



China Inverter Welding and Cutting Equipment Industry Report, 2012-2014

Feb. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

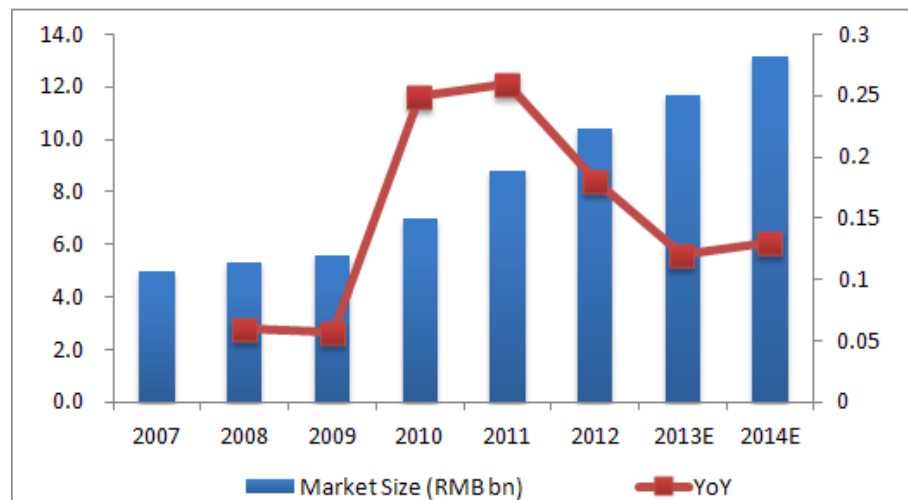
China's economic growth slowed down in 2012, and the growth rates of shipbuilding, construction steel structure, oil and gas pipeline industries decreased to varied extent, thus causing the weakened demand for welding & cutting equipment. In 2012, Chinese welding & cutting equipment market valued RMB33.9 billion with a year-on-year growth rate of 14%, while the growth rate was high up to 20% in 2010 and 2011.

As a new type of welding & cutting equipment, inverter welding & cutting equipment is replacing traditional one in most fields by virtue of high working frequency, fast response, excellent welding performance, energy saving and environmental friendliness, small size and light weight, and its market growth rate is higher than the average level of the whole welding & cutting equipment market.

In 2012, Chinese market size of inverter welding & cutting equipment reached RMB10.4 billion, up 18% from a year earlier, and contributing 31% to the welding & cutting equipment market value from 29% in 2010.

In view of the uncertainty of China's economic growth over the next two years, the growth rate of the overall welding & cutting equipment market is expected to remain at about 5% in 2013-2014, and the growth rate of the inverter welding & cutting equipment market will be 12-13% because of ever high substitution rate.

Chinese Inverter Welding & Cutting Market Size and Growth Rate, 2007-2014E



Source: ResearchInChina *China Inverter Welding and Cutting Equipment Industry, 2012-2014*

Shenzhen Riland Industry Co., Ltd. is China's largest inverter welding & cutting equipment manufacturer. In 2012, to ensure its revenue, the company raised the proportion of low-end products in production and marketing. During the first three quarters of 2012, the net income of the company dropped by 17.50% year-on-year to RMB66 million, and the gross margin descended from 27.44% in 2011 to 25.73%. The company is optimistic about the prospect of automatic welding equipment, and it made more investment in the marketing of such equipment in 2012, but this pulled down the company's net profit margin in Q1-Q3 2012 by 5 percentage points, especially net profit margin in Q3 slumped by 35 percentage points.

As China's second largest inverter welding & cutting equipment producer, Jasic Technology occupied 5.8% market share in 2012. In the first three quarters of 2012, its net income dropped by 15.91% year-on-year to RMB74 million. Because of the fairly high sales ratio in overseas markets, the gross margin of Jasic Technology was stable in 2012 without drastic decline. As the inverter welding & cutting equipment expansion project is completed in 2013, the company's capacity of inverter welding & cutting equipment will rise to 600,000 sets.

The report covers the followings:

- Industrial environment, technical environment, and policy environment of Chinese inverter welding & cutting equipment;
- Development and outlook of Chinese inverter welding & cutting market, including market size, market structure, regional pattern, corporate competition; future development trends and influencing factors;
- Structure of Chinese inverter welding & cutting application market, as well as development and outlook of main downstream markets;
- Development of major Chinese inverter welding & cutting companies, involving revenue, gross margin, main products and development strategies.

1. Introduction

- 1.1 Welding Industry
- 1.2 Definition and Principles of Inverter Welding and Cutting
 - 1.2.1 Merits and Demerits
 - 1.2.2 Classifications
- 1.3 Upstream and Downstream
- 1.4 Industrial Features
 - 1.4.1 Periodicity
 - 1.4.2 Regionality
 - 1.4.3 Seasonality

2. Development Environment of Inverter Welding and Cutting Equipment Industry

- 2.1 Industry Environment
 - 2.1.1 Industry Status Quo
 - 2.1.2 Industrial Pattern
- 2.2 Policy Environment
 - 2.2.1 Industry Authorities
 - 2.2.2 Industry Standards
 - 2.2.3 Regulation System
 - 2.2.4 Industrial Policy
- 2.3 Technical Environment
- 2.4 Development of Downstream Sectors
 - 2.4.1 Metal Furniture
 - 2.4.2 Electric Power
 - 2.4.3 Construction Steel Structure
 - 2.4.4 Petrochemical Pipelines

3. Chinese Inverter Welding and Cutting Equipment Industry

- 3.1 Welding and Cutting Equipment Market
 - 3.1.1 Industry Development
 - 3.1.2 Production
- 3.2 Inverter Welding and Cutting Equipment Market
 - 3.2.1 Market Size
 - 3.2.2 Market Structure
 - 3.2.3 Regional Structure
 - 3.2.4 Application Fields
- 3.3 Competition among Enterprises
- 3.4 Production Cost
- 3.5 Development Trend and Risk
 - 3.5.1 Influencing Factor
 - 3.5.2 Development Trend
 - 3.5.3 Operating Risk

4. Key Companies

- 4.1 Shenzhen Riland Industry Co., Ltd.
 - 4.1.1 Profile
 - 4.1.2 Revenue
 - 4.1.3 Gross Margin
 - 4.1.4 Customers and Suppliers
 - 4.1.5 Development Strategy
 - 4.1.6 Business Performance Prediction
- 4.2 Shenzhen Jasic Technology Co., Ltd.
 - 4.2.1 Profile

- 4.2.2 Revenue
- 4.2.3 Gross Margin
- 4.2.4 Customers and Suppliers
- 4.2.5 Development Strategy
- 4.2.6 Business Performance Prediction
- 4.3 Beijing Time Technologies Co., Ltd.
 - 4.3.1 Profile
 - 4.3.2 Revenue and Gross Margin
 - 4.3.3 Development Strategy
- 4.4 Lincoln Electric
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Operation in China
- 4.5 ESAB
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Operation in China
- 4.6 Others Still not Listed
 - 4.6.1 Panasonic Welding Systems (Tangshan) Co., Ltd.
 - 4.6.2 Shanghai WTL Welding Equipment Manufacture Co., Ltd.
 - 4.6.3 Kaierda Group
 - 4.6.4 Shanghai Hugong Electric (Group) Co., Ltd.
 - 4.6.5 Aotai Electric Co., Ltd.
 - 4.6.6 Shanghai Shiwei Welding Industry Co., Ltd.
 - 4.6.7 Chengdu Hanyan Weida Technology Co., Ltd
 - 4.6.8 Xionggu Electrical Co., Ltd

- Main Ways of Metal Connection
- Development Course of Welding and Cutting Equipment
- Classification of Welding
- Operation Theory and Classification of Inverter Power Supply
- Comparison between Traditional Welding and Cutting Equipment and Inverter Welding and Cutting Equipment
- Classification of Inverter Welding by Welding Technology
- Comparison between Different Switching Devices in Inverter Power Supply
- Upstream and Downstream Industries of Inverter Welding and Cutting Equipment
- Global Market Size of Inverter Welding and Cutting Equipment, 2007-2014
- Gaps between Chinese Enterprises and Global Enterprises in Welding and Cutting Equipment Industry
- Welding Industry by Region 2010, 163 billion RMB globally
- The World's Major Enterprises in Welding Industry (Ordered by Income)
- Proportion of Metal Furniture in Total Output of Furniture in China, 2002-2012
- Output and Growth Rate of Metal Furniture in China, 2002-2014
- Growth Rate Comparison between China's Power Installed Capacity and Its GDP, 2002-2012
- China's Power Installed Capacity, 2002-2014
- Comparison of Application of Steel Structure in China, Japan and America
- China's Output of Steel Structures, 2003-2014
- Chinese Market Size of Inverter Welding and Cutting Equipment in China, 2007-2014
- Gross Margin of Chinese Welding and Cutting Equipment Industry, 2003-2012
- China's Output of Electric Welders, 2001-2012
- China's Output of Electric Welders by Region, 2011-2012
- Growth Rates of China's Output of Crude Steel, Welded Steel Pipe and Welder, 2006-2012
- Scale and Growth Rate of Chinese Inverter Welding and Cutting Market, 2007-2014
- Proportion of Inverter Welding and Cutting in the Welding and Cutting Equipment in China and Beyond, 2007-2014

- Chinese Inverter Welding and Cutting Market Structure, 2007-2014
- Sizes of Inverter Welding and Cutting Market Segements in China, 2007-2014
- Inverter Welder Market Scale by Region in China, 2011
- Downstream Market Demand Structure of Welding and Cutting Equipment, 2007-2012
- Main Chinese Manufacturers of Welding and Cutting Equipment
- Market Share of Leading Chinese Manufacturers of Welding and Cutting Equipment, 2012
- Major Chinese Companies in Inverter Welding and Cutting Equipment Industry
- Comparison between Listed Chinese Companies in Inverter Welding and Cutting Equipment Industry
- Market Share of Leading Inverter Welding and Cutting Equipment Companies, 2012
- Cost Make-ups of Inverter Welder
- Average Salary of Chinese Workers, 2002-2011
- Upgrading Trilogy of Welding and Cutting Equipment Industry
- Competitiveness of Chinese Inverter Welding and Cutting Industry
- Workforce and R&D Investment of Shenzhen Riland Industry, 2007-2011
- Comparative Experiment of Riland's Inverter Welder and Traditional AC Arc Welder
- Revenue and Net Income of Shenzhen Riland Industry, 2007-2012
- Revenue of Shenzhen Riland Industry by Product, 2010-2012
- Revenue of Shenzhen Riland Industry by Region, 2007-2012
- Revenue (by Region) of Shenzhen Riland Industry from Domestic Market, H1 2012
- Consolidated Gross Margin of Shenzhen Riland Industry, 2007-2012
- Gross Margins of Shenzhen Riland Industry by Products, 2010-2012
- Customer Concentration of Shenzhen Riland Industry, 2007-2011
- Top Five Suppliers of Raw Materials for Shenzhen Riland Industry, 2010-2011
- Fund-Raising Projects List of Shenzhen Riland Industry

- Revenue Prediction of Shenzhen Riland Industry, 2012-2014E
- Revenue of Shenzhen Jasic Technology by Product, 2010-2012
- Revenue of Shenzhen Jasic Technology by Region, 2008-2012
- Consolidated Gross Margin of Shenzhen Jasic Technology, 2008-2012
- Gross Margins of Shenzhen Jasic Technology by Products, 2010-2012
- Customer Concentration of Shenzhen Jasic Technology, 2008-2012
- Supplier Concentration of Shenzhen Jasic Technology, 2008-2012
- Product Development Roadmap of Shenzhen Jasic Technology
- Construction Projects of Shenzhen Jasic Technology
- Revenue and Gross Margin of Shenzhen Jasic Technology, 2012-2014E
- Total Assets of Beijing Time Technologies, 2008-2012
- Workforce Structure of Beijing Time Technologies, 2011-2012
- Revenue and Net Income of Beijing Time Technologies, 2008-2012
- Gross Margin of Beijing Time Technologies, 2008-2012
- Beijing Time Technologies' Revenue from Welders and Cutters, 2008-2012
- Beijing Time Technologies' Gross Margin of Welders and Cutters, 2008-2012
- Net Sales and Net Income of Lincoln Electric, 2007-2011
- Total Assets of Lincoln Electric, 2007-2011
- Sales of Lincoln Electric by Segment, 2012Q3
- Location map of ESAB
- ESAB's business model
- Revenue by destination of ESAB
- Subsidiary undertakings in China of ESAB
- Main Products of Panasonic Welding Systems (Tangshan) Co., Ltd.

- Operation Data of Panasonic Welding Systems (Tangshan), 2007-2009
- Main Products of Shanghai WTL Welding Equipment Manufacture Co., Ltd.
- Operation Data of Shanghai WTL 2007-2009
- Operation Data of Hangzhou Kaierda, 2007-2008
- Operation Data of Zhejiang Kaierda, 2007-2009
- Operation Data of Shanghai Hugong Electric, 2007-2009
- Operation Data of Shandong Aotai Electric, 2007-2009
- Domestic Market Map of Aotai Electric
- Operation Data of Shanghai Shiwei Welding, 2007-2009
- Main Products of Chengdu Hanyan Weida Technology Co., Ltd
- Marketing Network of Chengdu Hanyan Weida Technology Co., Ltd
- Operation Data of Chengdu Hanyan Weida, 2007-2009
- Operation Data of Xiongnu Electrical, 2007-2009

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license)2,000 USD
 Hard copy 2,100 USD
 PDF (Enterprisewide license)..... 3,100 USD

※ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.