Global and China Mould and Die Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include CHINA DIE & MOULD INDUSTRY ASSOCIATION, National Bureau of Statistics of China and WIND Database etc.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

In recent years, due to the rapid development of automotive, home appliance and IT industries in China, and the transference of mould industrial bases worldwide to China, the mould and die industry in China has witnessed convincing development. In 2005-2011, the CAGR of mould output in China reached 9.7%, while that of sales registered 12.6%.

Meanwhile, along with the continuous optimization of mould product mix in China, the large, precision, complicated and long-life moulds, and standard mould parts have occupied over 50% of the domestic market presently. Besides, the proportion of plastic moulds and die casting moulds also rises continuously.

As for regional development, there have been four mould cluster regions in China, namely, Pearl River Delta, Jiangsu-Zhejiang-Shanghai, Hebei Beijing-Tianjin, and Central China. In 2011, the mould output in Hebei registered 4.777 million sets, and output value amounted to RMB5 billion. In the same year, the output value from automotive moulds and plastic moulds (the two primary mould products of Hebei Province) respectively shared 36.0% and 34.0% of total output value of moulds in Hebei.

Concerning enterprises, there have been a batch of enterprises with competitive advantages in China, like Tianjin Motor Dies, Chengfei Integration and FAW Die and Mould in the field of automobile panel moulds, Guangdong Greatoo Molds and Shandong Himile in automobile tire moulds, Tongling Zhongfa Suntech in plastic profile moulds, Changhong Technology in precision moulds, and Lung Kee Group in standard mould parts, etc.

Meanwhile, foreign-owned enterprises have also marched into China's mould market successively, represented by Japanese enterprises. At present, major automakers in Japan all have established mould companies in China, including Toyota, Toshiba, Sharp, Honda, Mitsubishi and Fuji; at the same time, a number of mould manufacturers from Japan have also accelerated the development in China, such as Ogihara, Kuroda and Uyemura-Solar.

Besides, the enterprises from USA and Europe have also started the distribution on China's mould market, including Nypro, Adval Tech, Hella and Perlos.

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