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Machine Tools in China

Industry Study with Forecasts for **2017 & 2022**

Study #3090 | December 2013 | \$5300 | 253 pages



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INDUSTRY STRUCTURE

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Machine tools demand in China will be spurred by strong growth in the industrial machinery and transportation equipment industries, as well as in the electrical and electronics market.

Demand to increase 9.2% per annum through 2017

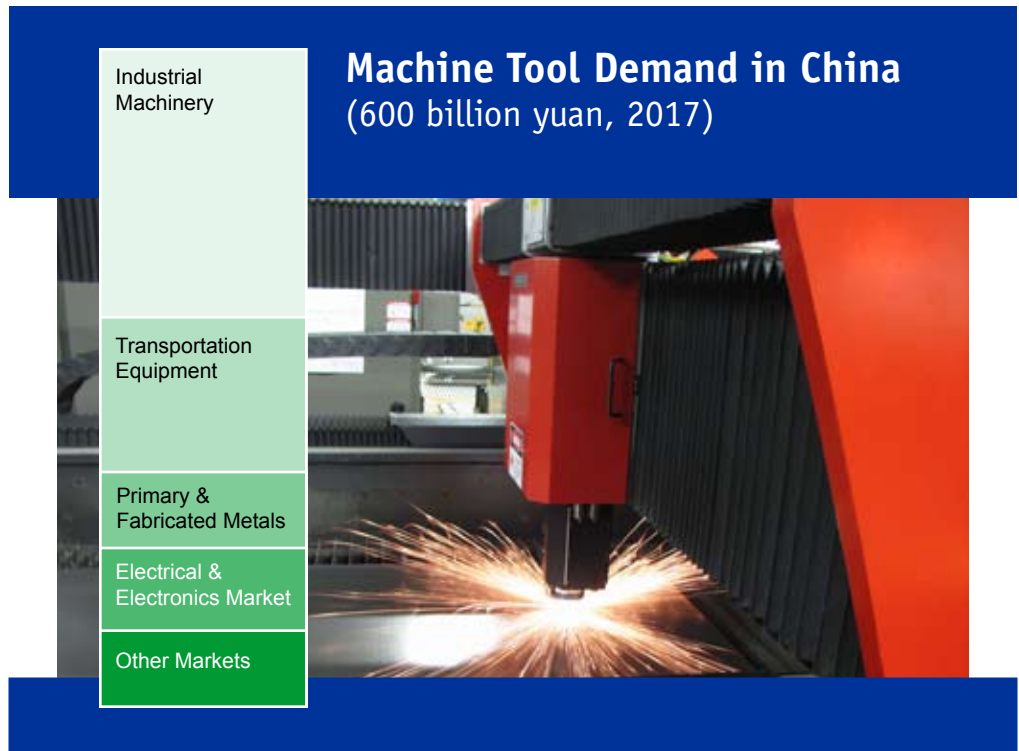
Demand for machine tools in China is projected to increase 9.2 percent per year to 600 billion yuan in 2017. Gains will be stimulated by healthy growth in manufacturing production, especially in the industrial machinery and transportation equipment industries. In addition, a continuing shift in the product mix toward higher-value product types such as machining centers, CNC machine tools, and multitasking machine tools will help drive market gains in value terms. Moreover, increasing regulations regarding energy conservation will lead to growth in demand for energy-efficient machine tools.

Shipments to slightly outpace demand

Machine tool shipments in China are projected to slightly outpace demand through 2017, benefiting from sizable expansions in the domestic market plus rising demand for Chinese machine tools in a number of export markets as the quality of Chinese machine tools continues to improve. Exports of machine tools will rise at a strong annual rate through 2017, driven by improved product quality, especially in small CNC machine tools, while prices remain competitive.

China will continue to see its trade deficit in machine tools expand for the foreseeable future. As imports increase through 2017, foreign suppliers will continue to benefit from growing demand for the precise and sophisticated machine tools needed to manufacture advanced machines.

Machine Tool Demand in China (600 billion yuan, 2017)



Metal cutting machine tools to remain largest segment

Metal cutting machine tools will continue to be the largest product segment in 2017, benefiting from a relatively wider range of applications in durable goods production and a comparatively greater variety of metal cutting product types. Growing demand for highly advanced and comprehensive metal cutting machines -- especially for machining centers and multitasking machines -- will also further boost product sales. Growth in demand for metal forming equipment is forecast to slightly outpace that of metal cutting machine tools through 2017, benefiting from strong growth anticipated in the motor vehicle, shipbuilding, aerospace, and power transmission and distribution industries.

Advances in key markets to track average industry pace

The industrial machinery and transportation equipment markets have the largest impact on overall machine tool sales, as they accounted for well over half of all demand in 2012. Gains in these two markets are forecast to be near the market average through 2017. Sustained plans to expand durable goods production, facility renovations, and new product innovation in all markets will continue to stimulate growth. Machine tool demand in the electrical and electronics market is also expected to expand near the average rate through 2017, benefiting from strong increases in fixed investment in the home appliance and power generating equipment industries.

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Sample Text, Table & Chart

PRODUCTS

Mechanical Presses -- Demand for mechanical presses in China is expected to grow 10.5 percent annually to ¥1.1 billion in 2017. Mechanical presses make up 76 percent of the other forging machine segment and are expected to see demand in 2012. Mechanical presses are used to form a flywheel, crank, or other metal workpieces. Although demand for mechanical presses will continue to grow, other forging machines, accounting for 76 percent of demand in 2017, due to their efficiency and ease of repair. Unlike other machine tools, the market for mechanical presses is dominated by non-CNC types because mechanical presses as a product type are not especially advanced in technological terms; thus, non-CNC models generally are able to meet end-product requirements. However, going forward, non-CNC mechanical presses will face growing competition from CNC models and will lose market share.

Various types of mechanical presses are used in China. For example, hot die presses produce large batch processing suitable for large batch processing of extrusion presses, on the other hand, small table and are often used for producing toothpaste tubes and bullet cases.

Hydraulic Presses -- Demand for hydraulic presses is expected to grow 10.5 percent annually to ¥1.1 billion in 2017. Demand for hydraulic presses is expected to be driven by increases in both manufacturing and construction of a wide range of Chinese machinery. Demand for hydraulic presses is restrained to some degree by the limited supply of domestically produced hydraulic presses. Hydraulic presses use a hydraulic cylinder and utilize liquid pressure to form

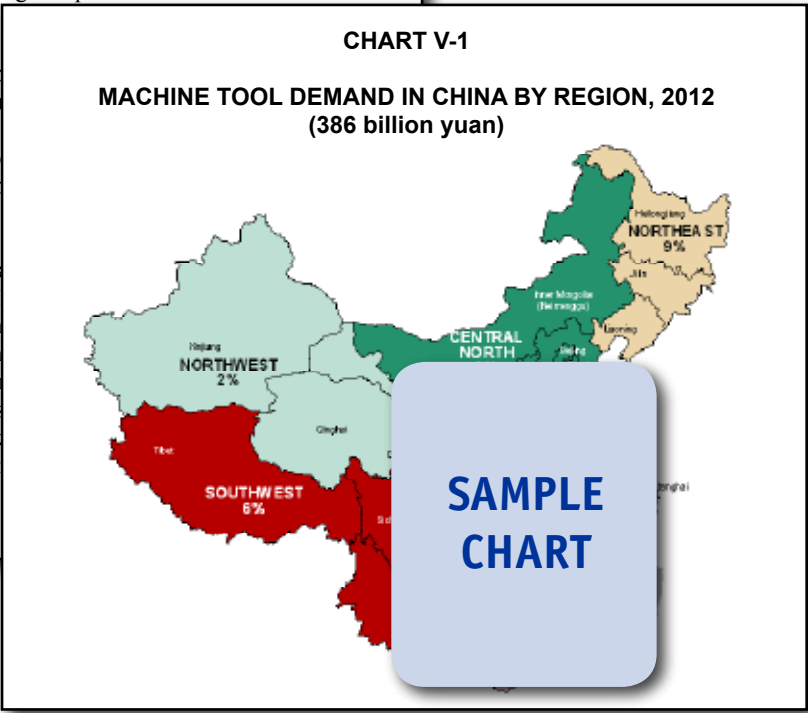
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SAMPLE
TEXT

TABLE III-1
MACHINE TOOL SUPPLY & DEMAND IN CHINA
 (million yuan)

Item	2002	2007	2012	2017	2022
Manufacturing GFCF (bil ¥) ¥ machine tools/000¥ GFCF					
Machine Tool Demand					
Metal Cutting					
Metal Forming					
Machine Tool Accessories					
- imports					
+ exports					
Machine Tool Shipments					

SAMPLE
TABLE



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE IV-7
**ELECTRICAL & ELECTRONIC PRODUCT MARKET
 FOR MACHINE TOOLS IN CHINA**
 (million yuan)

Item	2002	2007	2012	2017	2022
Electrical & Electronic GFCF (bil ¥) ¥ machine tools/000¥ GFCF					
Electrical/Electronic Machine Tools					
Electronic Products:					
Computers/Communication Equip					
Office Products/Measuring Equip					
Electrical Equipment & Appliances:					
PTD & Power Control Equipment					
Generators					
Other					
% electrical & electronic Total Machine Tool Demand	62				

**SAMPLE
TABLE**

COMPANY PROFILES

Dalian Machine Tool Group Corporation
 100 Liaohe East Road
 DD Port, Developing Zone
 Dalian, Liaoning 116622
 China
 86-411-8754-9
 http://www.dmtg.com.cn

Annual Sales: ¥1.1 billion (company, 4/13)
 Employment: 12,000
 Key Products: turning centers, lathes, machining centers, milling machines, and power transmission components

**SAMPLE
PROFILE**

Dalian Machine Tool Group (DMTG) is a producer of machine tools, automotive power assembly, and power transmission components, and has operations in manufacturing, microelectronics, and foreign trade. The Company is 65 percent owned by Dalian Golden Technological Development Company Limited (China), a privately held company; 20 percent owned by Dalian Industrial Development Company (China), a state-owned investment firm; and 15 percent owned by Dalian Huaxin Trust Company Limited.

With ¥12 billion in related sales and a 3.1 percent share, Dalian Machine Tool Group was the second largest supplier to the machine tool market in China in 2012. The Company produces machine tools such as turning centers, lathes, machining centers, and milling machines. Turning centers include the VT-MH series of vertical turning centers that can auto-matically complete the cutting of outer surfaces, among other functions. DMTG's lathes include CDL and CW series gap bed, CKE series computer numerical control (CNC) flat bed, CDS series high speed, CD series horizontal, and CL and DL series CNC

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**STUDY
COVERAGE**

This Freedonia study, *Machine Tools in China*, offers historical data (2002, 2007, 2012) as well as forecasts for 2017 and 2022 for demand by product, market and region of China. This study also assesses key market environment factors, details industry structure, evaluates company market share and profiles 38 competitors in the Chinese machine tools industry.

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OTHER STUDIES

**World 3D Printing
(Additive Manufacturing)**

This study analyzes the world 3D printing industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., 3D printers, materials, software), market (e.g., medical and dental, automotive, consumer products), world region and major country. The study also considers market environment factors, reviews technology, details industry structure, evaluates company market share and profiles industry participants.

#3123December 2013 \$6100

**World Plastics
Processing Machinery**

Global plastics processing machinery demand will rise 6.9 percent yearly through 2017 to \$37.1 billion. Plastics packaging production equipment will exhibit the fastest and largest gains in demand. Injection molding equipment will remain the most popular product type, while 3D plastics printers will grow the fastest. This study analyzes the \$26.6 billion world plastics processing machinery industry, with forecasts for 2017 and 2022 by type, process, market, world region, and for 30 major countries. The study also evaluates company market share and profiles industry players.

#3093 November 2013 \$6100

World Packaging Machinery

Growth in worldwide demand for packaging machinery is expected to climb at a 4.6 percent annual pace through 2017 to \$41.8 billion. Machines used in the packaging of chemicals, pharmaceuticals, and personal care products will post the most rapid gains. The Asia/Pacific region will remain the fastest growing market. This study analyzes the \$33.4 billion world packaging machinery industry, with forecasts for 2017 and 2022 by product, market, world region, and for 31 countries. The study also evaluates company market share and profiles industry players.

#3063September 2013..... \$6200

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950December 2012 \$6100

World Food Processing Machinery

Global sales of food processing machinery are expected to climb 7.3 percent per year to \$53.3 billion in 2016. The Asia/Pacific region will record the fastest demand gains, led by China, India, Indonesia and Thailand. Bakery and pasta machinery will remain the largest segment and post the highest value gains. This study analyzes the \$37.4 billion world food processing machinery industry, with forecasts for 2016 and 2021 by type, world region and for 21 major countries. The study also evaluates company market share and profiles industry participants.

#2931 November 2012 \$5900

About The Freedonia Group

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