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World Machine Tools

Industry Study with Forecasts for 2019 & 2024

Study #3373 | January 2016 | \$6300 | 447 pages

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INDUSTRY STRUCTURE

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Gains will be largely driven by China and other developing nations, where demand for durable goods is expected to post the strongest increases, resulting in investment in new manufacturing capacity.

World demand to rise 5.5% annually through 2019

Worldwide demand for machine tools is projected to climb 5.5 percent per year through 2019 to \$181 billion. Gains at the global level will be largely driven by market growth in China and other developing nations, where demand for durable goods is expected to post the strongest increases. This will result in additional investment in new manufacturing capacity and related machine tools in the Asia/Pacific region, the Africa/Mideast region, Eastern Europe, and Central and South America. China alone is expected to account for more than two-fifths of all new product demand through 2019. A large portion of the outdated machine tools currently in use in developing countries will be replaced between 2014 and 2019 as production levels climb. Additionally, durable goods firms in developing nations will shift from using conventional machine tools to computer numerical controlled (CNC) models, adding to market value gains.

Product upgrades to drive demand in developed areas

Through 2019, machine tool demand in Western Europe, the second largest regional market worldwide, is expected to grow in line with the average worldwide pace, and Western Europe will account for nearly one-fifth of product demand gains through 2019. Market conditions in numerous regional countries are expected to improve as both overall economic growth and gross fixed



investment accelerate. Growth will also be supported by the introduction of more expensive machine tools. In order to develop the next generation of durable goods, manufacturers in the region will invest in machine tools that offer increased control and precision. In Japan, the world's fourth largest national market, demand for machine tools is expected to rebound with the release of pent up demand after several years of losses. Manufacturers in Japan are expected to build new plants and upgrade existing factories because of growing sales opportunities in a number of key export markets. As competition from producers in other countries intensifies, Japanese companies will invest in new machine tools.

Machinery market to be key demand driver

The large machinery market is forecast to account for one-third of all new product demand generated between 2014 and 2019. Multiple trends are expected to fuel growth. As discretionary incomes in developing regions rise, households will increase spending on a wide range of durable goods. In response, suppliers will expand existing production facilities and open new plants, leading to a rise in both industrial equipment sales and related machine tool demand. Economic growth in developed nations will stimulate durables manufacturing activity and drive sales of machine tools for industrial applications.

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Sample Text, Table & Chart

WESTERN EUROPE

Switzerland: Machine Tool Market Outlook

In Switzerland, machine tool demand is forecast to rise in 2019, an improvement over the 2018 decline. With anticipated gains for Western Europe, demand is expected to fuel gains in the Swiss market. Demand for durable goods at home and abroad is expected to rise as goods manufacturers operating in Switzerland are expected to see an increase in local machine tool demand by a rise in exports of manufactured goods to industrializing nations in Asia, the Africa/Mideast region, and South America. The introduction of more expensive, technologically advanced machine tools will also contribute to market growth. Finally, many Swiss manufacturers will upgrade existing production facilities and invest in new machine tools because of more intense competition from manufacturers in Europe and Asia. On the other hand, these companies will also invest heavily in newer production facilities abroad and this will have a negative impact on local machine tool needs. An increase in durable goods imports will also hurt machine tool sales in Switzerland.

In Switzerland, machinery is the single largest end-use market for machine tools. These applications accounted for 39 percent of product sales in 2014 because Switzerland is a major manufacturer of many different types consumer and commercial products, ranging from advanced industrial equipment to pumps and compressors. The machinery segment is projected to account for 37 percent of all new machine tool demand generated between 2014 and 2019. As local and regional demand for many different types of equipment grows during this period, new production facilities will be built and existing production facilities will be upgraded to a rise in machine tool sales. Swiss manufacturers will also benefit from rising exports to North America and Asia, as well as other

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SAMPLE
TEXT

TABLE VII-9

RUSSIA: MACHINE TOOL SUPPLY & DEMAND
(million dollars)

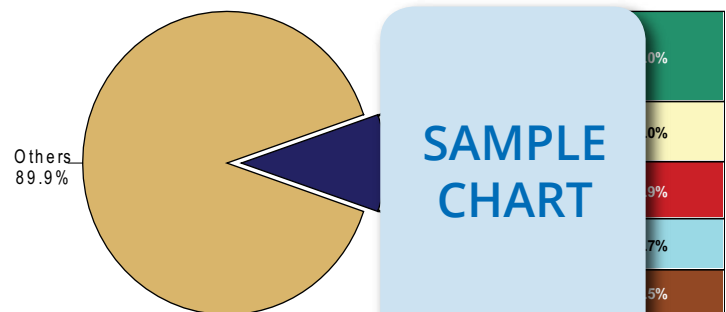
Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013\$)					
% fixed investment					
Gross Fixed Investment (bil 2013\$)					
Durable Goods MVA (bil 2013\$)					
\$ machine tools/000\$ fixed investment					
\$ machine tools/000\$ durable goods MVA					
Machine Tool Demand					
net exports					
Machine Tool Shipments					
% Russia					
Eastern Europe Machine Tool Shipments					

SAMPLE
TABLE

Source: The Freedonia Group

CHART VIII-1

MACHINE TOOL MARKET SHARE, 2014
(\$138.4 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE VI-12
INDIA: MACHINE TOOL DEMAND BY TYPE & MARKET
 (million dollars)

Item	2004	2009	2014	2019	2024
Machine Tool Demand					
By Type:					
Metal Cutting					
Metal Forming					
Accessories & Spare Parts					
By Market:					
Machinery					
Transportation Equipment					
Primary & Fabricated Metals					
Electrical & Electronic Equipment					
Other					
% India					
Asia/Pacific Machine Tool Demand	32100	42000	47000	52000	57000

Source: The Freedonia Group



COMPANY PROFILES

EMCO Maier GesmbH

Salzburger Straße 80
 5400 Hallein-Taxach
 Austria
 43-6245
 www.emc

Sales: \$ (y, 11/15)
 Employ
 Key Pro

EMCO Maier manufactures turning and milling machines. The privately held firm, which is owned by Kuhn Holding GmbH (Austria), has operations primarily in Europe.

The Company's turning machines include HYPERTURN modular computer numerically controlled (CNC) turning/milling centers; MAXXTURN high-performance CNC turning centers; VERTICAL TURN VT vertical pick-up turning machines; EMCOTURN CNC turning centers, which are designed for economic machining of chuck, shaft, and bar stock parts; and EMCOMAT high-precision lathes. For milling applications, EMCO Maier produces the MMV floor-type machining center, MAXXMILL five-axis milling center, EMCOMILL E series three-axis milling machines, LINEARMILL five-axis machining center, and EMCOMAT FB series universal milling machines.

EMCO Maier operates a production facility at its Hallein-Taxach, Austria headquarters site. In addition, the Company's European operations include such subsidiaries as MECOF Srl (Italy), which makes horizontal and vertical milling machines in Belforte Monferrato, Italy; EMCO Magdeburg GmbH (Germany), which has a plant located in

Related Studies

World Plastics Processing Machinery

The global market for plastics processing machinery is expected to advance 4.0 percent annually through 2019 to \$35.8 billion. Injection molding equipment will remain the most widely used type, while 3D printers will grow the fastest. This study analyzes the \$29.4 billion world plastics processing machinery industry, with forecasts for 2019 and 2024 by product and primary application for six world regions and 23 major countries. Total demand is given for an additional seven countries. The study also evaluates company market share and profiles industry players.

#3342..... November 2015.....\$6400

World Packaging Machinery

Global demand for packaging machinery will rise 6.5 percent per year through 2019 to \$52.5 billion. China will pace the leading Asia/Pacific region, which will remain the fastest growing market. Labeling and coding machines will be among the best opportunities. This study analyzes the \$38.2 billion worldwide packaging machinery industry. It forecasts demand for 2019 and 2024 by type and market for six world regions and 17 major countries, and total demand forecast for 13 additional countries. The study also evaluates company market share and profiles industry players.

#3323..... September 2015.....\$6400

World Food Processing Machinery

Global demand for food processing machinery is projected to advance 7.6 percent annually to \$73 billion in 2019. Growth will be driven by industrializing nations, where strong consumer demand for processed foods is emerging. Beverage and chocolate/confectionery processing equipment will be the fastest growing types. This study analyzes the \$50.5 billion world food processing machinery industry, with forecasts for 2019 and 2024 by type for six world regions and 20 major countries. The study also evaluates company market share and profiles industry players.

#3275..... June 2015.....\$6300

World Material Handling Products

Global material handling product demand will rise 5.0 percent annually through 2018 to \$142 billion. India and China will grow the fastest as material handling products supply growing manufacturing and distribution activity. Automated storage and retrieval systems and automated guided vehicles will grow the fastest. This study analyzes the \$111 billion world material handling product industry, with forecasts for 2018 and 2023 by product, market, world region, and for 29 countries. This study also evaluates company market share and profiles industry participants.

#3196..... September 2014.....\$6400

World 3D Printing (Additive Manufacturing)

World demand for 3D printers, materials and software will rise 21 percent yearly to \$5 billion in 2017. North America will remain the largest market while developing regions will grow the fastest. Plastics will continue to lead materials demand but will be outpaced by metals. The medical and dental market will offer some of the best opportunities. This study analyzes the \$2 billion world 3D printing industry, with forecasts for 2017 and 2022 by product, market, world region, and for 14 countries. The study also evaluates company market share and profiles industry players.

#3123..... December 2013.....\$6100

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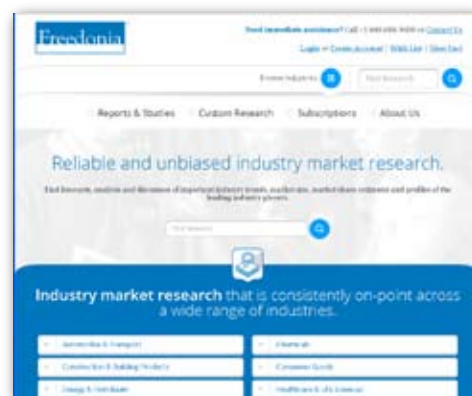
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