



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

Apr. 2018

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

With the fast evolvement 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.

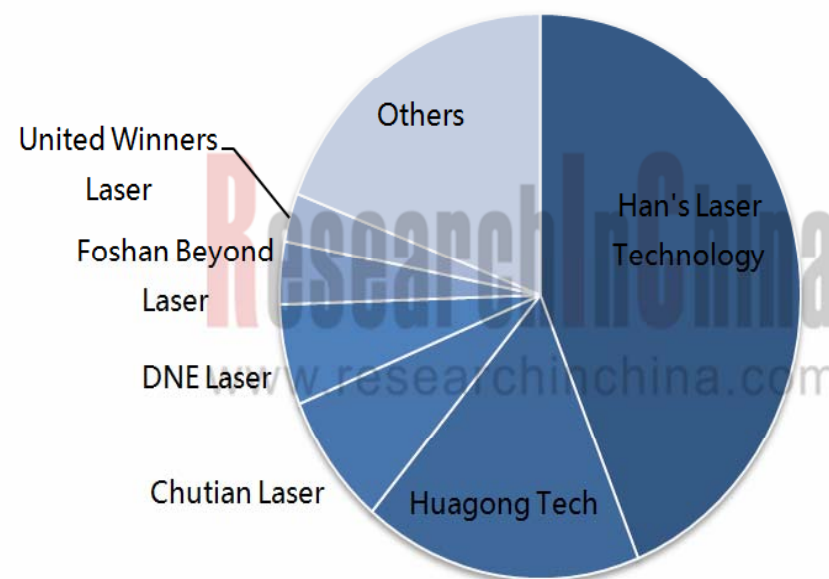
Global laser processing market has become further concentrated after Coherent's acquisition of Rofin in 2016. There are only four companies with revenue of more than USD1 billion, specifically, TRUMPF (Germany), Coherent (United States, after acquisition of Rofin), IPG (fiber laser leader), and Han's 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.).

Competitive Landscape of Laser Processing Equipment Industry in China, 2017



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

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