



WORLD INVESTMENT CASTING MARKET REVIEW 2002

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The objective of the presentation is to examine the major investment casting market areas of the World.

In considering these areas it is important to emphasise the size and contribution they make to the overall World investment casting industry sales turnover.

The North American market is by far the largest investment casting market in the World with a US\$ sales turnover exceeding 50% of World total. Western Europe contributes a level of approximately 20 – 25% of World total. Asia contributes approximately 15 – 20 % of World total.

Recent estimates when considering a broad overview of the Worldwide investment casting industry sales turnover can be shown in the following approximate way

➤ North America	55 – 60%
➤ Europe	20 – 25%
➤ Asia	15 – 20%
➤ Other Areas	5 – 10%

It has been possible to obtain approximate sales turnover levels for each area up to the end of year 2002. It is with much appreciation to the following that these figures have been made available.

EICF (European Investment Casting Federation)

ICI (Investment Casting Institute in the United States)

JACT (Japan Association Of Casting Technology)

For some time now at various market review meetings an attempt to classify turnover levels into certain market categories has been made.

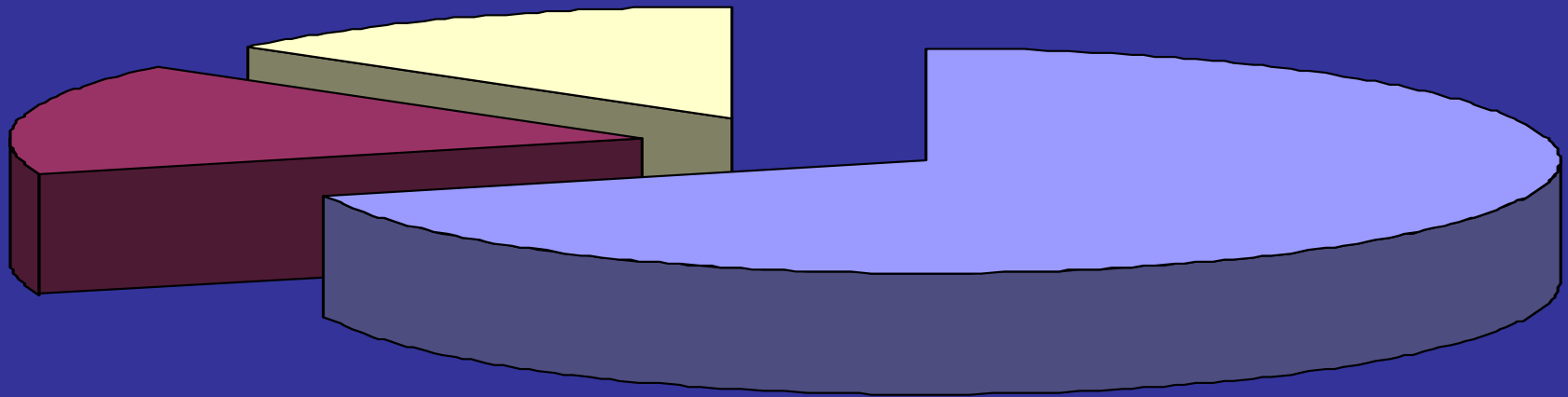
The best comparative market category data available allows turnover for each area to be split into 3 main market classifications as follows -

High Added Value

Automotive

Other Markets

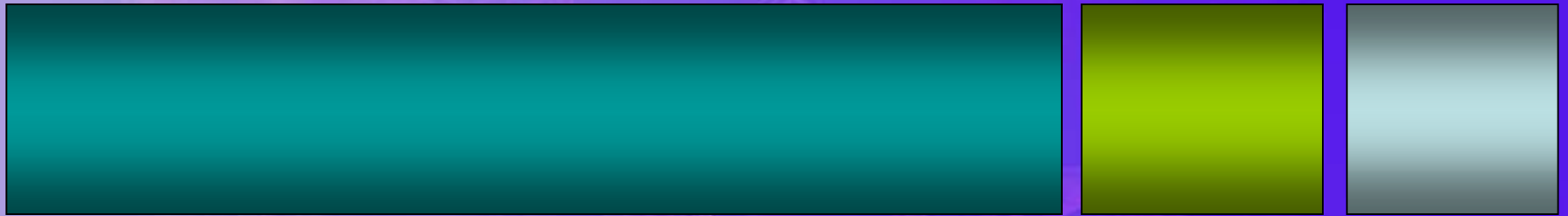
SALES TURNOVER FOR EUROPE TO YEAR 2002



- High Added Value (US\$ 980M)
- Automotive (US\$ 224M)
- Other Markets (US\$ 196M)

TOTAL US \$ 1400M

SALES TURNOVER FOR EUROPE IN PERCENTAGE TERMS



HIGH ADDED VALUE

70%



AUTOMOTIVE

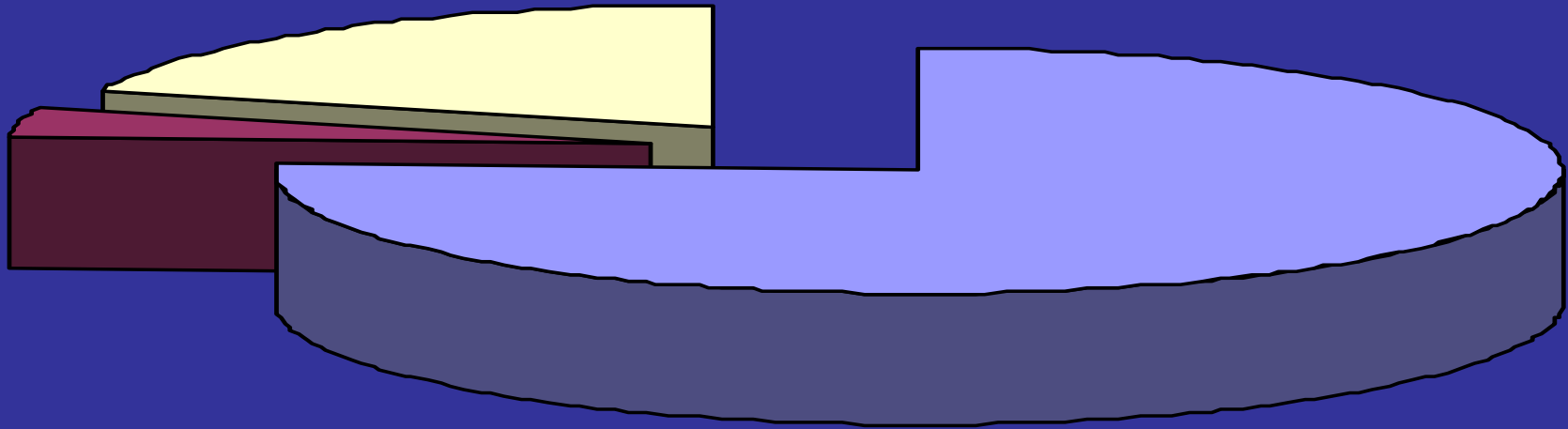
16%



OTHER MARKETS

14%

SALES TURNOVER FOR NORTH AMERICA TO YEAR 2002



- High Added Value (US\$ 3013M)
- Automotive (US\$ 169M)
- Other Markets (US\$ 793M)

TOTAL US \$ 3975M

SALES TURNOVER FOR NORTH AMERICA IN PERCENTAGE TERMS

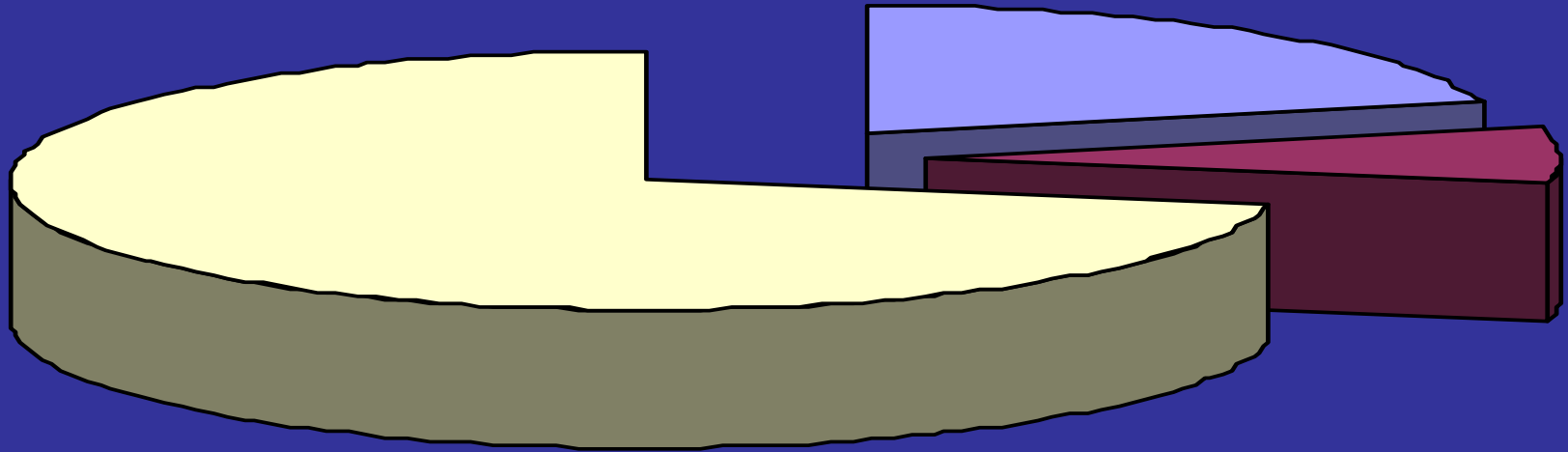


 HIGH ADDED VALUE 76%

 AUTOMOTIVE 04%

 OTHER MARKETS 20%

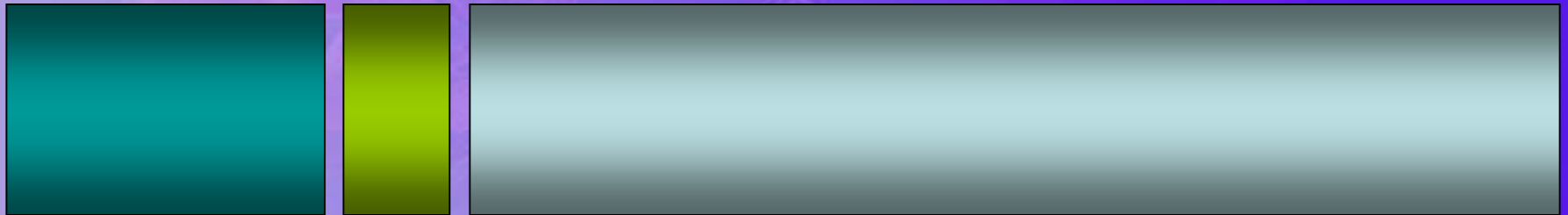
SALES TURNOVER FOR ASIA TO YEAR 2002



- High Added Value (US\$ 292M)
- Automotive (US\$ 98M)
- Other Markets (US\$ 1000M)

TOTAL US \$ 1390M

SALES TURNOVER FOR ASIA IN PERCENTAGE TERMS



HIGH ADDED VALUE 21%

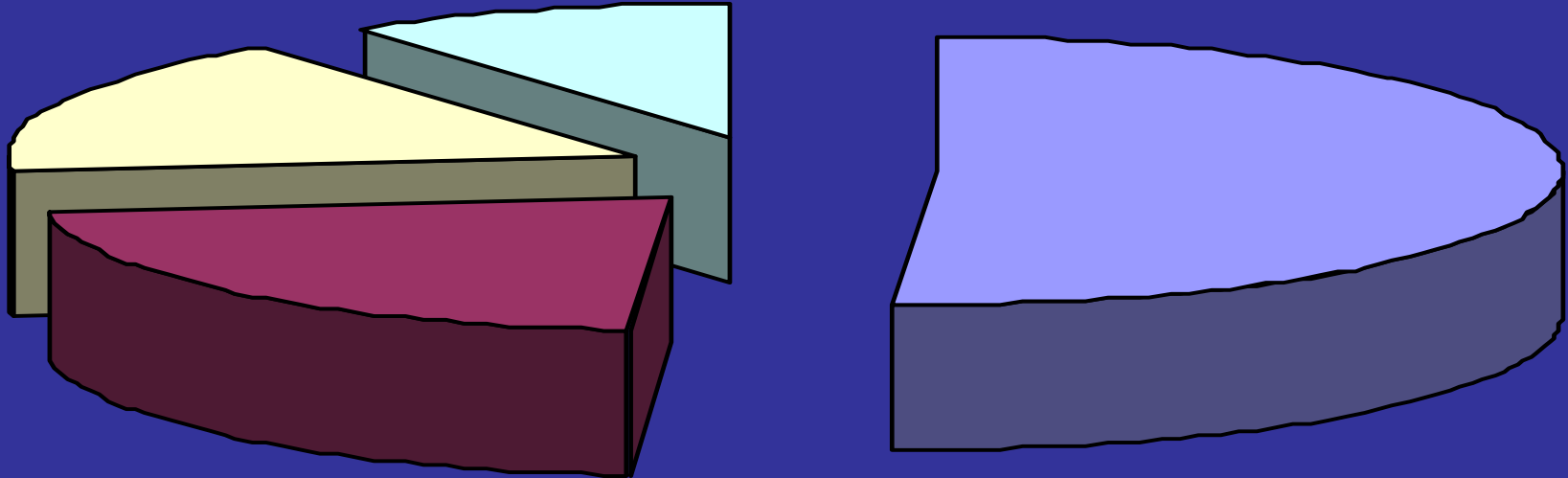


AUTOMOTIVE 07%



OTHER MARKETS 72%

BREAKDOWN OF EUROPE INVESTMENT CASTING MARKET



■ UK (US\$ 714M)

■ France (US\$ 308M)

■ Germany (US\$ 238M)

■ Others (US\$ 140M)

GEOGRAPHICAL PERCENTAGE BREAKDOWN OF EUROPEAN MARKET

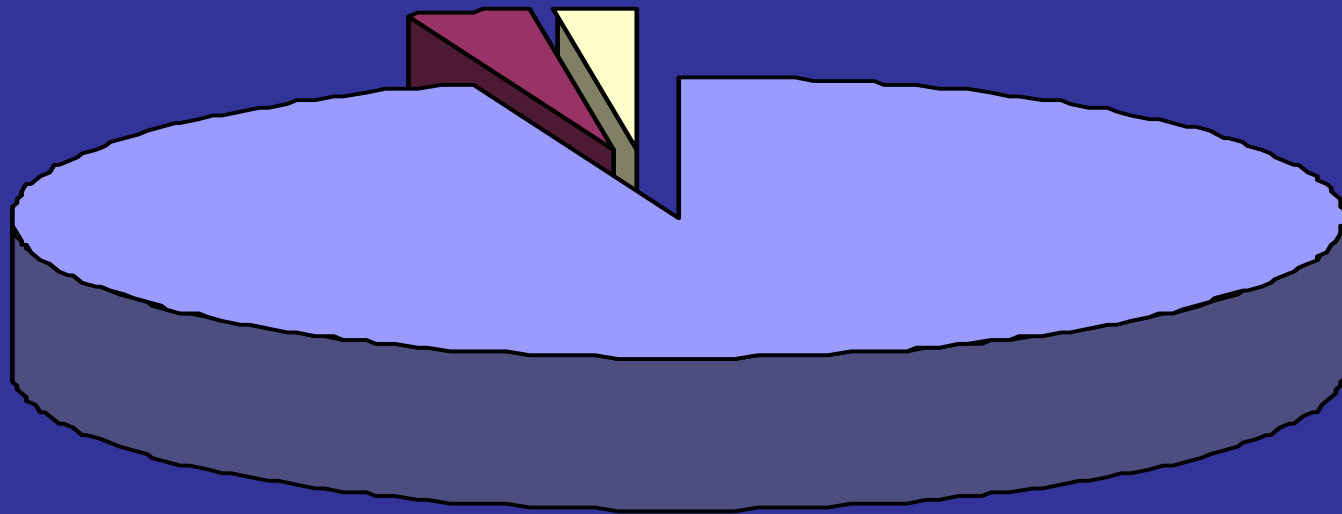
➤ UK 51%

➤ FRANCE 22%

➤ GERMANY 17%

➤ OTHERS 10%

BREAKDOWN OF NORTH AMERICAN INVESTMENT CASTING MARKET



■ USA (US\$ 3776M)

■ Canada (US\$ 119M)

■ Mexico (US\$ 80M)

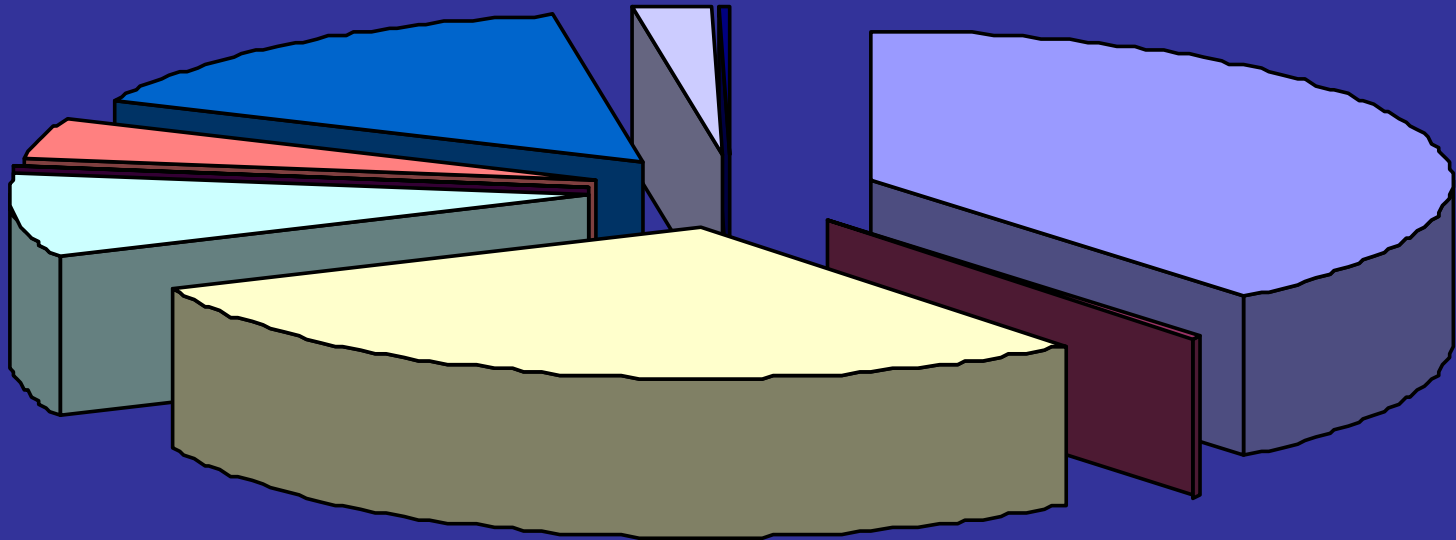
GEOGRAPHICAL PERCENTAGE BREAKDOWN OF NORTH AMERICAN MARKET

➤ USA 95%

➤ CANADA 03%


➤ MEXICO 02%

BREAKDOWN OF ASIA INVESTMENT CASTING MARKET



China (US\$ 542M)	Indonesia (US\$ 3M)	Japan (US\$ 403M)
Korea (US\$ 125M)	Malaysia (US\$ 6M)	Philippines (US\$ 55M)
Taiwan (US\$ 222M)	Thailand (US\$ 28M)	Vietnam (US\$ 6M)

GEOGRAPHICAL PERCENTAGE BREAKDOWN OF ASIAN MARKET



➤ CHINA	39%
➤ JAPAN	29%
➤ TAIWAN	16%
➤ KOREA	09%
➤ PHILIPPINES	04%
➤ THAILAND	02%
➤ MALAYSIA	0.4%
➤ VIETNAM	0.4%
➤ INDONESIA	0.2%

FUTURE TRENDS

We have reviewed the major areas of World Investment Casting sales turnover and shown data up to year 2002

It will be interesting to discuss trends with an aim to explore where the industry is moving into the future

THANKS FOR LISTENING