

Global and China Industrial Laser Industry Report, 2017-2021

Mar.2017

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

Industrial laser as the laser light generation and output device is the foundation of laser and its application technology. In 2016, global industrial laser market was worth USD3.16 billion, up 10.2% year on year, of which, the Chinese market reported RMB3.68 billion (approximately USD560 million), increasing by 11.7% year on year and accounting for roughly 17.7% globally. With the continuous development of industrial laser technology, China will see a steadily rising proportion of the global market, expected to exceed 20% in 2021.

The highlights in the industrial laser market in 2016 are listed as follows:

First, the continuation of M&A and reorganization boom in 2015. As the industrial laser market competition becomes fiercer, domestic and foreign companies have improved market competitiveness through the means such as M&A and reorganization. In the Chinese market, Chutian Laser was incorporated with Unity Laser in March 2016 for further increasing market share; Han's Laser bought a Canadian special optical fiber company named CorActive High-Tech Inc. in November 2016 to expand upstream raw material industries of fiber laser. In the international market, Coherent reported a further rise in high-end product market share through the acquisition of Rofin in October 2016. Second, the rapid development of laser display market. In 2016, global micro-processing market grew at a pace of more than 50% and the proportion of demand grew to 35% or so, mainly owing to the further increased proportion of demand for excimer laser in laser micro-processing market with the rising of laser TV and mini laser projector.

Third, China's continuous breakthroughs in fiber laser technology barriers. The successful development of 10000W laser fiber in 2013 reduced imported products' price from RMB5 million per unit to RMB3 million or more per unit. In 2016, 12000W fiber laser and 20000W fiber laser came out in succession, which brought another slump in the import price of related products.

Fourth, extreme ultraviolet laser development boosted by EUV. Currently, EUV technology is advancing towards mass production and application, resulting in constant improvement in the productivity and availability of extreme ultraviolet laser equipment. Therefore, more semiconductor companies have begun to order EUV extreme ultraviolet lasers.

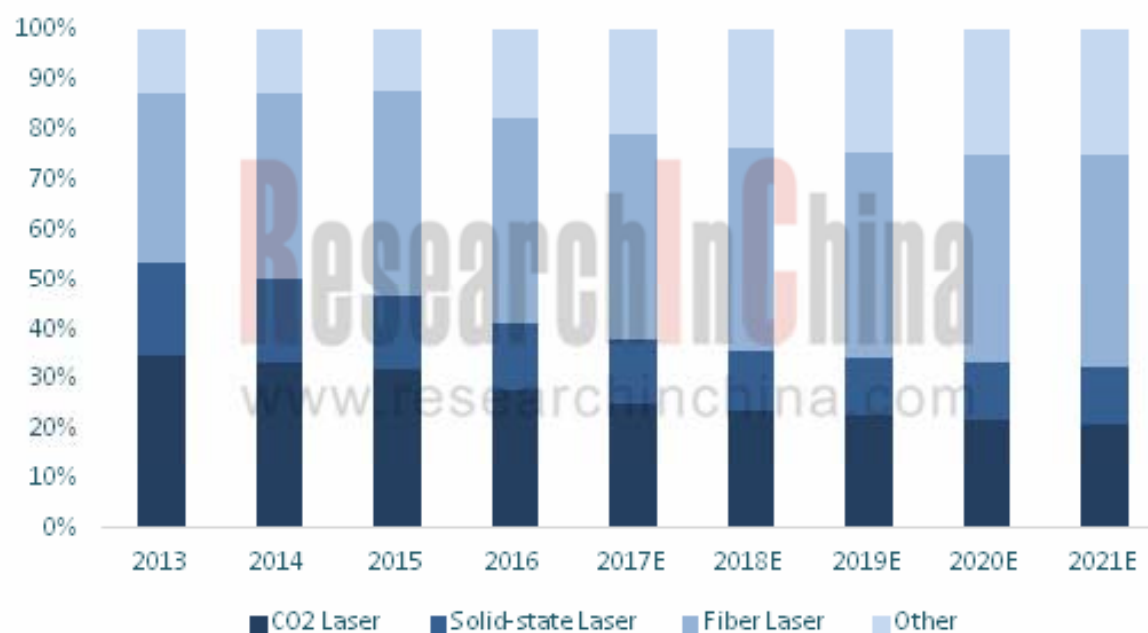
As concerns market structure, global industrial laser market is currently dominated by TRUMPF and IPG, which claimed a combined market share of more than 50% in 2016; Coherent saw market share grow to about 10% upon the acquisition of Rofin. In China, Han's Laser leads the industrial laser market, gaining over 45% market share in China but less than 5% globally in 2016.

By segment, the development of laser is mainly focused on semiconductor laser, fiber laser and disc laser. In the future, ultrafast laser will also be a rapidly growing segment of the market, with global market size expected to soar from USD450 million in 2015 to around USD1.5 billion in 2021 at a CAGR of 22.2% - higher than the average growth rate of industrial laser industry.

The report mainly covers the following:

- ◆ Definition, classification, technical status and industrial chain of industrial laser;
- ◆ Market size, market structure, application status and competitive landscape of global industrial laser industry;
- ◆ Development environment, development status, market size, market structure, competitive landscape, import & export, market price and trends of China industrial laser industry;
- ◆ Overview, market size, application status and competitive landscape of industrial laser market segments e.g. CO2 laser, solid-state laser, fiber laser;
- ◆ Laser processing equipment market size, corporate pattern, segments, etc.
- ◆ Operation, industrial laser business, etc. of 10 foreign and 13 Chinese industrial laser manufacturers.

Global Industrial Laser Market Structure, 2013-2021E



Source: Global and China Industrial Laser Industry Report, 2017-2021 by ResearchInChina

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