



中国模具工业的现状与发展趋势

The Situation and Development

Trends of China Die & Mould

Industry

中国模具工业协会

China Die & Mould Industry Association

# 中国模具工业发展现状

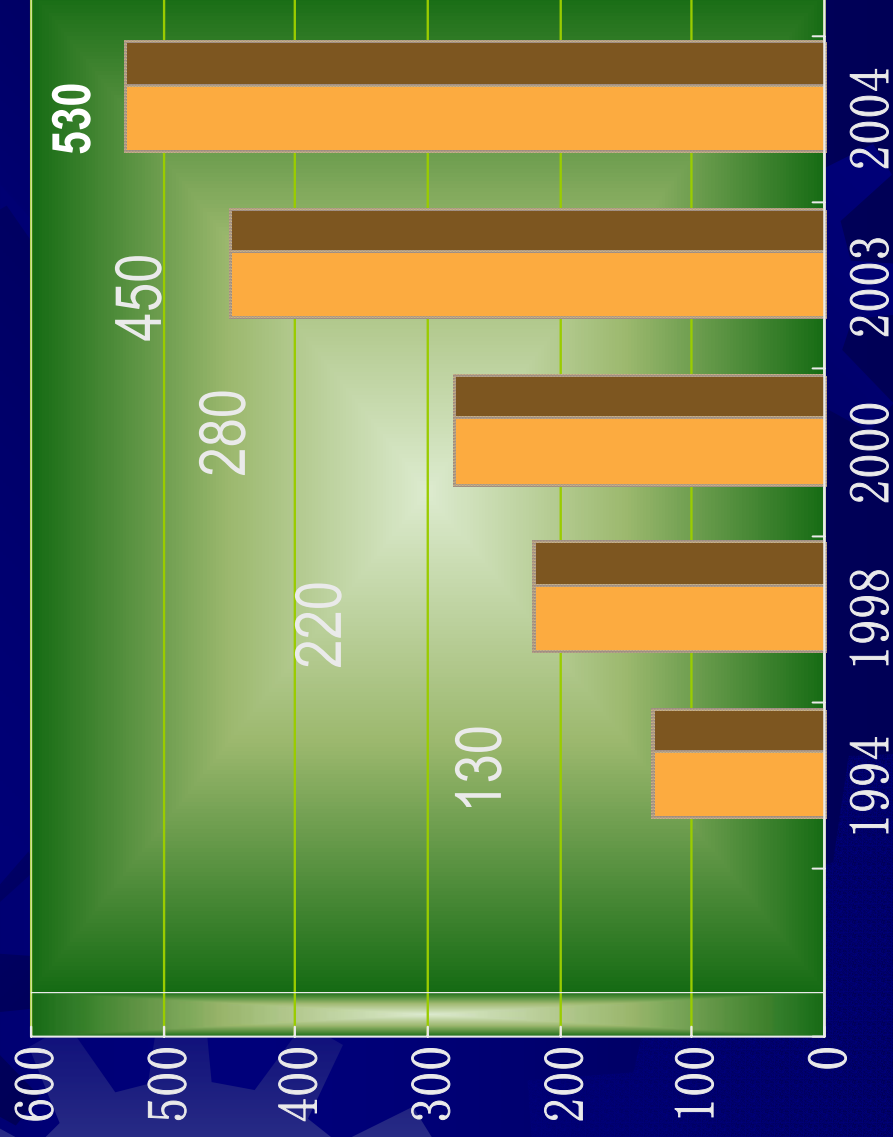
- ★ 中国经济的高速发展对模具工业提出了高要求，带来了新的机遇
- ★ 中国模具工业以每年15%以上的增长速度快速发展
- ★ 中国约有模具生产厂点3万余家
- ★ 中国模具从业人员达100多万人
- ★ 中国模具2005年销售额达610亿元（人民币）以上

# The Development Situation of China Die & Mould Industry

- \*The high speed development of China economy raises higher demands to die & mould industry, brought the new opportunity
- \*China die & mould industry has had about 15% yearly growth for more than 10 years.
- \*China has about 30,000 factories engaging in production of dies and moulds
- \*About 1000,000 people employed in the industry sector
- \*The 2005 Sale of die & mould industry has reached 61 billion RMB

# 中国模具工业总产值 (亿元)

Production Value of China Die & Mould Industry (a hundred million RMB)



# 例

## Products scale all kinds of die & mould in China



Press Dies

Foundry Dies

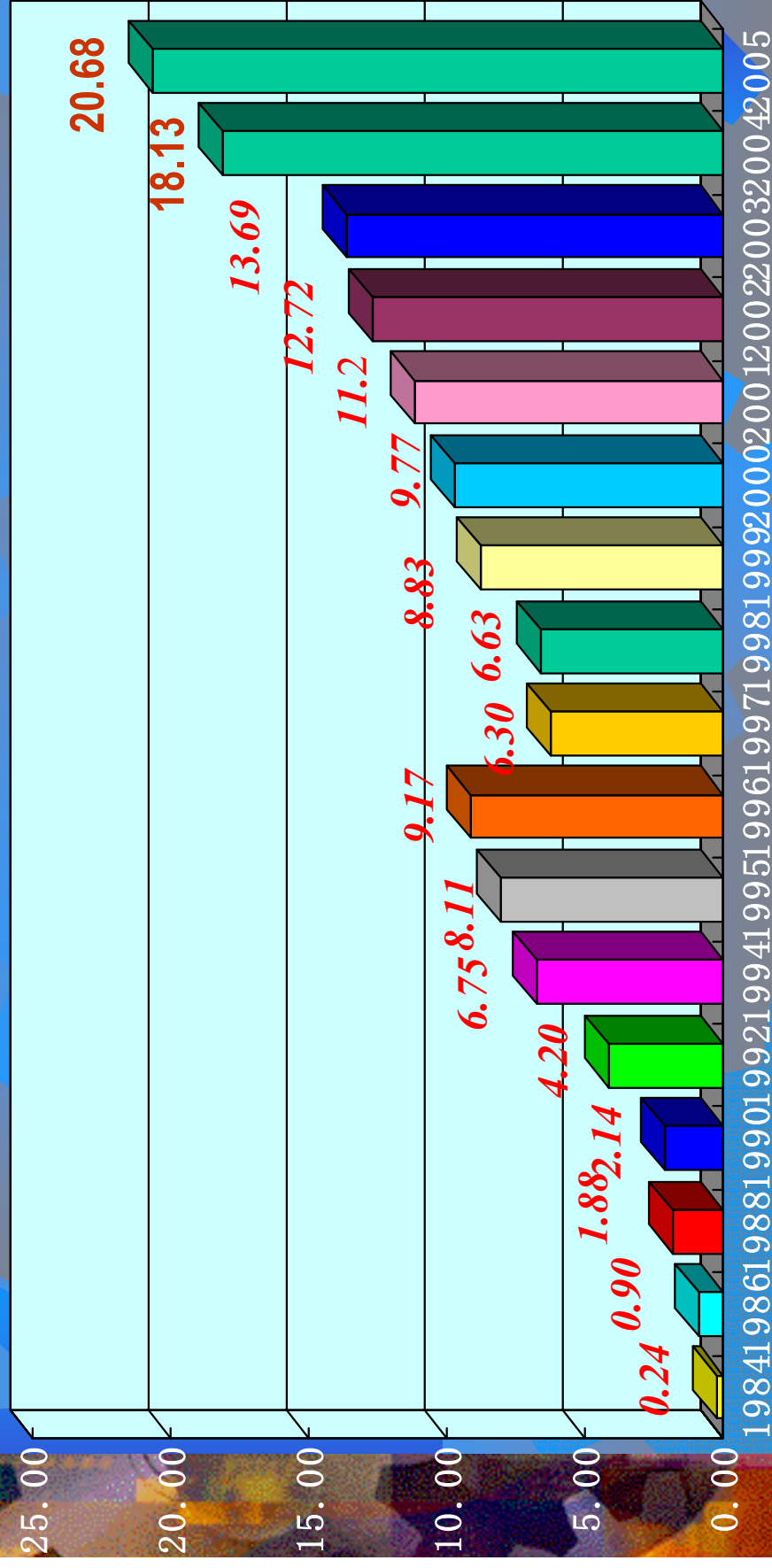
Other

Plastic Moulds

■ 冲压模具 ■ 铸造模具 ■ 其他各类模具 ■ 塑料模具

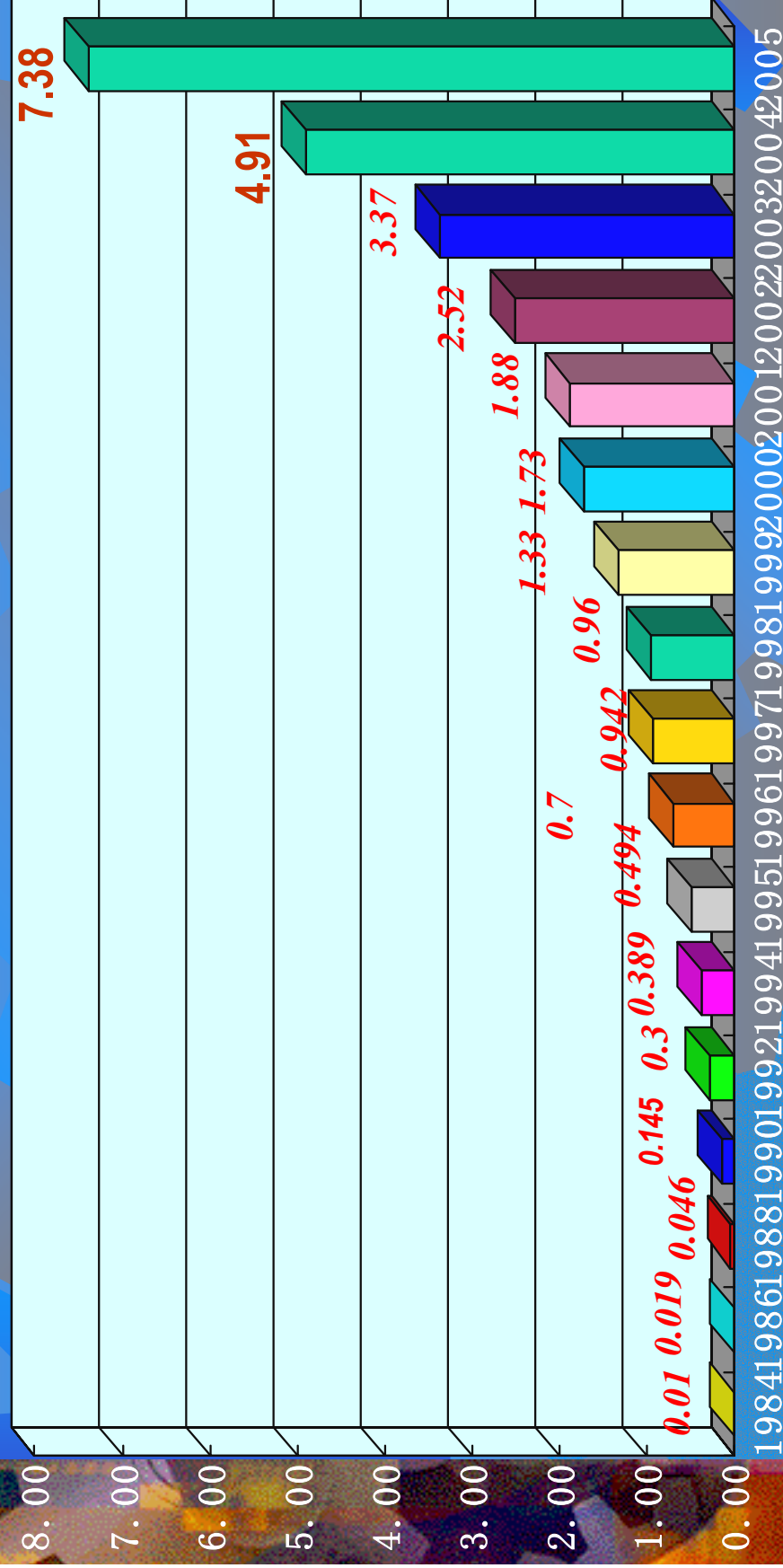
# 中国历年模具进口金额 (亿美元)

Import die & mould (a hundred million US\$)



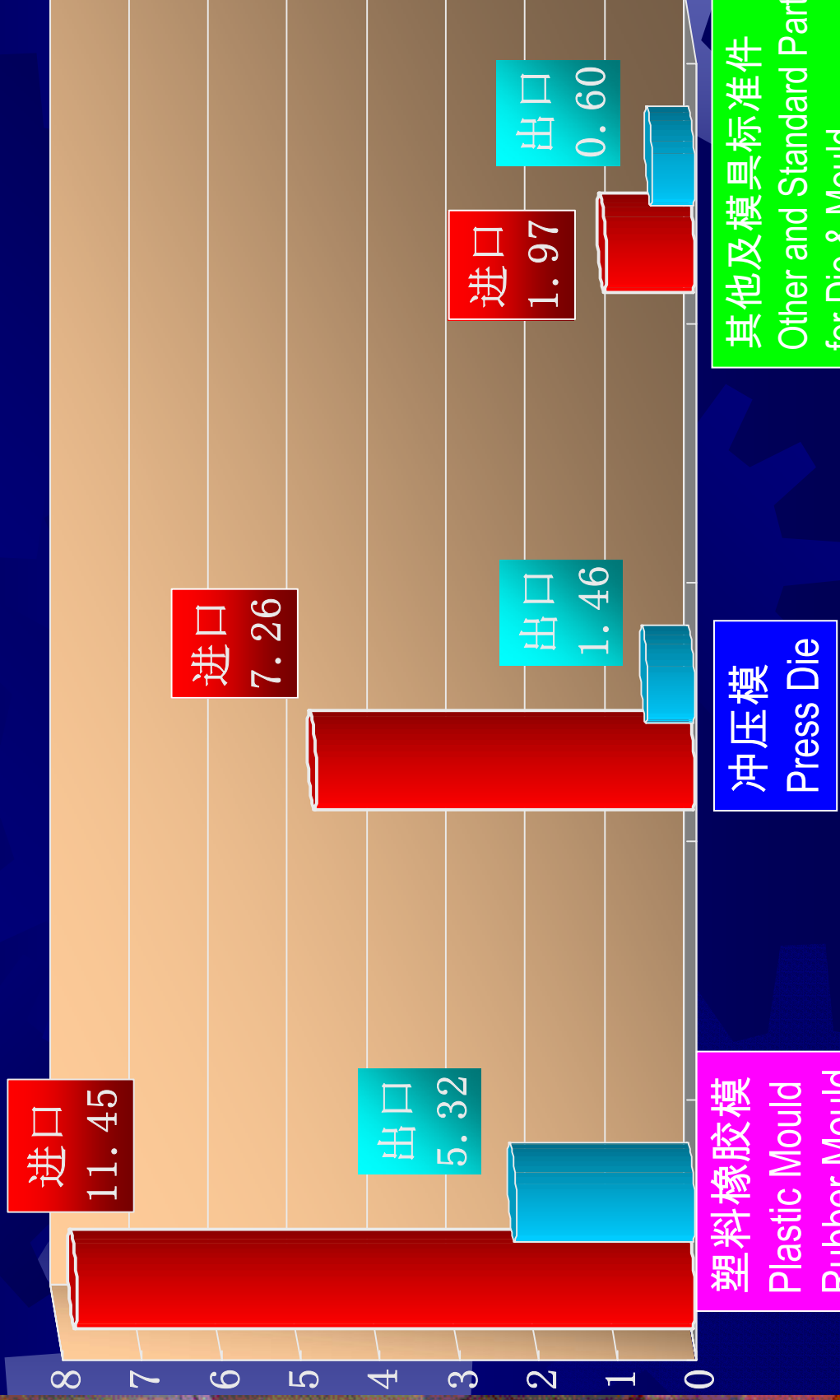
# 中国历年模具出口金额 (亿美元)

Export die & mould (a hundred million US\$)



# 2005中国模具进出口情况表

2005 China Die & Mould Export and Import  
( a hundred million US\$ 亿美元)



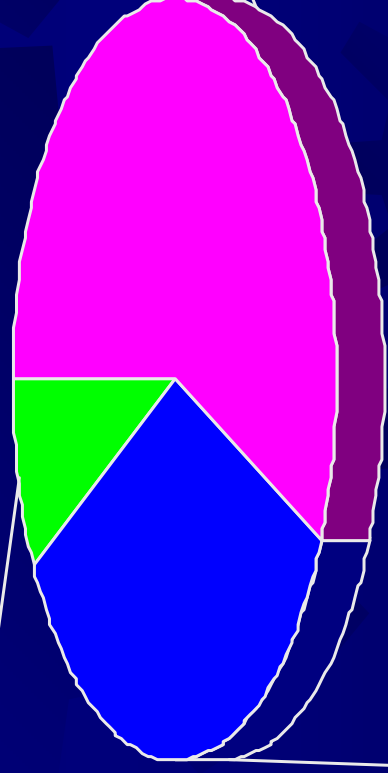
# 2005 各类模具进口所占比率

## 2005 Scale Import all kinds of Die & Mould

■ 其他及模具标准件  
Other and Standard Parts for Die & Mould  
9.5%

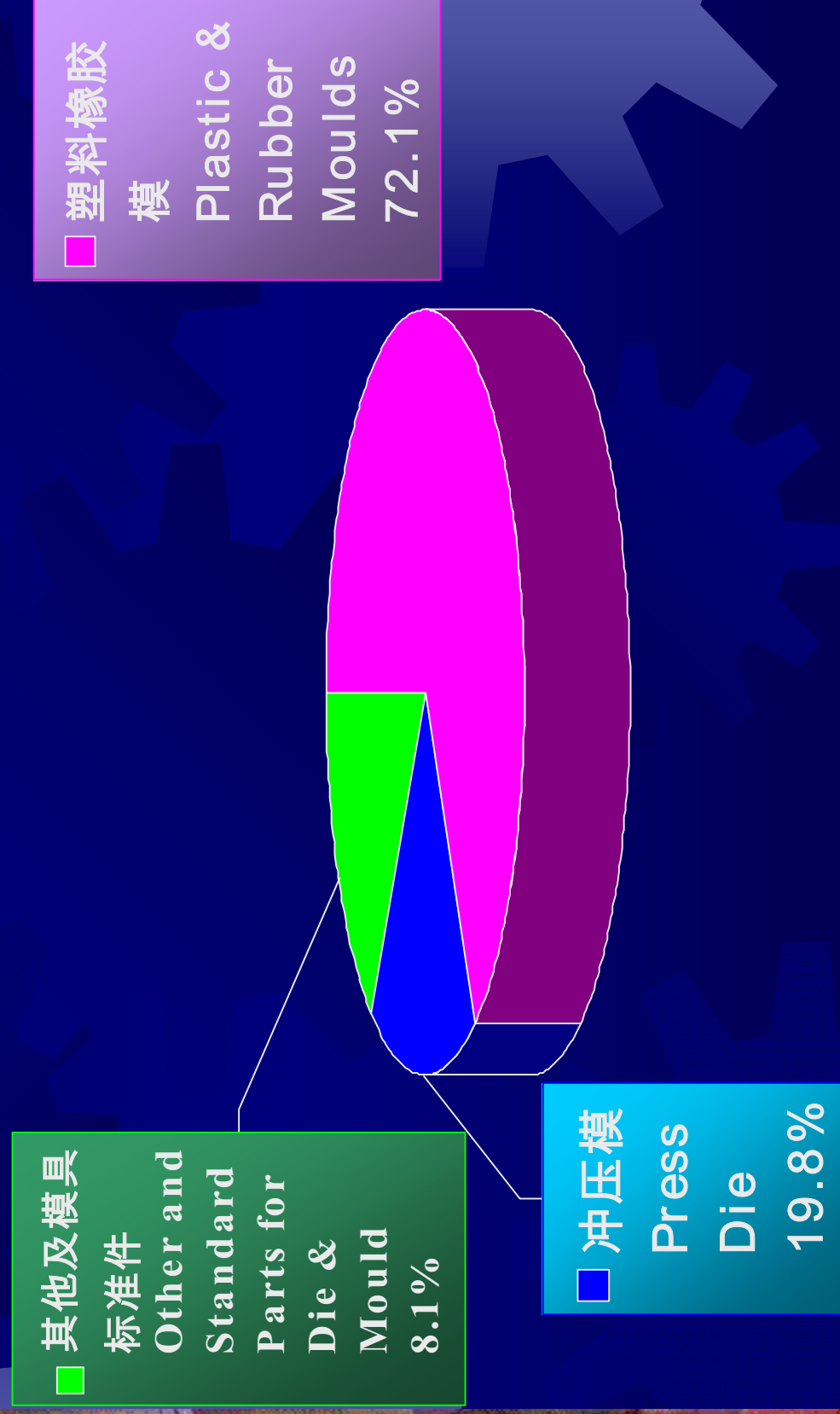
■ 塑料橡胶模  
Plastic and Rubber Moulds  
55.4%

□ 冲压模  
Press Dies  
35.1%



# 2005 各类模具出口所占比率

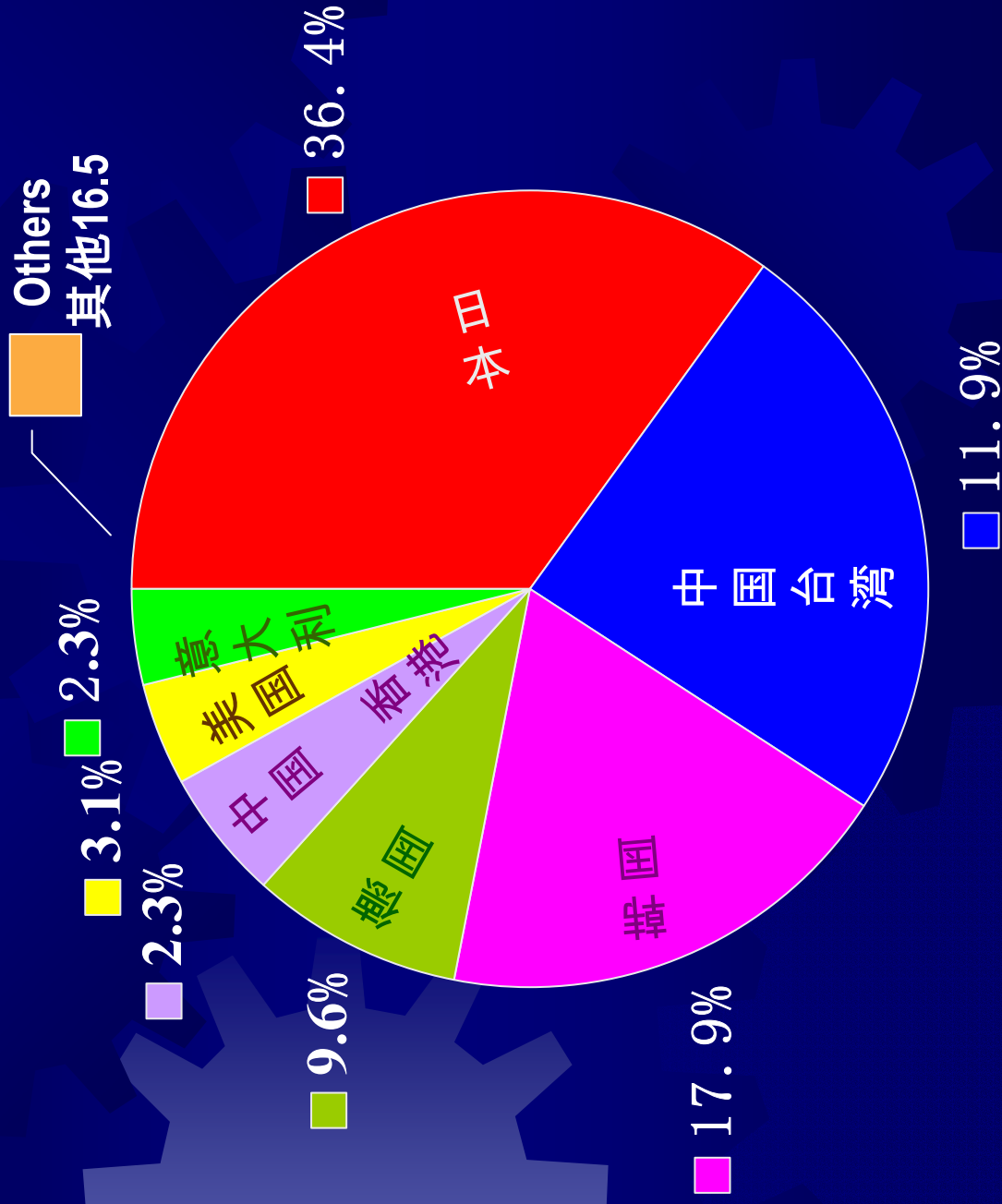
2005 Scale Export all kinds of die & mould



# 2005进口模具前7位货源地情况表

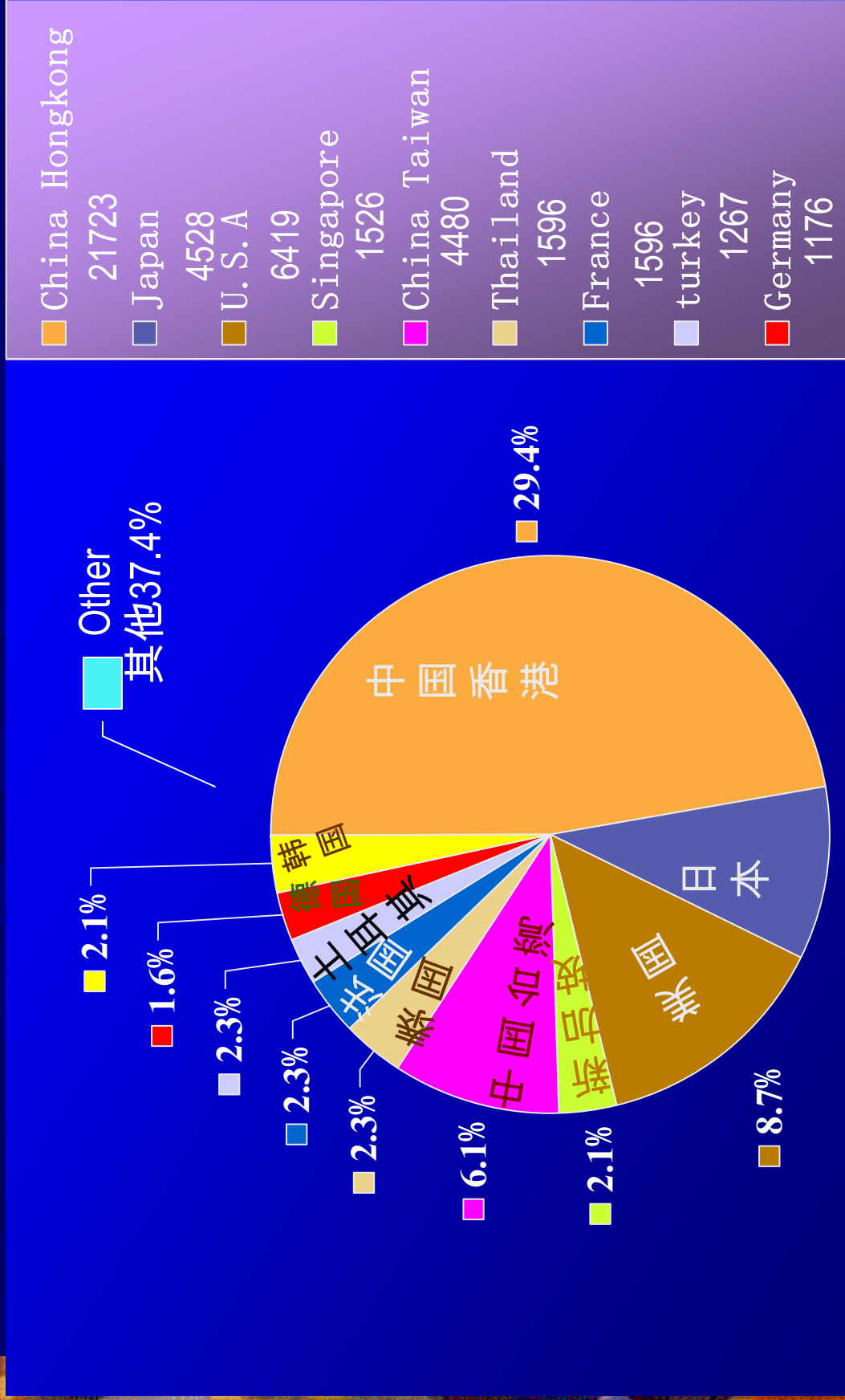
(亿美元)

Japan	7.524
China Taiwan	2.466
Korea	3.712
Germany	1.991
China Hongkong	0.48
U. S. A	0.64
Italy	0.485



# 2005出口模具的前10位目的地情况表

( 万美元 )



# 中国模具工业存在的问题

## The Problems of Die & Mould Industry Sector

- ★ 与发达国家相比，模具技术和产品存在较大差距，尤其是性能先进、精密度高、复杂的模具
- ★ 在产品结构上中低档模具相对过剩，中高档模具能力不足
- ★ 开发能力弱，技术人才严重不足，科研开发和技术攻关投入少
- ★ 中高级模具技术工人和经营管理人才缺乏
- ★ 模具企业管理相对落后
- ★ 模具生产的商品化、标准化、专业化程度较低
- ★ CAD/CAM/CAE、高速切削、新材料、热流道等相关技术的应用还较落后
- ★ 进出口逆差大（13.3亿美元）模具企业外贸人员短缺，国际市场的开拓急需加强
- ★ 总包和分包业务、市场的有序销售都有待加强

# The Problems in Die & Mould Industry Sector

- ★ Compared with developed countries, there exists obvious gap both in technology and product. Especially for large scale, precision, complicated, long life die & mould technology, the gap is even more obvious.
- ★ At present, medium and low grade dies & molds are relatively surplus. But die mould exceeds supply for high grade dies & moulds
- ★ The development ability is relatively weak, shortage of Technical personnel
- ★ Management of the die & mould companies need to be improved;
- ★ Lower level of commercialization, standardization and specialization in die & mould production;
- ★ Hi-techs, such as CAE, high speed machining, are not used popularly ;
- ★ International trade needs to be enhanced;
- ★ Domestic market order should be improved

# 今后需大力发展的模具产品

- ★ 汽车覆盖件模具（轿车所需）
- ★ 精密冲压模具（多工位级进模、精冲模）
- ★ 大型塑料模具（汽车和家电用）
- ★ 精密塑料模具（塑封模，多层、多腔、多材质、多色、薄壁精密塑料模）
- ★ 大型薄壁精密复杂压铸模和镁合金压铸模具
- ★ 子午线橡胶轮胎模具（活络模）
- ★ 新型快速经济模具
- ★ 多功能复合模具
- ★ 模具标准件（模架、导向件、推管推杆、弹性元件、热流道元件）

# Die & Mould that China need to be further develop

- ★ Automobile panel dies;
- ★ Precision stamping dies
- ★ Large scale plastic moulds
- ★ Precision plastic moulds
- ★ Die casting dies for large, complicated and thin walled parts and die casting die for magnesium alloy parts;
- ★ Meridian rubber tyre mould;
- ★ Rapid tooling
- ★ Compound die & mould of multi-functions
- ★ Standard parts die & mould parts

# 今后需提高的关键技术

- ★ 用微电子、光电子、计算机、网络通讯、软件技术等信息技术带动和提升模具制造技术
- ★ 模具数字化设计制造技术（CAD/CAE/CAM一体化技术等）
- ★ 模具加工技术（CAM）、高速铣削技术(HSM)
- ★ 快速原型制造技术、激光加工技术、直接金属成型技术
- ★ 信息化工程、虚拟技术、逆向工程、并行工程、敏捷制造等技术、先进的精密测量技术
- ★ 高性能、高品质的新型模具材料，及制造新工艺
- ★ 模具热流道技术、新型模具标准件
- ★ 先进的模具修复和抛光技术
- ★ 模具制造的现代化管理技术

# Key technology development in the future

- ★ Make full use of information technology to advance die & mold industry development
- ★ CAD/CAE of dies & moulds
- ★ CAM of die & mould machining technology (CAM, CNC, EDM)
- ★ Rapid Prototyping and Tooling and Laser machining technology
- ★ Reverse engineering, concurrent engineering, and virtual manufacturing;
- ★ New materials for die & mould, new processes
- ★ Hot runner technology;
- ★ Advanced surface technology and polishing process;
- ★ Advanced management

# 展望未来：机遇与挑战、学习与合作、 发展与双赢

- ★ 中国模具业进入了重要的发展时期，把握机会，迎接挑战，迅速提升，推向一个新的台阶
- ★ 中国模具市场前景广阔，欢迎世界各国模具业来华合作、促进发展、实现共赢
- ★ 加强国内外模具技术交流与经贸合作
- ★ 让我们携起手来，为世界模具业的发展而奋斗

# Prospect: opportunity and challenge, learning and cooperation, Development and Win-Win

- ★ China die & mould industry has entered an important development period----take the opportunity, meet the challenges, speed up our development
- ★ Broad die & mould market in China provides a good condition for inter nation trade and cooperation
- ★ To enhance technology exchange and trade cooperation is a important task of our association
- ★ Our objective win-win cooperation, high-speed and steady development

# 中国模具工业协会

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The background features a dark blue gradient with several semi-transparent gears of various sizes scattered across it. At the bottom of the image, there is a horizontal strip showing a close-up of interlocking gears in shades of orange, yellow, and brown, suggesting a sunset or a warm, industrial scene.

THANK YOU !

12 JUN 2006

ISTMA METTING