



OVERVIEW OF THE WELDING INDUSTRY IN INDIA

Prepared by BDB India Private Limited

Indian welding industry for FY 2016 is estimated at INR 4,000 Cr

Welding Equipment market size: ~ 30%

Welding consumable market size : ~ 70%

FY 2015 - 16

**CAGR
7-8%**

FY 2020 - 21

INR 1200 Cr

INR 1500 Cr

FY 2015 - 16

**CAGR
10-11%**

FY 2020 - 21

INR 2800 Cr

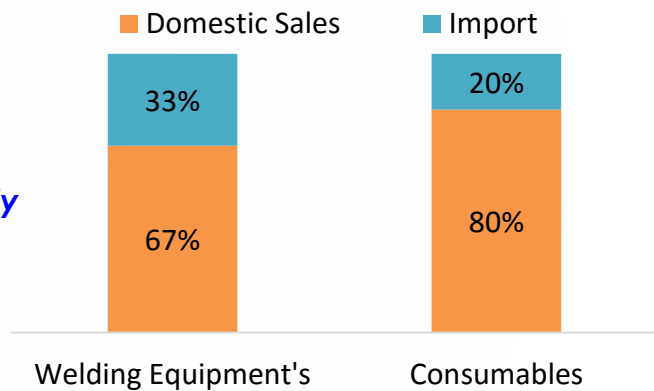
INR 4200 Cr

Market Size

Key highlights

- ▶ Fragmented industry with 40-50% being controlled by unorganised players
- ▶ Driven by infrastructure, heavy engineering, and automobile sectors
- ▶ Imports constitute significant portion of the market
- ▶ Semiautomatic and automatic systems witnessing good growth

Import Vs Domestic supply



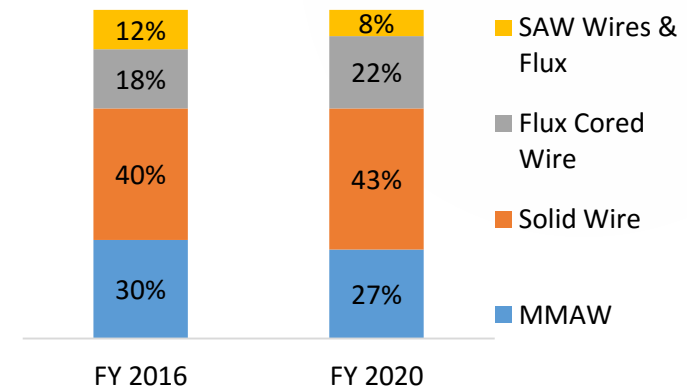
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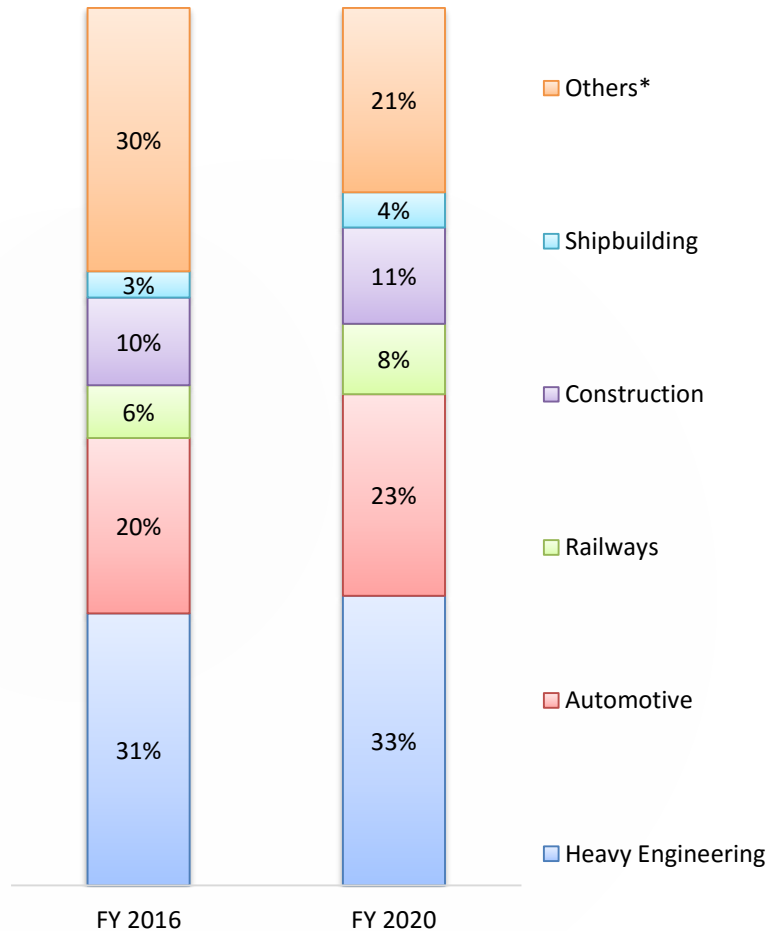
Technology	Market contribution
MMAW	30-35%
GMAW	40-45%
GTAW	10-15%
SAW	8-10%

Semi automatic and automatic systems seeing increased growth. Automation predominantly present in the heavy engineering segment



Stick electrodes are losing its market share to wires and fluxes to growing usage across the end-use industries and their advantages such as high deposition rate, strong welds, and suitability for outdoor work

Segment wise contribution



New technologies

Growth in use of semiautomatic and automatic robots for efficient and qualitative welding

Orbital TIG welding, stud welding, robotic welding, and laser welding are some of the latest technologies that have been introduced to meet precision welding requirement

Robotics and automation are increasingly being deployed by industries to achieve welding quality and improve productivity

Industry challenges

Availability of sufficient skill welders

Customer awareness for selection of right technology with a long term perspective

R & D effort in India for welding electrodes is fragmented among few leading manufacturers and WRI, Tiruchy. Very frequently research effort is being spent on already developed products.

Technology upgradation in the small and medium sectors

Unorganised market and increased imports

Thank You

