
Description:
In recent years, China has gradually step into a 'New Normal' economic form. The growth and structure of Chinese economy has significantly changed. Affected by this, Chinese machine tool industry appeared some changes accordingly.

Affected by the continued weak market demand, Chinese machine tool industry presented obvious inertial downturn trends during 2014-2015.

Demand further weakened, sales continued to slump:

Because the Chinese domestic machine tool demand mainly relies on investment to drive, so the decrease of fixed-asset investment has directly influenced the market size of machine tool. The total consumption of Chinese machine tool market was USD 31.83 billion in 2014, which dropped 0.3% on a YoY base.

Affected by flagging domestic demand and declining investment growth, both production and import of domestic machine tools presented weakening trend in the first half of 2015. The import value of metal working machine tools was USD 4.242 billion, which dropped 14.1% on a YoY basis. Newly added orders of metal working machine tools declined 6.3%. Industry-wide revenue declined 4.6% on a YoY basis.

Production decreased dramatically, inventory remains high:

In the first half of 2015, the production of metal working machine tools declined 15.3%. Industry-wide inventory of finished products increased 4.1% during the same period.

Profit continued to decline, loses remains high:

In the first half of 2015, industry-wide total profit declined 16.6%, total profit of metal cutting and metal forming machine tools declined 207.1% and 10.9% respectively. 39.4% of enterprises in the industry noted loses.

Export maintained growth, but decelerated:

The total export value of machine tool products in the first half of 2015 reached USD 5.393 billion, which increased 2.3% on a YoY basis while the growth rate declined 16.2 percent points. Among which, metal working machines increased 3.7%.

Accelerated demand structure upgrade:

The CNC machine tool occupied 76.7% of the total consumption of Chinese machine tool market in 2014, which increased 6.9% on a YoY basis. In the first half of 2015, the NC rate of metal working machine product value was 75.3%, which increased 4.3% on a YoY basis. The market structure of Chinese machine tool industry will develop to automation, customization and shift gears upgrade in the future.

From 2011, consumption has gradually surpassed investment to become the primary driver of Chinese economic growth. Affected by this, the production and consumption of machine tools targeting consumer goods is obviously better than that of machine tools targeting investment. For instance, investment associated metal cutting machine tool presented a downturn trend, but consumer goods associated metal forming machine tool maintained the growth.

As for cutting tools, homemade low-end cutting tools (high speed steel drill, etc.), which accounts for a majority of homemade cutting tools production, noted sharp decreases. On the other hand, imported cutting tools that meeting middle and high-end market demand maintained high speed growth.

Changes and outlook:

Traditional heavy industries that mainly driven by investment are gradually been caught up and surpassed by emerging manufacturing targeting consumption. In the process, the operation of different segment
markets, industries and enterprises will be further differentiated.

Viewing from the whole industry, no matter metal working machine tools, functional units, tools or NC systems are confronting significant contraction of demand for low-end common products.

The total volume and structure of export are changing positively. The export of metal working machine tools will maintain relatively rapid growth and account for more and more proportion in the total export value.

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