



## Welcome to the CELIMO International Meeting

EMO Milan  
Wednesday 7<sup>th</sup> October 2015



## Associate Members

- There are countries where no such association exists
- Developed the concept of Associate Members for companies in those countries
- Expands the CELIMO Network

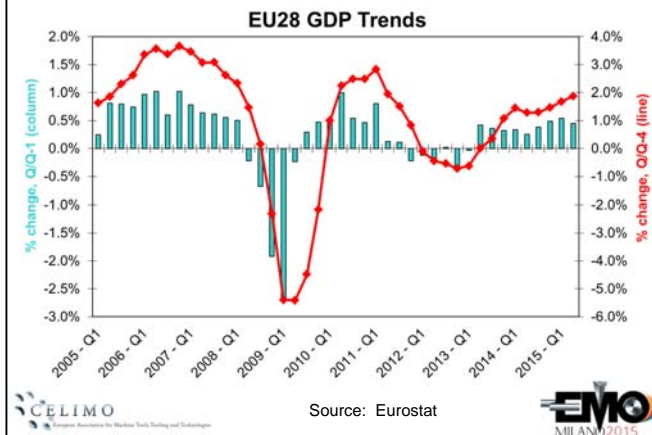


## The Countries of CELIMO

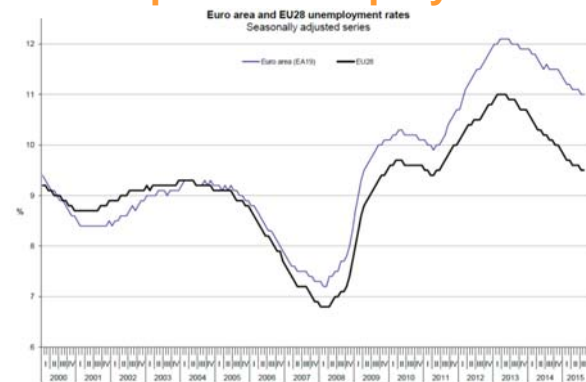
- CELIMO covers 12 European countries
  - Austria
  - Belgium
  - Germany
  - Finland
  - France
  - Italy
  - Netherlands
  - Spain
  - Sweden
  - Switzerland
  - Turkey
  - United Kingdom



## European GDP



## European Unemployment



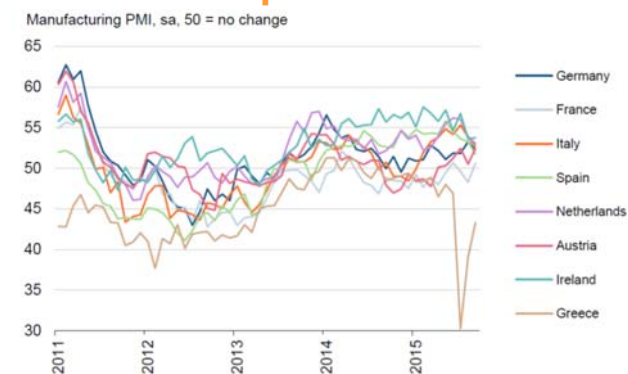
## European PMI's



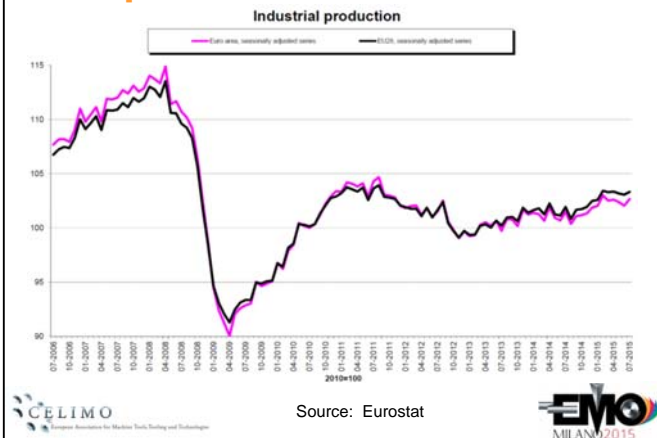
## European Inflation



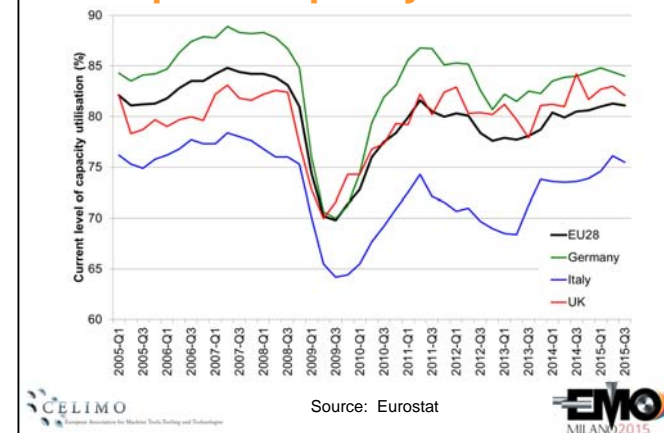
## European PMI's



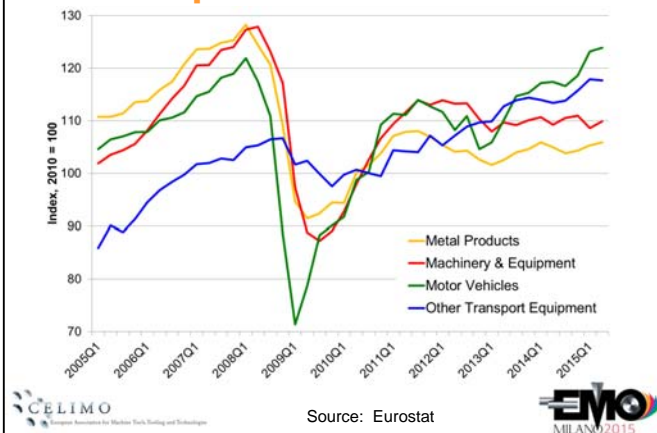
## European Industrial Production



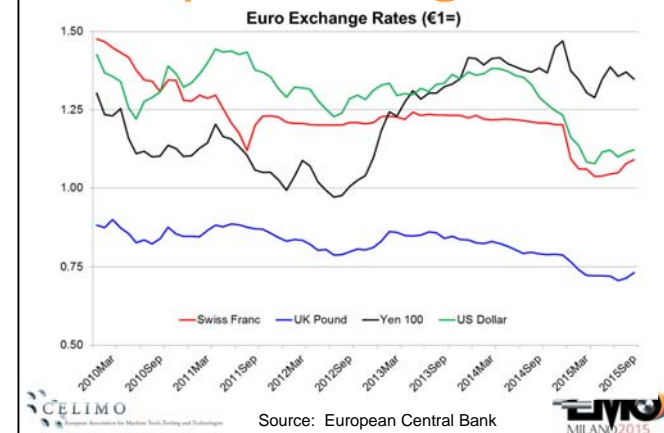
## European Capacity Utilisation



## European end-user data

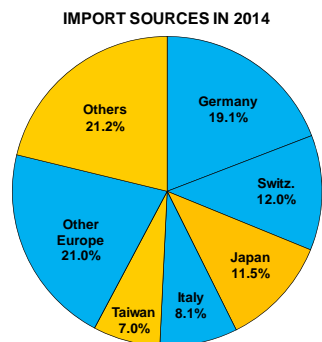


## European Exchange Rates



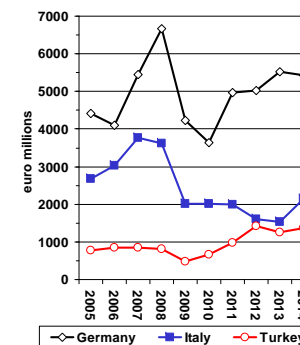
## The Source of Machine Tool Imports

- Germany is the most important source of imports into the other CELIMO countries
- European countries account for 60% of imports into the CELIMO area
- Japan and Taiwan are the other major sources

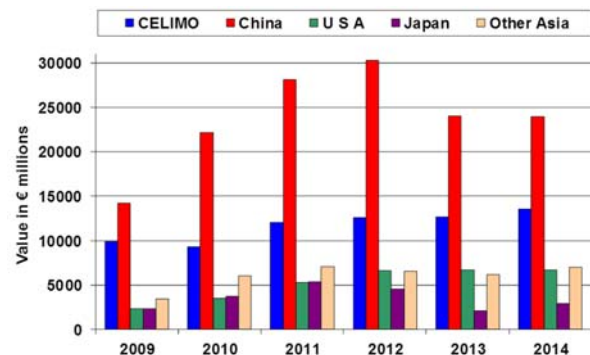


## Key European Markets

- The largest machine tool markets in CELIMO are Germany, Italy and Turkey.
- Germany accounted for 40% of the market in the CELIMO area in 2014.
- Italy had a double dip in demand for machine tools, but 2014 showed signs of recovery - at last!
- The Turkish market has plateaued over the past couple of years

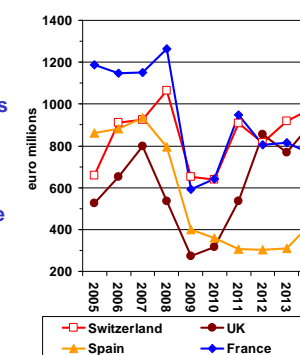


## Trends in Machine Tool Demand



## Medium-sized Markets

- The UK figures are affected by exchange rate changes
- The Swiss did not see quite as large a recession as others and has recovered well
- France saw a good recovery initially, but machine tool demand has fallen back since 2011
- Spain, like Italy, is only now seeing a recovery, but again, the most recent data is positive.



## Summary - The Outlook for 2016

- Europe's exchange rate advantage should help it to continue growing ...
- ... but this won't help non-Euro countries
- The slowdown in China will have an impact, but the risk of Greece leaving the Euro has eased ...
- ... and low inflation should help keep interest rates low.



## U.S. Market Perspective



Pat McGibbon

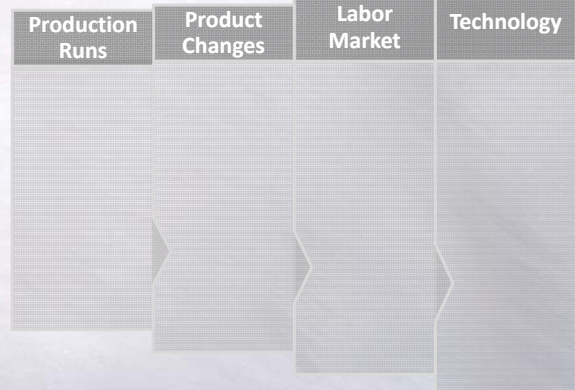
Vice President – Strategic Analytics



## Market Drivers



## Manufacturing Eco System

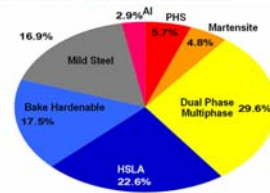
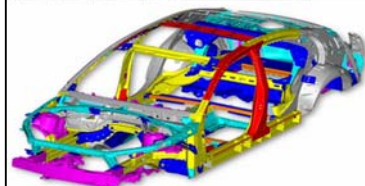
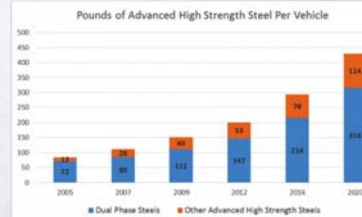
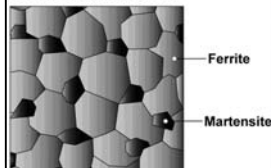


## Labor Market



## Technology

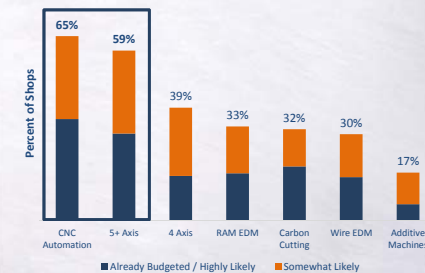
### Ferrite-Martensite DP



## Automation:

### Over 1,300 Planned Purchases Within 12 Months

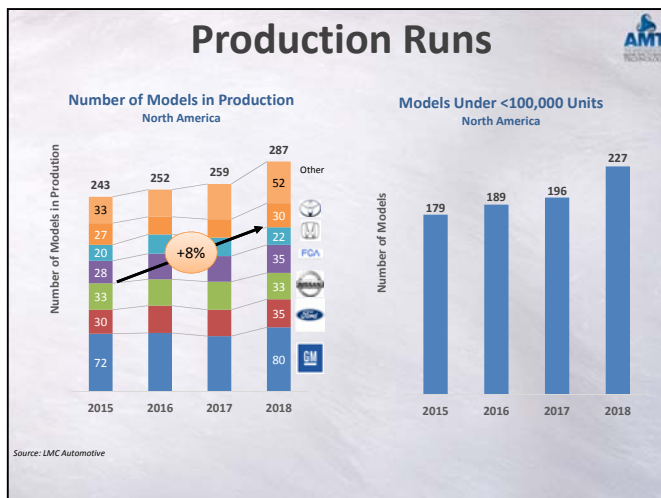
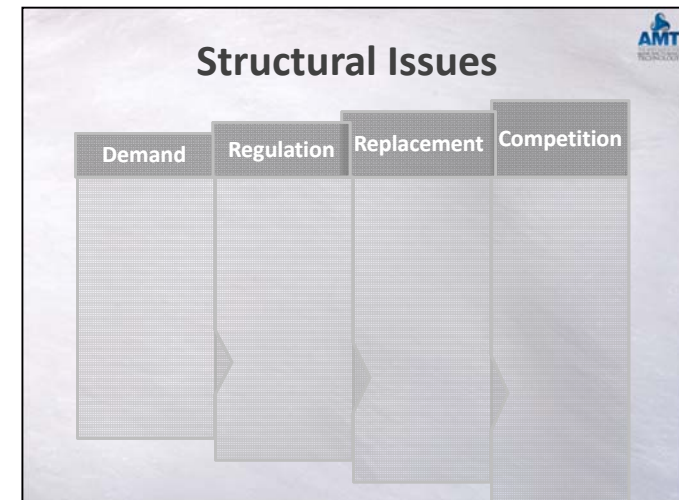
#### Likelihood to Purchase by Machine Segment



- In the next 12 months, shops of all sizes in the tool and die industry plan to purchase over **1,300** machines
- The focus on 5+ Axis machines is due to tool complexity, throughput demands, and increased capability

Source: Harbour IQ Industry Machining Survey

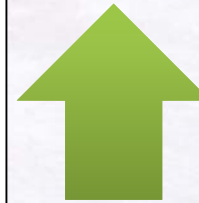




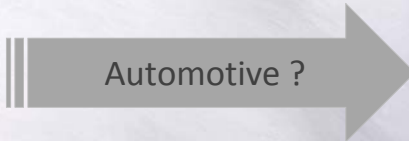
## Replacement



## Demand



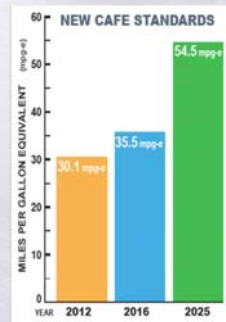
Aerospace  
Medical



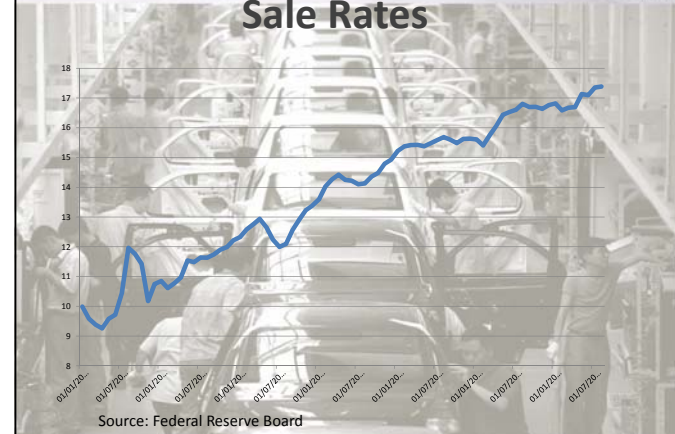
Energy  
Off Road



## Regulation

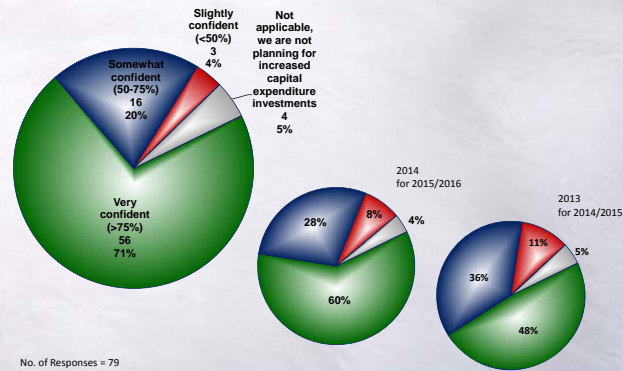


## Domestic Automotive Sale Rates





How confident are you that your company will move ahead and implement the needed capital investment to meet your 2016/2017 demand requirements?



No. of Responses = 79

QESA Automotive Supplier Barometer- September 2015  
Published with the support of Deloitte LLP

## Aerospace

"Aerospace is the strongest manufacturing market in the world. We've had over a decade of record numbers, and despite concerns about the world economy, we've got a few more years of growth ahead."

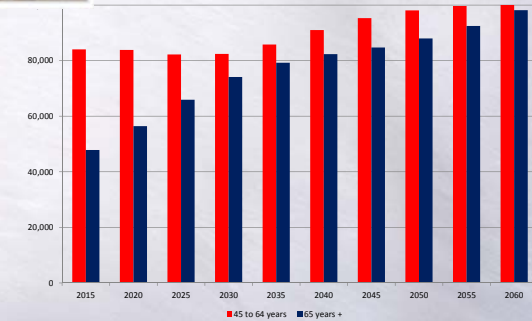
Richard Aboulafia, Vice President, Analysis at Teal Group

Backlog: \$502.3 Billion

Demand: 29,400 airplanes valued at \$3.2 Trillion over the next 20 years

## Medical

Resident population as of July 2014  
Numbers in thousands



## Contract Machining



Durable Manufacturing Capacity Utilization



## Outlook



## Energy & Off Road



Pat McGibbon

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AMT – The Association For  
Manufacturing Technology



# EMO 2015 CELIMO INTERNATIONAL MEETING

7<sup>TH</sup> OCTOBER 2015

PRESENTED BY  
JAPAN MACHINE TOOL DISTRIBUTORS ASSOCIATION  
(J M T D A)



## JAPAN MACHINE TOOL DISTRIBUTORS ASSOCIATION (JMTDA)

Established: 1970

Number of Member :

Regular Members - 75 companies  
(both whole sellers and direct distributors)

Associate Members – 63 Machine Tool builders  
12 Leasing companies

Total 150 companies

A total sales of regular members cover approx.70% of  
domestic Machine Tool sales.



### JMTDA One of Main Activities

The educational course, SE(Sales Engineer) Certification System, for sales personnel of members and related industries will be the 25<sup>th</sup> year this year after the educational activities have been initiated in 1991.



### JMTDA Topics

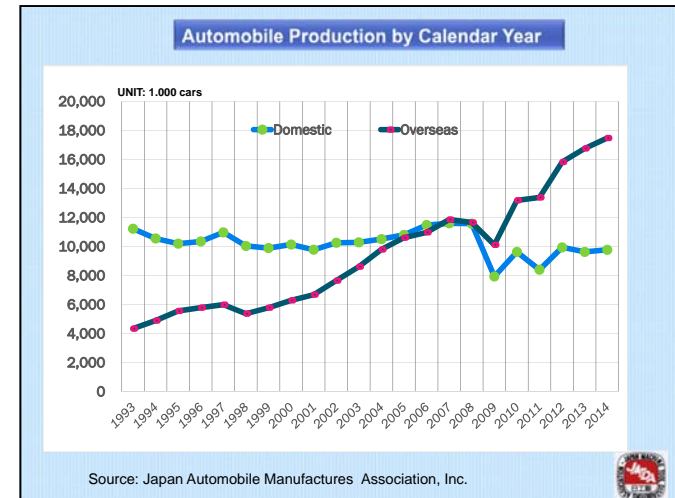
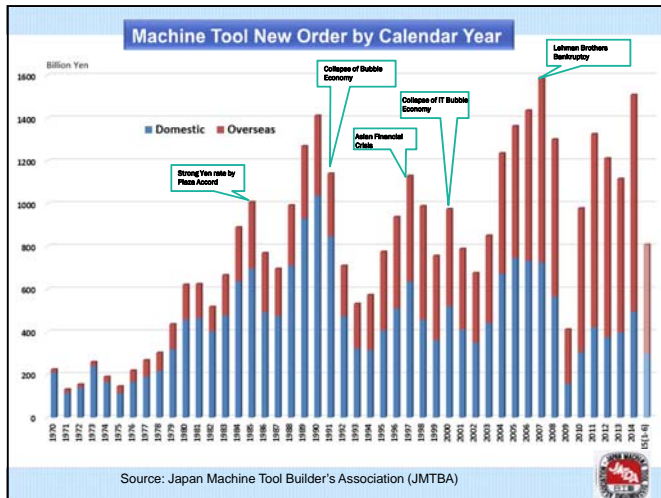
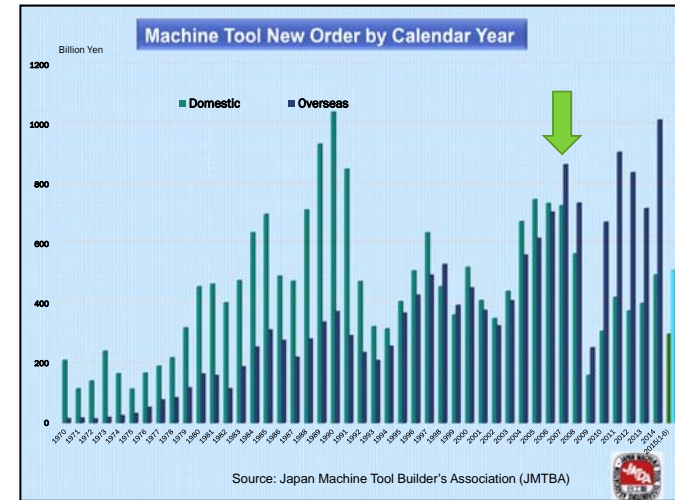
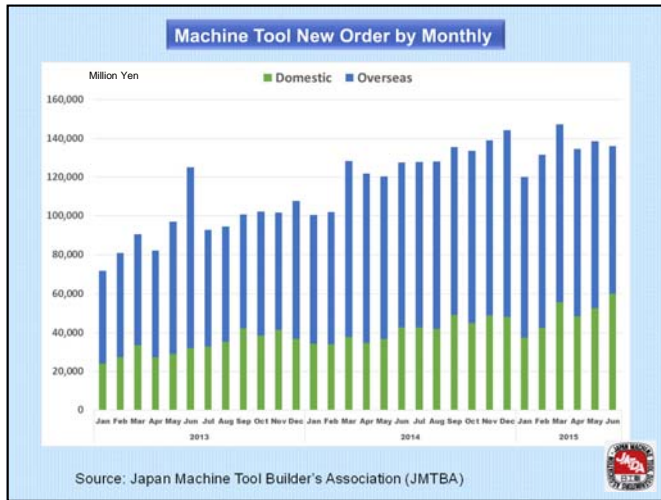
The educational course, SE (Sales Engineer) Certification System, for sales personnel of members and related industries will be the 25<sup>th</sup> year this year after the educational activities have been initiated.  
Total students exceeded 7,500 last year and students with SE certification is expected to exceed 3,000 this year.

In this June, new board of directors were elected, and Mr. Kaoru Tomita, President & CEO of TOMITA CO.,LTD. was elected as a chairman of the board.



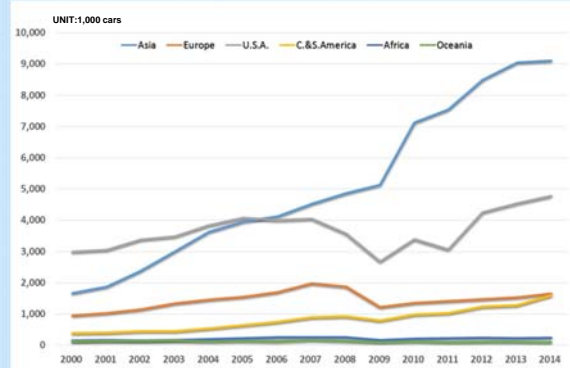
New Chairman, Mr.Kaoru Tomita







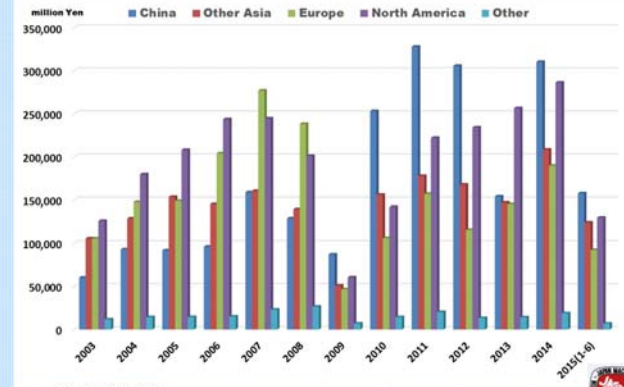
### Automobile Production at Overseas (Japanese Manufacturers)



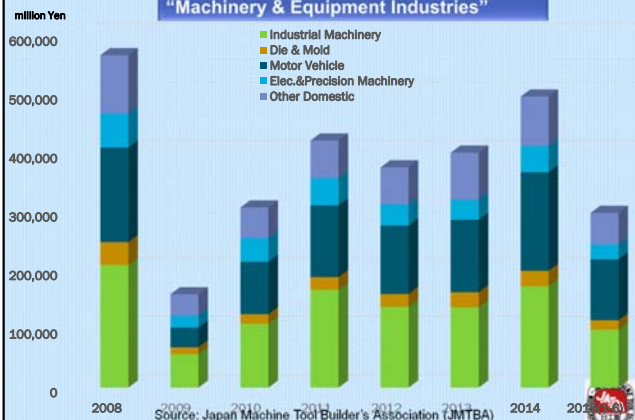
Source: Japan Automobile Manufacturers Association, Inc.



### Machine Tool New Order from Overseas Market by Destination



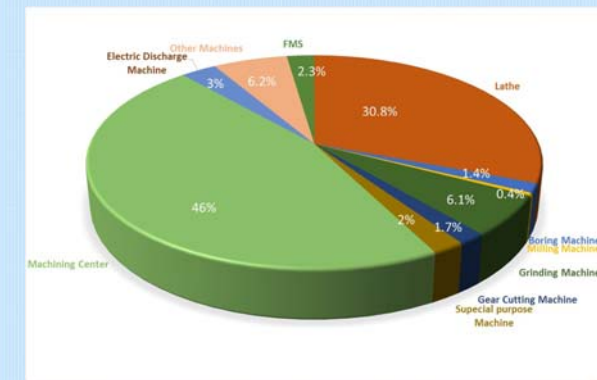
### New orders –Metal Cutting Machine from “Machinery & Equipment Industries”



Source: Japan Machine Tool Builder's Association (JMTBA)



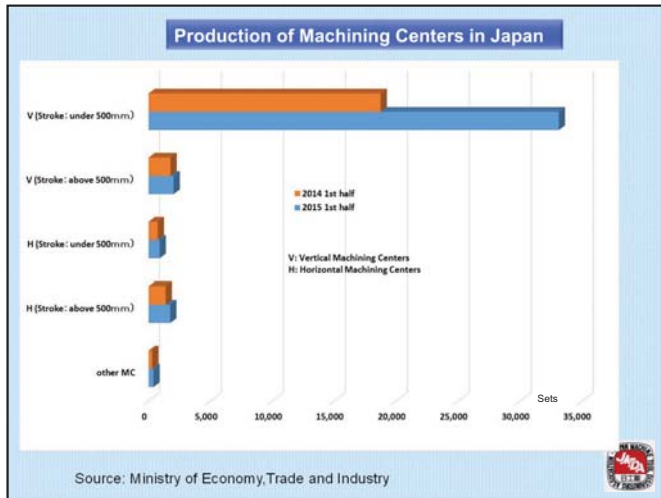
### New Order by Machine Type (Year of 2014)



Source: JMTBA







**EMO MILANO 2015** **INDIAN MACHINE TOOL MANUFACTURERS' ASSOCIATION** **INDIA Advantage...**

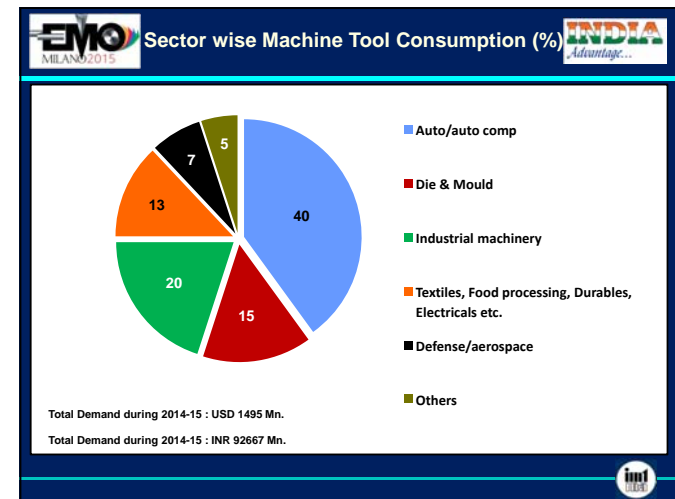
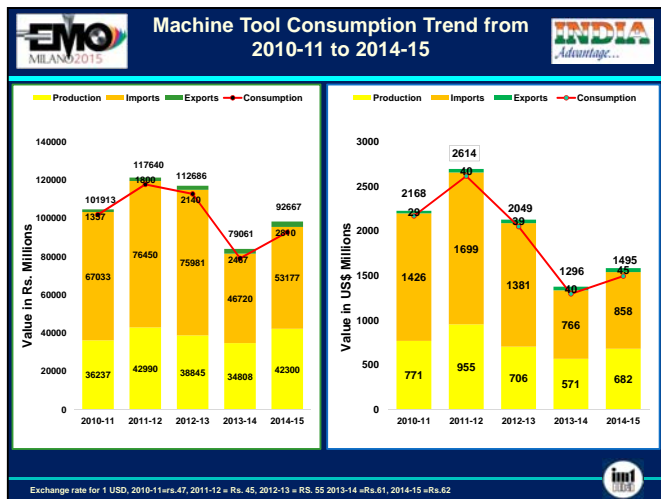
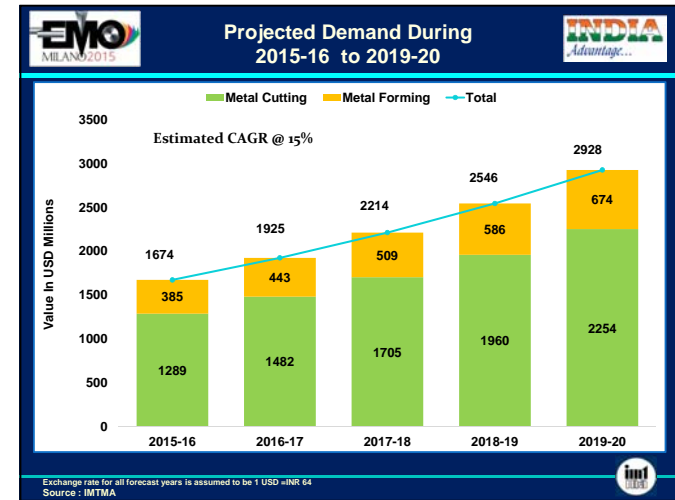
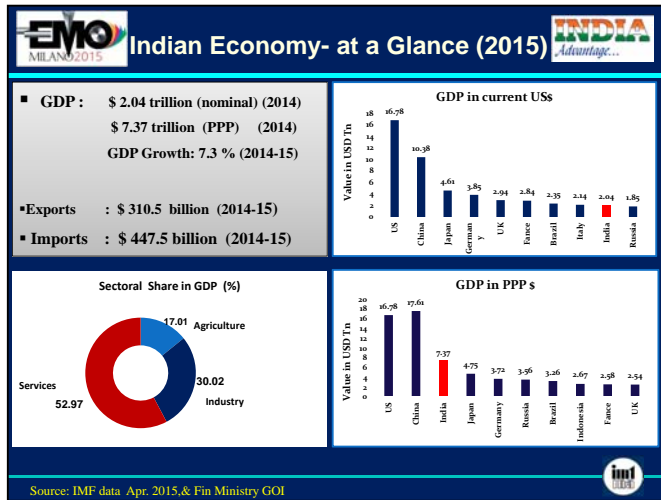
**CELIMO NETWORKING MEETING**  
7<sup>th</sup> October 2015

*Thank you for your attention !*

JMTDA

**EMO MILANO 2015** **IMTMA at a Glance** **INDIA Advantage...**

- Constituted in 1946
- Single point of contact for industry
- Represents over 90 % of organised machine tool and allied equipment manufacturers
- Membership of 490+ companies



## Indian Machine Tool Industry

India makes Standard Products and Special Purpose Machines

**Major products**

- > CNC turning Machines
- > Machining centers
- > Grinding machines
- > Boring machines
- > Vertical Turret Lathe
- > EDMs / Wire EDM
- > Inspection and CMMs
- > Special Purpose Machines
- > Metal forming presses
- > Press brakes

**Important Manufacturers**  
ACE Designers, AMS, BFW, Jyoti CNC, Micromatic Grinding, Lakshmi, Lokesh, HMT, Electropneumatics, ISGEC, Hindustan Hydraulics & others...

## USP of Indian Machine Tools

- > Toolled up solutions
- > TPM friendly
- > Contemporary design
- > Reliable performance
- > After sales support

## Accessories, Tools and Components

**Major products:**

- > Tool turrets
- > Rotary tables
- > Bar feeders
- > Spindles
- > Deburring Tools & Moulds
- > Cutting tools
- > Form tools
- > Tool holders
- > Special tools
- > Chucks
- > Chip conveyors
- > Coolant systems
- > Robotics and Automation

**Important Manufacturers:**  
UCAM, Fenwick & Ravi, Miven Mayfran, Pragati, PARI, Rajamane, Span, Universal, Taegutec, Kennametal, Sandvik, SECO, Walter, Addison, Bhukanwala, Bipico, Chennai Metco, Dagger Forst Tools, Forbes, Hittco, Ind-Sphinx and others....

## Key Industry Strengths

- > Most companies are ISO certified with CE marked products
- > Cost effective, high quality, reliable and customised solutions
- > Strong backward integration
- > Optimum price performance
- > Interactive customer relationships and proactive linkages

Export Competitiveness

- Major exports - China, Germany, Italy, Turkey, Middle-East, USA, etc.
- No language difficulty
- Rupee exchange rate advantage
- Ideal opportunity for dealers to sell competitive products

India at EMO 2015

- Enter co-operation agreements
- Explore business partnerships
- Strategic partnerships for global markets

Indian Companies' Overseas Ventures

Major Indian Companies with Global Footprints

- ✓ ACE MICROMATIC GROUP
- ✓ BFW
- ✓ BATLIBOI
- ✓ GRIND MASTER MACHINES
- ✓ HMT MACHINE TOOLS
- ✓ JYOTI CNC AUTOMATION
- ✓ UCAM

and many more.....

INDIA @ EMO MILANO

Welcome to Indian Stalls !!!

Thank You

CELIMO

## China's Economy, China's Machine Tool Consumer Market & Trade

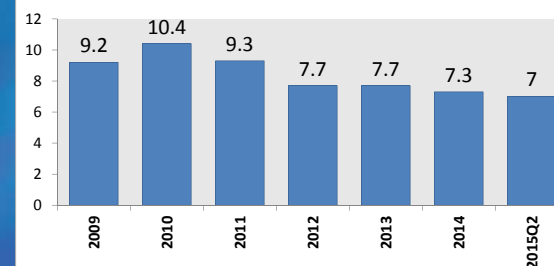
China Machine Tool & Tool Builders' Association

October, 2015 MILANO



### China's Economy

Figure 1: GDP Growth Rate in China (Y-o-Y%)



Data Sources: National Bureau of Statistics of the People's Republic of China

中国机床工具工业协会

[www.cmtba.org.cn](http://www.cmtba.org.cn)



### Abstract

- China's economy
- China's machine tool consumer market
- China machine tool international trade

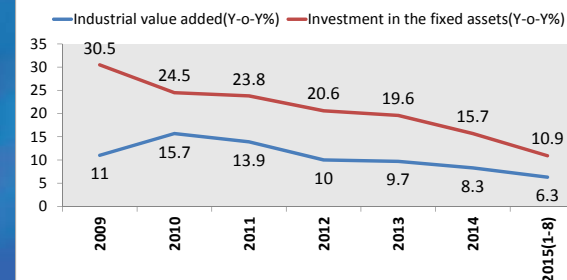
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### China's Economy

Figure 2: Major Economic Indicators in China



Data Sources: National Bureau of Statistics of the People's Republic of China

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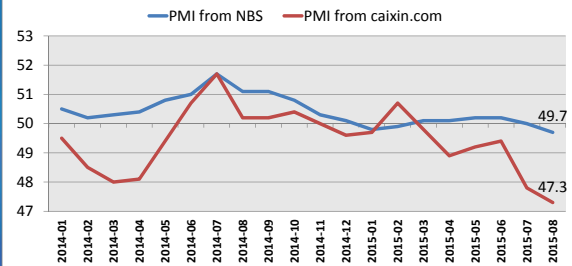
[www.cmtba.org.cn](http://www.cmtba.org.cn)





## China's Economy

Figure 3: China Manufacturing Purchasing Managers' Index



Data Sources: National Bureau of Statistics of the People's Republic of China, www.caixin.com

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## China's Economy

- The downward pressure on China's economy is indeed strong, and also with many difficulties, but China's economy still maintains at a reasonable operating range ;
- The problem of China's economy has derived from the process of reform and adjustment, so it is a problem in the process of progress and a temporary one ;
- A strategic vision is needed to observe China's economy as President Xi Jinping recently stated to "look at whether the direction is right or not, whether the driving force is strong or not and whether the potential is abundant or not".

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## China's Economy

- How to understand the current situation of China's economy ?
- How to judge the future of China's economy ?

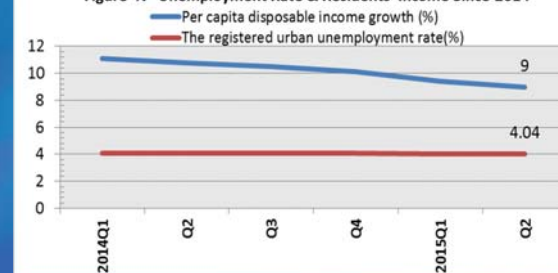
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## China's Economy

Figure 4: Unemployment Rate & Residents' Income Since 2014



Data Sources: National Bureau of Statistics of the People's Republic of China

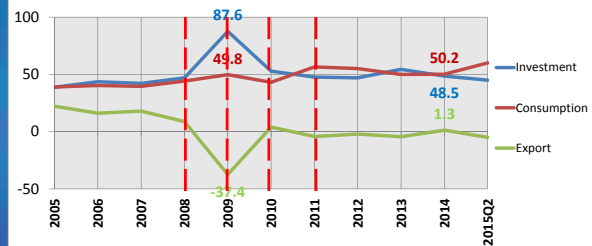
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## China's Economy

Figure 5: Contribution Rate of Investment, Consumption and Export to GDP in China (%)



Data Sources: National Bureau of Statistics of the People's Republic of China

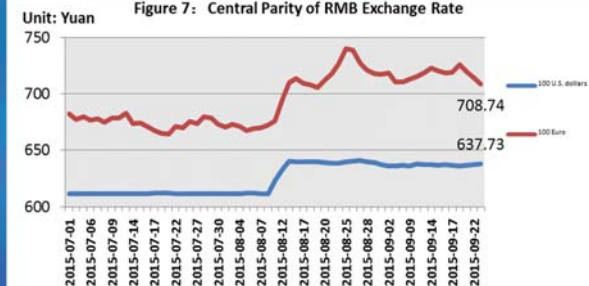
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## China's Economy

Figure 7: Central Parity of RMB Exchange Rate



Data Sources: State Administration of Foreign Exchange

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## China's Economy

Figure 6: China's Stock Market Index



Data Sources: China Securities Regulatory Commission

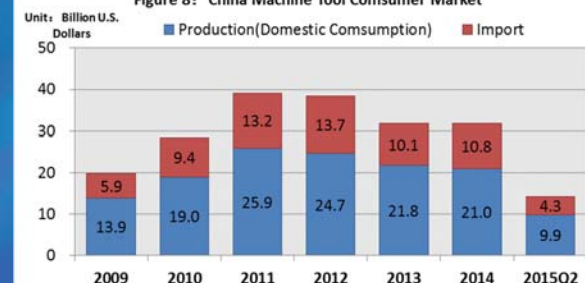
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## China Machine Tool Consumer Market

Figure 8: China Machine Tool Consumer Market



Data Sources: CMTBA

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## China Machine Tool Consumer Market

Figure 9: The Main Direction of the Upgrade of Demand Structure



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## China Machine Tool Consumer Market

**First**, because the most significant market demand decline is the low - end homogeneity products and most of which are manufactured by enterprises at home. **Therefore, China's machine tool manufacturing industry has experienced a greater impact and influence.**

Relatively speaking, the influence on imported machine tools is weaker. Especially due to the upgrade of the market demand structure, **the comparative advantage of imported machine tools has been correspondingly expanded.**

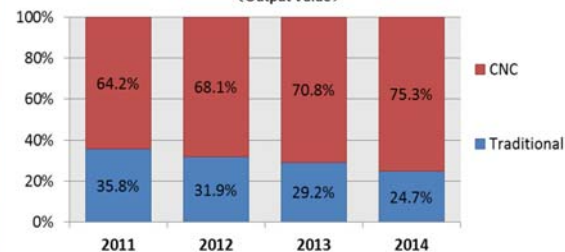
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## China Machine Tool Consumer Market

Figure 10: CNC Rate of China Machine Tool Output from 2011 to 2014  
(Output Value)



Data Sources: CMTBA

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## China Machine Tool Consumer Market

**Second**, although the total demand of China's machine tool consumer market is declining, China is still the world's largest machine tool consumer, the largest machine tool importer and the major force of international trade.

In 2014 China's total machine tool consumption reached USD31.8 billion, accounting for 42.1% of total global consumption. The machine tool imports reached USD10.8 billion, accounting for 29.8% of the world total. The total amount of machine tool trade reached USD14.2 billion, accounting for 18.1% of total global trade.

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## China Machine Tool Consumer Market

**Finally**, China's machine tool consumer market demand decline is a periodical phenomenon. In a sense, this is a reasonable price having to be paid for the implementation of the economic structure adjustment. With the continuous deepening of China's economic structure adjustment, the long-term growth potential of China's machine tool consumer market will be effectively released.

Although China's economic aggregate has been very large, China is still a developing country. China's new model of industrialization, informatization, urbanization and agricultural modernization still has a long way to go, which means that China's machine tool consumer market has also a long-term growth potential and tremendous growth space.

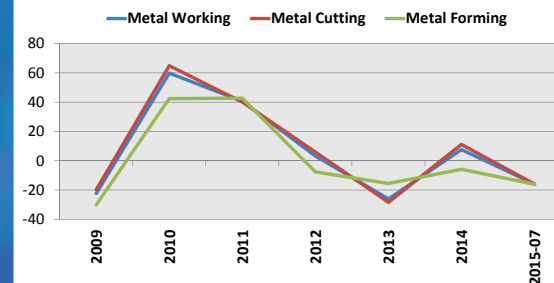
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## China Machine Tool Consumer Market

Figure 12: China Machine Tool Import Growth Rate (Y-o-Y%)



Data Sources: General Administration of Customs of the People's Republic of China

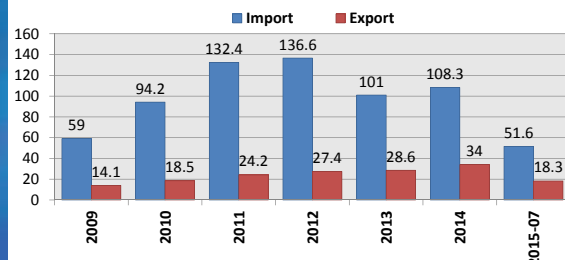
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## China machine tool international trade

Figure 11: China Machine Tool International Trade (Import and Export) (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

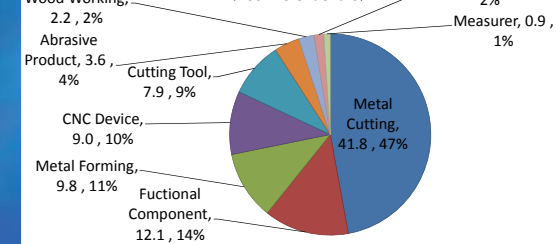
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## China Machine Tool Consumer Market

Figure 13: Machine Tools Products Import Structure from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

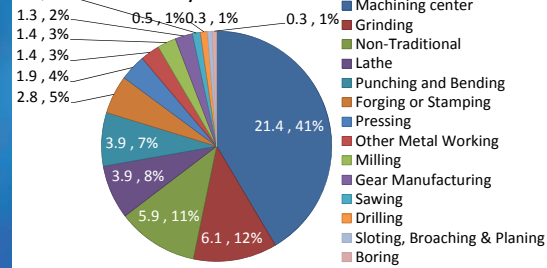
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## China Machine Tool Consumer Market

Figure 14: Machine Tool Import Type Structure from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

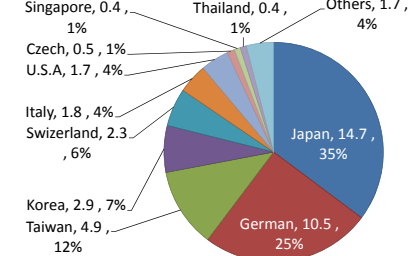
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## China Machine Tool Consumer Market

Figure 16: Metal Cutting Machine Tool Import Origin from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

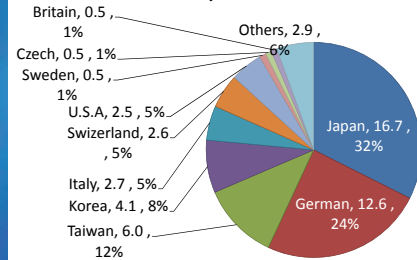
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## China Machine Tool Consumer Market

Figure 15: Metal Working Machine Tool Import Origin from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

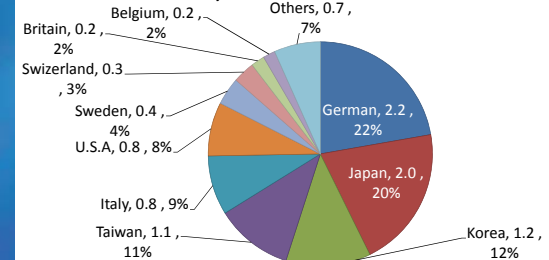
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## China Machine Tool Consumer Market

Figure 17: Metal Forming Machine Tool Import Origin from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

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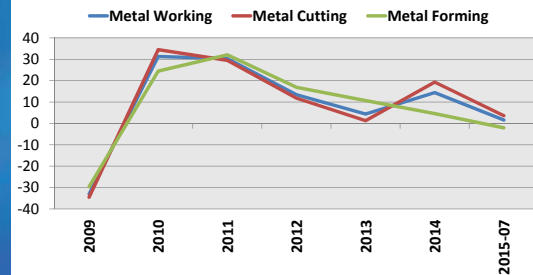
www.cmtba.org.cn





## China machine tool international trade

Figure 18: China Machine Tool Export Growth Rate (Y-o-Y%)



Data Sources: General Administration of Customs of the People's Republic of China

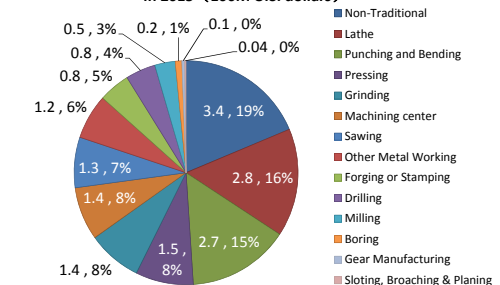
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## China machine tool international trade

Figure 20: Machine Tool Export Type Structure from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

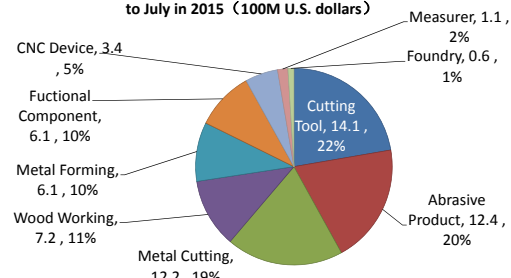
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## China machine tool international trade

Figure 19: Machine Tools Products Export Structure from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

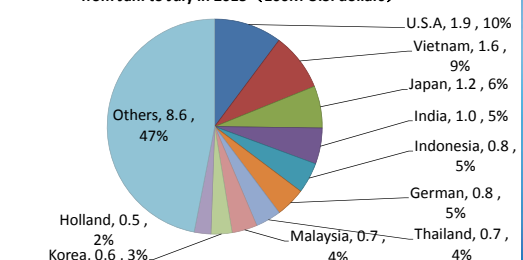
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## China machine tool international trade

Figure 21: Metal Working Machine Tool Export Destination from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

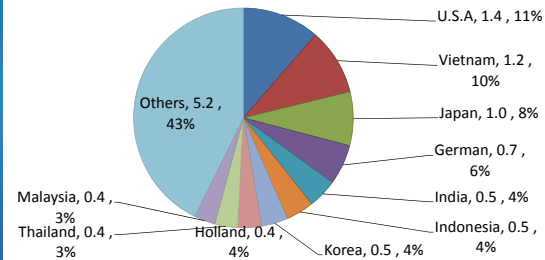
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## China machine tool international trade

Figure 22: Metal Cutting Machine Tool Export Destination from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

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Thank you

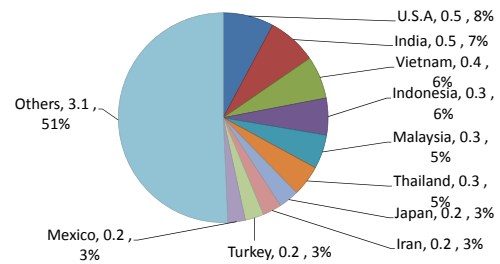
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## China machine tool international trade

Figure 23: Metal Forming Machine Tool Export Destination from Jan. to July in 2015 (100M U.S. dollars)



Data Sources: General Administration of Customs of the People's Republic of China

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