



Portuguese Association for the Mould Industry

The Portuguese Moulds Industry

The Portuguese Moulds Industry has been growing and consolidating its reputation in the international market, driven by external demand and competitive, integrated and innovative solutions on quality, price and time to market.

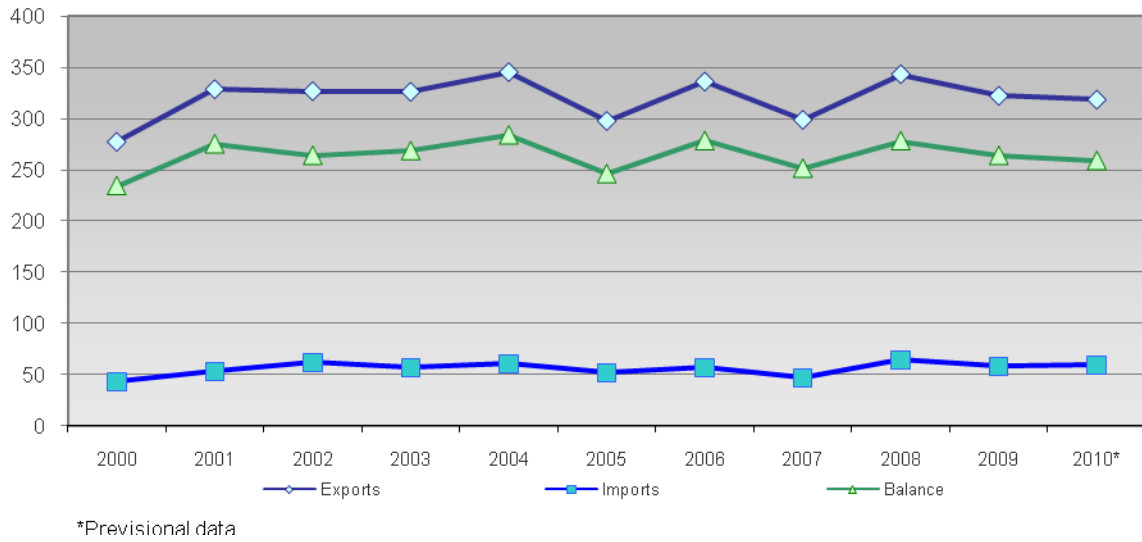
Currently, the Portuguese Moulds Industry has about 532 companies, normally with a SME dimension, dedicated to the conception, development and manufacture of moulds and tools, employing 8250 workers, with a bipolar geographical distribution, especially in Marinha Grande and Oliveira de Azeméis regions.

Portugal is among the world's leading manufacturers of moulds, particularly in the area of injection moulds for plastics, currently exporting over 90% of total production. The analysis of the trade balance over the past two decades shows the strong export vocation of the Sector.

In 2010, exports reached a value of 318 million Euros, being the total production approximately 350 million Euros, representing the fact that Portugal, over the years, has demonstrated a high capacity adaptation to the needs of its clients and to developments, whether of markets or technologies.

It is an innovative and high-technology Sector that exports the vast majority of its production. In 2010, the main markets were Germany, Spain, France, Czech Republic, Mexico and USA.

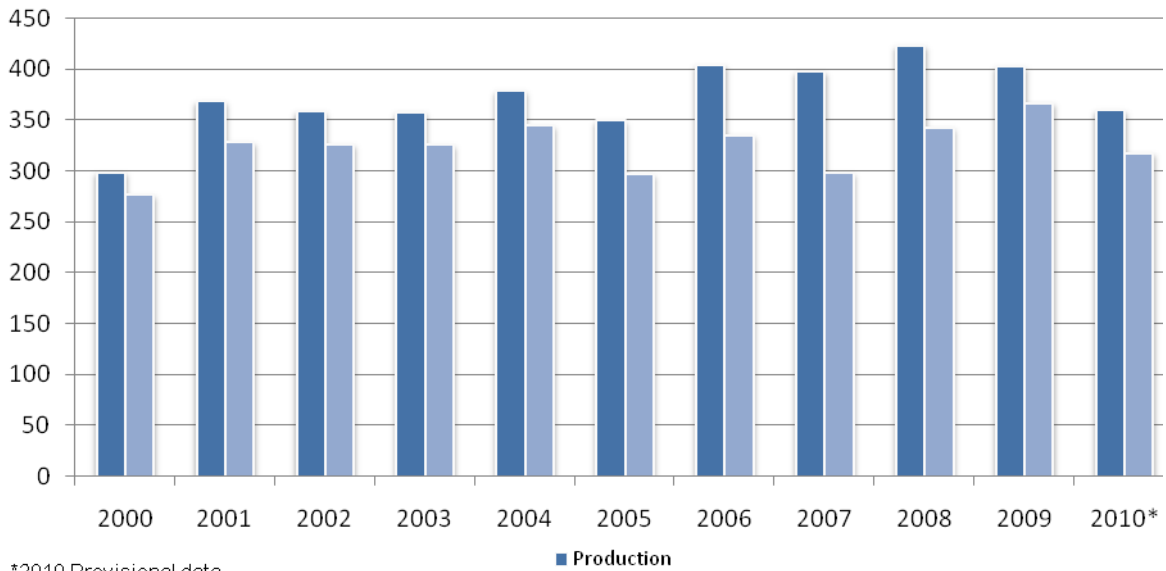
Trade Balance



Source: AICEP Unit: Million Euros

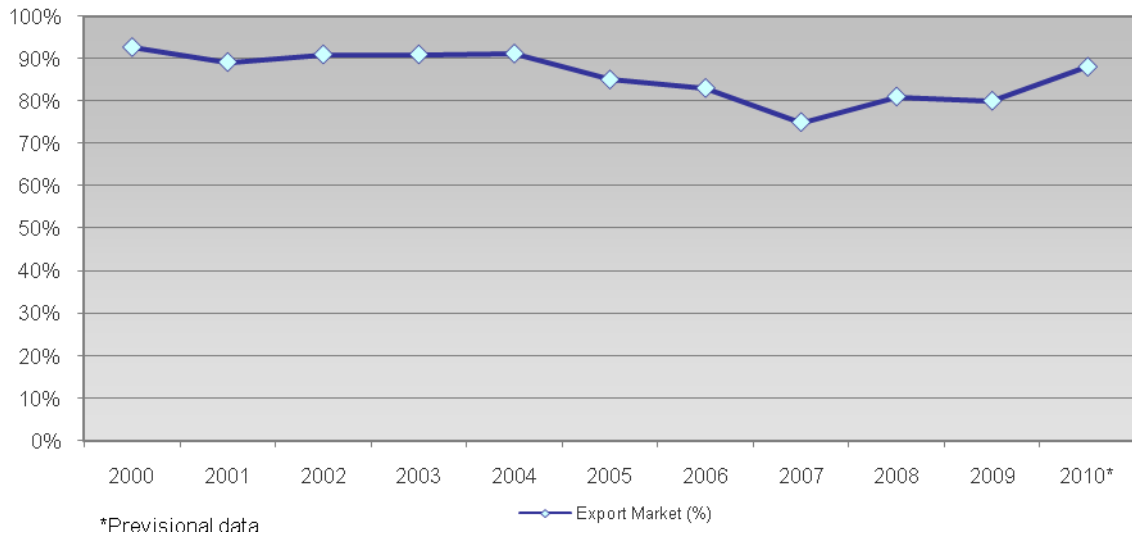
The trade balance analysis of the over recent years shows a potential and export vocation of the Sector, registering a consistent growth from 234.23 million Euros in 2000 to 259.2 million Euros in 2010.

Production vs Exports (million euros)



Sources: AICEP and CEFAMOL

Development of the Export Market



Sources: AICEP and CEFAMOL

The analysis of previous graph highlights the strong and systematic export orientation of the Sector (never below 75% of the production), having the lowest value registered in the years associated with the economic crisis in recent years. Moreover, this situation, which exists with greater intensity since 2004, also derives from the remarkable growth that the national Industry, especially plastics, has had over last years, often driven by the expansion of toolmaking companies value chain.

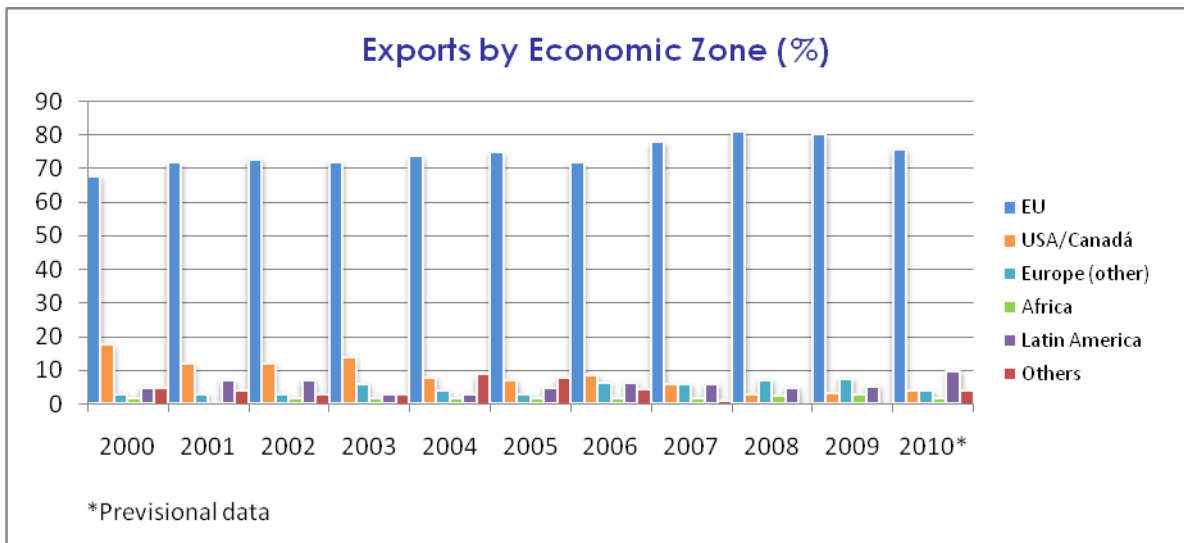
The total value of Portuguese exports amounted 318.2 million Euros, in 2010, being the sales made to 80 different markets (countries), which demonstrates the international and global dimension of this Industry.

The following table illustrates the evolution of the main clients markets, in recent years.

Evolution of the Main Markets

	2002	2003	2004	2005	2006	2007	2008	2009	2010
1 st	France	Germany	France	France	France	Germany	Germany	Germany	Germany
2 nd	Germany	France	Germany	Germany	Germany	France	Spain	Spain	Spain
3 rd	Spain	USA	Spain	Spain	Spain	Spain	France	France	France
4 th	USA	Spain	United Kingdom	USA	USA	USA	Poland	Sweden	Czech Republic
5 th	United Kingdom	United Kingdom	USA	United Kingdom	United Kingdom	United Kingdom	United Kingdom	USA	Mexico

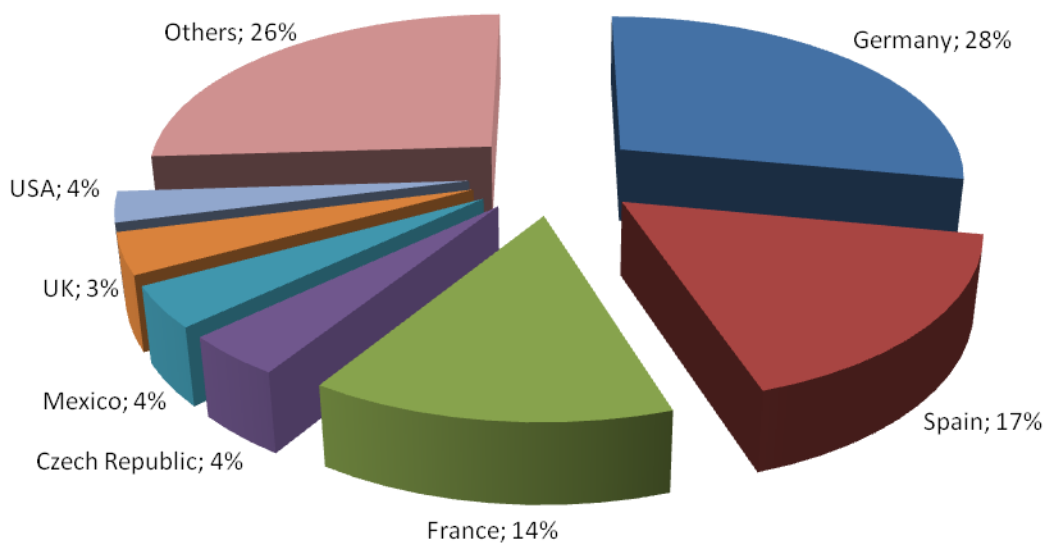
Source: CEFAMOL



Source: AICEP

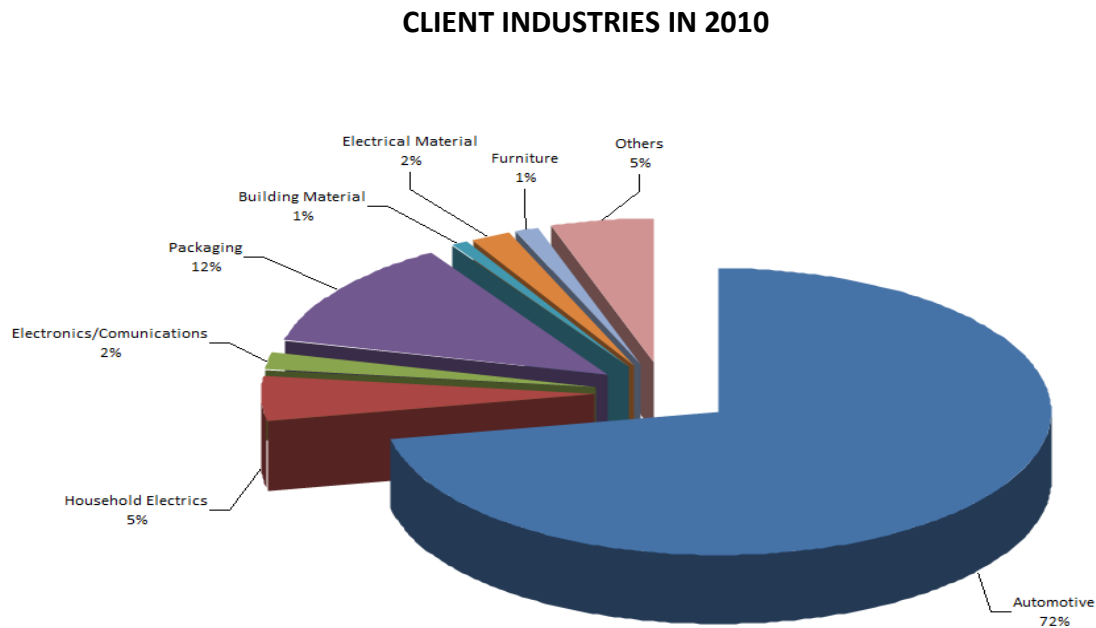
In terms of relevance and distribution through economic regions, the preponderance of the European market, especially EU, representing in recent years about 80% of total exports, facing the decrease in exports to the North America region in the latest years. This decrease is mainly justified by the relocation of corporate clients from this region to countries with low labor costs as well as the sharp depreciation of the US Dollar against the Euro in recent years.

MAIN MARKETS IN 2010



Sources: AICEP and CEFAMOL

Analyzing the Portuguese foreign trade data, in 2010, it is noted that the five main destinations of Portuguese exports were Germany (28%), Spain (17%), France (14%), Czech Republic (4%), Mexico (4%), USA (4%) and UK (3%).



Source: CEFAMOL

Statistical information concerning the major industries served by the Moulds Sector shows that the automotive industry has been consolidating its growth and importance in the development of the Sector, having evolved from 14% of the total production in early 90's to 72% in 2010.

However, it should be highlighted the presence of the Sector in other major and high tech industries, contributing for the development of new products in the world economy and acting in new areas and niches.