



China Powder Metallurgy Industry Report, 2010-2011

August 2011

This report

- ◆ **Analyzes the Powder Metallurgy market in China and worldwide**
- ◆ **Focuses on Key Powder Metallurgy Enterprises**
- ◆ **Highlights the market outlook**

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Abstract

Benefiting from China's status as a global manufacturing center, industries such as the auto parts industry have been transferring their capacities to China, pushing the rapid development of powder metallurgy industry. In H1 2011, the output of powder metallurgical machinery parts in China hit 85,980 tons, and the sales volume realized 81,213 tons, up 16.8% and 12.8% year-on-year respectively.

In most industrialized countries, about 70%-85% powder metallurgy parts products are applied in automotive industry. In 2010, the automobile output of China hit 18.2647 million, up 32.44% year-on-year. According to CMPMA, the sales volume of powder metallurgy auto parts in 2010 realized 65,608 tons, up 52.4% year-on-year.

Presently, the consumption of powder metallurgy parts by an automobile made in China approximates 4.5 kg, far lower than 15-20kg in Europe and America. With accelerated industrialization of clean electric vehicle, the consumption of powder metallurgy composite materials will be several times of the present level, indicating huge market potential.

In the powder metallurgy parts market of China, home appliance parts, especially refrigerator compressor parts, carry weight, which is attributable to the buoyant refrigerator compressor market. In 2010, the sales volume of home appliance powder metallurgy parts increased by 46% year-on-year to 32,632 tons. In the field of compressor parts, the penetration of powder metallurgy parts is roughly 30%, still with much room for improvement.

NBTM New Materials Group, a domestic flagship manufacturer of powder metallurgy products, possesses eight subsidiaries, with the total assets in 2010 exceeding RMB1.4billion and the total capacity surpassing 45,000 tons/year. And the products of the company are widely applied in automobile, motorcycle, refrigerator and air-conditioning compressor, electric tool and home appliance industries.

In 2010, the company's sales of powder metallurgy auto parts exceeded RMB3.9 billion, up 49% year-on-year, accounting for more than 44% of its total sales revenue. In H1 2011, the company's sales volume of powder metallurgy products totaled 19,842.9 tons.

Major Economic Indicators of Powder Metallurgy Industry in China, Q2 2011

Indicator	Achievement in 2011Q2	Accumulative Achievement in Q2 2011	YoY Accumulative Achievement	YoY Growth (%)
Number of Manufacturers	53	53	50	
Total Industrial Output Value (at current price) (RMB mln)	Total 1,495.94	2,833.64	2,375.99	19.3
	Output Value of New Products 168.09	328.55	328.57	0
Industrial Sales Output Value (at current price) (RMB mln)	Total 1,412.41	2,729.69	2,343.72	16.5
	Export Delivery Value 134.17	280.98	357.56	-21.4
Operating Revenue (RMB mln)	1,359.67	2,640.6	2,247.96	17.5
Industrial Added Value (RMB mln)	401.43	793.99	805.84	-1.5
Total Profit & Taxes (RMB mln)	166.87	300.62	274.92	9.4
Average Workforce	16,403	17,332	15,206	14
Output of Powder Metallurgy Machinery Parts (ton)	45,892	85,980	73,606	16.8
Sales Volume of Powder Metallurgy Machinery Parts (ton)	41,442	81,213	71,992	12.8

Source: CMPMA; ResearchInChina

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