



**Global and China Power Tool Industry  
Report, 2013-2014**

**Jun. 2014**

## 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

Global and China Power Tool Industry Report, 2013-2014 mainly includes the followings:

1. Introduction to power tools
2. Global power tool market and industry
3. Global property and infrastructure construction market
4. Power tool market and industry in China
5. Analysis of 16 power tool manufacturers

Power tools are used primarily in three fields: construction, DIY and gardening, and therefore they are closely related to infrastructure construction and real estate market. Except for the period of financial crisis, the power tool market has remained fairly stable, with narrow scope of fluctuations.

In 2013, both China and the United States witnessed an excessively thriving property market, especially for China. Entering 2014, however, China's property market dived, and the US housing market presented a declining tendency. As for China, both real estate market and infrastructure construction market showed an upward trend, mainly caused by Chinese Government's crackdown on corruption. In the United States, however, the number of new home starts was annualized at 1.001 million units by May, versus a projected number of 1.03 million homes, down 6.5% on a month-on-month basis for new home starts and 3.9% for the projected decrease. And also as of May, the number of building permits was annualized at 991,000 homes compared with an expected number of 1.05 million units. The building permits were down 6.4% from a month earlier while the

estimated drop stood at 0.9%. Additionally, the high short-term interest rates in the US hurt the housing market, and this would be worse in 2015. But the power tool market slightly lagged behind the real estate market. So, 2014 is expected to be a good year for power tool market.

In 2013, the global market size of power tools approximated USD16.3 billion, an 8.7% increase, and this figure is expected to reach USD16.8 billion, up 3.1%. But it is projected that the power tool market will shrink by 4.2% in 2015, to USD16.1 billion.

The global power tool market characterizes a quite high market concentration degree, with Stanley Black & Decker's and TTI's markets converged in North America, Makita's and Bosch's in Europe, Hilti's in infrastructure construction in Europe and Hitachi-koki's in Japan and Europe. The revenue of the four giants all outnumbers USD3 billion, and there is a small gap between them.

China is the world's largest power tool manufacturing base, with nearly 80% of global power tools made in China, especially in Jiangsu and Zhejiang. In 2013, China exported a total of 201 million sets of power tool, but only gained USD6.207 billion.

China is endeavoring for a change in its image of low-end manufacturing mainly by means of mergers and acquisitions. Take Chervon for example, it acquired German Flex. Meanwhile, the Chinese enterprises are acquired by foreign companies. For instance, Stanley Black & Decker obtained a 60% stake in Jiangsu Guoqiang in 2013.

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## Ranking of Major Global Power Tool Manufacturers by Revenue, 2013-2014

(USD mln)	2013	2014
Ken Tools	97	106
Chervon Holdings Ltd.	330	360
Jiangsu Dongcheng	307	310
Jiangsu Jinding	138	158
Zhejiang Crown	208	220
Positec Machinery	288	306
Makita	3,230	3,280
TTI	3,140	3,208
Stanley Black & Decker	3,390	3,520
Bosch	3,240	3,360
Hilti	602	678
Hitachi-koki	1,308	1,350
Metabo	450	502
Ryobi(Japan)	251	255

Source: Global and China Power Tool Industry Report, 2013-2014

### 1 Introduction to Power Tools

### 2 Power Tool Market and Industry

#### 2.1 Global Power Tool Market

#### 2.2 Global Infrastructure Construction and Building Market

##### 2.2.1 Europe

##### 2.2.2 The Middle East and North Africa

##### 2.2.3 Sub-Saharan Africa

##### 2.2.4 Latin America

#### 2.3 Property Market in America

#### 2.4 Power Tool Industry

#### 2.5 Lithium Battery for Power Tool

#### 2.6 Lithium Battery Industry

#### 2.7 Lithium Battery Industry in China

### 3 Power Tool Industry and Market in China

#### 3.1 Power Tool Industry in China

#### 3.2 Power Tool Market in China

#### 3.3 Property Market in China

### 4 Major Power Tool Manufacturers

#### 4.1 Chervon Holdings Ltd.

#### 4.2 Shanghai Ken Tools Co., Ltd.

#### 4.3 Jiangsu Dongcheng Power Tools Co., Ltd.

#### 4.4 Jiangsu Jinding Electric Tools Group Co., Ltd

#### 4.5 Zhejiang Crown Electric Tools Manufacture Co., Ltd.

#### 4.6 Zhejiang Xinyuan Electric Appliance Manufacture Co., Ltd.

#### 4.7 Zhejiang Huafeng Electric Tools Co., Ltd.

#### 4.8 Positec Machinery (China) Co., Ltd.

#### 4.9 MAKITA

#### 4.10 TTI

#### 4.11 STANLEY BLACK & DECKER

#### 4.12 BOSCH

#### 4.13 HILTI

#### 4.14 HITACHI-KOKI

#### 4.15 METABO

#### 4.16 RYOBI

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