



Global and China Laser Processing Equipment Industry Report, 2019-2025

May 2019

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

As new laser sources are used and laser technology gets popularized, China's laser processing industry has sustained steady growth. The industry took a spring in its step in 2017, booming by over 30% on the previous year, and continued the growth trend to the first half of 2018, but its growth took a dive in the second half, with a full-year rate of 16%.

Industrial laser, a key component for laser processing, developed by leaps and bounds in recent years. In particular, the fiber laser had a whopping 51.5% share in 2018 compared with 40.8% in 2015. Fiber laser has been increasingly localized in China. In 2018, more than 110,000 units of homemade fiber laser were sold, over 20 percent of which were medium and large power products. Large power fiber lasers, especially 12KW-above ones will be a tipping point of the market.

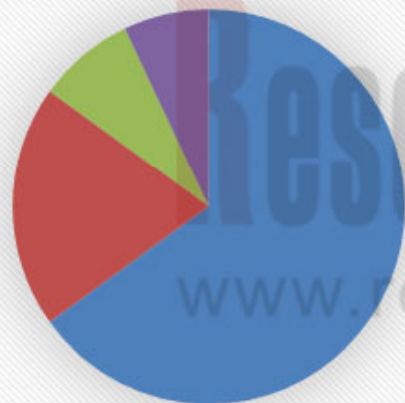
Ultrahigh power laser market has been on the rise as well. International players have quickened their pace of merger and acquisition, among which brands like Coherent, Trumpf, NKT and MKS have become global leaders. Chinese firms have been rushing to make deployments, too. In 2018, China made headway in production of ultrafast lasers which could be mass-produced on certain scale instead of just trial production in small volume.

Laser processing equipment market size was in excess of RMB60 billion in China in 2018, and is expected to jump 20% or so in 2019. By application, industrial market accounts for around 50%. It is predicted that revenue in laser processing market will be approximately RMB90 billion in 2025.

Laser processing equipment include laser cutting equipment, marking/engraving equipment, welding equipment, etc.. Laser cutting equipment is the one most widely-used, 80%-90% of which available on market are 3kW/6kW products, and the remaining 10% are high power products for special needs. Laser cutting tends to be high power and intelligent. Laser marking plays the second most important part behind laser cutting in industrial application. Universalization of light source, galvanometer and control software helps lower the technical threshold of standalone marking integration, which is a boon for prosperity of laser marking market. As the internet of things wins popularity, laser traceability marking will be a new driver for the market growth.

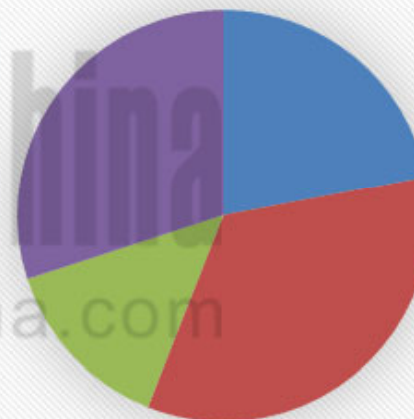
Laser Processing Equipment Revenue Structure by Product in China, 2005 & 2018

2005



■ Laser marking equipment ■ Laser cutting equipment
■ Laser welding equipment ■ Laser engraving and others

2018



■ Laser marking equipment ■ Laser cutting equipment
■ Laser welding equipment ■ Laser engraving and others

Source: ResearchInChina

As concerns companies, Germany's Trumpf and America's Coherent and IPG lead the world, and have put down roots in the Chinese market for many years; among Chinese players, Han's Laser Technology Industry Group and Huagong Tech Co., Ltd., two first-echelon companies, boast annual sales of over RMB5 billion apiece. In 2018, Han's Laser Technology Industry Group's revenue from small power laser equipment encountered a decline, while its high power ones and display panel laser equipment grew. Most noticeably, the company rolled out a 20kW ultrahigh power optical fiber cutting machine, and put it on sale in April 2019.

In China's laser market, Wuhan Raycus Fiber Laser Technologies Co., Ltd., Shenzhen Maxphotonics Co., Ltd. and Shenzhen JPT Opto-electronics Co., Ltd. stay ahead of other players. Wherein, Wuhan Raycus Fiber Laser Technologies Co., Ltd., a high power fiber laser leader, saw its revenues from 2,000W and above high power continuous fiber lasers and 3,300W ones rocket by 190% and 259% from a year ago, respectively, and began to sell 12kW products in small volume, in 2018. There is a hope that Raycus will soon leave its American peer IPG behind in the high power fiber laser field. Raycus has also indicated an acquisition of a stake in Gauss Lasers in 2019 to deploy ultrafast laser segment.

The report highlights the following:

- Global laser industry (laser and laser equipment market size and key vendors);
- China laser processing, laser and laser processing equipment market (size, structure, regional pattern, key companies, import and export, and price trend);
- Chinese laser processing market segments (laser cutting, welding, marking, and engraving equipment) (size, key companies, development trend, etc.);
- China laser application industries (semiconductor, PCB, automobile, smartphone, OLED, power battery, 3D printing, etc.) (market size, key companies, and demand for laser processing equipment);
- 6 global and 28 Chinese laser processing (including laser) companies (operation, laser processing business, key projects, forecast, etc.).

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