

**2019年台北國際工具機展覽會記者會**

The Press Conference of TIMTOS 2019

日期/時間：2019年3月4日(星期一)下午2時

Date：14:00, Monday, March 4, 2019

地點：南港展覽一館403會議室

Venue：Room 403, Nangang Exhibition Hall 1

程序表 Agenda

14:00 14:05	中華民國對外貿易發展協會 黃處長漢唐	Remarks by Mr. Thomas HUANG Executive Director of Exhibition Department Taiwan External Trade Development Council (TAITRA)
14:05 14:10	臺灣機械工業同業公會 工具機專業委員會 陳會長燦輝	Remarks by Mr. Ingo CHEN Chairman of Machine Tool Committee Taiwan Association of Machinery Industry (TAMI)
14:10 14:15	臺灣機械工業同業公會 機械零組件專業委員會 許會長文憲	Remarks by Mr. Habor HSU Chairman of Machine Parts & Elements Committee Taiwan Association of Machinery Industry (TAMI)
14:15 14:20	臺灣機械工業同業公會 金屬成型機械專業委員會 蕭會長文龍	Remarks by Mr. Wen Lung HSIAO Chairman of Metal Forming Machinery Committee Taiwan Association of Machinery Industry (TAMI)
14:20 14:25	臺灣機械工業同業公會 王秘書長正青 工具機產業現況報告	Taiwan Machine Tool Industry Remarks by Mr. C. C. WANG President of TAMI
14:25 15:00	問與答	Q & A
15:00	散會	Adjourn



Welcome Remarks

by Thomas Huang, Executive Director, TAITRA

I am pleased to have you with us this year at the 2019 Taipei International Machine Tool Show press conference.

Groundbreaking Record for TIMTOS 2019

To begin with, a special appreciation needs to be shared to the continuous and active support by the exhibitors of TIMTOS and the side-by-side partnership between TAITRA and TAMI, which has allowed TIMTOS to continuously expand over the years. The highly anticipated Nangang Exhibition Center Hall 2 has officially begun its operation today with TIMTOS as its first show. TIMTOS this year is also using the Taipei World Trade Center Exhibition Halls 1 and 3, as well as Nangang Exhibition Center Hall 1, allowing for more exhibitors and booths than ever before. TIMTOS 2019 has in total invited 1,230 exhibitors from both domestic and international regions with up to 7,000 booths used. It is now not only the largest TIMTOS ever, but also the world's third largest machine tools exhibition.



4 Major Highlights at TIMTOS 2019

In the 2019 edition of TIMTOS, 4 major highlights are being organized for the show.

First, a total of 26 nations' brands are exhibiting at TIMTOS 2019. In addition to the key industry members from Taiwan, many international brands can also be seen at the show, including MAZAK, DMG MORI, FANUC, Mitsubishi, Heidenhain, Siemens, Haas Automation, and Universal Robots. Aside from the existing Swiss and German pavilions from past editions, exhibitors from the USA, Denmark, and Turkey now have country pavilions for the first time. The scale of the show is a new record high, with greater international participation than ever before.

Second, the TIMTOS 2019 theme is "Industry 4.0 & Smart Manufacturing". There are abundant exhibits for new system integration and digitalized manufacturing solutions. These include robots, sensors, I.o.T. technology, cloud platforms, and Big Data analysis, all of which can assist manufacturers to build a more flexible, efficient, and smarter production line, and enable Industry 4.0 production for small quantities and diverse requirements.



Third, many domestic and international exhibitors are showcasing their new A.I. technology and the collaborative robots. By incorporating artificial intelligence into manufacturing systems, “human-machine synergy” manufacturing can be created. This new collaboration can further decrease human error while enhancing work precision and product quality, resulting in safer and more efficient production lines.

Lastly, in responding to the current industry trends and the smart manufacturing theme, the second edition of TIMTOS Summit will take place on March 5th and 6th at The Taipei International Convention Center, Room 101. The summit will invite speakers from several international brands within the industry to share their knowledge regarding aspects of current industry trends. The experts include smart I.o.T. solutions delivered by SAP and ITTS, world-renowned additive manufacturing (3D printing) machinery by DMG MORI and Optomex, aerospace smart manufacturing by Heidenhain, Siemens, Dassault Systèmes, and Airbus, as well as the new changes in automotive manufacturing by ABB and Bosch. We are looking forward to a great deal of inspiring content at this summit.



Invitation to Buyers and Country Delegations Visits on a Global Scale

As an international procurement platform with a mission to help exhibitors to explore worldwide markets, TAITRA and its branch offices worldwide have co-jointly organized intensive promotion campaigns. Around 7,500 international buyers from 70 countries are expected to visit within the 6-day show of TIMTOS. Among these buyers, there are more than 20 purchasing associates of various international enterprises, coming from 14 countries including Germany, USA, Canada, Netherlands, Italy, Mexico, South Africa, Russia, and India. These buyers will attend the “TIMTOS 2019 Procurement Meetings” being arranged this afternoon at TIMTOS.

Additionally, TAITRA has successfully invited buyers’ delegations to TIMTOS organized by industry associations from different regions. There are the Brazilian Association of the Tools, Abrasives and Machining Industry (ABIMEI), the Federation of Indian Micro and Small & Medium Enterprises (FISME), the Ambattur Industrial Estate Manufacturers’ Association (AIEMA), the Ho Chi Minh City's Association of Mechanical–Electrical Enterprises (HAMEE), the Penang Foundry & Engineering Industries Association (PENFEIA), the Machine Tools Industrialists and Businessmen Association of Turkey (TIAD), as well as the industry associations from Singapore and



China. All these large group delegations are expected to further boost the procurement during TIMTOS and trigger more business opportunities and cooperation with Taiwan manufacturers.

Finally yet most importantly, I want to thank all the media friends again for sharing your strong enthusiasm for TIMTOS and elaborating it in your TIMTOS reports. I wish you all good health and all the best in 2019.



Welcome Remarks by Ingo Chen, Chairman Of Machine Tool Committee of TAMI

In recent years, Taiwan's machine tools have been particularly successful in developing new models and expanding overseas markets. In 2018, with the efforts of all parties, the annual export value achieved a remarkable performance of 3.66 billion US dollars, a 9.5% increase over the same period last year.

Faced with the slowdown in China-US trade and international market demand, Taiwan's machine tool industry is maintaining a cautious attitude toward the prospects for 2019. I think this moment is the best time for companies to adjust their pace and reorganize their market strategies. Starting many years ago, some Taiwanese machine tool manufacturers have already expanded their second and third production bases in Vietnam, Indonesia and other Southern Asia countries. This expansion has been successful and become one of the ways for Taiwanese manufacturers to spread market risks. As active players always look for opportunities, machine tool manufacturers cannot stop seeking new demand at this time; they can seek better resource providers, add customization, refine and add high value in their products



as their top strategic priority. In addition to technological innovation, talent cultivation is also an indispensable source to bring new opportunities to the machinery industry.

It is well known that Taiwan is dominated by small and medium-sized enterprises, what we call “SME” s” . Today, in response to the global trend of smart machinery and manufacture, the government has included smart machinery in the “Five Plus Two” innovation industry plan. This plan is in line with the needs of Taiwan's next generation. In the process of development, we strive to achieve balanced local development in Northern, Central and Southern areas, promote and connect foreign industries through industrial settlements, introduce overseas talents, and link to international markets. The promotion of smart machinery involves introducing the industry into intelligent science and technology, establishing a smart mechanical ecosystem, and promoting key industries such as electromechanical, chemical engineering for consumer products, electronic information, as well as information services and other key industries to smart manufacturing. Last year, TAMI and the Industrial Bureau collaborated to promote the Smart Machine Box (SMB), resulting in about 1,300 installations. This number is expected to add another 1,500 sets in 2019. For Taiwanese SMEs, the use of networked devices to achieve "visualized" cloud service utilization,



"connectable" system integration and "smart" upgrades is the goal. Through data collection, networking, visualization and intellectualization of a large amount of information, we have established smart factories that enable the effective use of resources. To provide an optimal production environment and to truly practice smart manufacturing, we will be able to connect to global markets and drive the machinery industry to enhance Taiwan's competitiveness.

Taiwan's machinery industry has a complete supply chain model, and it has abundant research and development energy to meet the needs of aerospace, automotive, medical, consumer electronics, and energy industries, as well as precision molds and parts processing equipment. In the future, our industry will continue to innovate and plant the seeds for the growth of key technologies, to strengthen our international competitiveness, and to continue to win success for Taiwan.

Thank you all. I hope that TIMTOS 2019 runs smoothly for everyone, and that exhibitors and attending guests all find this event meets their expectations.



Welcome Remarks by Habor Hsu, Chairman Of Machine Parts & Elements Committee of TAMI

It is my honor to be here again with you as one of the speakers for the TIMTOS International Press Conference. And I would like to first share my gratitude to the machines tool manufacturers and the committee for their years of support. The mutually complementing cooperation between machine parts makers and machine tools builders has helped the Taiwan machine parts industry grow hugely, as well as elevate our product precision and quality. In the past years, many machine parts makers have even expanded their products and services to the high-end markets such as Europe, the United States, and Japan. Supplying to these high-end machine builders has provided many opportunities for Taiwan makers to learn the diverse requirements from these markets, and then further create higher value products that are made in Taiwan. Taiwan-made machine parts now play a major role amidst the worldwide industry supply chain.

It is to be believed by many industry members that the recent China-US trade war has generated huge impact on the industry. However, I have deep trust in the high flexibility that Taiwan machine parts makers have already



demonstrated in the past. And on the contrary, this might just be another good moment for us to rethink business and market exploration strategies. With better preparation we will be ready and confident, and even able to turn future challenges into another new path for business.

These days, we stand at a crossroads in which AIoT is bridging connections to the critical components of machinery, and realizing a new future of manufacturing. Trends of automation, smart production, and predictive management are anticipated in the coming generation. Therefore, machine parts makers must now be even more flexible and transform their manufacturing, adopt new technologies, and create their own smart manufacturing solutions. This transformation will then be the best support to enhance the industry overall.

Due to market attenuation in the fourth quarter 2018, the overall performance of 2018 remained the same as 2017. However, Taiwan has developed a strong capability to deliver high-end and customized machinery and parts. The inquiries for high-end and customized products are gradually increasing even in this time of market stagnation. This proves once again the high value of the Taiwan-made machinery and parts.



This year, the Nangang Exhibition Center Hall 2 has been completed and TIMTOS is the first show ever to be hosted in this new building. This new hall not only satisfies the increasing space demands of TIMTOS, but it also relocates most machine parts exhibitors to Hall 2, which sits just across from Hall 1, where the majority of Taiwan machine tools exhibitors are located. This helps assemble a more complete cluster of Taiwan supply chain members at one location, and is more convenient for all visitors. We highly encourage you to walk around and experience the new TIMTOS of 2019.

Without further introduction, I hope everyone enjoys TIMTOS this year, and we certainly hope each one of you find the show to be rewarding.



Welcome Remarks

by Wen Lung Hsiao, Chairman Of Metal Forming Machinery Committee of TAMI

Being here as both an industry member as Forewell Group President and also the current Metalforming Committee Chairman, it is a great pleasure for me to be with all the media friends here today, and I will be sharing with you on the recent status of Taiwan metalforming industry and its future prospects.

US-China Trade War Suppressed Recent Demand

Based on the report shared by Taiwan Customs administration, Taiwan metalforming machinery exported a total of 530 million US dollars from January to November 2018, which decreased 5.3% compared to the 2017 data. Some of our main exporting markets included China, USA, Vietnam, India, Indonesia, Thailand, and Turkey.

An analysis on this report showed that, Taiwan metalforming machinery exports to China market had endured the impact from the US-China trade war but still decreased over the months in 2019. However, exports to the US market were gradually increasing.



Another estimate based on the China automotive sales report in 2018 also shows the metalforming industry might be impacted in this year.

Forecasting the Metalforming Industry in 2019

The automated equipment sector is highly anticipated for its upcoming development, and its demand shall only be increasing. And the China market still has great possibility for more growth due to its huge domestic demand.

Overall in 2019, the largest variable to influence on global markets still lies on the outcome of US-China trading negotiations. It is expected there will be a likewise slow demand in the first-half and more growth in the second-half of the year. In the first-half, inventories will still need to be depleted, and then more orders will materialize in the second-half for automated and smart machinery and equipment.

Among all the markets matching the government's New Southbound Policy, India, Vietnam, Turkey and the US are the markets reserved with the most business potential for machinery sales triggered by their transformation to more automated production.



The Smart manufacture by Taiwan Metalforming Makers

The Taiwan metalforming machinery makers are now transforming their China factories to total smart manufacture, where they have structured a complete smart manufacturing system with widely utilizing the I.o.T. technology as well as the remote surveillance platform through subcontractor' support. Through the I.o.T. technology, Taiwan makers have now achieved the production status online monitoring on their presses. Next, these Taiwan makers will then replicate the successful experiences back to Taiwan and help their Taiwan factories also speed up on their development toward visualized management.

Virtual Reality (VR) Trending Up for Metalforming Equipment Demonstration

In response to the smart machinery and intelligent production trend, the metalforming exhibits at TIMTOS 2019 are demonstrating more integrated systems and equipment for smart production.

Currently, many metalforming machinery builders are implementing VR to showcase a complete automated factory with 3d models presented. While participating in their presentations, the buyers are able to take a very close look at the machinery and the components such as the quick mold change



system. Not just the machinery itself but also each section detail of the entire production line is well visible to buyers' view

The metalforming equipment usually weighs in tons and requires considerable space and height. This results in them as highly suitable for VR presentations, especially when it comes to exhibitions in distant markets such as Europe, the US, central and south America, or Russia.

Building Smart Machinery and Smart Manufacture with More Interdisciplinary Talents

Taiwan metalforming machinery makers have been supplying servo presses with over a decade of experience. To further fabricate smart servo presses requires a thorough research on sensor system. Also, the software design is also crucial in building a smart machine in order to embody functions such as work simulation, processing control, and data collection.

Interdisciplinary talents will be part of the essential elements to step into the smart manufacturing era. We highly encourage manufacturers to initiate new training programs to cultivate more personnel with interdisciplinary talents, which will support and shorten the time required for their smart manufacture transformation.



During the TIMTOS show, I invite everyone to visit the new metalforming exhibits located in Taipei World Trade Center (TWTC) Exhibition Hall 1. Thank you, and I hope you all enjoy the show.



The Taiwan Machine Tool Industry

C.C. WANG

President of TAMI

The 2017 Taiwan survey of machine tools showed that production value had grown up with business conditions on the export and home market. The production value in 2017 was USD 4,289 million, an increase of 15.5 % from the same period in 2016. The value of metal cutting machine tools production in the same period of 2017 accounted for 83.9 % of the total production value, or USD 3,600 million, an increase of 17.03% compared with the same period in 2016.

Export and Import statistics announced by Customs indicate that the value of machine tool exports during 2017 was USD 3,339 million, an increase of 15.3 % compared with 2016. The value for machine tool imports was USD 835 million, an increase of 15.7% compared with 2016.

The 2018 Taiwan Survey of machine tools showed that production value will grow up with business conditions on the export and domestic market. The production value in year-to-Dec. 2018 was USD 4,700 million, an increase of 9.6% from the same period in 2017. Meanwhile, production value for metal



cutting machine tools share 83.95% to USD 3,946 million.

Export and Import statistics announced by the Ministry of Finance indicated that the value of machine tools exports during this year up to Dec. was USD 3,656 million, an increase of 9.5 % compared with the same period in 2017. The value for machine tools imports was USD 964 million, and increase 15.4% compared with the same period in 2017.

Please see the attachment.

Taiwan Machine Tool Statistics in 2017

TMTF

Unit : million USD

	2017	2016	2017/2016 Change(%)
Production, Machine tool	4,289	3,714	15.5%
Exports	3,339	2,897	15.3%
Imports	835	722	15.7%
Consumption	1,785	1,539	16.0 %

Source : Production/TMTF

Export, Import/ Ministry of Finance



Taiwan Machine Tool Statistics in 2018

TMTF

Unit : million USD

	2018	2017	2018/2017 Change(%)
Production, Machine tool	4,700	4,289	9.6%
Exports	3,656	3,339	9.5%
Imports	964	835	15.4%
Consumption	2,008	1,780	12.8%

Source : Production/TMTF

Export, Import/ Ministry of Finance

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2019年台北國際工具機展覽會記者會

中華民國對外貿易發展協會

黃處長漢唐 致詞稿

機械公會陳會長(燦輝)、許會長(文憲)、蕭會長(文龍)、王秘書長(正青)，各位媒體朋友們，大家午安！感謝各位百忙中抽空前來參加「2019年台北國際工具機展」記者會。

【展出規模再創歷史新高】

首先，特別感謝業者的熱烈支持以及在外貿協會與機械公會的通力合作之下，使TIMTOS規模不斷成長。在業界引頸期盼之下，台北南港展覽館2館今天正式啓用，與世貿1、3館及南港展覽館1館，共同容納更多廠商及攤位。今年TIMTOS總計1,230家國內外廠商參展，使用7,000個攤位，展覽規模再創歷史新高，成為全球第三大工具機專業展。

【TIMTOS展出4大特色】

本屆TIMTOS，我們歸納出4大特色：

第一、本屆總計有26國的品牌參展，除了臺灣指標廠商齊聚，更有國際知名大廠如MAZAK、DMG MORI、FANUC、Mitsubishi、Heidenhain、Siemens、Haas Automation、Universal Robots等共襄盛舉。另外，除了既有



的瑞士館、德國館之外，美國、丹麥、土耳其也首次以國家館形式參展，盛況空前，顯示TIMTOS的國際化程度逐屆升高。

第二、本展以「工業4.0、智慧製造」為展覽主題，各位將可看到各家廠商展出系統整合與數位化解決方案，將機器人、感測器、物聯網、雲端運算、大數據分析等導入生產線，協助製造業者實現更具彈性、迅速的智慧化生產，滿足少量多樣的客製化需求，進一步邁向工業4.0。

第三、另一展出亮點則是許多國內外廠商，展示最新研發的AI(人工智慧)技術和協作型機器人，透過“人工智慧+製造”來打造「人機協同」的工作環境，使機器能夠配合人的工作，讓自動化產線變得更安全、更有有效率，並且降低人為失誤、提升良率及品質。

第四、因應產業趨勢與展覽主題，我們將在3月5日到6日在台北國際會議中心101會議室舉辦第二屆高峰論壇，邀請到全球知名企業的高階主管以及國內外學術專家剖析產業趨勢與脈動，例如提供「智慧聯網」解決方案的專家SAP及東捷資訊、國際知名的「積層製造(3D列印)」製造廠DMG MORI和Optomec，還有講述「航太智慧製造」主題的海德漢(Heidenhain)、西門子(Siemens)、達梭(Dassault Systèmes)、空中巴士(Airbus)以及「汽車製造業變革」的ABB、和Bosch，相信今年高峰論壇的內容絕對是相當精采。



【邀請全球買主及買主團參觀】

此外，TIMTOS作為協助參展廠商拓銷全球市場的重要平台，貿協動員全球駐外單位強力宣傳，預計吸引超過90國約7,500名國外買主來臺觀展，其中有來自德國、美國、加拿大、荷蘭、義大利、墨西哥、南非、俄羅斯、印度等14國超過20家大型買主參加今天下午辦理的「一對一採購洽談會」。

另外本會也邀請到巴西機械進口商同業公會(ABIMEI)、印度微型和中小型企業聯合會(FISME)、印度清奈安巴度工業區製造商協會(AIEMA)、越南胡志明市機電公會(HAMEE)、馬來西亞檳城機器廠商會(PENFEIA)、土耳其工具機進口商協會(TIAD)，還有新加坡及中國大陸等相關公協會與工商會組團前來參觀，預計這些重量級買主將為本展帶動一波採購熱潮，為臺灣廠商創造更多商機。

最後，謝謝各位媒體記者朋友對本展的熱情支持與報導，敬祝各位身體健康、萬事如意。



2019年台北國際工具機展覽會記者會
臺灣機械工業同業公會 工具機專業委員會
陳會長燦輝 致詞稿

各位媒體朋友，大家午安，今天很榮幸擔任台北國際工具機展的展中記者會致詞嘉賓。

近年來台灣工具機在新機種開發與拓銷海外市場的表現格外亮眼，2018年在各方努力之下，全年出口金額達到36.66億美元，較去年同期成長了9.5%，這是相當不易之事。

面對中美貿易、國際市場需求趨緩問題，台灣工具機對2019年的前景則是保留觀望態度。本人認為此刻是公司調整腳步，重整市場布局之最佳時機。台灣有些許工具機廠商早在多年前就已朝向越南、印尼等南向國家打造第二、第三生產基地，皆有不錯的發展，這也是台灣廠商分散市場風險的方法之一；所謂積極者找機會，工具機廠商是沒有停止需求的時候，而是可以尋求更好的資源商，以客製、精緻化、高附加價值等級為首要。除了技術革新，人才培育同樣也是不可或缺的動力來源，方能為機械產業帶來新契機。

眾所皆知台灣是以中小型企業居多，現今政府為因應全球智慧機械與製造



發展趨勢，將智慧機械列入五加二創新產業，此產業創新計畫是符合台灣下個世代的需要，並在發展過程中力求北中南均衡發展，透過產業聚落的方式來推動並連結國外產業，引進海外人才、連結國際市場。智慧機械的推動做法包含將產業導入智慧化科技，建立智慧機械生態系，並推動金屬機電、民生化工、電子資訊、資訊服務等重點產業導入智慧製造。去年機械公會與工業局相互合作之下，推動了智慧機上盒（SMB）帶動機台聯網約有1,300台聯網運用，預計2019年能為企業增加到1,500台。對台灣中小企業來說，運用聯網設備達到系統「可視化」的雲端服務運用、「可連結」的系統整合及「智慧化」等升級為目標，藉由大量資訊的蒐集、連網、可視化與智慧化，建立起讓資源有效應用的智慧工廠，進而提供一個最佳的生產環境，以真正實踐智慧工廠之境界，方能接軌全球市場，帶動機械產業提升台灣競爭力。

台灣機械業擁有完整的供應鏈模式，且具豐沛的研發能量可滿足航太、汽車、醫療、3C、能源產業的精密模具及零件加工設備需求，未來我們的產業會持續創新，厚植關鍵技術，強化國際競爭力，為台灣繼續爭光。

感謝大家，在此預祝2019 TIMTOS展出順利，廠商及與會來賓皆能事事圓滿。



2019年台北國際工具機展覽會記者會

臺灣機械工業同業公會 機械零組件專業委員會

許會長文憲 致詞稿

各位來賓、各位媒體朋友，大家午安，今天很榮幸擔任台北國際工具機展的展中記者會致詞嘉賓。

首先要感謝近年來工具機整機廠及協力廠的相輔相成以及各廠間的技術交流合作，讓零組件廠商緊隨工具機產業的發展而成長茁壯，實為不易。近幾年台灣很多零組件廠商已經成功打入歐美、日本等高階市場，並從中瞭解各國市場需求，不斷發展出高附加價值產品來提升台灣競爭力，並在全球產業供應鏈佔有一席之地。

近期的中美貿易戰，相信對台灣廠商而言，影響層面廣泛。但我深信台灣零組件廠商的靈活度，正可藉此機會重新思考全球布局的新策略，從容面對後續的挑戰，化危機為轉機。

現今AIoT互聯網之整合關鍵零組件，都是引導未來趨勢的要點。面對未來製造的時代，需以自動化到智慧化及預知搭配。而零組件產業不僅要懂得彈性調整更要進行部分轉型，不斷透過導入新科技，打造智慧解決方案，方能對產



業升級提供最佳效益。

2018年零組件整體產業相較於2017年是呈現持平的狀態，雖2018年的第四季呈現較為衰退現象，但台灣做高技術端產品及客製化的能力相當強大，在衰退中卻呈顯出不斷向上攀升的價值，這也說明台灣機械零組件高附加價值帶來高競爭力。

TIMTOS以往因為展覽館分散且使用面積不足等因素，影響許多參觀者及國際買主參訪意願。今年南港展覽館二館甫落成，TIMTOS作為首展啓用，除了展出面積較為充裕，更因為展館集中，加深整機與零組件廠商的鏈結，群聚效益更高。參觀TIMTOS展會可一次了解台灣產業供應鏈的完整面貌，參觀者千萬不容錯過。

在此祝台北國際工具機展TIMTOS圓滿成功，大家也都能在這次展覽會上有很好的收穫，感謝大家。



2019年台北國際工具機展覽會記者會

臺灣機械工業同業公會 金屬成型機械專業委員會

蕭會長文龍 致辭稿

各位先進大家好：

我是「金屬成型專業委員會」現任會長的富偉集團總裁蕭文龍，很榮幸與各位媒體朋友們共聚一堂，向大家報告臺灣金屬成型機械業的近況與願景。

受美中貿易戰影響需求受到壓抑

依據海關進出口貿易統計，2018年1~11月台灣金屬成型機械出口約5.3億美元，較上年衰退5.3%。主要出國國家為：中國大陸、美國、越南、印度、印尼、泰國及土耳其等市場。

受到美中貿易戰的影響，台灣金屬成型機械出口到大陸出現逐月衰退的情形，出口到美國則呈現逐月增加趨勢。

依據2018年大陸汽車產銷情況來推估，金屬成型設備受的影響，將在今年出現效應。

金屬成型產業的市場前景

看好未來自動化領域的發展與需求，只有更多，沒有更少。也看好大陸的未來，因為大陸的內需夠大。



整體而言，影響2019年的景氣前景的最大變數，端看中美貿易是否有個圓滿的結局。預期2019年前景將呈現先蹲後跳，在上半年庫存去化後，下半年在自動化及智能化的機械設備需求，仍然會陸續出籠。

在新南向國家中，最看好印度及越南，以及土耳其以及美國自動化升級的商機。

台灣金屬成型業者推智能製造

台灣金屬成型機械業者在大陸廠已全面推動智能製造，廣泛應用物聯網(IoT)，甚至外部協力體系的遠程監控站等，已經建立完成的智慧製造體系等。在IoT的部份已做到沖壓機生產的在線監控。將來台灣廠也會複製大陸廠的成功經驗，加速台灣廠的可視化管理。

虛擬實境(VR)展示適合金屬成型設備

因應智慧機械以及智慧製造，預期TIMTOS 2019會增加很多整合加工型態的設備展出，以迎合智慧製造的趨勢。

金屬成型機械已導入虛擬實境(VR)展示，使用3D模型建出整個自動化廠，可以看到快速換模系統在整廠自動化的運行，整個機台擺在眼前，可以看到機台及廠內的細節。

金屬成型設備噸位大、體積大、機台高，很適合使用VR技術來展示機台，尤其到歐洲、美國、中南美洲及俄羅斯等遙遠的國家參展，使用VR來展示機台設備，會是個好選擇。



培育跨領域人才 由智慧機械邁向智慧製造

台灣金屬成型機械在伺服沖床部份，也已有10幾年的製造經驗。感應器開發對智慧化的伺服衝壓機械設備非常重要，未來軟體的實力將會是長期發展的關鍵，不管是加工模擬軟體或是控制、資料收集軟體。

未來跨領域人才的整合將是邁入智慧機械的必備條件，廠商應及早啟動跨領域人才的培育計畫，才能在最短的時間由智慧機械邁向智慧製造。

歡迎各位到沖壓廠商的展出專區世貿一館參觀指教，謝謝大家！



臺灣工具機產業概況

臺灣機械工業同業公會

秘書長 王正青

2017年台灣工具機產業受益於景氣情況，總產值無論是出口方面或本地市場消費方面，均呈現成長態勢。2017年總產值約為美金 42.9億，與2016年同期相比，成長幅度達15.5%。另外，切削工具機產值約為美金36億，占總產值的83.9%，與2016年同期相比，成長幅度達17.03%。

根據公正第三方所發布的進出口統計數據指出，2017年台灣工具機產業的出口總值為美金33.39億，與2016年相比，成長幅度達15.3%。而進口總值為美金8.35億，與2016年相比，成長幅度亦達15.7%。

進一步看2018年台灣工具機產業，同樣受益於景氣情況，總產值無論是出口方面或本地市場消費方面，也是呈現成長態勢。2018年總產值約為美金 47億，與2017年同期相比，成長幅度達9.6%。另外，切削工具機產值約為美金 39.46億，占總產值的83.5%。

進出口方面，根據中華民國財政部所發布的統計數據指出，2018年台灣工具機產業的出口總值為美金36.56億，與2017年同期相比，成長幅度達9.5%。而進口總值為美金9.64億，與2017年同期相比，成長幅度亦達15.4%。

詳見附表



2017年台灣工具機統計分析

金額單位：百萬美元

	2017年	2016年	2017年/2016年 (%)
工具機產值	4,289	3,714	15.5%
出口額	3,339	2,897	15.3%
進口額	835	722	15.7%
國內市場消費額	1,785	1,539	16.0%

資料來源：臺灣機械工業同業公會

2018年台灣工具機統計分析

金額單位：百萬美元

	2018年	2017年	2018年/2017年 (%)
工具機產值	4,700	4,289	9.6%
出口額	3,656	3,339	9.5%
進口額	964	835	15.4%
國內市場消費額	2,008	1,780	12.8%

資料來源：臺灣機械工業同業公會