



Global and China 3D Printing Industry Report, 2015-2018

Aug.2015

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

3D printing (also called additive manufacturing) is a technology with which, based on digital model file, to fabricate objects by using binding materials like plastic or metal powder and through layer-by-layer printing. It is widely used in many fields such as manufacturing, medical treatment, education, archaeology, architecture, and military.

Since 2010, the global 3D printing market has been in a period of rapid development, with an AAGR of 30% or so. In 2014, the market size totaled USD4.1 billion. 3D printing mainly involves software, equipment, materials and service, of which 3D printing equipment accounted for about 46.5% in the industry in 2014.

3D printing equipment can be roughly divided into two categories, personal and industrial. The personal 3D printers, whose prices are relatively low, get chiefly used in personal DIY, education, among others. In 2014, the global sales volume amounted to approximately 100,000 units. By contrast, industrial 3D printers have wide applications and are principally marketed in the United States, Japan and Germany. Among them, the United States occupied a market share of around 40% in 2014.

Through acquisition, 3D Systems and Stratasys have become the world's two 3D printing giants, whose businesses cover the whole 3D printing industry chain. In terms of sales value, the two companies swept a 34% market share in 2014. In 2014, Stratasys acquired Solid Concept, Harvest Technologies, GrabCAD, and Interfacial Solutions, while 3D Systems purchased Cimatron, Simbionix, LayerWise, Laser Reproductions, Robtec, etc.

At present, China's 3D printing market is still at its initial stage, with the industry chain to be improved. For example, some core components and 3D printing materials for China-made 3D printing equipment have to be imported from overseas. But 3D printing technologies in national defense and aviation industries have taken the lead in the world. In 2014, China's 3D printing market size approximated 4.65 billion. It is projected that in the following years the market size will still grow at an average rate of around 40%, and that it will very likely exceed RMB20 billion by 2018.









In 2014, China's 3D printing market featured a rather low concentration degree, and the number of enterprises involved was close to 100, but mostly small-sized. The 3D printing equipment manufacturers consist mainly of Beijing Tiertime Technology Co., Ltd., Hunan Farsoon High-tech Co., Ltd., and Shining 3D.

In recent years, as the State introduced policies incentive to the development of 3D printing industry, more and more listed companies have entered the industry, a situation that helped integrate and develop China's 3D printing industry. In 2014, there were more than 10 enterprises operating 3D printing business in China, mainly including Golden Laser, Sunshine Laser & Electronics, Guangdong Silver Age Sci & Tech, Yinbang Clad Material, and Jiangsu Asia-Pacific Light Alloy Technology, etc.

Global and China 3D Printing Industry Report, 2015-2018 compiled by ResearchInChina is primarily concerned with the following:

- Market size, competitive landscape and development prediction of global 3D printing industry;
- Market size, competitive landscape and development prediction of China's 3D printing industry;
- Operation and 3D printing business of 26 global and Chinese 3D Printer manufacturers.

Revenue and Developments of 3D Printing Business of Major Listed Companies in China, 2014

Listed Company	3D Printing Revenue (RMB mln)	3D Printing Business
 金运激光 GOLDEN LASER	10.3	"Laser, 3D digital technology innovation platform"+ "laser 3D printing cloud factory"
 光韵达 Sunshine-laser	7.3	The subsidiary Shanghai Sunshine 3D Printing Company is committed to 3D printing application in automotive, medical, cultural creativity, etc.
 Silver 银禧科技	-	R&D and production of 3D printing materials, of which, ABS and PLA wire have reached small batch sales; PVA wire and PA powder are in the pilot stage.
 YINBANG 银邦	5.7	The subsidiary FalconTech produces 3D printing materials (titanium-alloy powder) and Wuxi Yinbang engages in 3D printing technology application in civilian areas.
 SJEC 江苏捷	0.6	SLS 3D printer prototype trial-production has been completed, with SLA 3D printers exported; polymer composite powder materials and liquid light-cured resin 3D printing material samples have been developed.
 HYM 海源机械	5.9	The joint-stock company Fujian HaiYuan Three Dimensional FDM rapid prototyping equipment has been on sale, photocurable laser 3D printer coming soon.
 南风股份 NanFeng Corporation	1.2	With heavy metal 3D printing equipment, the subsidiary Nanfang Zengcai can produce heavy metal components with maximum diameter of 6 meters and weight of 300 tons, a technical leader in the world.
 YASHA 亚厦股份	30.8	Participation in the world's first building 3D printing enterprise – Winsun Architectural Technology Co., Ltd.

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