

Global and China Power Tool Industry Report, 2013-2014

<https://marketpublishers.com/r/GB30DEBE4AAEN.html>

Date: June 2014

Pages: 70

Price: US\$ 1,650.00 (Single User License)

ID: GB30DEBE4AAEN

Abstracts

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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