China Laser Processing Equipment Industry Research Report 2016-2018

Description:
Under the background of industry transformation and upgrading, Chinese government has introduced number of supporting policies to promote the development of laser industry in recent years. In 2015, the government published “China Manufacturing 2025 Technology Roadmap of Key Areas”, which brought many new laser technologies and products into national strategy plan, such as automobile laser radar system, laser remote detection, laser small hole molding, laser hybrid welding, laser display etc.

Since 2012, benefiting from the continuous development of downstream markets, China’s laser industry has stepped into a high-speed development period. The total sales of laser equipment in industrial field, information, business, medicine and scientific research field reached RMB 33.6 billion in 2015, which increased by 4.7 percentage point compared with 2014.

Sales of industrial laser equipment slowed down on YoY basis in 2015. However, this segment still increased by RMB 810 million. This is mainly benefiting from Trumpf’s sustaining development in China, as well as Han’s Laser Sheet Metal Division and other major manufacturers’ stable growth.

The three major telecom operators, CMCC, China Unicom and China Telecom, are continuing to build up 4G networks. The “Broadband China” and “Fiber to the Home (FTTH)” strategies published in 2015 will stimulate the investment of fiber broadband, which has maintained the growth of many photo-communication enterprises in the past year. In addition, with the release of Hisense’s laser TV and the introduction of laser giant-screen cinema in more and more regions, laser display will be driven into a high speed way.

Cigarette and wine enterprises boosted the updating paces in low and medium-grade products, which produced increasing demand for laser anti-counterfeit packaging. The total sales of laser in business field in 2015 achieved significant growth.

The explosive medical cosmetology and dermatologic therapy markets has promoted the growth of domestic laser medical equipment manufacturers. The net income of Miracle Laser, the first medical laser public company in China, increased 21.8% in the first half of 2016. The total medical laser market increased 18% in 2015 on YoY basis.

China, as the third largest laser market, ranks only after the EU and USA. Some homemade medium and low power level fiber laser has equipped with the ability to compete with foreign leading brands in quality and performance parameter. On the other hand, core laser components still rely on import, high-end market remains occupied by foreign manufacturers. In 2015, the total amount of China’s imported laser components reached USD 1128 million.

Customarily, China’s laser processing was divided into four areas: Pearl River Delta, Yangtze River Delta, central China and Circum-Bohai Sea Region. Pearl River Delta and Yangtze River Delta mainly focus on medium and low power level laser processing equipment and high power laser cutting & welding respectively, while Circum-Bohai Sea Region mainly engage in high power laser cladding equipment and all solid state laser components.

Domestic manufacturers launched many new products in 2015. In laser processing, Huagong Laser released a sapphire fiber laser cutting machine. Han’s laser published a laser welding equipment used for automobile tailor welded blanks. In laser, Skyeralaser lanched nanosecond grade fiber laser, which supporting 10 gears independent control of pulse/ frequency. In laser display, ILLUMINANCE Co., Ltd. released a high resolution micro projector using MEMS laser projective techniques. As for laser components, the raman fiber amplifier produced by Shanghai Institute of Optics and Fine Mechanics successfully solved the power boost of raman fiber laser.

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