



**China Inverter Welding and Cutting Equipment
Industry Report, 2013-2015**

Mar. 2014

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.

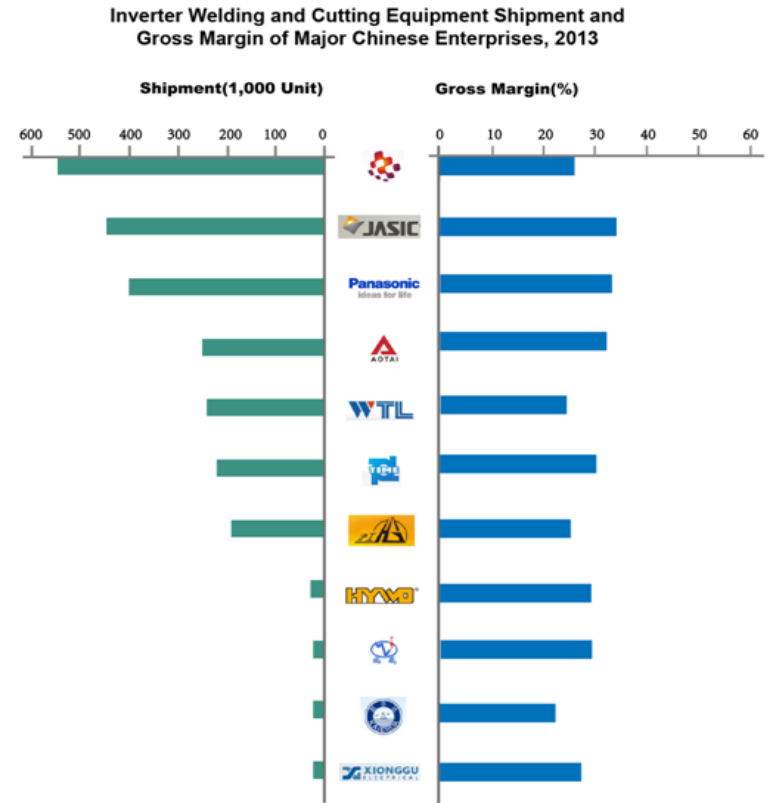
INFORMATION SOURCES

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

Abstract

Due to the slowdown in economic growth, China shipbuilding, construction machinery and steel structure industries have suffered depression. As a result, the demand for crude steel products is on a decline, leading to a falling demand for inverter welding and cutting equipments. In 2013, China inverter welding and cutting equipment industry achieved single-digit growth rate, with the overall market size reporting RMB10.4 billion, on a par with 2012 in the main.

2013 witnessed a rising proportion of inverter welding and cutting equipments to 35% of the total in China, reflecting a narrowing gap comparing to developed countries. As the inverter technology becomes popular, the advantage of the inverter welding and cutting equipment grows conspicuous, and the pace to replace traditional welding and cutting equipments is speeding up. It is expected that the proportion of inverter welding and cutting equipments in the overall welding and cutting equipment industry will jump to 50% by 2015.



Source: China Inverter Welding and Cutting Equipment Industry Report, 2013-2015, ResearchInChina

Shenzhen Riland Industry boasts China's largest inverter welding and cutting equipment manufacturer, with the capacity of inverter welder approaching 600,000 sets. In 2012, the company's output and sales volume claimed 588,045 sets and 598,713 sets respectively, of which, 90% were inverter welding equipments. In H1 2013, the revenue of the company from inverter welding equipments business decreased by 9.76% year-on-year, as a result of the weakened downstream demand. In recent two years, Shenzhen Riland Industry has got its laggard sales network improved. At the same time, the construction of its Kunshan-based project is expected to further improve its production capability. And the business performance of the company is expected to see a robust growth when the industry rebounds.

Shenzhen Jasic Technology, China's second largest inverter welding and cutting equipment manufacturer, has realized the capacity of inverter welding and cutting equipments approximating between 400,000 and 500,000 sets. In 2012, the output and sales volume of the company hit RMB425,424 sets and 425,953 sets, respectively, of which, inverter welding equipments took up 92% of the total. In H1 2013, under the backdrop of sluggish industrial status quo, the revenue from its inverter welding equipment business saw a slight increase by 2.7% year-on-year. In 2013, the company's Shenzhen-based inverter welding equipment project realized full capacity. With the growing demand in the future, the business performance of the company is expected to see rapid rise.

The report highlights:

- ✘ market size, shipment, gross margin, market structure and demand in downstream markets in China inverter welding and cutting equipment industry between 2013 and 2015;
- ✘ leading enterprises and their market occupancy in China inverter welding and cutting equipment market in 2013 and 2015;
- ✘ price fluctuation of inverter welding and cutting equipment in China, and supply of IGBT and MOS;
- ✘ development of main inverter welding and cutting equipment manufacturers in China, including their hit products, revenue, gross margin, shipment, development strategy, etc.

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