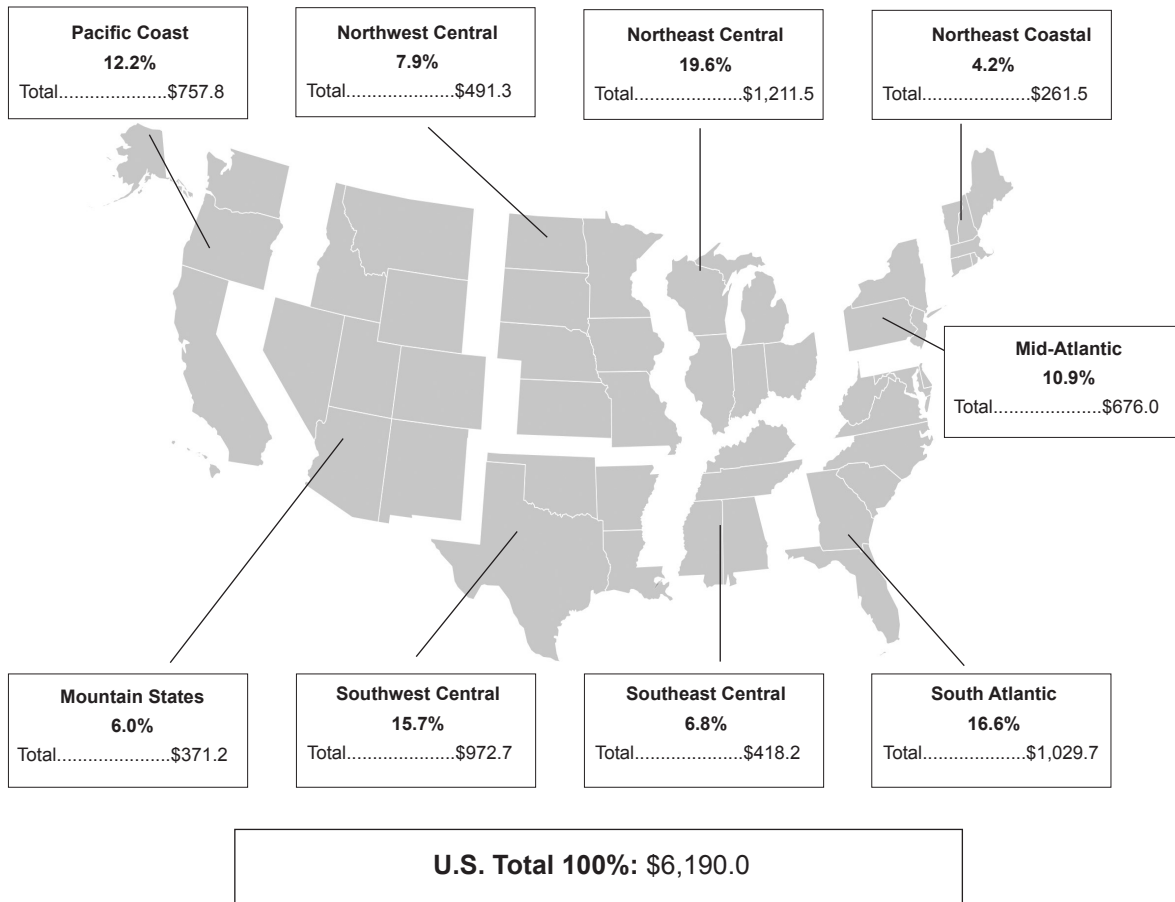


MARKET ANALYSIS: Welding Gases & Equipment Consumption in North America

Consumption of Welding Gases & Equipment in the U.S. was \$6.2 billion in 2013, according to data from MDM Analytics (formerly Industrial Market Information). In Canada, consumption of Welding Gases & Equipment was \$797.6 million and in Mexico consumption was \$713.9 million. All estimates are 2013 end user demand, in U.S. dollars, including distributor margin.

■ U.S. End-User consumption of Welding Gases & Equipment by region, in millions of \$ (2013 estimates)



■ U.S. End-User Consumption of Welding Gases & Equipment: Top 10 End-Markets

Top 10 end-markets in \$ volume, by NAICS code, consuming Welding Gases & Equipment (2013 estimates)

End User	Estimated Consumption
238220 Plumbing, Heating, and Air-Conditioning Contractors	\$635.2 million
238120 Structural Steel and Precast Concrete Contractors	\$193.7 million
811310 Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	\$189.3 million
238910 Site Preparation Contractors	\$158.1 million
236220 Commercial and Institutional Building Construction	\$152.9 million
325412 Pharmaceutical Preparation Manufacturing	\$143.2 million
336411 Aircraft Manufacturing	\$124.3 million
322121 Paper (except Newsprint) Mills	\$115.7 million
213111 Drilling Oil and Gas Wells	\$113.5 million
324110 Petroleum Refineries	\$109.3 million

End-User Consumption of Welding Gases & Equipment in Canada

■ End-Market Size by Province (U.S.\$)

Provinces	Estimated Consumption
Ontario	\$301.4 million
Quebec	\$165.8 million
Alberta	\$153.8 million
British Columbia	\$78.7 million
Manitoba	\$29.7 million
Saskatchewan	\$26.1 million
New Brunswick	\$16.1 million
Nova Scotia	\$13.5 million
Newfoundland and Labrador	\$9.0 million
Prince Edward Island	\$2.6 million
Northwest Territory	\$0.5 million
Yukon	\$0.4 million
Nunavut Territory	\$0.1 million

■ Top 5 End-Markets for Welding Gases & Equipment

End-markets in \$ volume, by NAICS code (2013 estimates)

6-digit NAICS	Description	Estimated Consumption
238220	Plumbing, Heating, and Air-Conditioning Contractors	\$58.2 million
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	\$46.8 million
325412	Pharmaceutical Preparation Manufacturing	\$22.7 million
238190	Other Foundation, Structure, and Building Exterior Contractors	\$20.1 million
213111	Drilling Oil and Gas Wells	\$18.8 million

Total Consumption in Canada: \$797.6 million

End-User Consumption of Welding Gases & Equipment in Mexico

■ End-Market Size: Top 10 States (U.S.\$)

States	Estimated Consumption
Distrito Federal	\$138.6 million
Mexico	\$105.0 million
Nuevo Leon	\$69.6 million
Jalisco	\$59.2 million
Coahuila De Zaragoza	\$39.1 million
Guanajuato	\$38.4 million
Veracruz Llave	\$28.0 million
Chihuahua	\$26.9 million
Puebla	\$25.8 million
Queretaro De Arteaga	\$24.6 million

■ Top 5 End-Markets for Welding Gases & Equipment

End-markets in \$ volume, by NAICS code (2013 estimates)

6-digit NAICS	Description	Estimated Consumption
332313	Plate Work Manufacturing	\$49.5 million
238120	Structural Steel and Precast Concrete Contractors	\$41.7 million
336390	Other Motor Vehicle Parts Manufacturing	\$34.8 million
325180	Other Basic Inorganic Chemical Manufacturing	\$31.6 million
236220	Commercial and Institutional Building Construction	\$30.4 million

Total Consumption in Mexico: \$713.9 million

This market size estimate was compiled by MDM Analytics, Lafayette, CO. Learn more about MDM Analytics at www.mdm.com/analytics.

