Global and China Laser Processing Equipment Industry Report, 2017-2021

Apr. 2018

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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

With the fast evolution and wide application of laser technology, the global laser processing industry has grown by leaps and bounds. In 2017, the global laser processing market size exceeded USD10 billion, of which the global industrial laser market was worth USD3 billion. Industrial lasers are primarily used in laser material processing, laser micromachining and marking. Laser welding, laser cutting and marking account for over 60% of global laser material processing.

China, the world leader in laser applications, has seen a surge in laser processing demand under the impetus of manufacturing upgrading and the burgeoning emerging industries. In 2017, the scale of laser processing equipment in China surpassed RMB26 billion, a year-on-year increase of 10.2%. Wherein, laser cutting equipment and laser welding equipment grew dramatically. The growth of laser cutting equipment was mainly prompted by OLED panel cutting, 3D glass cutting, sapphire cutting, and mobile phone abnormality cutting; the growth of laser welding equipment was boosted by metal middle frame welding, power battery welding, automotive lightweight and other fields. Relatively speaking, the slowdown in the growth rate of laser marking equipment was largely due to low technical threshold and relatively mature market.

As concerns laser applications, fiber lasers have become the first choice for the laser processing industry. Over the past two years, the applications of fiber lasers in laser cutting systems have registered leapfrog growth globally, particularly in medium-power cutting systems. In welding systems, 60% of laser welding equipment has rendered fiber lasers.

The Chinese fiber laser cutting equipment market in 2017 was primarily characterized by 10KW and even 12KW products launched by manufacturers represented by Han's Laser Technology, HGLASER, Penta Laser and Lead Laser. And 15KW and above products will come into being in 2018. With emergence of ultra-high-power laser cutting equipment, the thickness limit of material cutting will be broke constantly and the price for plate processing will be further lowered, thus attracting more enterprises into the field.

Global laser processing market has become further concentrated after Coherent’s acquisition of Rofin in 2016. There are only four companies with revenue of more than USD1 billion, specifically, TRUMPF (Germany), Coherent (United States, after acquisition of Rofin), IPG (fiber laser leader), and Han's Laser Technology.
Han's Laser Technology achieved revenue of RMB11.56 billion (over RMB10 billion for the first time) and net income of RMB1.68 billion in 2017, soaring 66.1% and 122.1% over the previous year, respectively, largely thanks to strong demand for consumer electronics, new energy, high-power and PCB equipment. The company is building global laser smart manufacturing base in Bao'an District, Shenzhen, which will be the world’s largest laser production base upon completion.

Global and China Laser Processing Equipment Industry Report, 2017-2021 highlights the followings:

◆ Global laser industry, laser and laser equipment market size, major companies;

◆ Chinese laser processing equipment market (size, structure, regional structure, major companies, import & export, price trend, etc.);

◆ Chinese laser processing equipment market segments (laser cutting, welding, marking, and engraving) (size, major companies, etc.);

◆ Downstream markets for traditional (semiconductor, PCB, automobile, etc.) and emerging industries (smartphone, OLED, power battery, 3D printing, etc.) in China (market size, major enterprises, demand for laser processing equipment);

◆ Six global and 25 Chinese laser processing equipment manufacturers (operation, laser processing equipment business, key projects, forecast, etc.)

◆ Chinese laser processing equipment market and enterprise (summary & forecast, development trends, etc.).
<table>
<thead>
<tr>
<th>1 Overview of Laser Processing Equipment Industry</th>
<th>3.6 Import and Export</th>
<th>5.2.4 3D Printing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Industry Chain</td>
<td>3.7 Price Trend</td>
<td></td>
</tr>
<tr>
<td>1.2 Laser</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.3 Laser Equipment</td>
<td>4 Market Segments</td>
<td></td>
</tr>
<tr>
<td>1.4 Laser Processing</td>
<td>4.1 Laser Cutting Equipment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.1.1 Market Size</td>
<td></td>
</tr>
<tr>
<td>2 Global Laser Equipment Market</td>
<td>4.1.2 Fiber Optic Laser Cutting Machine</td>
<td></td>
</tr>
<tr>
<td>2.1 Laser Equipment</td>
<td>4.1.3 Leading Manufacturers</td>
<td></td>
</tr>
<tr>
<td>2.1.1 Market Size</td>
<td>4.2 Laser Welding Equipment</td>
<td></td>
</tr>
<tr>
<td>2.1.2 Applied Structure</td>
<td>4.2.1 Market Size</td>
<td></td>
</tr>
<tr>
<td>2.2 Industrial Laser</td>
<td>4.2.2 Application of Laser Welding in Automobile</td>
<td></td>
</tr>
<tr>
<td>2.2.1 Market Size</td>
<td>4.2.3 Leading Manufacturers</td>
<td></td>
</tr>
<tr>
<td>2.2.2 By Power</td>
<td>4.3 Laser Marking Equipment</td>
<td></td>
</tr>
<tr>
<td>2.3 Applications</td>
<td>4.3.1 Market Size</td>
<td></td>
</tr>
<tr>
<td>2.3.1 Micro Processing</td>
<td>4.3.2 Fiber Optic Laser Marking Machine</td>
<td></td>
</tr>
<tr>
<td>2.3.2 Marking</td>
<td>4.3.3 Leading Manufacturers</td>
<td></td>
</tr>
<tr>
<td>2.3.3 Material Processing</td>
<td>4.4 Laser Engraving Equipment</td>
<td></td>
</tr>
<tr>
<td>2.4 Major Enterprises</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.4.1 Competitive Landscape</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.4.2 M&amp;As</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Chinese Laser Equipment Market</td>
<td>5 Downstream Market</td>
<td></td>
</tr>
<tr>
<td>3.1 Industrial Policy</td>
<td>5.1 Traditional Sectors</td>
<td></td>
</tr>
<tr>
<td>3.2 Business Model</td>
<td>5.1.1 Semiconductor</td>
<td></td>
</tr>
<tr>
<td>3.3 Market Size</td>
<td>5.1.2 PCB</td>
<td></td>
</tr>
<tr>
<td>3.4 Major Enterprises</td>
<td>5.1.3 Automobile</td>
<td></td>
</tr>
<tr>
<td>3.5 Regional Distribution</td>
<td>5.2 Emerging Industries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.1 Smart Phone</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.2 OLED</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.2.3 Power Battery</td>
<td></td>
</tr>
</tbody>
</table>

5.2.3 M&A
5.2.4 Laser Business
5.2.5 Development in China
6.1 TRUMPF
6.1.1 Profile
6.1.2 Operation
6.1.3 Laser Business
6.1.4 Development in China
6.2 Coherent
6.2.1 Profile
6.2.2 Operation
6.2.3 M&A
6.2.4 Laser Business
6.2.5 Development in China
6.3 IPG
6.3.1 Profile
6.3.2 Operation
6.3.3 Main Products
6.3.4 Major Customers
6.3.5 M&A
6.3.6 Development in China
6.4 Prima Industrie
6.4.1 Profile
6.4.2 Operation
6.4.3 Laser Business
6.4.4 Development in China
6.5 Novanta (GSI Group)
<table>
<thead>
<tr>
<th>Chinese Companies</th>
<th>7.3 Huagong Tech Company Limited</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1 Han's Laser Technology Co., Ltd.</td>
<td>7.3.1 Profile</td>
</tr>
<tr>
<td>7.1.1 Profile</td>
<td>7.3.2 Operation</td>
</tr>
<tr>
<td>7.1.2 Operation</td>
<td>7.3.3 Laser Business</td>
</tr>
<tr>
<td>7.1.3 Revenue Structure</td>
<td>7.3.4 Subsidiaries</td>
</tr>
<tr>
<td>7.1.4 Laser Business</td>
<td>7.3.5 Performance Forecast</td>
</tr>
<tr>
<td>7.1.5 Subsidiaries</td>
<td>7.4 Siasun Robot and Automation Co., Ltd.</td>
</tr>
<tr>
<td>7.1.6 Key Projects</td>
<td>7.4.1 Profile</td>
</tr>
<tr>
<td>7.1.7 Performance Forecast</td>
<td>7.4.2 Operation</td>
</tr>
<tr>
<td>7.2 Wuhan Golden Laser Co., Ltd.</td>
<td>7.4.3 Laser Business</td>
</tr>
<tr>
<td>7.2.1 Profile</td>
<td>7.4.4 Subsidiaries</td>
</tr>
<tr>
<td>7.2.2 Operation</td>
<td>7.5 Jiangsu Yawei Machine Tool Co., Ltd.</td>
</tr>
<tr>
<td>7.2.3 Laser Business</td>
<td>7.5.1 Profile</td>
</tr>
<tr>
<td>7.2.4 Subsidiaries</td>
<td>7.5.2 Operation</td>
</tr>
<tr>
<td>7.2.5 Key Projects</td>
<td>7.5.3 Laser Business</td>
</tr>
<tr>
<td>7.2.6 Performance Forecast</td>
<td>7.6 Suzhou Tianhong Laser Co., Ltd.</td>
</tr>
<tr>
<td>7.3 Huagong Tech Company Limited</td>
<td>7.6.1 Profile</td>
</tr>
<tr>
<td>7.3.1 Profile</td>
<td>7.6.2 Operation</td>
</tr>
<tr>
<td>7.3.2 Operation</td>
<td>7.6.3 Laser Business</td>
</tr>
<tr>
<td>7.3.3 Laser Business</td>
<td>7.6.4 Customers and Suppliers</td>
</tr>
<tr>
<td>7.3.4 Subsidiaries</td>
<td>7.7 Shenzhen Sunshine Laser &amp; Electronics Technology Co., Ltd.</td>
</tr>
<tr>
<td>7.3.5 Performance Forecast</td>
<td>7.7.1 Profile</td>
</tr>
<tr>
<td>7.4 Siasun Robot and Automation Co., Ltd.</td>
<td>7.7.2 Operation</td>
</tr>
<tr>
<td>7.4.1 Profile</td>
<td>7.7.3 Laser Processing Business</td>
</tr>
<tr>
<td>7.4.2 Operation</td>
<td>7.7.4 Subsidiaries</td>
</tr>
<tr>
<td>7.4.3 Laser Business</td>
<td>7.7.5 Performance Forecast</td>
</tr>
<tr>
<td>7.4.4 Subsidiaries</td>
<td>7.8 United Winners Laser Co., Ltd.</td>
</tr>
<tr>
<td>7.4.5 Laser Business</td>
<td>7.8.1 Profile</td>
</tr>
<tr>
<td>7.5 Jiangsu Yawei Machine Tool Co., Ltd.</td>
<td>7.9 Jiatai Laser Technology Co., Ltd.</td>
</tr>
<tr>
<td>7.5.1 Profile</td>
<td>7.9.1 Profile</td>
</tr>
<tr>
<td>7.5.2 Operation</td>
<td>7.9.2 Operation</td>
</tr>
<tr>
<td>7.5.3 Laser Business</td>
<td>7.9.3 Laser Business</td>
</tr>
<tr>
<td>7.6 Suzhou Tianhong Laser Co., Ltd.</td>
<td>7.9.4 Major Customers and Suppliers</td>
</tr>
<tr>
<td>7.6.1 Profile</td>
<td>7.10 Chutian Laser Group</td>
</tr>
<tr>
<td>7.6.2 Operation</td>
<td>7.11 Wuhan Unity Laser Co., Ltd.</td>
</tr>
<tr>
<td>7.6.3 Laser Business</td>
<td>7.12 Wuhan Tianqi Laser Equipment Manufacturing Co., Ltd.</td>
</tr>
<tr>
<td>7.6.4 Customers and Suppliers</td>
<td>7.13 Suzhou Delphi Laser Co., Ltd.</td>
</tr>
<tr>
<td>7.7 Shenzhen Sunshine Laser &amp; Electronics Technology Co., Ltd.</td>
<td>7.14 Beijing Daheng Laser Equipment Co., Ltd.</td>
</tr>
<tr>
<td>7.7.1 Profile</td>
<td>7.15 Wuhan Dahua Laser Technology Co., Ltd.</td>
</tr>
<tr>
<td>7.7.2 Operation</td>
<td>7.16 Jiangsu Shuguang Photoelectricity Co., Ltd.</td>
</tr>
<tr>
<td>7.7.3 Laser Processing Business</td>
<td>7.17 BOYE Laser Co., Ltd.</td>
</tr>
<tr>
<td>7.7.4 Subsidiaries</td>
<td>7.18 Beijing Kaitian Tech. Co., Ltd.</td>
</tr>
<tr>
<td>7.7.5 Performance Forecast</td>
<td>7.19 Wuhan HE Laser Engineering Co., Ltd.</td>
</tr>
<tr>
<td>7.8 United Winners Laser Co., Ltd.</td>
<td>7.20 Suzhou Lead Laser Technology Co., Ltd.</td>
</tr>
<tr>
<td>7.8.1 Profile</td>
<td>7.21 Shenzhen GDIlaser Technology Co., Ltd.</td>
</tr>
<tr>
<td>7.9 Jiatai Laser Technology Co., Ltd.</td>
<td>7.22 Shenzhen DNE Laser Technology Co., Ltd. (Bystronic DNE)</td>
</tr>
<tr>
<td>7.9.1 Profile</td>
<td>7.23 Foshan Beyond Laser Co., Ltd. (HSG Laser)</td>
</tr>
<tr>
<td>7.9.2 Operation</td>
<td>7.24 Dongguan Strong Laser Equipment Co., Ltd. (Strong Laser)</td>
</tr>
<tr>
<td>7.9.3 Laser Business</td>
<td>7.25 Suzhou Quick Laser Technology Co., Ltd.</td>
</tr>
<tr>
<td>7.9.4 Major Customers and Suppliers</td>
<td>8. Summary and Forecast</td>
</tr>
<tr>
<td>7.10 Chutian Laser Group</td>
<td>8.1 Industry</td>
</tr>
<tr>
<td>7.11 Wuhan Unity Laser Co., Ltd.</td>
<td>8.2 Enterprise</td>
</tr>
<tr>
<td>7.12 Wuhan Tianqi Laser Equipment Manufacturing Co., Ltd.</td>
<td>8.3 Development Tendencies</td>
</tr>
<tr>
<td>7.13 Suzhou Delphi Laser Co., Ltd.</td>
<td>8 Summary and Forecast</td>
</tr>
</tbody>
</table>
• Laser Processing Equipment Industry Chain
• Laser Types and Applicable Areas
• Correlation between Laser and Laser Equipment
• Global Sales of Laser Processing Systems, 2012-2021E
• Application Structure of Global Laser Processing Systems, 2016
• Global Sales of Laser Systems for Materials Processing and Photo Etching, 2013-2017
• Global Sales of Laser Systems for Communications and Optical Storage, 2013-2017
• Global Sales of Laser Systems for Scientific Research and Military Purpose, 2013-2017
• Global Sales of Laser Systems for Medical Care and Beauty, 2013-2017
• Global Sales of Laser Systems for Entertainment, Display and Printing, 2013-2017
• Global Industrial Laser Sales and YoY Growth, 2013-2021E
• Global Industrial Laser Sales by Product, 2013-2017
• Global Industrial Laser Sales Structure by Power, 2016
• Global High-power Industrial Laser Sales by Product, 2015-2017
• Global High-power Industrial Laser Sales by Application, 2015-2017
• Global Industrial Laser Sales by Application, 2013-2017
• Global Sales of Lasers for Micromachining, 2015-2017
• Global Sales of Lasers for Marking, 2015-2017
• Global Sales Structure of Lasers for Materials Processing by Application, 2016
• Global Major Manufacturers of Laser and Laser Processing Equipment
• Revenue Comparison between Global Major Laser Companies, 2015-2016
• Global Laser Processing System Market Pattern, 2015
• Global Laser Processing System Market Pattern, 2016
• M&A Cases of Laser Companies Worldwide, 2015-2018
• China’s Laser Industry Policies, 2006-2018
Selected Charts

- Business Models of Laser Equipment Industry in China
- Laser Equipment Sales in China, 2014-2021E
- Laser Equipment Sales in China by Application, 2014-2018
- Major Laser Processing Equipment Manufacturers in China, 2017
- Competition Pattern of Small-power Laser Equipment Market in China, 2016
- Competition Pattern of High-power Laser Equipment Market in China, 2016
- High-power Laser Equipment Sales in China, 2014-2017
- Regional Characteristics and Representative Companies of Laser Industry in China
- Regional Distribution of Laser Industry in China, 2017
- China’s Laser Exports, 2010-2016
- China’s Exported Laser Products, 2015-2017
- China’s Laser Imports, 2010-2016
- China’s Imported Laser Products, 2015-2017
- Price Trend of Optical Fiber Lasers in China, 2015-2020E
- Application of Laser Cutting Machines to Sheet Metals
- Comparison of Cutting Speed between Optical Fiber Laser and CO2 Laser
- Comparison of Cutting Energy Consumption between Optical Fiber Laser and CO2 Laser
- Efficiency Comparison between Lasers
- Operating Expense Comparison between Lasers
- Large-power Cutting Equipment Sales in China, 2013-2016
- Ultrahigh Power (≥10KW) Laser Cutting Machine Manufacturers in China, 2017
- Major Laser Cutting Equipment Manufacturers in China
• Application of Laser Welding to Automotive
• Comparison between Tailored Blank Laser Welding Technology and Conventional Technologies
• Milestones of Localization of Automotive Sheet Laser Welding Machines in China, 2013-2018
• Welding Robot Market Size in China, 2016-2020E
• Application of Laser Welding to Automotive Lithium Battery Industry
• Major Laser Welding Machine Manufactures in China
• Laser Marking Equipment Market Size in China, 2014-2021E
• Global Laser Marking Machine Sales by Product, 2014-2024E
• Laser Engraving Equipment Market Size in China, 2014-2021E
• Global and Chinese Semiconductor Equipment Sales, 2009-2021E
• Market Size of Equipment in Each Link of Integrated Circuit in China, 2018
• Laser Applied in Semiconductor Fabrication
• Leading Suppliers of Semiconductor-used Laser Equipment in the World
• PCB Output Value in China and the World, 2011-2021E
• Comparison of CO2 Laser and UV Laser in PCB Cutting
• China Automobile Manufacturing Equipment Industry Scale, 2014-2021E
• China Automobile Manufacturing Equipment Market Size Structure by Process
• Laser Applied in Automobile Manufacturing
• Smart Phone Shipments in China and the World, 2010-2021E
• Laser Technologies Applied in Mobile Phone
• Han’s Laser Technology’s Revenue of Orders from Smart Phone Customers, 2016-2017
• Example of Full Screen Mobile Phones (Samsung Galaxy S8)
• Global Smartphone Dual Camera Penetration, 2014-2020E
• Global Smartphone Double-sided Glass Penetration, 2014-2020E
• Mobile Phone Metal Frame Processing Technology
• Laser Equipment Used for AMOLED Fabrication
• Global Shipments of OLED Panel, 2016-2022E
• Global Shipments of OLED Panel for Smart Phone, 2016-2021E
• AMOLED Adopted by Three Major Cellphone Brands
• Layout of World’s Major OLED Panel Manufacturers
• Production and Sales of New Energy Vehicle in China, 2014-2021E
• Shares of Major Chinese Enterprises by Power Battery Shipment, 2016
• Output of Power Lithium Battery in China, 2014-2021E
• Lithium Battery Manufacturing Process and Laser Equipment Utilized
• Comparison between 3D Printing Technology and Traditional Manufacturing Technology
• 3D Printing Industry Chain
• Revenue of Global 3D Printing Industry, 2009-2021E
• Global Sales of Metal 3D Printers, 2000-2017
• Policies on 3D Printing in China, 2015-2017
• 3D Printing Market Size in China, 2012-2021E
• Presence of TRUMPF’s Subsidiaries Worldwide
• TRUMPF’s Revenue, FY2013-FY2017
• TRUMPF’s Revenue by Division, FY2016
• TRUMPF’s Revenue from Laser Business, FY2010-FY2017
• TRUMPF’s Companies and Business in China
• Coherent’s Revenue, FY2015-FY2017
• Coherent’s EBITDA, FY2015-FY2017
• Coherent’s Operating Indicators, FY2014-FY2017
• Coherent’s Revenue by Division, FY2015-FY2017
• Application Structure of Coherent’s Products, FY2015-FY2017
• Rofin’s Revenue, Net Income, Headcount and Order Amount, FY2015
• Rofin’s Manufacturing Bases Worldwide, 2015
• Coherent’s Main Products and Laser Technologies
• Presence of Coherent’s Key Manufacturing Bases, FY2017
• IPG’s Operational Indicators, 2015-2017
• IPG Revenue Structure by Region, 2015-2017
• IPG’s Product Portfolios
• IPG’s Revenue Structure by Application, 2015-2017
• IPG’s Major Customers
• IPG’s Revenue from Top 5 Clients and % of Total Revenue, 2012-2017
• IPG’s M&As as of 2017
• Business Segments of Prima Industrie
• Prima’s Revenue, 2014-2017
• Prima’s Revenue by Region, 2016-2017
• Prima’s Revenue and Gross Margin by Business, 2016-2017
• Major Customers of Prima Industrie
• Novanta’s Revenue and Gross Profit, 2010-2017
• Novanta’s Revenue by Business, 2015-2017
• Novanta’s Gross Profit by Business, 2015-2017
• Novanta’s Laser Product Line
• Novanta’s Sales in Major Countries/Regions, 2015-2017
• Bystronic’s Turnover and Staff Distribution by Region, 2017
• Bystronic’s Main Products
• Revenue and Net Income of Han’s Laser Technology, 2008-2017
• Output and Sales of Han’s Laser Technology, 2012-2016
• Revenue Structure (by Business) of Han’s Laser Technology, 2015-2017
• Revenue Structure (by Region) of Han’s Laser Technology, 2013-2017
• The Standing of Han’s Laser Technology’s Laser Equipment in Sapphire Processing
• Han’s Laser Technology’s Self-supply Capability of Key Components
• Operation of Subsidiaries Held by Han’s Laser Technology, H1 2017
• The Projects Invested with Raised Funds of Han’s Laser Technology, 2018
• Revenue and Gross Margin of Han’s Laser Technology, 2015-2019E
• Revenue and Gross Margin of Wuhan Golden Laser, 2008-2017
• Output and Sales of Wuhan Golden Laser, 2011-2016
• Main Products of Wuhan Golden Laser
• Revenue of Wuhan Golden Laser by Region, 2013-2016
• Main Laser Equipment of Wuhan Golden Laser
• Revenue and Gross Margin of Wuhan Golden Laser by Business, 2015-2016
• Revenue and Gross Margin of Wuhan Golden Laser by Business, H1 2017
• Operation of Main Subsidiaries under Wuhan Golden Laser, 2016
• Revenue and Gross Margin of Huagong Tech, 2007-2017
• Revenue Structure (by Product) of Huagong Tech, 2012-2017
• Overseas Revenue of Huagong Tech, 2007-2017
• Revenue and Gross Margin of Laser Processing and Complete Equipment Business of Huagong Tech, 2007-2017
• Operation of Main Subsidiaries under Huagong Tech, 2017H1
• Revenue and Gross Margin of Huagong Tech, 2015-2019E
• Revenue and Gross Margin of Siasun Robot and Automation, 2007-2017
• Revenue Structure of Siasun Robot and Automation by Business, 2012-2017
Selected Charts

- Operation of Main Subsidiaries under Siasun Robot and Automation, 2017
- Revenue and Gross Margin of Jiangsu Yawei Machine Tool, 2009-2017
- Laser Cutting Machines of Jiangsu Yawei Machine Tool
- Revenue of Suzhou Tianhong Laser by Product, 2015-2016
- Revenue and Gross Margin of Shenzhen Sunshine Laser & Electronics Technology, 2009-2017
- Revenue and Gross Margin of Shenzhen Sunshine Laser & Electronics Technology by Product, 2016-2017
- Operation of Main Subsidiaries under Shenzhen Sunshine Laser & Electronics Technology, 2017
- Revenue and Gross Margin of Shenzhen Sunshine Laser & Electronics Technology, 2015-2019E
- Revenue Structure of United Winners Laser by Business, 2016-2017
- Main Subsidiaries and Business of United Winners Laser at the End of 2017
- Revenue of Jiatai Laser Technology by Business, 2016-2017
- Top 5 Customers and Suppliers of Jiatai Laser Technology, 2017
- Subsidiaries of Chutian Laser Group
- Main Production Bases of Wuhan Tianqi Laser Equipment Manufacturing
- Operational Indicators of Beijing Daheng Laser Equipment, 2015-2017
- Worldwide Distribution of Customers of Beijing Kaitian Tech
- China Laser Processing Equipment Market Size and Growth Rate, 2014-2021E
- China Laser Processing Equipment Market Structure, 2017-2021E
- Market Shares of Major Chinese Laser Processing Equipment Enterprises, 2017
• Comparison between High-power Laser Cutting and Traditional Cutting Mode
• Alternative Space of High-power Laser Cutting Equipment in China in the Future
• Development Tendency of High-power Laser Welding Equipment
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<table>
<thead>
<tr>
<th>Title</th>
<th>Format</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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