

# The welding industry in Europe 2021 - 2022

# Main markets using welding and cutting of metals for construction and repair

- Building and infrastructures – metallic construction
- Transport equipment
  - Train
  - Automotive
  - Ships
  - Aircraft
- Energy
  - Oil and gas processes
  - Pipelines and pipe mills
  - Power plants (Coal, gas, nuclear)
  - Windmills
  - Petrochemicals industry
- Equipment for other industrial processes (food industry, storage, tanks...), waste treatment
- Other mechanical equipment: earth moving, agricultural equipment, military equipment, construction of various machines
- Maintenance and repair
- Hobby

# Dynamics of the welding market

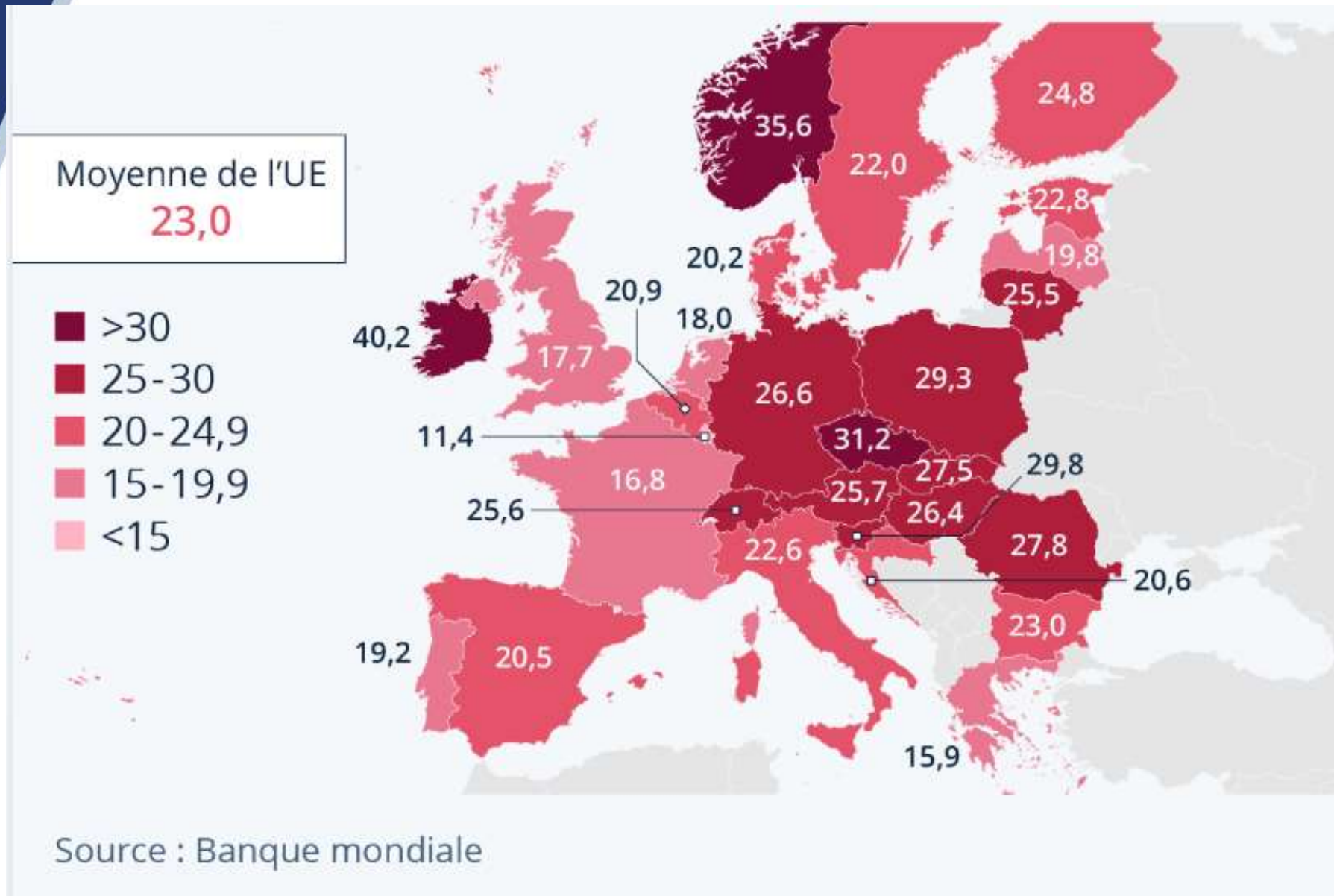
- Main TRENDS :
  - Automation of welding (and cutting) operations – growth of robotics sector
  - Lack of skilled welders – need for more trained welders / and more training
  - Construction of lighter structures with the use of higher-strength and lighter-weight materials, particularly steels and aluminium
  - Demands of higher levels of reliability and higher-quality requirements.
  - Developing countries with industrialisation and rapid urbanisation
  - Improving safety for welders / process with less emission of fumes / individual protection / fumes extraction system / General ventilations
  - Additive manufacturing
  - Welding 4.0 / data collection and treatment to improve productivity, repeatability and quality
  - Impact of European Directives or recommendations on eco-Design , circular economy, possible classification of welding fumes in annexe 1 of CRMD
  - Acceleration of energy transition ( energy , transportation, construction , manufacturing , heavy industry , agricultural sectors will be affected)
  - Long term steel consumption in Europe

# Specific situation of the welding Industry in Europe in 2021 -2022

- Lack of welders
- Difficulty of supply chain / cost of transport
- Inflation, Cost of energy
- War in Ukrainian
- Rebound of steel consumption in 2022
- Growth of import of solid wires in EU27
- Transformation of the car industry >> Electrification
- Dynamic in the construction of military equipment and green electricity
- Application of Eco design directive
- Pressure of European Commission to classify welding fumes in Annexe 1 of CRMD

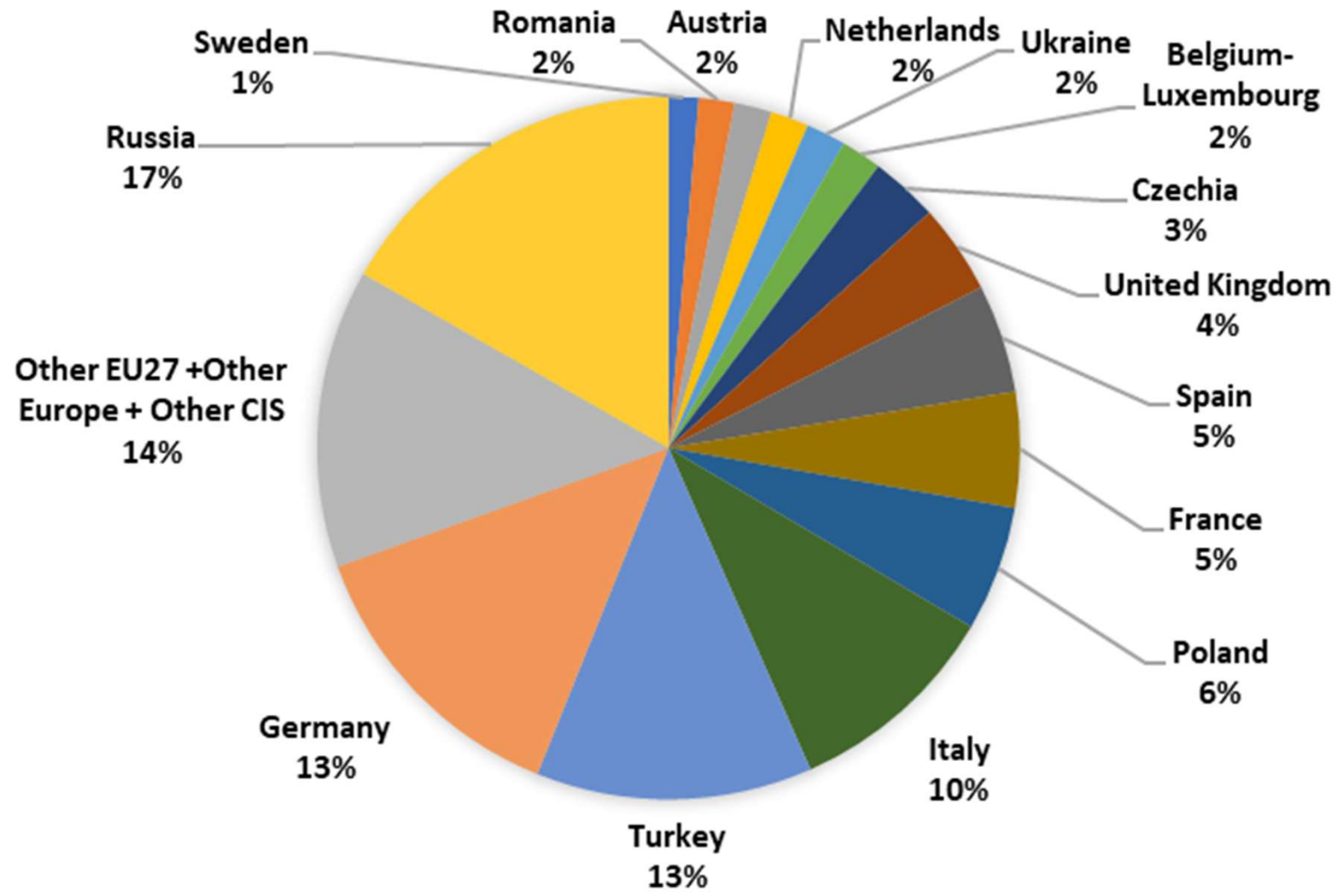
# The weight of industry in the European economy

*Share of the industrial sector in the gross domestic product of countries in 2021 (%)*

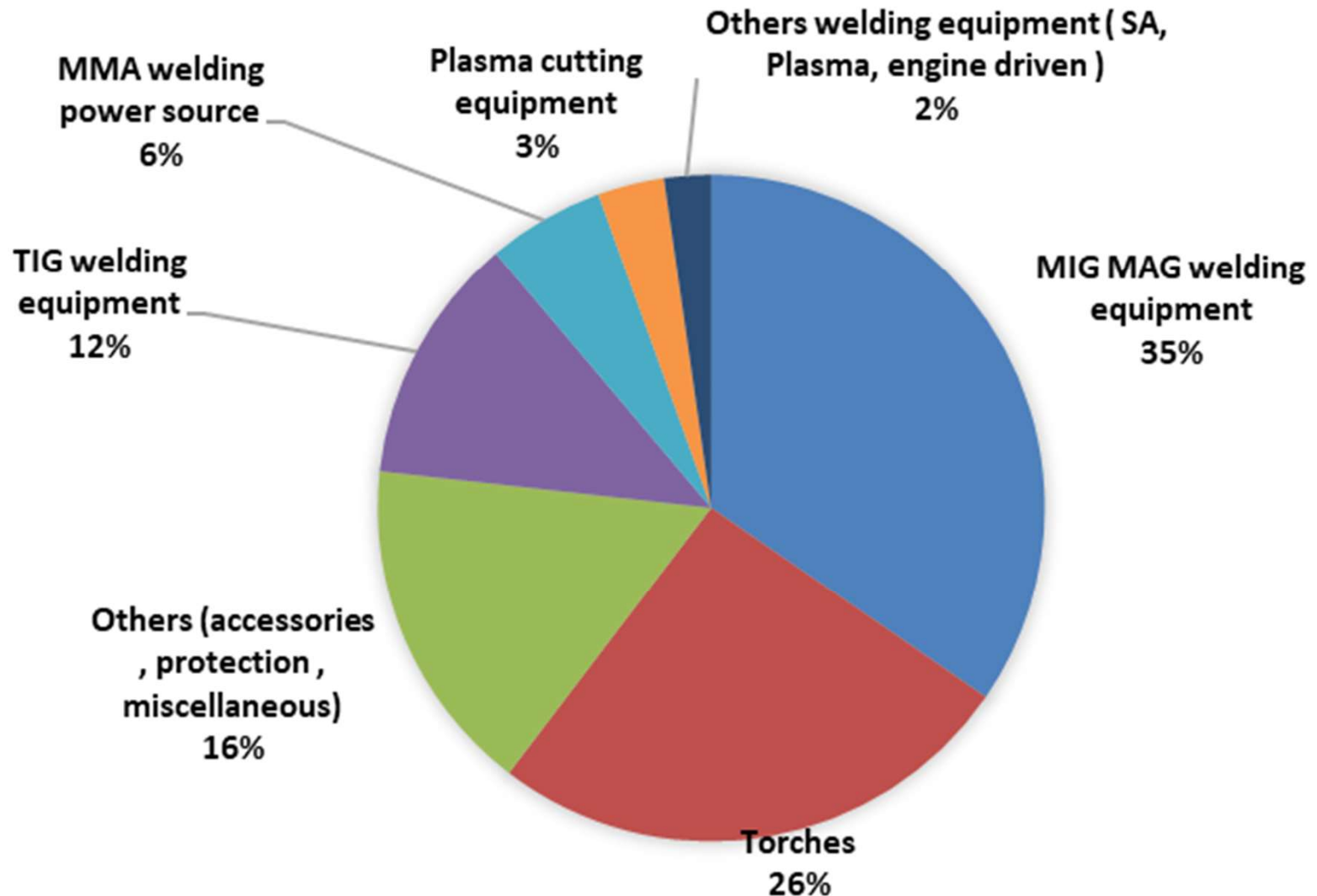


# Apparent stee use in European countries

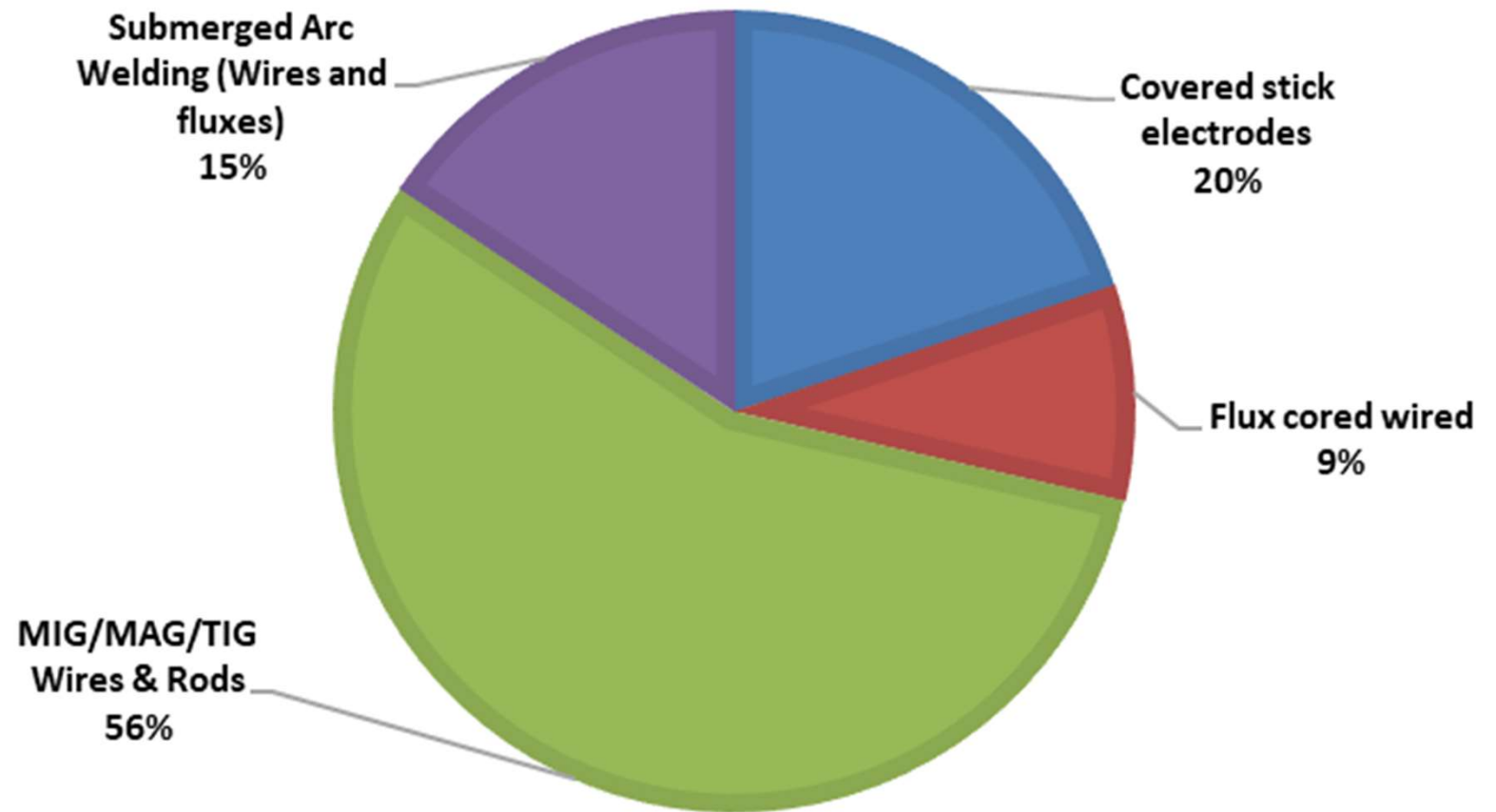
2021 *from worldsteel : 260 Millions T*



# 2022 European market of arc welding equipment is estimated at 1200 M €

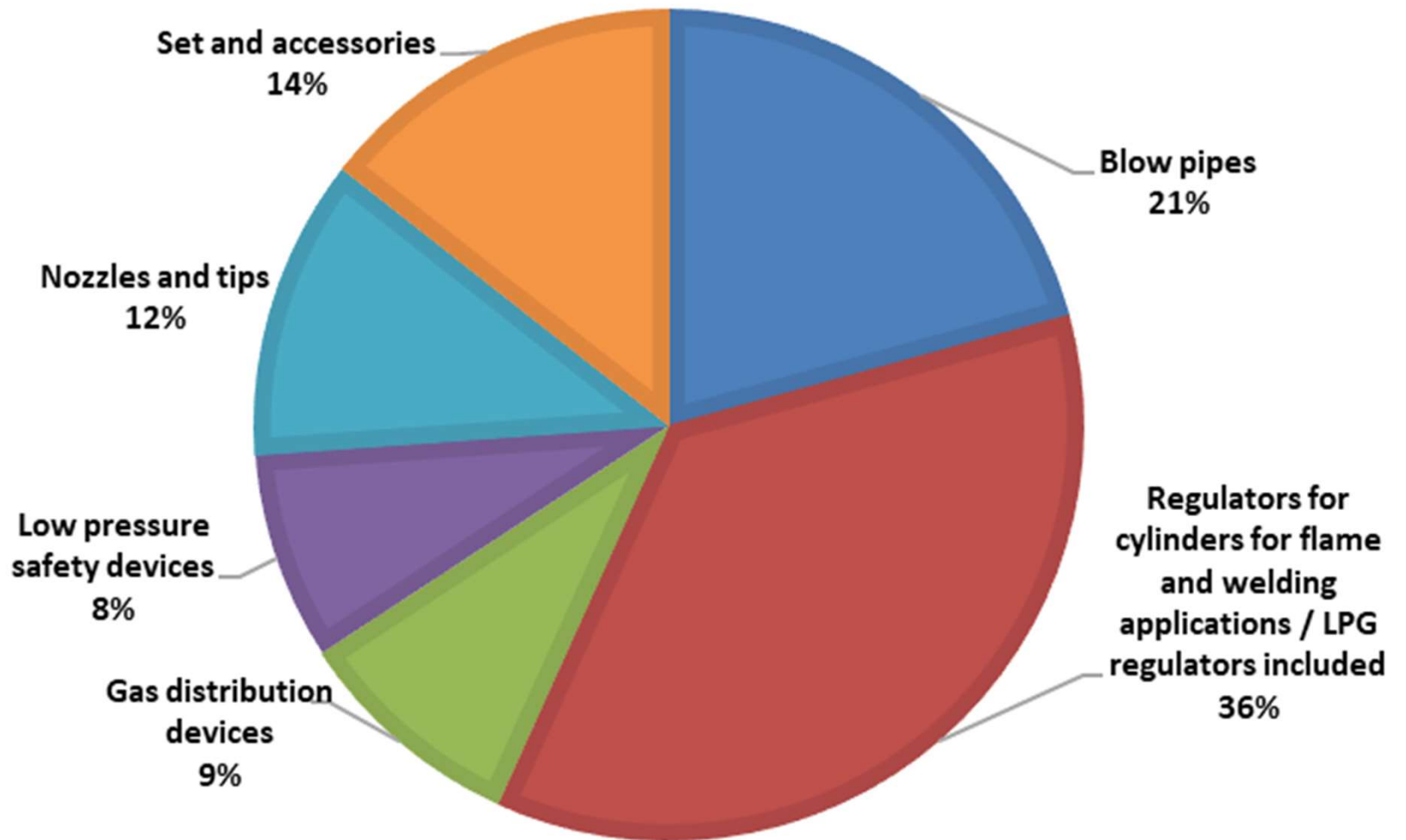


# 2022 European market of Welding Consumables is estimated 700 K Tons



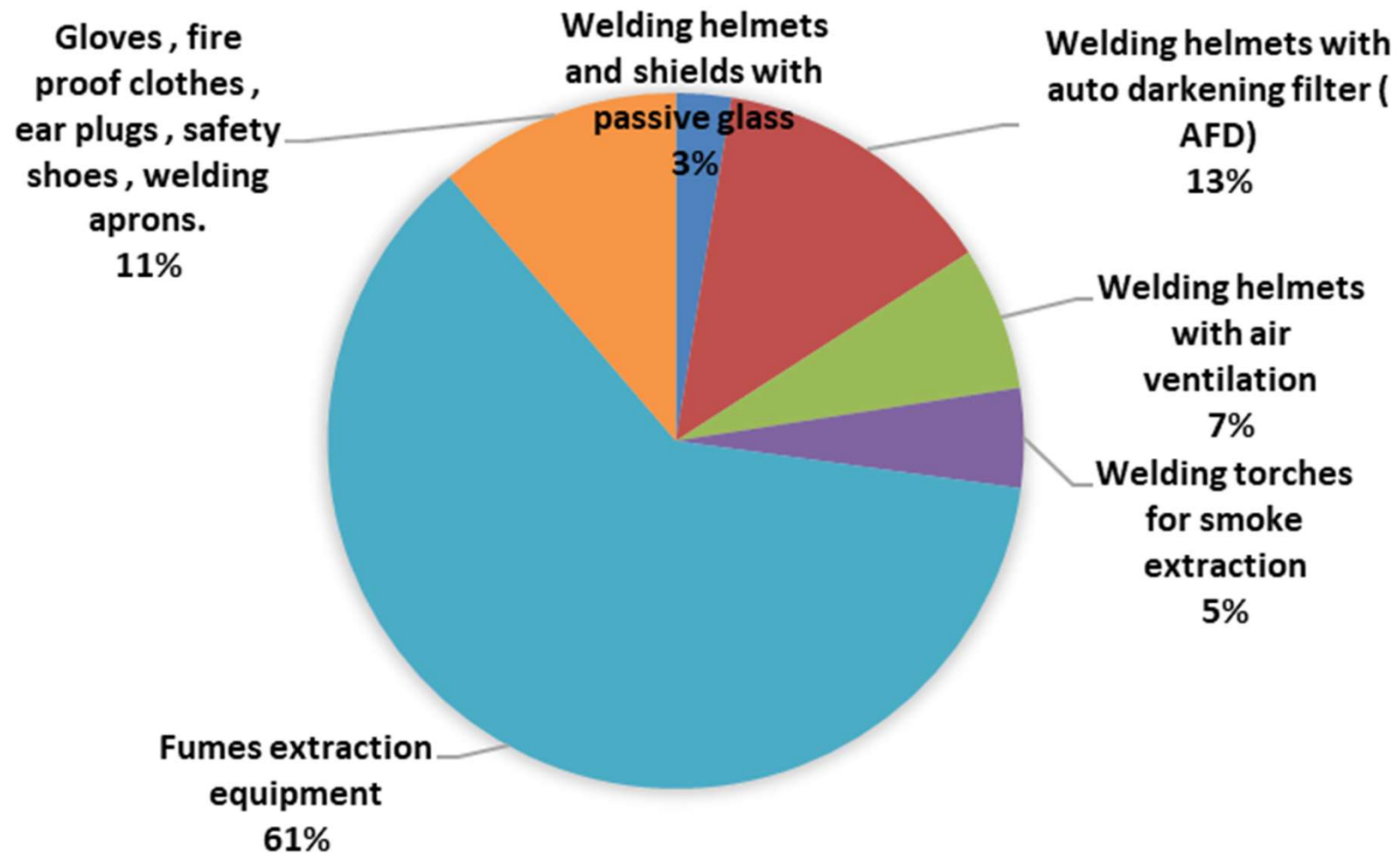


# 2022 -European Flame equipment market is estimated at 120 Millions €



European countries – Turkey included

# 2022 -European market of health and safety equipment for welders estimated at 200 Millions €

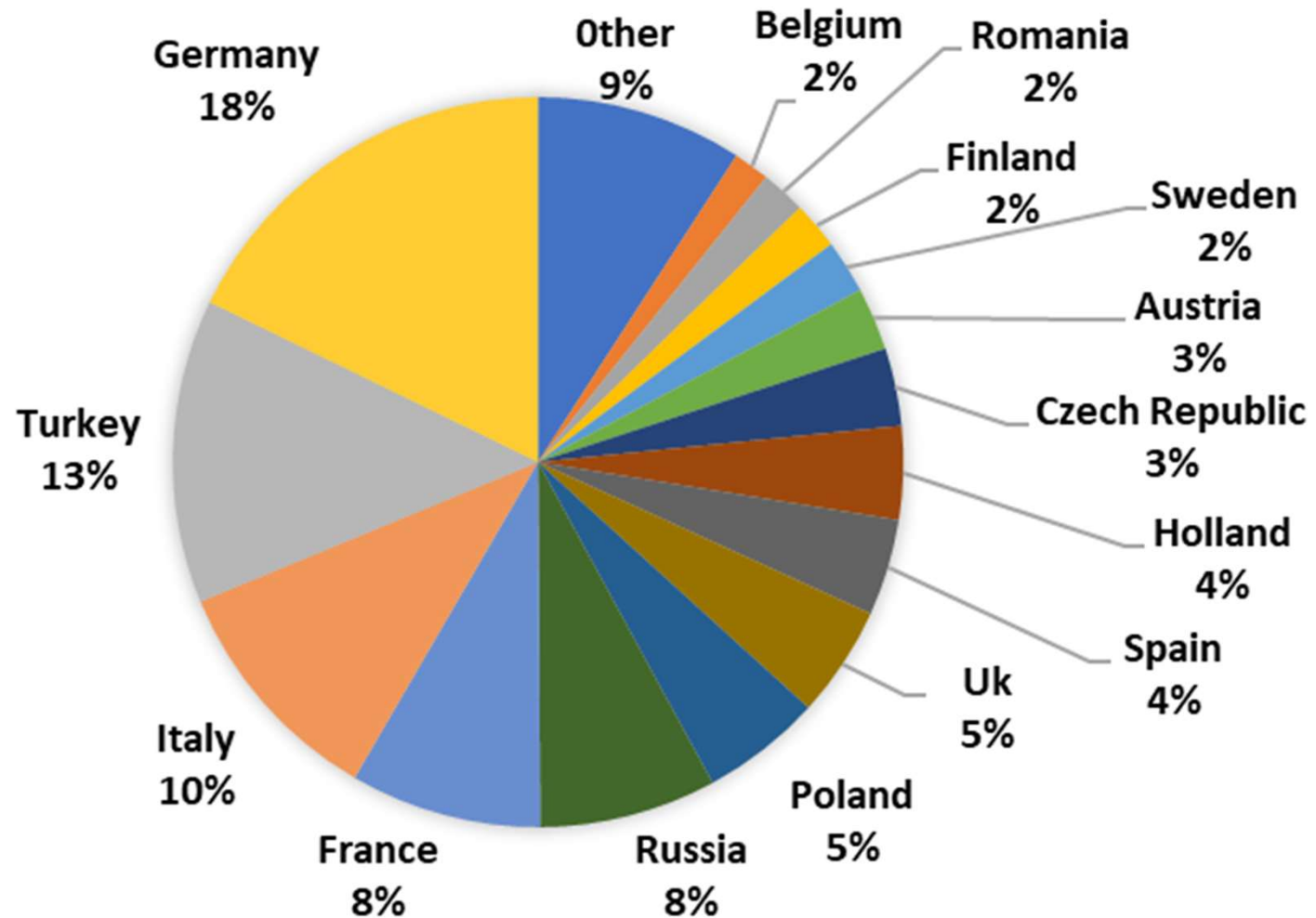


European countries – Turkey included

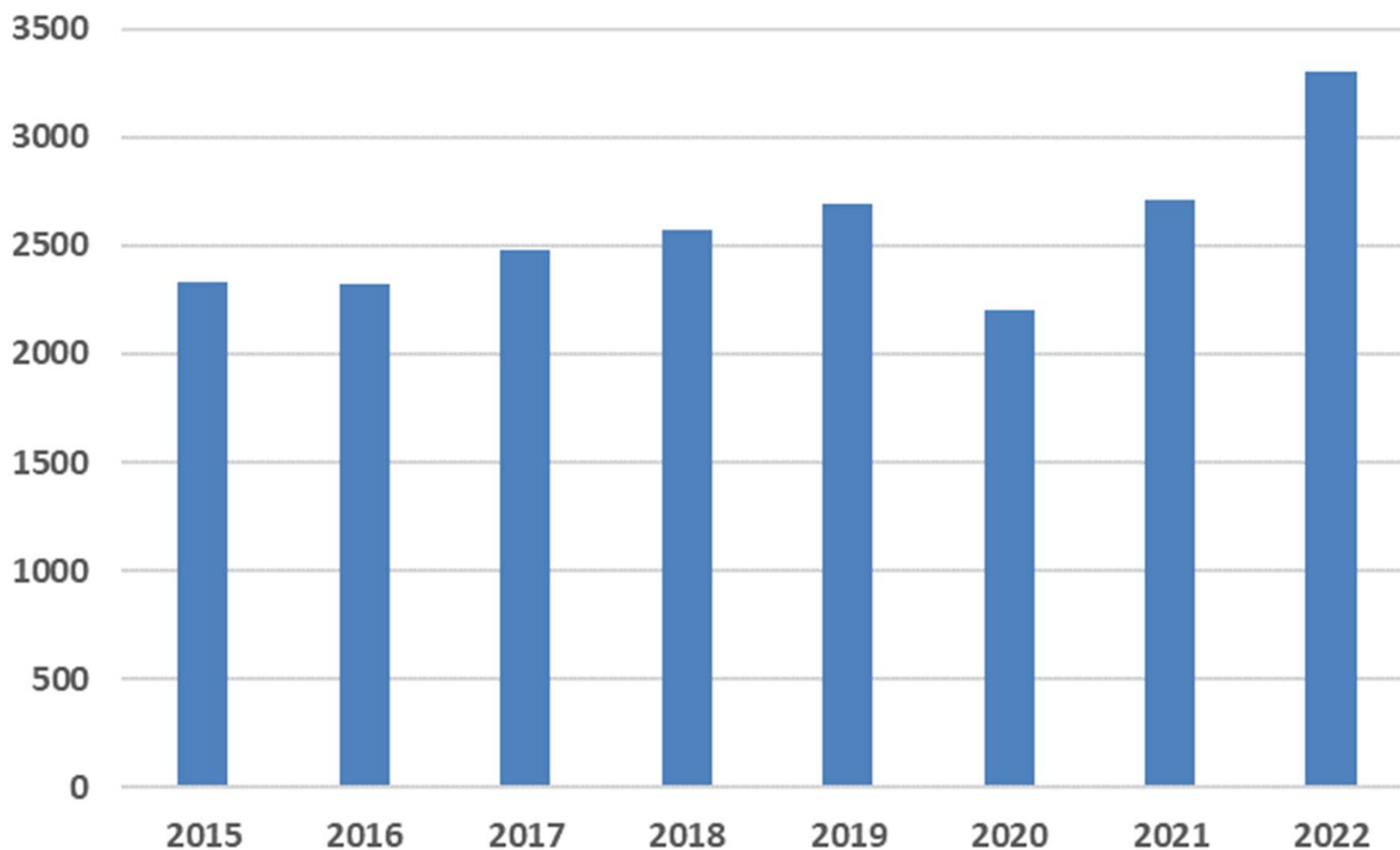
# Market repartition

(Arc welding equipment + Welding consumables)

2022 estimation: 3,3 billions €



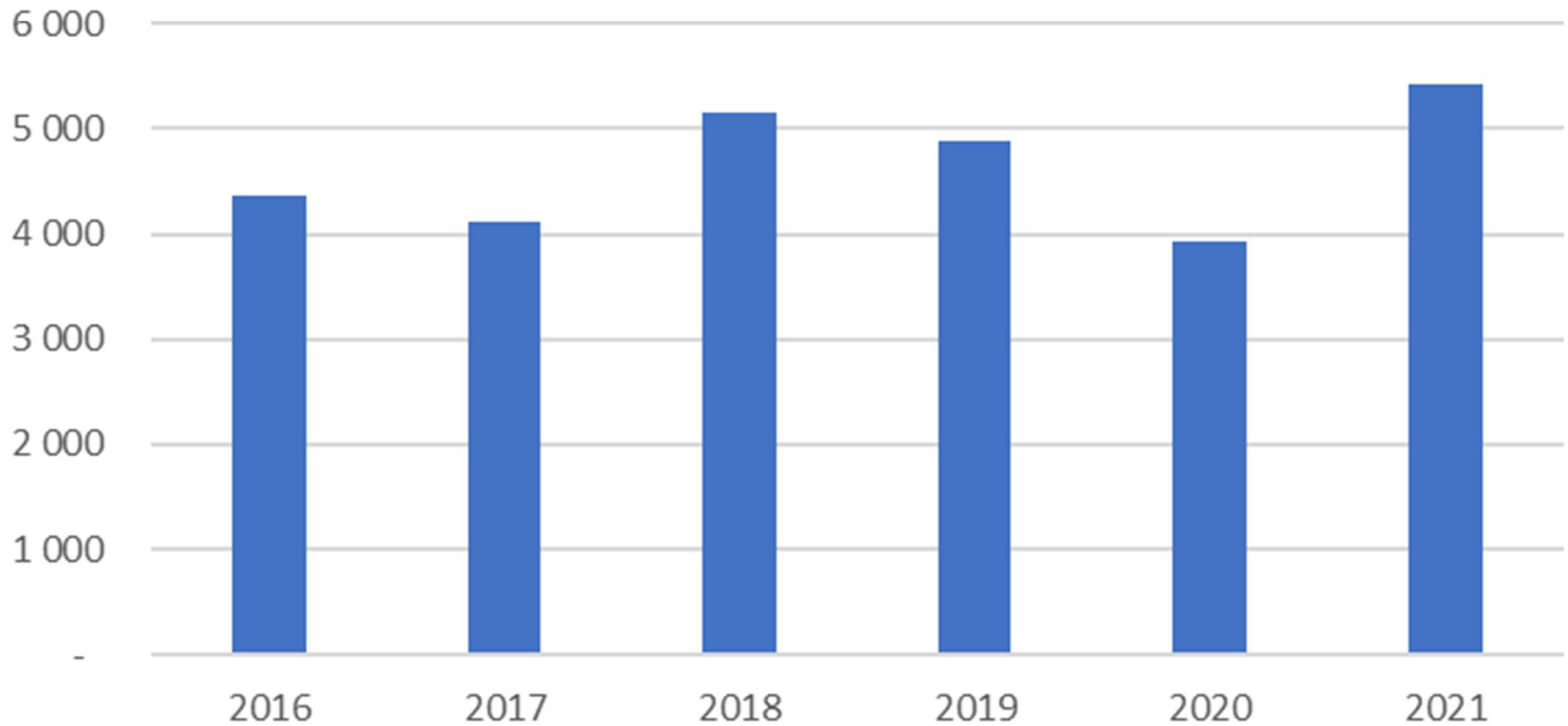
# Evolution of the European Market ( Welding consumables + Electric equipment) Estimated 3,3 Billions €



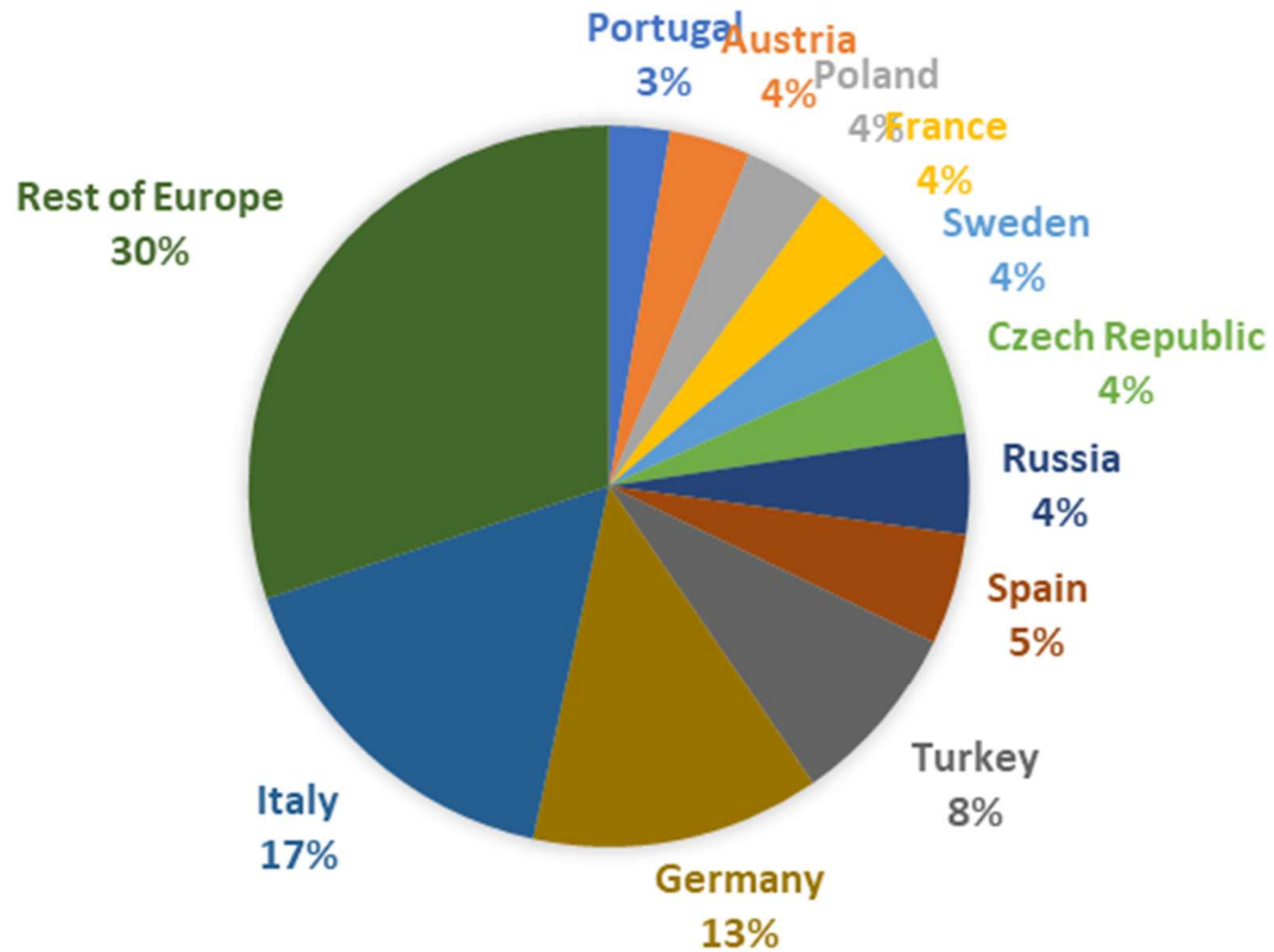
# Evolution of Arc Welding Robots

2021

## Number ( units ) of arc welding robots sold in Europe



## 2021 REPARTITION OF ARC WELDING ROBOT SOLD IN EUROPE



Welding industry is very linked  
with steel consumption



Welding market is linked with apparent steel use  
Europe and other Europe represent 11,1% of the world steel use

## Apparent steel use (finished steel products)

World total: 1 834 million tonnes

