



Global and China Plastic Injection Molding Machine Industry Report, 2013

Nov. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

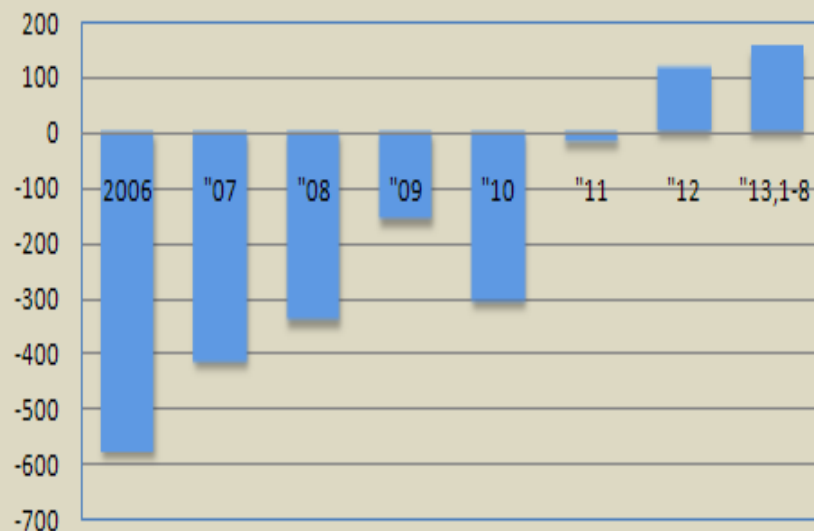
Abstract

The annual output of injection molding machines in China, the world's largest injection molding machine producer, hit roughly 100,000 sets. However, impacted by the weakening demand for auto and household appliances downstream on the heels of slowdown in the growth of Chinese economy, China's output of injection molding machines slowed down in growth since 2011H2, and even witnessed negative growth in 2012. Nevertheless, China injection molding machine market showed stable momentum from 2013Q2, with the expected annual output growing by around 2.5% over the preceding year.

Meanwhile, China also boasts a major trader of injection molding machines in the world. 2012 witnessed a notable turning point in terms of trading in China injection molding machine industry, with the export exceeding the import for the first time, and with the trade surplus amounting to USD111.85 million. In 2013, the trade surplus further expanded, with the value in the first eight months hitting USD150.30 million. This came as the following two aspects: firstly, more and more overseas manufacturers are establishing injection molding machine works in China, fueling the export of injection molding machines; secondly, China's sluggish demand in recent two years caused the decline in import. Rather, some of western economies are emerging from its doldrums, creating better conditions for investment and generating import of injection molding machines.

Import-Export Balance in China Injection Molding Machine Industry, 2006-2013 (USD mln)

Export exceeded import the first time ever in 2012, with a favorable balance of USD111.85 mln.



Source: General Administration of Customs of the P.R.C.; ResearchInChina

The report emphasizes the production, sales, and import & export of global and China injection molding machine industry, dwells on the market breakdown of all-electric, all-hydraulic and two-plate models, and highlights six international tycoons including Arburg, Sumitomo (SHI) Demag, Engel and NISSEI Plastic Industrial as well as 14 domestic enterprises including Haitian International Holdings Limited, The Chen Hsong Group, L.K. Technology Holdings Limited, Cosmos Machinery Enterprises Limited, FU CHUN SHIN Machinery Manufacture, Borch Machinery and Guangdong Yizumi Precision Machinery.

Arburg boasts the world's leading injection molding machine producer which has established branches in Hong Kong, Shanghai and Shenzhen. In particular, the Shanghai outlet is its focus in China, providing mid to high-end products such as metal powder injection molding machines, liquid silicone injection molding machines, and thermal plastic injection molding machines in a modular approach. In Jul. 2013, Arburg set up injection molding machine spot warehouse in Shanghai, in an aim to offer better service for clients across Asia.

Sumitomo (SHI) Demag has four injection molding machine production bases located at Schwaig and Wiehe of Germany, Japan and Ningbo of China. In Aug.2013, Demag input EUR7 million in China earmarked for expanding the capacities of injection molding machines in the Ningbo base, with the targeted capacities increasing from 650 sets to 1,000-3,000 sets.

Haitian International Holdings Limited, the world's largest injection molding machine manufacturer, has set up distribution networks in China, Germany, Brazil, Turkey, and Vietnam. In 2012, its output of injection molding machines hit 22,000 sets, with the sales amounting to RMB6.336 billion. In 2013, it planned to build the 12th and 13th branches in Ningbo specializing in the production of all-electric and large-sized injection molding machines, respectively.

FU CHUN SHIN Machinery Manufacture, the largest injection molding machine manufacturer in Taiwan, owns three production bases in Ningbo, Dongguan and Taiwan, with the annual capacity hitting 3,160 sets. In 2012, the revenue of the company claimed NTD1.654 billion, of which, NTD1.012 billion from injection molding machine business. In Oct.2013, the company set a target to realize the revenue of NTD6 billion by 2018. In addition, it is poised to strength its commercial arm towards overseas market through building one to two injection molding machine production bases in Brazil and Indonesia in coming five years as well as three to five self-support footholds in the Philippines and India.

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