

General information on the
“European Welding market”
Updated (2024)

The welding industry in Europe

2024

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
- Defence / military equipment
- Other mechanical equipment: earth moving, agricultural equipment, construction of various machines
- Maintenance and repair
- Hobby

Dynamics of the welding market in Europe 2023-2024

- Main TRENDS :

- Automation of welding (and cutting) operations – long term 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
- Growth of the demand of Military equipment
- Welding 4.0 / data collection and treatment to improve productivity, repeatability and quality
- Fiber laser welding equipment (handheld laser)
- First application of H2 in flame cutting
- Impact of European Directives or recommendations on eco-Design , circular economy, classification of some welding fumes as carcinogenic
- 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 2023 -2024

Lack of welders

No growth of industrial production in Europe

On going economic uncertainty is likely to intensify / custom barriers of Trump administration

Growth of Chinese import (Solid wire , low-cost inverters, Handheld laser) - **China standard 2035 -**

War in Ukrainian

Transformation of the car industry >> Electrification

Dynamic in the construction of military equipment

Application of Eco design directive / Weakness of the market surveillance

Pressure of European Commission to classify welding fumes in Annexe 1 of CRMD

2024 European economic situation

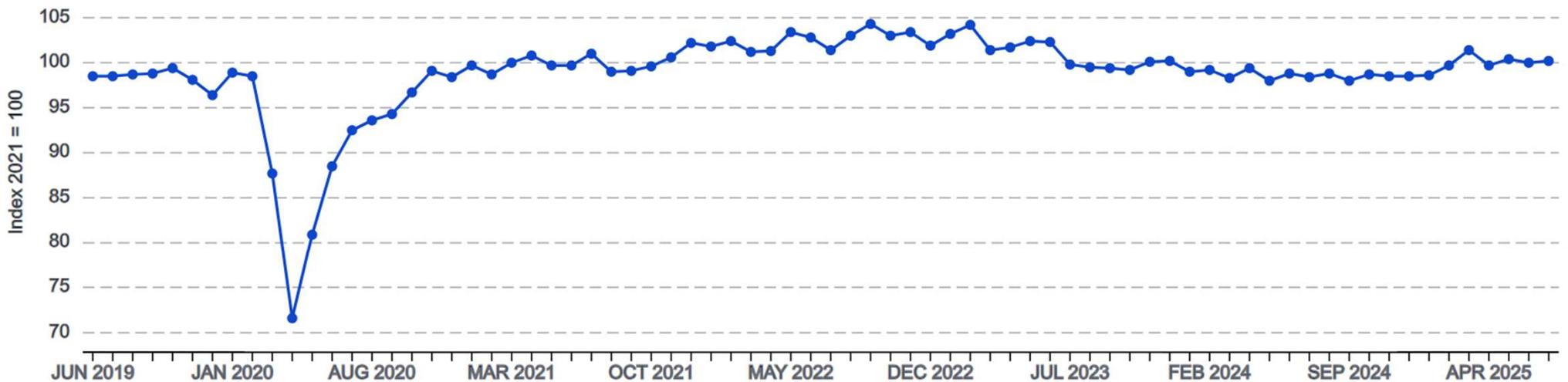
European Union

Index 2021 = 100

Industrial production



Index 2021 = 100

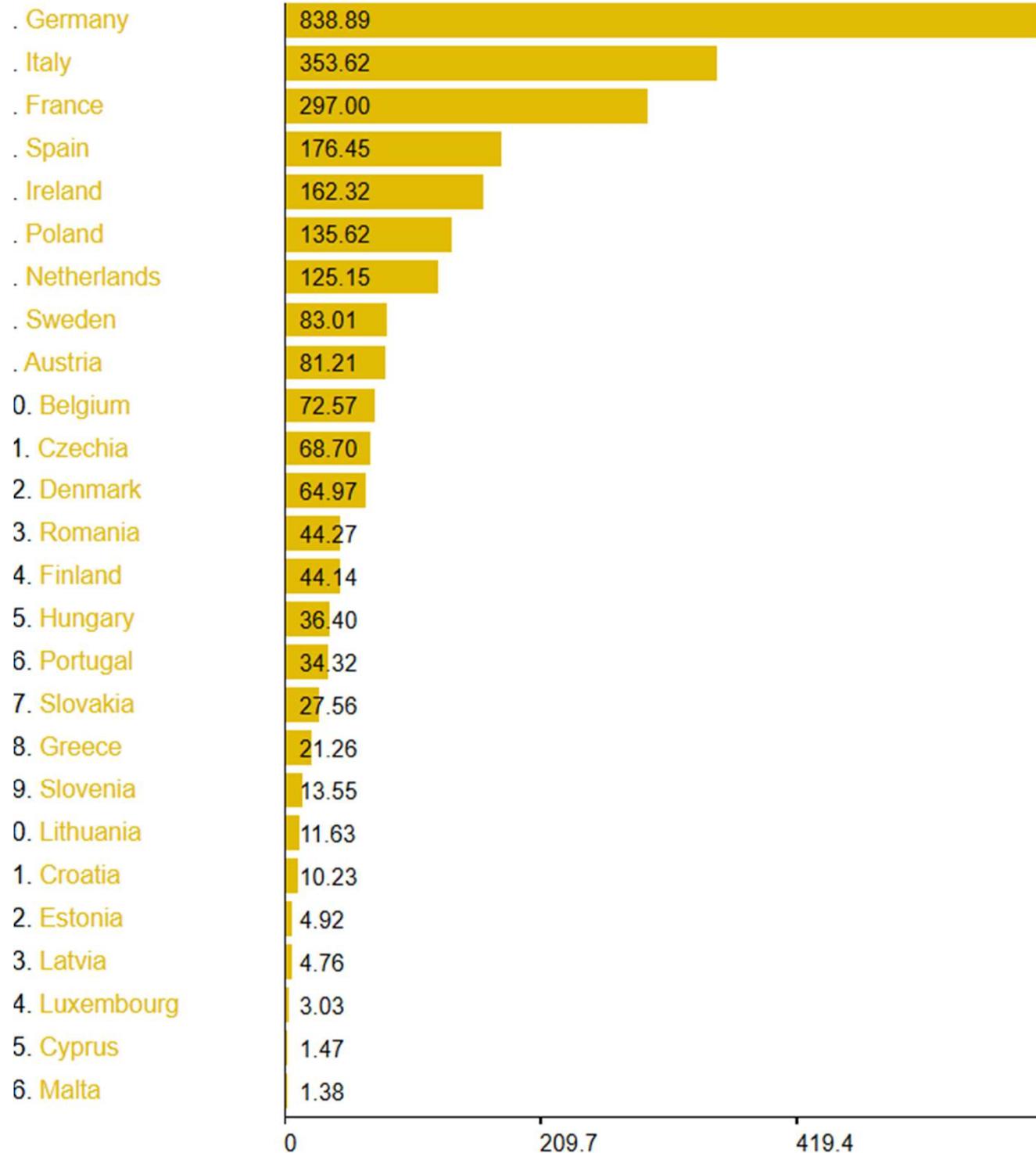


JUN 2019

Source: Eurostat - [access to dataset](#)

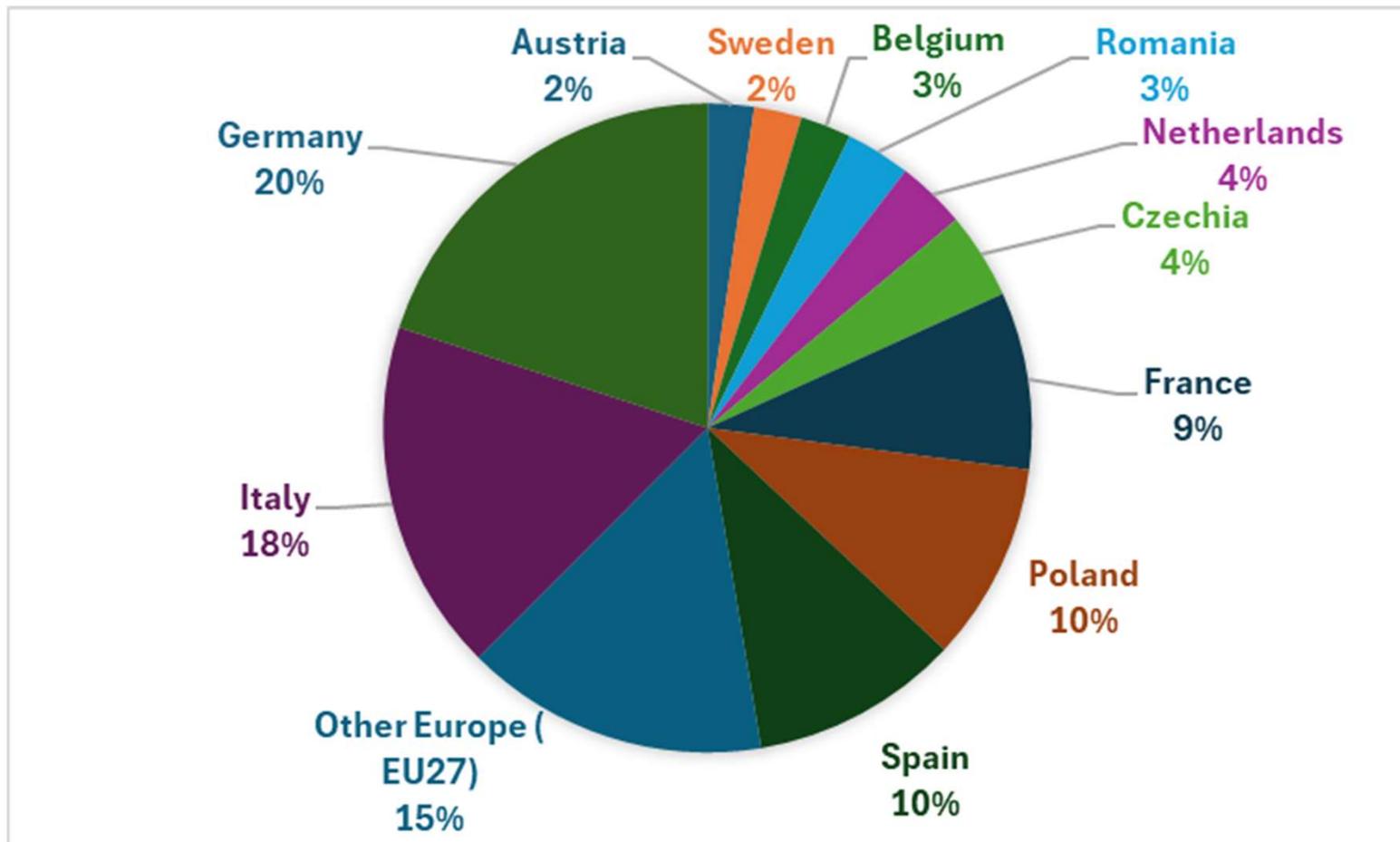
Manufacturing value added Country rankings - billion USD, 2023

https://www.theglobaleconomy.com/rankings/manufacturing_value_added/European-union/



Welding market is very linked
with the steel consumption

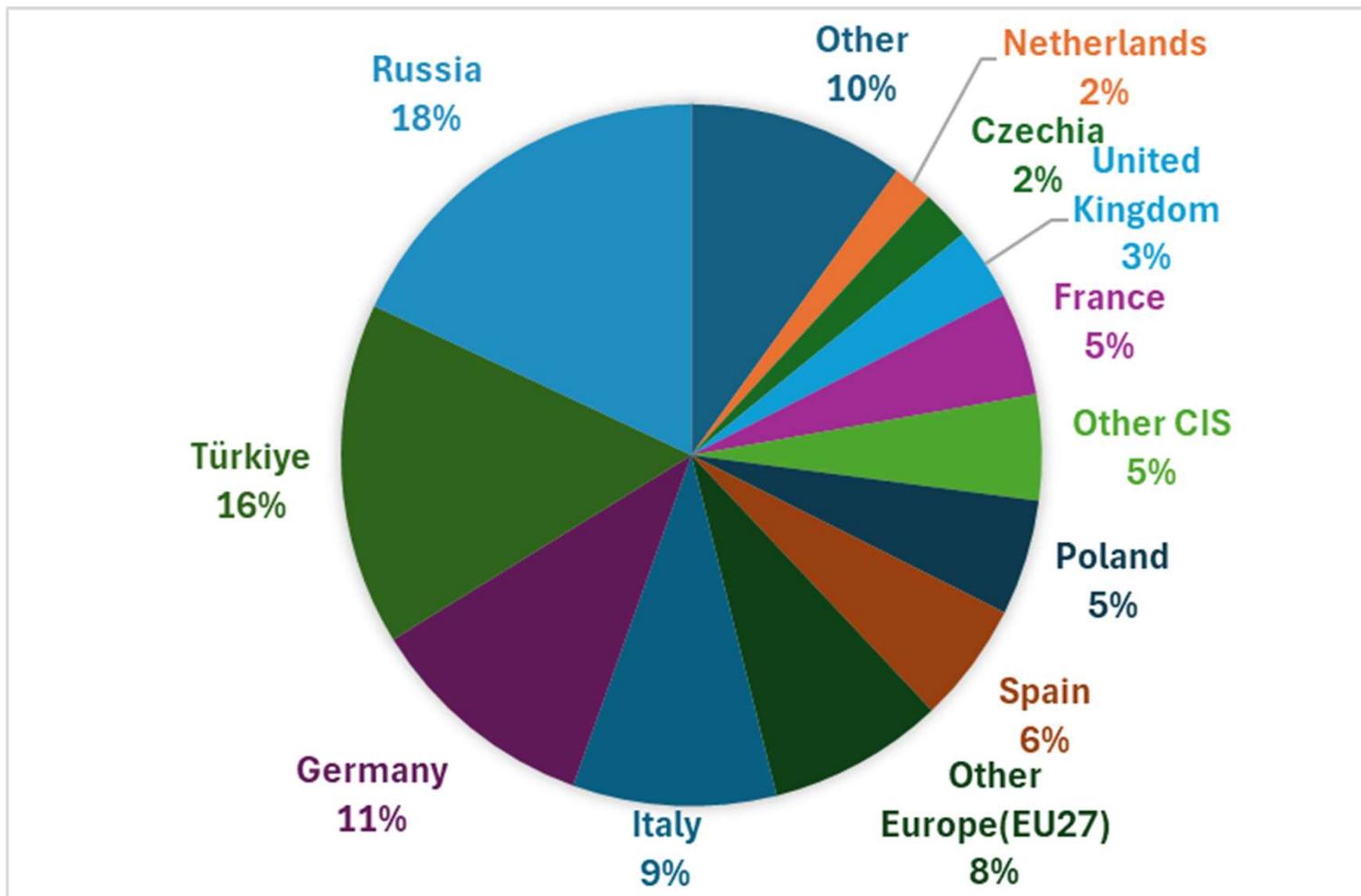
Steel consumption EU27 2024



	2020	2021	2022	2023	2024
European Union (27)	130.8	154.1	142.6	129.8	130.1

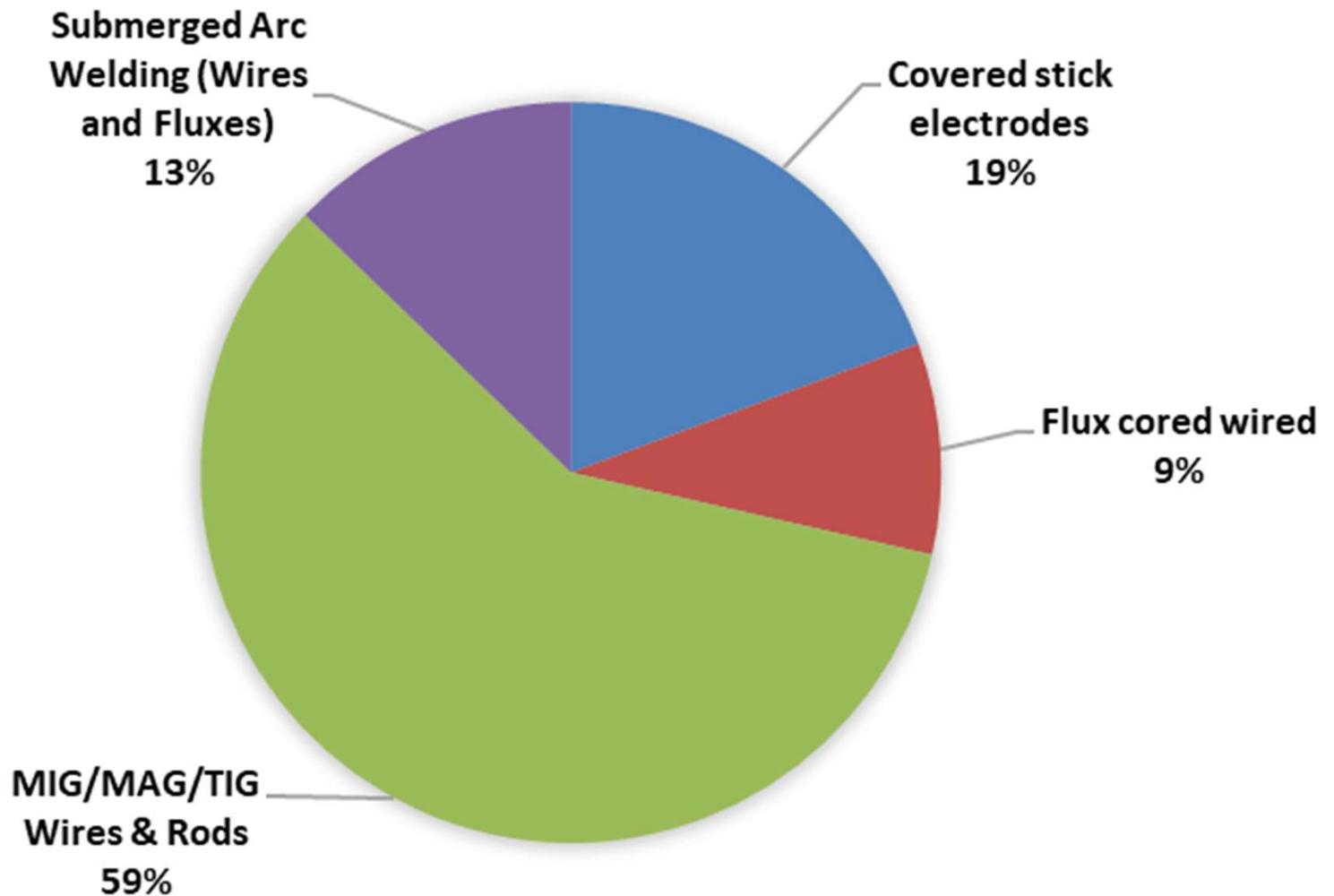
Data from Eurofer and world steel

2024 Steel consumption in geographical Europe

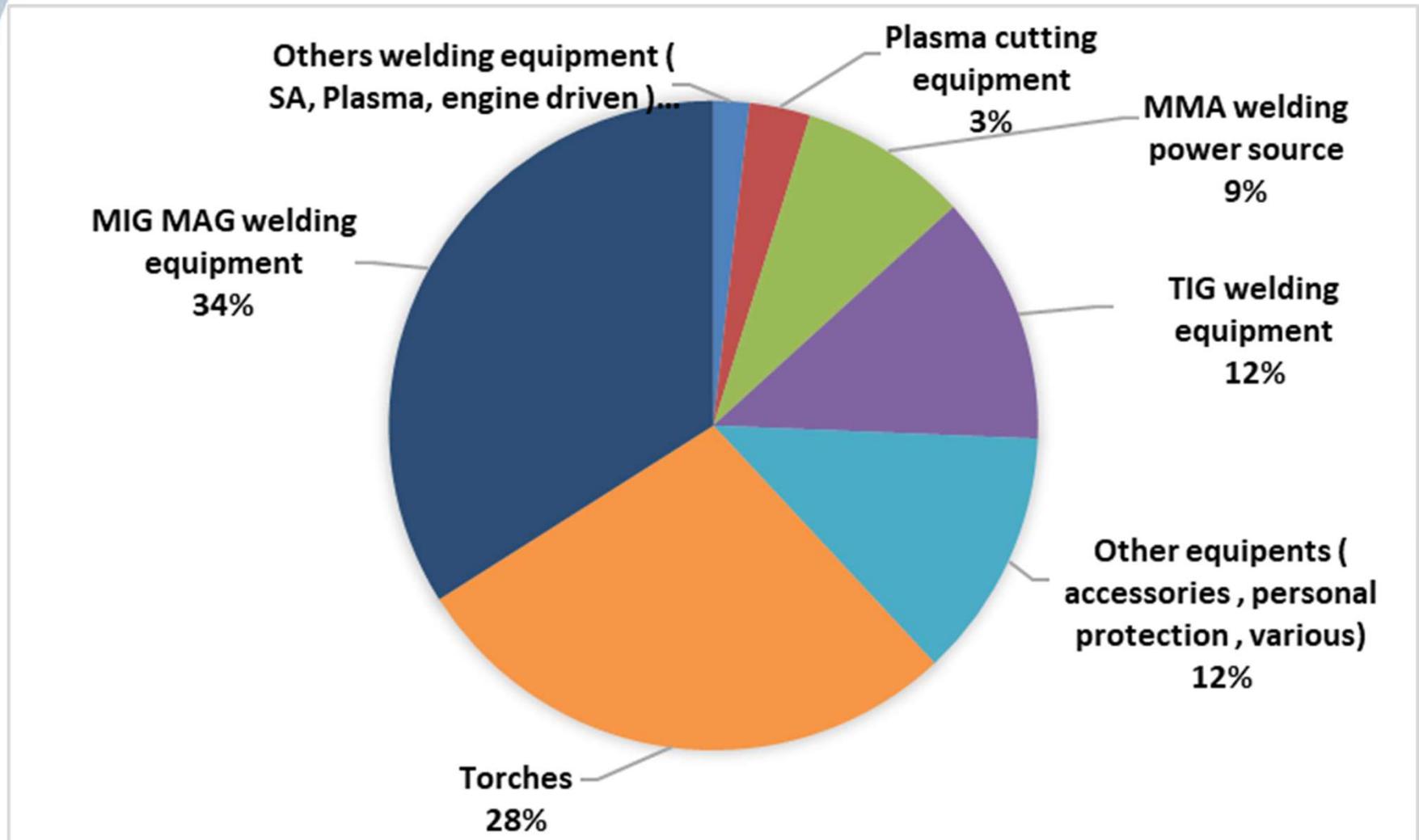


2020 (MT)	2021	2022	2023	2024
232,8	262,7	241,5	242,5	242,5

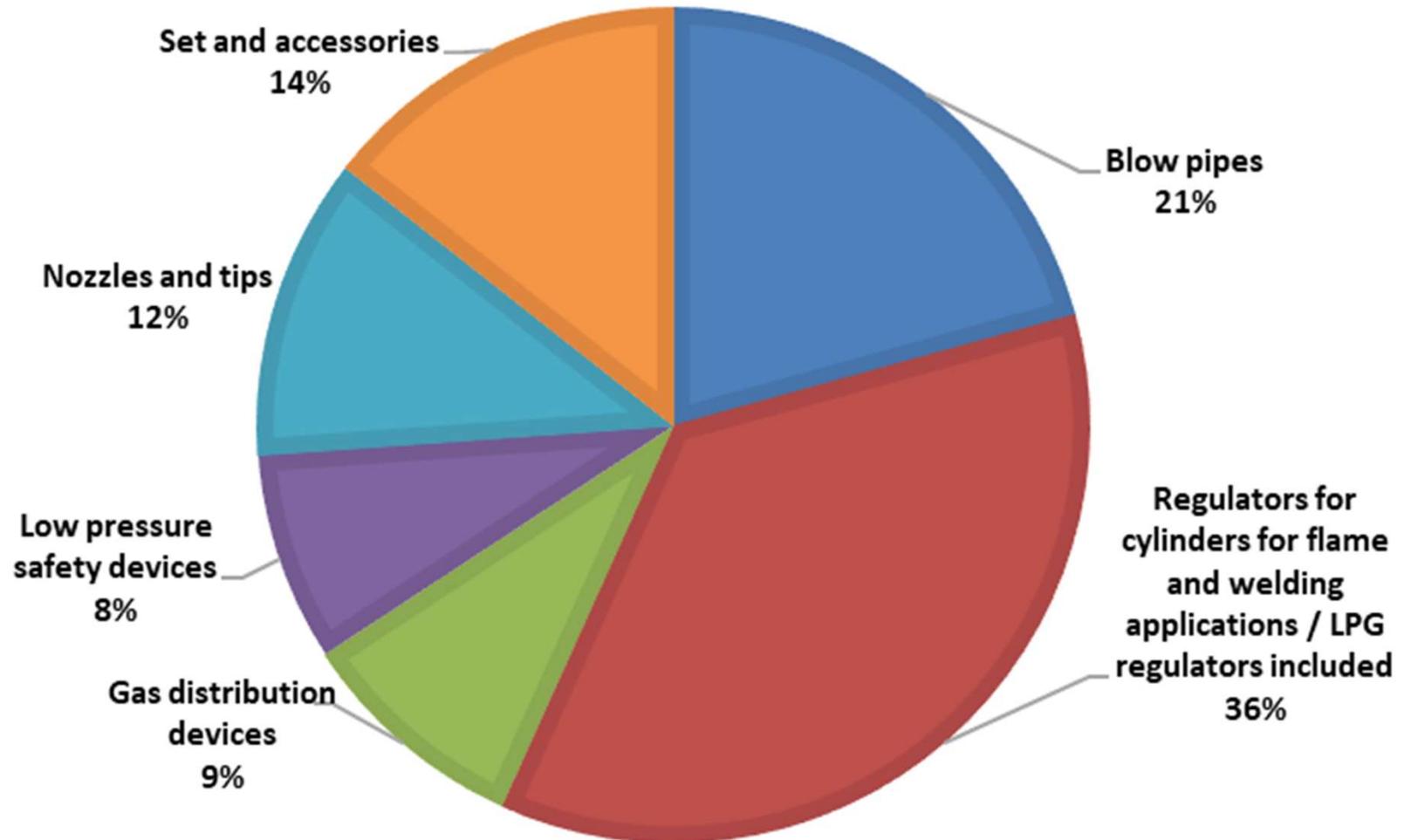
2024 European market of Welding Consumables estimated at 700 K Tons



2024 European market of Arc welding equipment (for professional use) is estimated at 1000 M €

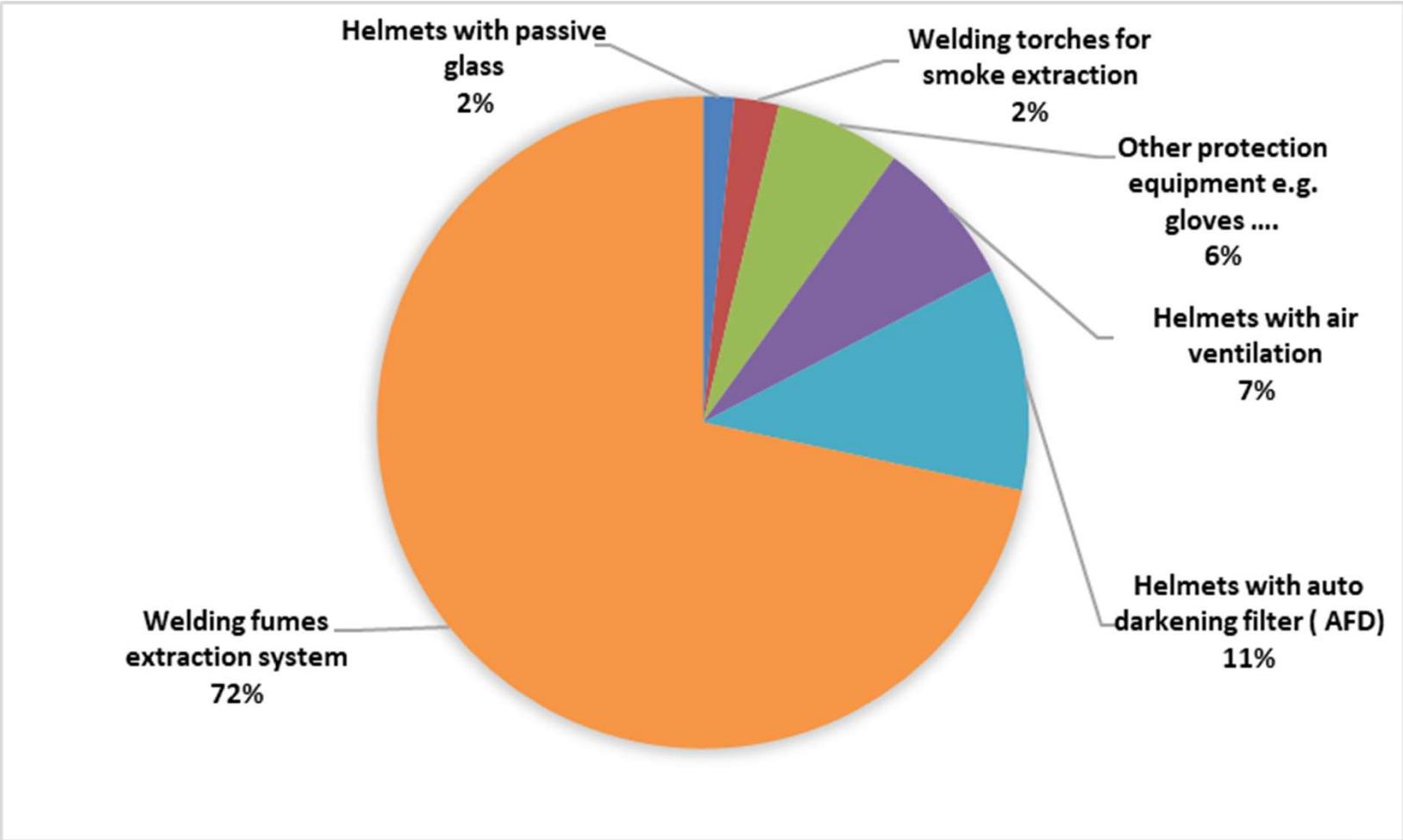


2024 -European Flame equipment market is estimated at 100 Millions €



European countries – Turkey included

2024 European market of health and safety equipment for welders estimated at 300 Millions €



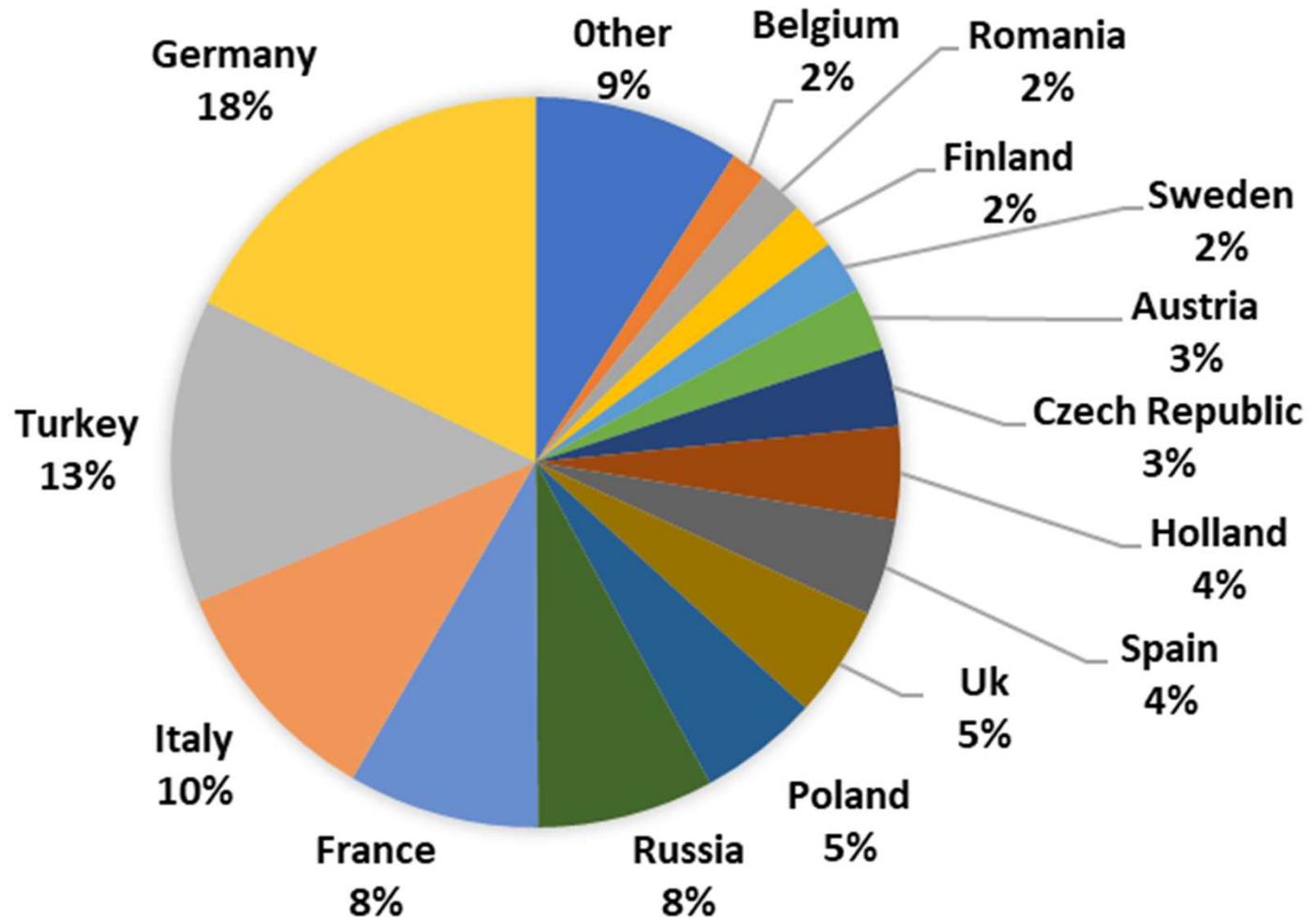
European countries – Turkey included



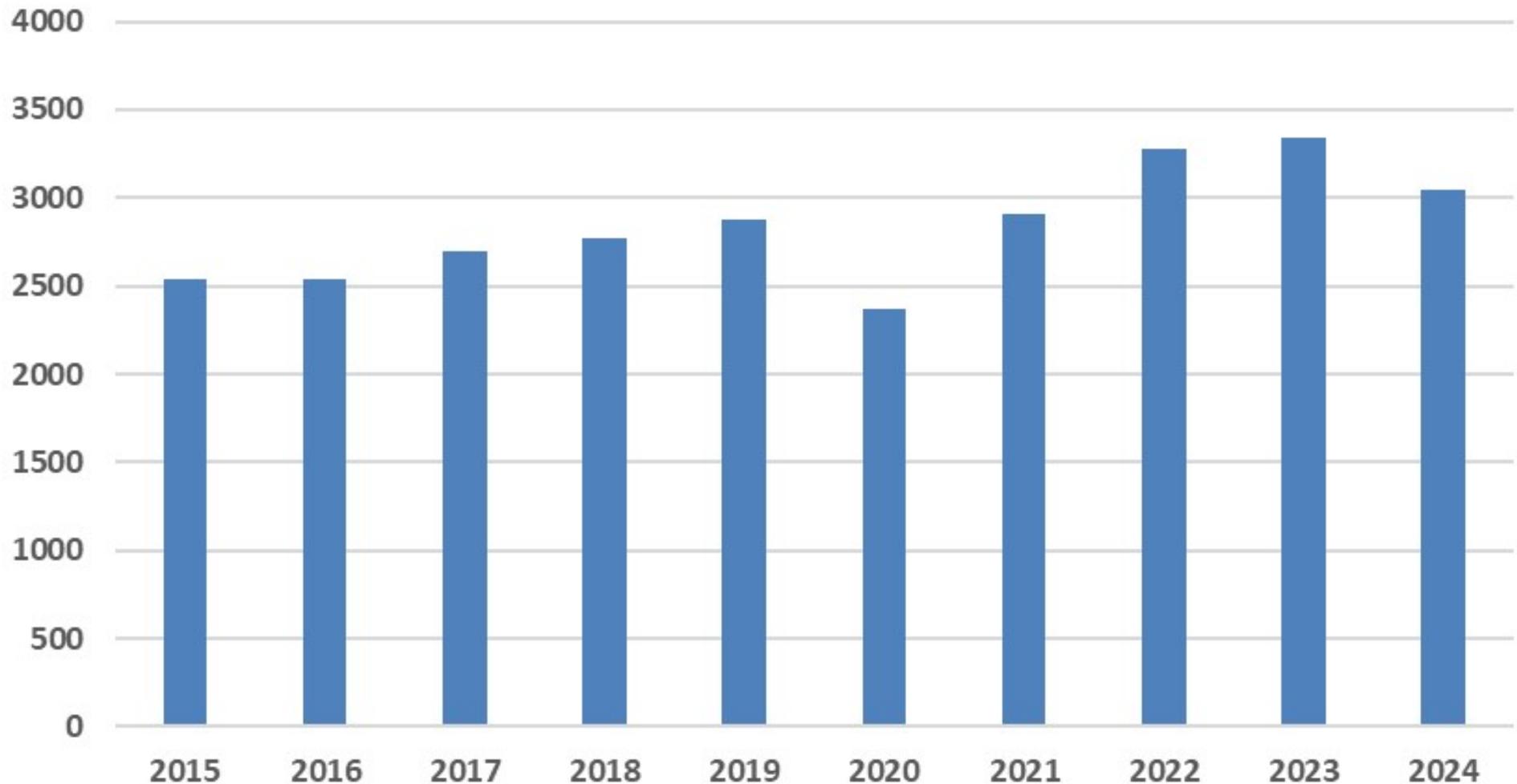
Market repartition

(Arc welding equipment + Welding consumables)

2024 estimation: 3 billions €



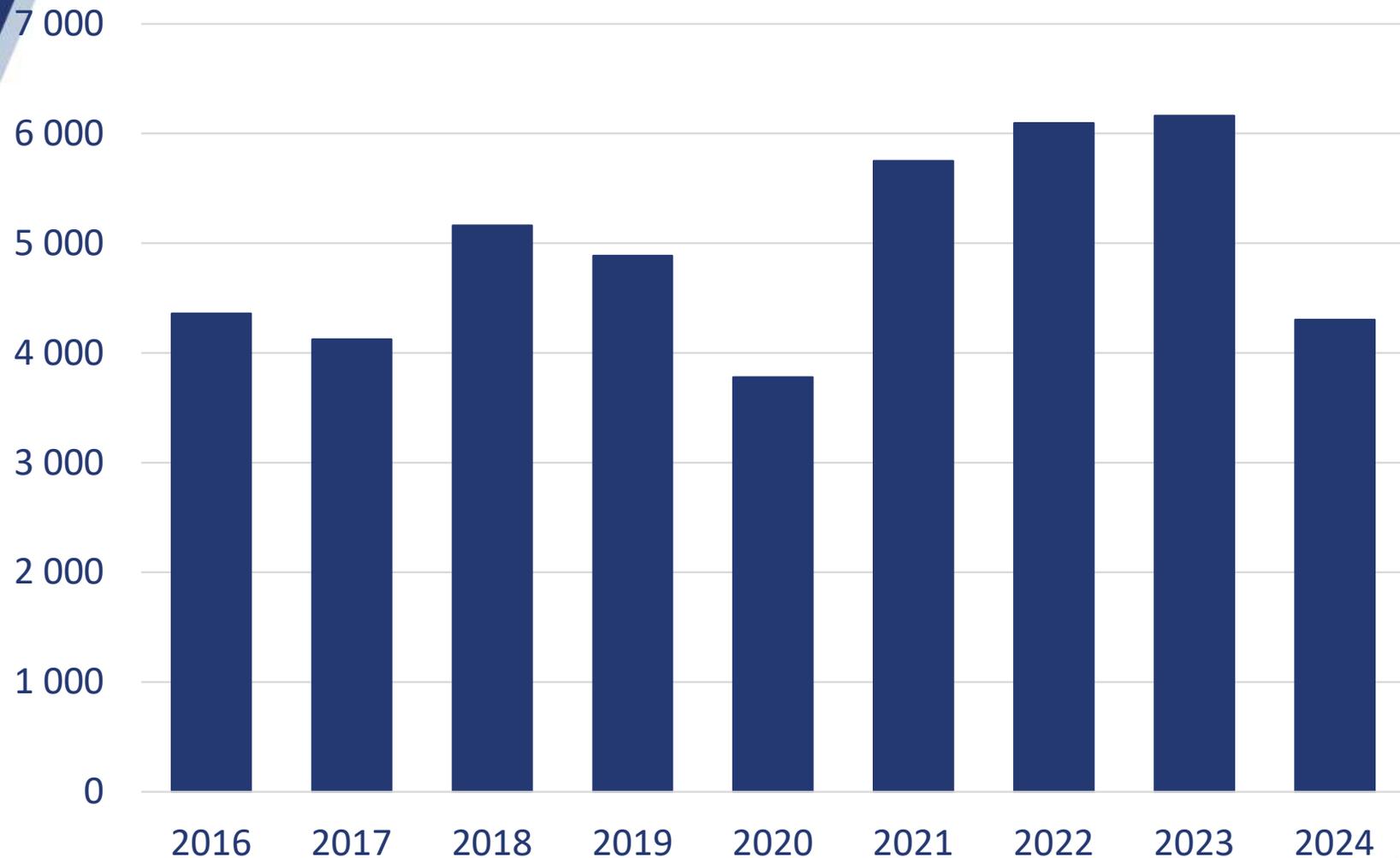
Evolution of the European Market (Welding consumables + Electric equipment+ Flame equipment) 2024 Estimated 3 Billions €



2024

EVOLUTION OF ARC WELDING ROBOTS IN EUROPE

NUMBER (UNITS) OF ARC WELDING ROBOTS SOLD IN EUROPE



2024 REPARTITION OF ARC WELDING ROBOT SOLD IN EUROPE

