



台灣模具產業現況與 切入印度模具市場之契機

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關鍵詞(Keywords)

- 模具 Molds and Dies
- 印度模具 India Molding
- 產業分析 Industry Analysis

摘要(Abstract)

模具產業可說是一個國家興衰的指標，若模具產業發達，表示該國的經濟根基穩固。台灣模具產業以中小企業為主，且北、中、南聚落明顯，其最終的應用產品則以 3C 電子、電機、半導體與汽車及相關零組件產業為主，且在塑膠模具與沖壓模具上，台灣廠商已具備高品質與成熟技術，成為國際一流大廠。2013 年台灣產值為 566 億新台幣，已回復金融海嘯前之水準，進口值為 52.3 億新台幣，出口值達 203.5 億新台幣，為近五年新高，出口比例為 36%，表面需求為 414.5 億新台幣，進口依存度 12.6%。

印度由於近年來可支配所得增加，國內市場需求成長快速，尤其在 3C 產品與乘用車市場可明顯感受到消費力道的提升，因此也帶動了塑膠模具與汽車模具需求的提升，但由於印度模具技術仍無法達到國際大廠之要求水準，所以有 20~30% 的模具仍須仰賴國外進口，而 2009~2013 年模具進口的年複合成長率也達到 25.4% 的高成長狀態。

台灣塑膠模具在國際上具有高品質水準，在汽車用模具上，也獲得日系與歐美



車廠信賴，因此若有機會跟隨國際大廠進入印度消費市場，當其衛星工廠，將會具有更好的市場競爭力，而該從哪個產業下手，未來印度市場前景如何？將會藉由本篇文章與讀者一同解析。

The die and mold industry can be an indicator of a nation's prosperity. If the die and mold industry is well developed, it means that the nation has a sound and solid economic foundation. The die and mold industry in Taiwan is mostly comprised of middle and small-sized enterprises, which form clusters in northern, central and southern Taiwan and whose final application products are chiefly 3C electronics, electrical machines, semiconductors, automobiles and related components. Meanwhile, Taiwanese manufacturers have already possessed high quality and mature technology in terms of plastic mold and stamping die and play a leading role in the international market. The output value in Taiwan was 56.6 billion NTD in 2013, which had returned to the level before the financial crisis, while the import value was 5.23 billion NTD and the output value reached 20.35 billion NTD, which came to a new peak in the recent five years. The export proportion was 36 %, with the apparent demand being 41.45 billion NTD and the ratio of dependence on import 12.6 %.

The disposable income in India has risen in recent years, leading to rapid growth in the domestic market demand. The consumption increase is particularly evident in 3C products and passenger vehicles markets, which promotes the demand for plastic molds and automobile dies. However, the die technology in India still cannot meet the requirements of internationally leading manufacturers. Therefore, 30 % of dies must depend on foreign import, while the compound annual growth rate of mold import reached as high as 25.4 % between 2009 and 2013.

The plastic molds in Taiwan are internationally renowned for their high quality, with automobile dies winning the trust of Japanese, European and US automobile manufacturers. If Taiwanese manufactures have the opportunity to enter Indian consumption market with internationally leading manufacturers by acting as their satellite factories, they will gain greater market competitiveness. Which industry shall be chosen to start with? What is the Indian market prospect? This article will analyze these issues and share views with readers.

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