numerical Control Market has been segmented into

Computer Numerical Control Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028...

the following categories, in addition to the industry trends which have also been detailed below:

Computer Numerical Control Market, By Machine Type:

Lathe Machine

Miller Machine

Laser

Welding Machine

Winding Machine

Computer Numerical Control Market, By End User:

Automotive

Industrial

Power and Energy

Aerospace

Defense

Others

Computer Numerical Control Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Computer Numerical Control Market.

Available Customizations:

Global Computer Numerical Control market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL COMPUTER NUMERICAL CONTROL MARKET

5. VOICE OF CUSTOMER

6. GLOBAL COMPUTER NUMERICAL CONTROL MARKET OVERVIEW

7. GLOBAL COMPUTER NUMERICAL CONTROL MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Machine Type (Lathe Machine, Miller Machine, Laser, Welding Machine, and Winding Machine)

7.2.2. By End User (Automotive, Industrial, Power and Energy, and Aerospace and Defense)

7.2.3. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)

7.3. By Company (2022)

7.4. Market Map

8. NORTH AMERICA COMPUTER NUMERICAL CONTROL MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Machine Type

8.2.2. By End User

8.2.3. By Country

8.3. North America: Country Analysis

8.3.1. United States Computer Numerical Control Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Machine Type

8.3.1.2.2. By End-User

8.3.2. Canada Computer Numerical Control Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Machine Type

8.3.2.2.2. By End-User

8.3.3. Mexico Computer Numerical Control Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Machine Type

8.3.3.2.2. By End-User

9. EUROPE COMPUTER NUMERICAL CONTROL MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Machine Type
 - 9.2.2. By End-User
 - 9.2.3. By Country
- 9.3. Europe: Country Analysis
 - 9.3.1. Germany Computer Numerical Control Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Machine Type
 - 9.3.1.2.2. By End-User
 - 9.3.2. France Computer Numerical Control Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Machine Type
 - 9.3.2.2.2. By End-User
 - 9.3.3. United Kingdom Computer Numerical Control Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Machine Type
 - 9.3.3.2.2. By End-User
 - 9.3.4. Italy Computer Numerical Control Market Outlook
 - 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
 - 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Machine Type
 - 9.3.4.2.2. By End-User
 - 9.3.5. Spain Computer Numerical Control Market Outlook
 - 9.3.5.1. Market Size & Forecast
 - 9.3.5.1.1. By Value
 - 9.3.5.2. Market Share & Forecast
 - 9.3.5.2.1. By Machine Type
 - 9.3.5.2.2. By End-User
 - 9.3.6. Belgium Computer Numerical Control Market Outlook

- 9.3.6.1. Market Size & Forecast
 - 9.3.6.1.1. By Value
- 9.3.6.2. Market Share & Forecast
 - 9.3.6.2.1. By Machine Type
 - 9.3.6.2.2. By End-User

10. SOUTH AMERICA COMPUTER NUMERICAL CONTROL MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Machine Type
 - 10.2.2. By End-User
 - 10.2.3. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Computer Numerical Control Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Machine Type
 - 10.3.1.2.2. By End-User
 - 10.3.2. Colombia Computer Numerical Control Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Machine Type
 - 10.3.2.2.2. By End-User
 - 10.3.3. Argentina Computer Numerical Control Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Machine Type
 - 10.3.3.2.2. By End-User
 - 10.3.4. Chile Computer Numerical Control Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Machine Type
 - 10.3.4.2.2. By End-User

10.3.5. Peru Computer Numerical Control Market Outlook

10.3.5.1. Market Size & Forecast

10.3.5.1.1. By Value

10.3.5.2. Market Share & Forecast

10.3.5.2.1. By Machine Type

10.3.5.2.2. By End-User

11. MIDDLE EAST & AFRICA COMPUTER NUMERICAL CONTROL MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Machine Type

11.2.2. By End-User

11.2.3. By Country

11.3. Middle East & Africa: Country Analysis

11.3.1. Saudi Arabia Computer Numerical Control Market Outlook

11.3.1.1. Market Size & Forecast

11.3.1.1.1. By Value

11.3.1.2. Market Share & Forecast

11.3.1.2.1. By Machine Type

11.3.1.2.2. By End-User

11.3.2. UAE Computer Numerical Control Market Outlook

11.3.2.1. Market Size & Forecast

11.3.2.1.1. By Value

11.3.2.2. Market Share & Forecast

11.3.2.2.1. By Machine Type

11.3.2.2.2. By End-User

11.3.3. South Africa Computer Numerical Control Market Outlook

11.3.3.1. Market Size & Forecast

11.3.3.1.1. By Value

11.3.3.2. Market Share & Forecast

11.3.3.2.1. By Machine Type

11.3.3.2.2. By End-User

11.3.4. Turkey Computer Numerical Control Market Outlook

11.3.4.1. Market Size & Forecast

11.3.4.1.1. By Value

11.3.4.2. Market Share & Forecast

- 11.3.4.2.1. By Machine Type
- 11.3.4.2.2. By End-User
- 11.3.5. Israel Computer Numerical Control Market Outlook
 - 11.3.5.1. Market Size & Forecast
 - 11.3.5.1.1. By Value
 - 11.3.5.2. Market Share & Forecast
 - 11.3.5.2.1. By Machine Type
 - 11.3.5.2.2. By End-User

12. ASIA PACIFIC COMPUTER NUMERICAL CONTROL MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Machine Type
 - 12.1.2. By End-User
 - 12.1.3. By Country
- 12.2. Asia-Pacific: Country Analysis
 - 12.2.1. China Computer Numerical Control Market Outlook
 - 12.2.1.1. Market Size & Forecast
 - 12.2.1.1.1. By Value
 - 12.2.1.2. Market Share & Forecast
 - 12.2.1.2.1. By Machine Type
 - 12.2.1.2.2. By End-User
 - 12.2.2. India Computer Numerical Control Market Outlook
 - 12.2.2.1. Market Size & Forecast
 - 12.2.2.1.1. By Value
 - 12.2.2.2. Market Share & Forecast
 - 12.2.2.2.1. By Machine Type
 - 12.2.2.2.2. By End-User
 - 12.2.3. Japan Computer Numerical Control Market Outlook
 - 12.2.3.1. Market Size & Forecast
 - 12.2.3.1.1. By Value
 - 12.2.3.2. Market Share & Forecast
 - 12.2.3.2.1. By Machine Type
 - 12.2.3.2.2. By End-User
 - 12.2.4. South Korea Computer Numerical Control Market Outlook
 - 12.2.4.1. Market Size & Forecast
 - 12.2.4.1.1. By Value
 - 12.2.4.2. Market Share & Forecast
 - 12.2.4.2.1. By Machine Type

- 12.2.4.2.2. By End-User
- 12.2.5. Australia Computer Numerical Control Market Outlook
 - 12.2.5.1. Market Size & Forecast
 - 12.2.5.1.1. By Value
 - 12.2.5.2. Market Share & Forecast
 - 12.2.5.2.1. By Machine Type
 - 12.2.5.2.2. By End-User
- 12.2.6. Indonesia Computer Numerical Control Market Outlook
 - 12.2.6.1. Market Size & Forecast
 - 12.2.6.1.1. By Value
 - 12.2.6.2. Market Share & Forecast
 - 12.2.6.2.1. By Machine Type
 - 12.2.6.2.2. By End-User
- 12.2.7. Vietnam Computer Numerical Control Market Outlook
 - 12.2.7.1. Market Size & Forecast
 - 12.2.7.1.1. By Value
 - 12.2.7.2. Market Share & Forecast
 - 12.2.7.2.1. By Machine Type
 - 12.2.7.2.2. By End-User

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. Siemens AG
 - 15.1.1. Business Overview
 - 15.1.2. Key Revenue and Financials
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel/Key Contact Person
 - 15.1.5. Key Product/Services Offered
- 15.2. Fanuc Corporation
 - 15.2.1. Business Overview
 - 15.2.2. Key Revenue and Financials
 - 15.2.3. Recent Developments

- 15.2.4. Key Personnel/Key Contact Person
- 15.2.5. Key Product/Services Offered
- 15.3. Mitsubishi Electric Corporation
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials
 - 15.3.3. Recent Developments
 - 15.3.4. Key Personnel/Key Contact Person
 - 15.3.5. Key Product/Services Offered
- 15.4. Haas Automation, Inc.
 - 15.4.1. Business Overview
 - 15.4.2. Key Revenue and Financials
 - 15.4.3. Recent Developments
 - 15.4.4. Key Personnel/Key Contact Person
 - 15.4.5. Key Product/Services Offered
- 15.5. DMG Mori Co., Ltd.
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel/Key Contact Person
 - 15.5.5. Key Product/Services Offered
- 15.6. Hurco Companies, Inc.
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. Yamazaki Mazak Corporation
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. Okuma Corporation
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel/Key Contact Person
 - 15.8.5. Key Product/Services Offered
- 15.9. Amada Co., Ltd.

- 15.9.1. Business Overview
- 15.9.2. Key Revenue and Financials
- 15.9.3. Recent Developments
- 15.9.4. Key Personnel/Key Contact Person
- 15.9.5. Key Product/Services Offered
- 15.10. Makino Milling Machine Co., Ltd.
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments
 - 15.10.4. Key Personnel/Key Contact Person
 - 15.10.5. Key Product/Services Offered
- 15.11. Doosan Machine Tools Co., Ltd.
 - 15.11.1. Business Overview
 - 15.11.2. Key Revenue and Financials
 - 15.11.3. Recent Developments
 - 15.11.4. Key Personnel/Key Contact Person
 - 15.11.5. Key Product/Services Offered
- 15.12. Trumpf GmbH + Co. KG
 - 15.12.1. Business Overview
 - 15.12.2. Key Revenue and Financials
 - 15.12.3. Recent Developments
 - 15.12.4. Key Personnel/Key Contact Person
 - 15.12.5. Key Product/Services Offered
- 15.13. JTEKT Corporation
 - 15.13.1. Business Overview
 - 15.13.2. Key Revenue and Financials
 - 15.13.3. Recent Developments
 - 15.13.4. Key Personnel/Key Contact Person
 - 15.13.5. Key Product/Services Offered
- 15.14. Brother Industries, Ltd.
 - 15.14.1. Business Overview
 - 15.14.2. Key Revenue and Financials
 - 15.14.3. Recent Developments
 - 15.14.4. Key Personnel/Key Contact Person
 - 15.14.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

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