



**Global and China Industrial Laser Industry
Report, 2018-2022**

July 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

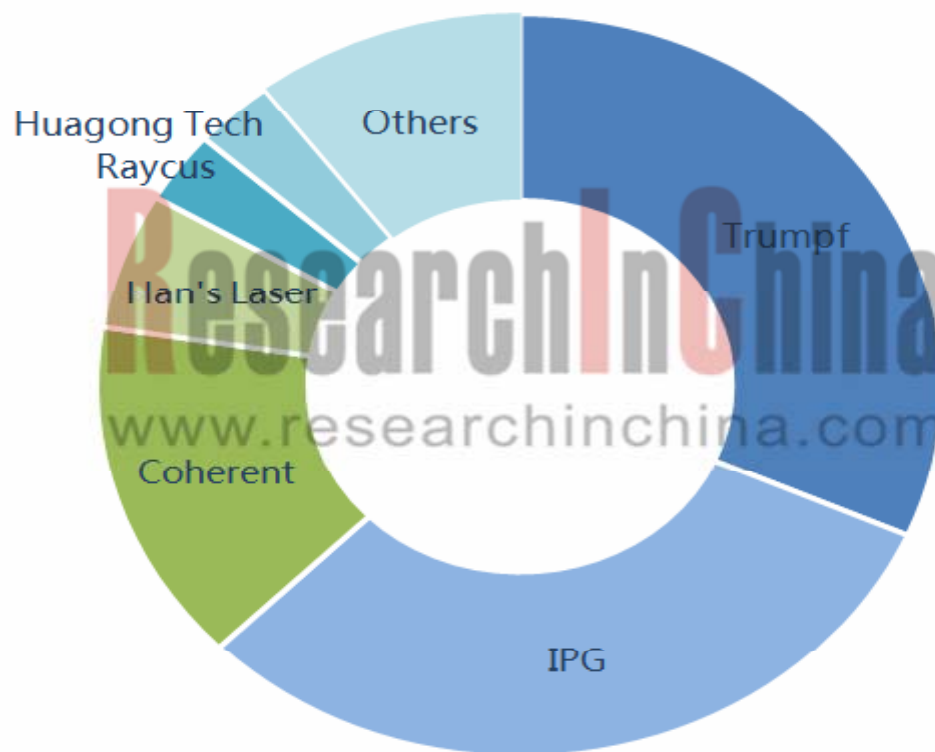
Industrial laser, playing a key role in the laser industry chain, makes up roughly 30% of laser equipment cost. The industrial laser market in 2017 is featured as follows:

1. Rapid market expansion: global industrial laser market was USD4.31 billion in 2017, a year-on-year surge of 26.1%, largely thanks to a boom in new industrial laser business, and is expected to maintain a CAGR of about 7.0% between 2018 and 2022. Specifically, the Chinese industrial laser market was RMB4.5 billion (USD670 million by an exchange rate of 1:6.75), up 11.0% from a year ago and accounting for 15.5% of the global market, and is predicted to sustain a growth rate of over 10.0% during 2018-2022, as the country has broken technical barriers of industrial laser in recent two years.
2. Higher market share of new industrial lasers: global fiber laser and diode/ excimer laser markets grew by over 30% in 2017. The diode/ excimer laser market expanded by up to 56%, being spurred by its use for phone display. The application of high-power fiber laser in metal cutting squeezed the market share of conventional CO2 laser whose market size contracted by 14% in 2017.
3. Enhanced production and R&D capabilities of Chinese industrial laser manufacturers: local Chinese producers have developed 10,000W fiber laser, 12,000W fiber laser and 20,000W fiber laser successively since 2013, realizing import substitution in a progressive way.

Competitive landscape: Global industrial laser market pattern has remained stable, occupied primarily by Trumpf, Coherent, IPG, Han's Laser, Huagong Tech and Wuhan Raycus Fiber Laser Technologies. Global top5 manufacturers held a combined market share of over 80.0% in 2017. To be specific, Trumpf and IPG each seized more than 30%, while Han's Laser, the largest one in China, shared only 6%. Companies continue to enhance market competitiveness through mergers and reorganization, finally leading to a pattern of the bigger ones getting stronger.

As for application, industrial laser is mostly used in material processing, micro-machining and marking, of which material processing is the largest applied field of industrial laser, with a 53.4% share in global market in 2017, a figure projected to climb to 57.0% in 2022 driven by sheet metal cutting market growth; industrial laser applied in marking has the lowest share and grows at the slowest rate, and it grew 7.3% worldwide in 2017, being primarily incentivized by new applied markets including unique identifier (UID), 2D data matrix code and ID card.

Competition Pattern of Global Industrial Laser Market, 2017



Source: ResearchInChina

Global and China Industrial Laser Industry Report, 2018-2022 highlights the following:

- ◆ Industrial laser (classification, technical status, industry chain, etc.);
- ◆ Global industrial laser industry (development environment, market size, market structure, application status, competitive landscape, development tendency, etc.);
- ◆ China industrial laser industry (development environment, status quo, market size, market structure, import and export, competitive pattern, market price, development trend, etc.)
- ◆ Industrial laser market segments, e.g., CO2 laser, solid-state laser, fiber laser, semiconductor laser, UV laser (market size, market structure, competitive pattern, etc.);
- ◆ Upstream markets (gain medium, pump source, etc.); downstream laser processing equipment market (market size, major companies, market segment, applications, etc.);
- ◆ 10 foreign and 13 Chinese industrial laser manufacturers (operation, industrial laser business, etc.).

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