



# Global and China Injection Molding Machine Industry Report, 2014-2016

Mar. 2015

## 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

Injection molding machine is the most crucial plastic processing machinery, accounting for 60%-85% in developed countries, and it finds application mainly in fields like automobile, household appliances, food & beverage packaging, plastic building materials, and electronic communications.

China injection molding machine industry has grown bigger and stronger along with rapid development of downstream sectors, becoming the world's largest producer and consumer of injection molding machine. In 2010, China's injection molding machine sales exceeded RMB20 billion for the first time and approximated RMB25.5 billion in 2013, the best since financial crisis, and it is expected to reach RMB30 billion or so in 2016.

At present, nearly 30% of China-made injection molding machines are exported. Customs data show that, China exported 25,082 injection molding machines in 2014, a year-on-year rise of 9.2%, generating export value of USD1.01 billion, up 9.1% from a year earlier.

Production Bases and Capacity of Major Injection Molding Machine Manufacturers in China, 2014

	Production Bases	Capacity ( Unit/year )
	Ningbo , Hong Kong	35,000
	Shenzhen, Hong kong	15,000
	Foshan	15,000
	Dongguan , Wuxi	5,000
	Foshan, Shunde, Suzhou	3,500
	Ningbo, Dongguan, Taiwan	3,160
	Guangzhou, Hangzhou	3,000
	Hangzhou	3,000

Source: Global and China Injection Molding Machine Industry Report, 2014-2016 by ResearchInChina

In recent years, driven by demands from energy conservation and environmental protection, all-electric injection molding machine, electro-hydraulic injection molding machine, and two-platen injection molding machine have gradually become R&D and promotion priorities. It is noteworthy that more and more injection molding machines are two-plate ones. By early 2014, Chen Hsong Holdings, Haitian International Holdings, and Guangzhou Borch Machinery all had independently developed two-platen ultra-large injection molding machines with clamping force of 6,500 tons and above.

Global and China Injection Molding Machine Industry Report, 2014-2016 focuses on the following:

- ⇒ Size, structure, and major manufacturers of global injection molding machine market;
- ⇒ Policy environment and industry environment for injection molding machine in China;
- ⇒ Production, sales, import & export, and competitive landscape of injection molding machine in China;
- ⇒ Development of product segments, including all-electric injection molding machine, all-hydraulic injection molding machine, two-platen injection molding machine;
- ⇒ Development of injection molding machine in major provinces and cities, covering Zhejiang, Shenzhen, and Jiangsu;
- ⇒ Operation, injection molding machine business, and development strategy of 9 global and 15 Chinese injection molding machine manufacturers.

**Haitian International Holdings:** the largest injection molding machine manufacturer in China and even in the world; output of 27,000 injection molding machines in 2013, over 30% of China's total output.

**Chen Hsong Holdings:** the second largest injection molding machine manufacturer in China; focuses on large and medium-sized injection molding machines, which take up more than 50% of the company's revenue; developed supermaster 6,500-ton servo drive two-platen injection molding machine in 2014 after the launching of 4,500-ton ultra large two-platen injection molding machine in 2013.

**Engel:** a major injection molding machine manufacturer in Europe, with injection molding machine production bases in Australia, Czech Republic, Germany, China, and South Korea; established second injection molding machine plant in Changzhou (China) in Mar. 2013, branded as “Wintec”, which started production in Jul. 2014, with annual capacity of 300 units.

**Sumitomo (SHI) Demag:** formed by the injection molding activities of Sumitomo Heavy Industries (SHI) and those of Demag Plastics Group; has wholly-owned subsidiary in Ningbo, China, mainly producing precision injection molding machines; with the aim of expanding capacities in China, it invested EUR7 million to build new plants, which saw foundation-laying ceremony in Apr. 2014 and is scheduled to go into operation in Jul. 2015, with annual capacity of 1,000 injection molding machines then.

**Milacron:** a major injection molding machine manufacturer in America; has production bases in Jiangyin (China), manufacturing mainly ELEKTRON all-electric injection molding machine and MAXIMA large two-platen injection press; invested USD4 million-USD5 million in 2014 for capacity expansion, with current capacity lifted from 200-300 units to 950 units.

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