China Welding Equipment Industry Research Report 2016-2019

Description: The welding equipment industry in China continued to slide in 2015, but the falling range been narrowed. A large number of middle and small-sized enterprises still been confronted with difficulties of survival, transformation and upgrading.

The mill price of welding equipment has been continued to decline. In addition, along with the economic downturn, the industry-wide capacity utilization further slumped and the surplus enterprises increased.

Major economic indicators in 2015 of welding equipment industry, such as revenue, export etc., continued to decrease except the R&D investment of new products, which increased by 18.8 percentage compared with the figure in 2014. This reflected the players trying to keep their competitiveness in current depressed market environment.

In 2015 the output and sales of welding equipment in China decreased by 22% and 24% respectively, and the inventory increased by 33%. The proportion of inverter arc welding machine both in output and sales continued to increase in 2015. Among which, the proportion of MIG/MAG arc welder (inverter=250A) achieved the largest increase of 4.58%.

Laser welding will continue to grow based on the stable traditional Chinese auto market and the vibrant electric vehicle market. Laser applications for welding and cutting allow flexible and highly automated production systems. Over the period, a variety of laser applications have already replaced large sections of classic fabrication processes like resistance spot welding. Typical applications are the welding of side walls, doors and door steps, roof joints, floor groups, the front of the vehicle, and hood parts. Laser welding penetration will reach 17%/21% by 2018E/2019E (from 10% currently), with additional opportunities arising from the use of laser welding in auto parts, such as gear, clutch, engine piston, etc.
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