Global and China Industrial Laser Industry Report, 2020-2026

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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.

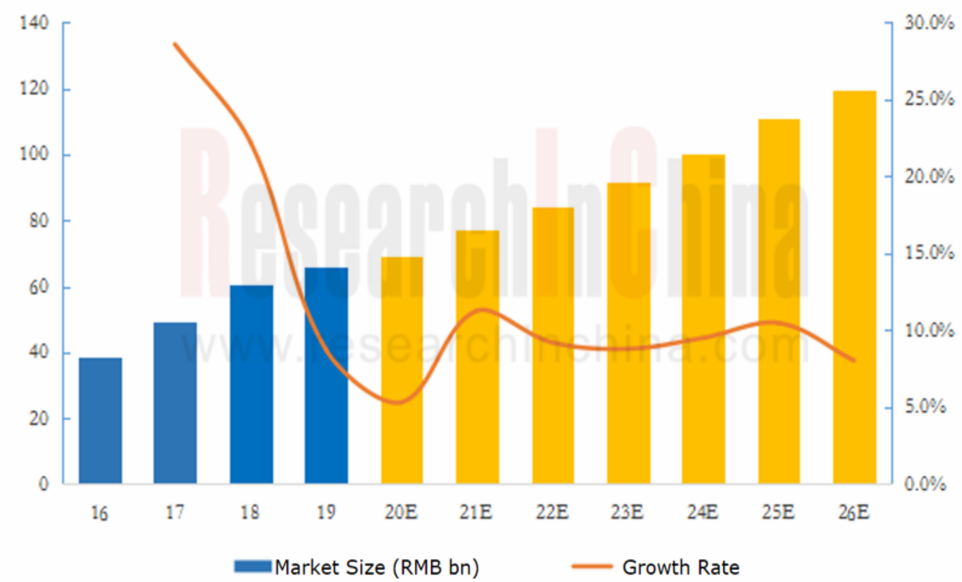
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

As one of the most advanced manufacturing and processing technologies in the world, laser technology has been widely used in industrial production, communications, information processing, medical beauty, 3D sensing, military, cultural education, and scientific research. With the continuous improvement of domestic economic conditions, China's laser industry has been booming. In recent years, China has intensified the development of the laser industry, and all regions have concentrated on scientific research, technology upgrades, market exploration, and construction of laser industrial parks with laser companies under the leadership of the government. In 2019, the market size of China's laser processing equipment hit RMB65.8 billion with the CAGR of 21.4% in 2012-2019. In the medium and long term, laser processing (laser cutting and welding) will penetrate into more application scenarios (3C, power batteries, photovoltaics, etc.). China's laser processing market will maintain a rapid growth trend for a long time with potentials.

China's Industrial Laser Equipment Market Size and Growth Rate, 2016-2026E

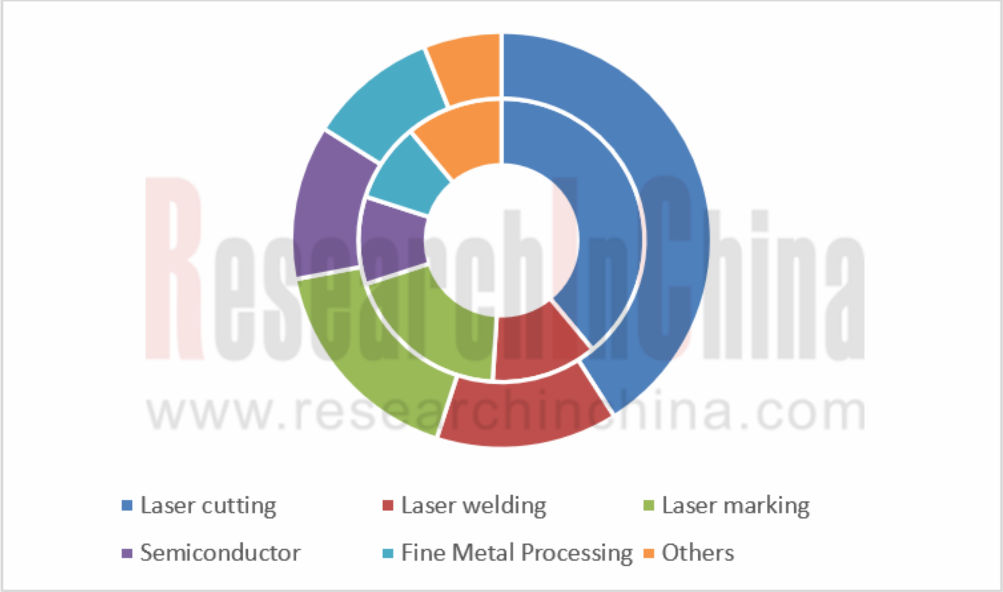


Source: ResearchInChina

Among application scenarios, laser cutting is gradually replacing traditional machine tools and is used in a wider range of fields due to its advantages such as non-contact with objects, zero cutting head wear, fast cutting speed, adaptability and flexibility, which can improve processing efficiency, reduce processing costs, and enhance workpiece quality. Common laser processing equipment includes: laser cutters, laser welders, laser markers, laser drilling machines, laser cladding equipment, etc.

Laser cutting is the most important application segment of laser processing. The sales volume of laser cutters (optical fiber + CO_2) in China swelled from 2,700 units in 2013 to 41,000 units in 2019. In terms of market size, Chinese laser cutting market valued RMB25.8 billion in 2019, accounting for 39% of Chinese laser equipment market. Wherein, 19% came from laser marking and only 12% from laser welding.

Distribution of Chinese Industrial Laser Equipment Market, 2019 VS 2026E

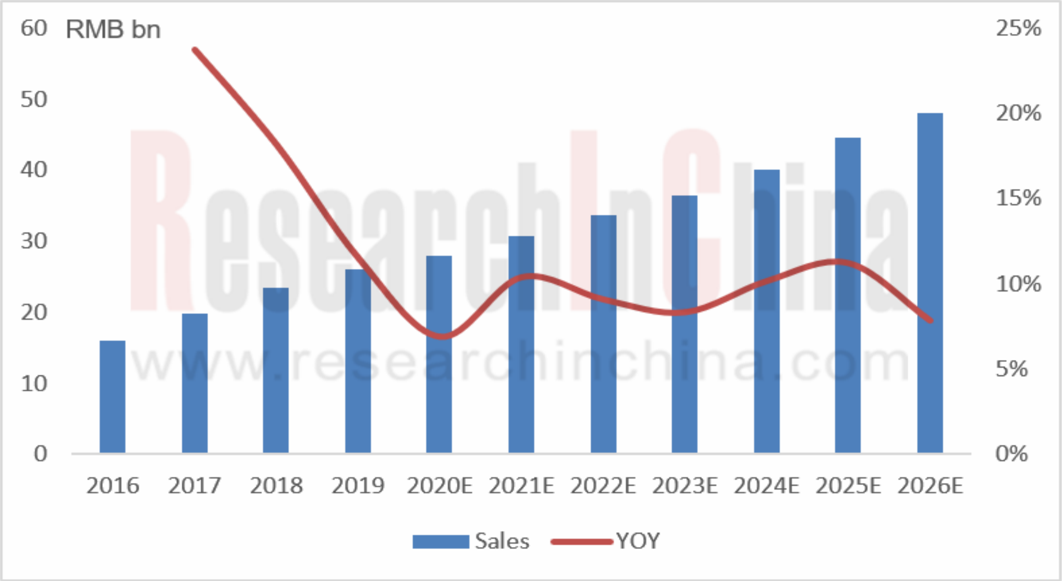


Note: The inner circle stands for 2019, and the outer circle means 2026
Source: ResearchInChina

In terms of the competitive landscape, the concentration of laser processing equipment in China is relatively low. In 2019, there were more than 150 domestic laser companies with the annual revenue of over RMB20 million, more than half of which focused on laser processing and laser-related fields. In 2019, Han's Laser earned the revenue of RMB7.64 billion from laser processing equipment, with a market share of 12.6%; Huagong Tech's laser processing equipment revenue reached RMB1.723 billion, occupying a market share of 2.8%.

Lasers are the core optical components of laser equipment. The rapid growth of the downstream equipment market drives the demand for lasers. In 2019, China's overall industrial laser market size (including laser amplifiers) hit RMB26.1 billion, with the CAGR of 18.1% in 2015-2019.

Chinese Industrial Laser Market Size, 2016-2026E



Source: ResearchInChina

By gain medium, lasers can be divided into solid-state lasers (including all-solid-state, fiber, hybrid and semiconductor lasers), gas lasers, liquid lasers, etc. Solid-state lasers (generally refer to all-solid-state lasers in a narrow sense) and fiber lasers are the two mainstream lasers on the current market, which enjoyed market share of 30.1% and 44.4%, respectively in 2019.

In recent years, industrial lasers have been rapidly localized with descending prices. Take fiber lasers as an example, the localization rate of low-, medium-, and high-power fiber lasers in China reached 98.81%, 57.76%, and 55.56% in 2019 respectively. Correspondingly, the prices of fiber lasers at all power levels have slumped in the past 10 years. The average price of a 3000W fiber laser in China was RMB1.5 million in 2012, while it descended to only about RMB400,000 in 2018, and further dropped to about RMB250,000 in 2020.

As for the competitive landscape, China industrial laser market is highly concentrated compared to the relatively fragmented market structure of laser equipment. In 2019, CR3 (IPG, Wuhan Raycus Fiber Laser Technologies, Maxphotonics) accounted for nearly 80% of the fiber laser market, of which IPG was far ahead with a share of 41.9% as a leader. The market share of domestic laser companies presented an upward trend. From 2017 to 2019, the market share of IPG declined year by year, from 53% to 42%. In contrast, the market share of Wuhan Raycus Fiber Laser Technologies jumped from 12% to 24%, and Maxphotonics' market share increased from 10% to 12%.

Global and China Industrial Laser Industry Report, 2020-2026 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, 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.);
- 11 foreign and 15 Chinese industrial laser manufacturers (operation, industrial laser business, etc.).

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