

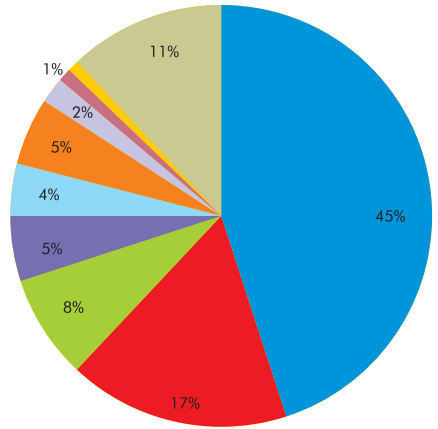
## ESTIMATED DEMAND OF INDIAN TOOL ROOM INDUSTRY FOR FY 2012-13

Estimated sales turnover of Indian Tool Room Industry for FY 2012-13 --> INR 136,300 Million

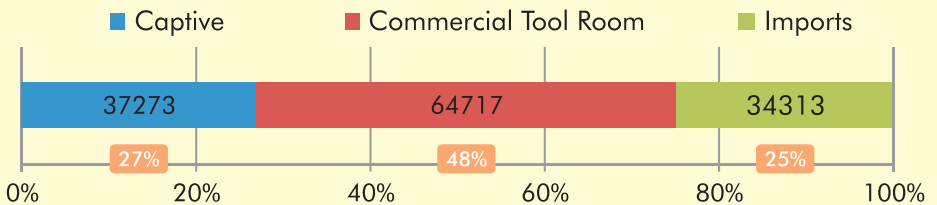
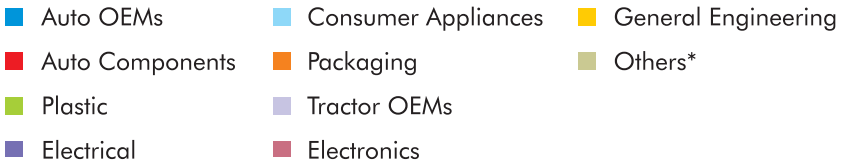
The segment wise break up of total tooling demand is shown below

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Segments	Tooling Demand (INR Million)
Auto OEMs	61160
Auto Components	23719
Plastic	11135
Electrical	6850
Consumer Appliances	5795
Packaging	6675
Tractor OEMs	2992
Electronics	2002
General Engineering	975
Others*	15000
<b>Total</b>	<b>136,300</b>



Others include industries such as Railways, Defense, Medical Equipment, Industrial Machinery, Material Handling, Construction & Mining equipment etc



# THE INDIAN TOOL ROOM INDUSTRY REPORT 2013

TAGMA has been periodically conducting survey/study of the Indian Toolrooms Industry and document the research findings to keep track of the developments which is widely shared in enhancing the contribution of this sector to the growth of the Indian economy

The Indian Tool Room industry is a major contributor to the manufacturing sector of the Indian economy. It is one of the important industry contributing to the success of automobile industry and other manufacturing sector in the country. In India, tooling requirement is met through three sources namely Commercial Tool Room (CTR), Captive (In-house) Tool Room and Import.

The Indian Commercial Tool Room sector has made rapid strides and currently catering to almost all type of tooling requirement of both domestic and International Companies based in India. The sector has proven its design and development capability and gradually emerging as preferred source for the outsourcing of dies and mould for both domestic and International companies based in India. The technical competency of domestic Commercial Tool makers with national presence are well appreciated by international OEM's based in India.

## DEMAND TREND IN INDIAN TOOLROOM INDUSTRY

The last few years growth trend of Indian Tool Room Industry is shown below through column chart. The industry has grown at a compound annual growth rate (CAGR) of 8% over the period of 2008 to 2013.

The negative growth was witnessed in last fiscal mainly due to overall slowdown in economy, prolonged slump and reduction of spending on tooling in automotive sector which is the major contributors in total tooling demand.

