Global and China Industrial Laser Industry Report, 2016-2020

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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

An industrial laser consists of gain media, pumping source and optical resonator. As the core part of laser processing equipment, industrial lasers are widely used in laser welding, laser cutting, laser micromachining, marking and other fields.

In recent years, the global industrial laser market has been developing steadily. The revenue herein jumped by 4.9% year on year to USD2.76 billion in 2015. Under the impetus of cars, 3D printing and other markets, the global industrial laser revenue is expected to grow at a CAGR of about 7.7% in 2016-2020.

Chinese industrial laser market started late, showing a small size. In 2015, the revenue herein fetched about USD530 million (USD1=RMB6.2284), accounting for 19.2% of the global; however, the market grew radically with the year-on-year growth rate of 18.9% in 2015, faster than the global market because: First, China introduced a number of policies to encourage the development of the laser industry and its downstream emerging fields (such as material increase manufacturing) after 2010; second, Chinese enterprises gradually realized technological breakthroughs to break the monopoly of foreign enterprises and intensify the market competitiveness.

Industrial lasers primarily embrace CO2 lasers, solid lasers and fiber lasers, in which fiber lasers featured with excellent performance have replaced CO2 lasers and ordinary solid-state lasers in the fields of marking, metal cutting and so forth gradually, as well as represent the future development trend of the industry. The market share of fiber lasers is expected to escalate from 34.5% in 2015 to 44.3% in 2020 in China.

Compared with developed countries, China is weak at R & D of industrial lasers, and heavily dependent on imported high-power industrial lasers. China’s laser trade deficit amounted to USD610 million in 2015, an increase of 10.0% over last year. In the next 3-5 years, this situation is difficult to reverse, but the deficit is expected to narrow.

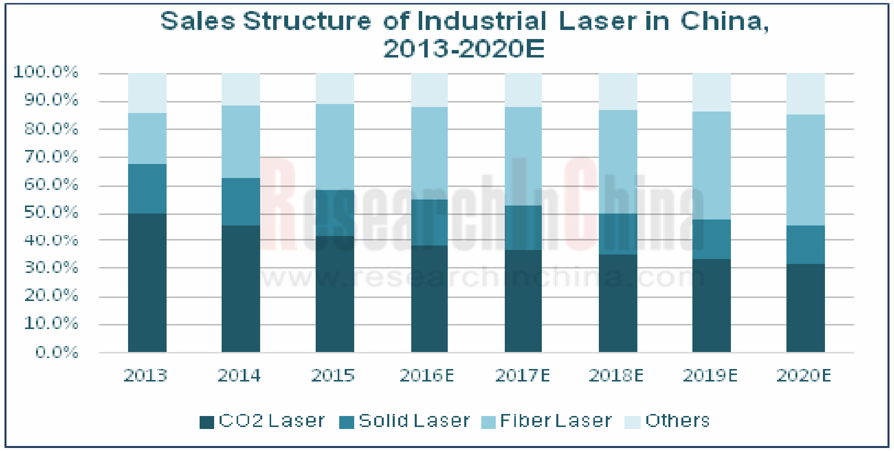
Globally, major industrial laser manufacturers include the US-based Coherent, IPG, Rofine and Nufern, Germany-based Trumpf, Italy-based Prima, China-based Han's Laser, Huagong Tech, Wuhan Raycus and the like. Wherein, Trumpf ranks first with a 15% market share, followed by Han's Laser with 8%. In the wake of mergers and acquisitions between companies, the Matthew effect of the industrial laser industry will not fade out in the short term.

Trumpf, the world's largest industrial laser manufacturer, has been actively promoting R & D of new products. In July 2015, it launched TruDisk 421 pulse suitable for efficient welding of copper as a pulse green laser. In October 2015, it invested EUR70 million in constructing a new building to develop high-power lasers used in the new generation of EUV lithographic equipment.

Han's Laser, China's largest industrial laser manufacturer, holds a vertical industrial chain covering optical devices, lasers and automatic control systems. In 2016, it starts the construction of "High-power Semiconductor Devices, Specialty Optical Fiber and Fiber Laser Industrialization Project" to further improve the fiber laser industrial chain. The project is expected to be fulfilled in 2018.

Huagong Tech masters core laser technologies concerning fiber lasers, all-solid-state lasers and high-power CO2 cross-flow lasers. In 2015, the subsidiary Huaray Precision Laser successfully acquired Attodyne Laser Inc. – a Canadian industrial ultrafast laser manufacturer, which was conducive to further raising the market share in Europe and America.

Wuhan Raycus is one of the few Chinese manufacturers that are capable of producing kilowatt fiber lasers. At present, it focuses on enhancing quality and reliability of 2000W and 4000W products, and R & D of core devices and materials of fiber lasers.



Global and China Industrial Laser Industry Report, 2016-2020 by ResearchInChina covers the followings:

- Global industrial laser market size, market structure, applications, competitive pattern, etc.;
- Chinese industrial laser policies, market size, market structure, import & export, competitive pattern, etc.;
- Overview, market size, market structure, competitive pattern, etc. of main industrial laser market segments;
- Industrial laser upstream industry status, downstream market size, market pattern, etc.;
- Operation, revenue structure, industrial laser business, etc. of 12 foreign and 13 Chinese industrial laser manufacturers.

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