

**A Review of
Investment
Casting
Markets**

Maastricht 1996

A REVIEW OF INVESTMENT CASTING MARKETS

Presented at the EICF Conference in Maastricht, The Netherlands, 1996

R B Williams, Blayson Olefines Ltd, UK

INTRODUCTION

At the Prague EICF Conference in June 1994, I was Chairman of a Seminar that reviewed some of the major investment casting areas throughout the World. It is a pleasure to be invited back again by EICF to make a similar review and to update the data to the beginning of 1996.

As before, I initially plan to present some general data that considers the situation in the major markets of the World at the start of 1996. Then I would like to call upon several knowledgeable people within the industry to make a brief presentation about the investment casting industry in their country or countries they know well.

It is hoped that as a result of all the data presented and any subsequent discussion we can consider how the industry can develop further into the future.

The World Investment Casting Market

At the beginning of 1996 the World Investment Casting Industry had a turnover of approximately US\$4.25 Billion for the major markets of Europe, North America and Asia. It should be pointed out that these figures do not include data from some of the Eastern European Nations and China. However, later during the individual presentations we hope to have a closer look at both these areas. Also it must be emphasised that the figures listed are based on turnover and not on tonnage of castings produced. The approximate percentage breakdown of World turnover is shown in Figure 1.

European Investment Casting Market

At the beginning of 1996, the approximate turnover of the European Investment Casting Industry was US\$1075 Million. The approximate percentage breakdown into different areas is shown in Figure 2.

It is worth noting that within the UK roughly 60-65% of the turnover figure is

derived from aerospace or released (documented) applications, compared with about 50% for France and Germany.

North American Investment Casting Market

At the beginning of 1996, the approximate turnover of the North American Investment Casting Industry was US\$2135 Million. It has the largest total share of the overall World market at 50% of the World total.

Within North America, the market is dominated by the United States, which contributes to roughly 95% of the total North American turnover. The approximate percentage breakdown into different areas is shown in Figure 3. It may be interesting to note that within the United States total, about 60-65% relates to aerospace or released (documented) applications.

Asian Investment Casting Market

At the beginning of 1996, the estimated turnover of the Asian Investment Casting Industry was US\$840 Million. The approximate percentage breakdown into different areas is shown in Figure 4.

The largest contributor to the Asian market is still Japan and up until now 15-20% of Japan's turnover is made up of aerospace or released (documented) applications. The markets in Taiwan and Korea are almost entirely non documented or commercial. Hopefully, in the individual presentations we can expand upon the growing markets, such as Thailand, Malaysia and Vietnam and review the large Chinese investment casting market. However, it must be stressed that the figures quoted in the overall Asian turnover data do not include China.

CONCLUSION

The data presented is a reflection of the situation at the beginning of 1996. Generally the World investment casting industry has shown growth during the past 2 years. It will be interesting to consider this along with individual presentation data in assessing the current state of the industry and how we see it developing into the future.

**WORLD INVESTMENT CASTING MARKET
APPROXIMATE TURNOVER US\$4.25 BILLION
PERCENTAGE SPLIT INTO AREAS**

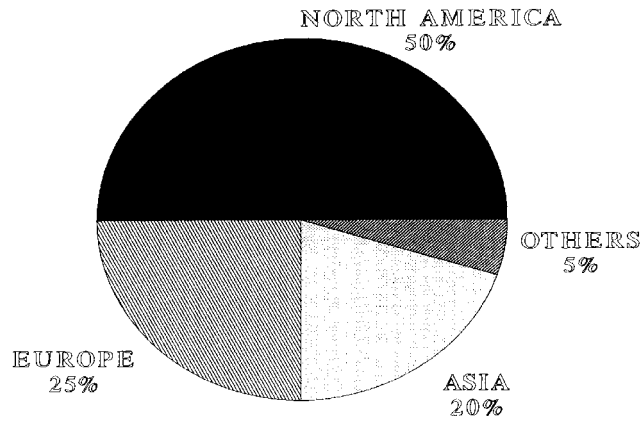


FIGURE 1

**EUROPEAN INVESTMENT CASTING MARKET
APPROXIMATE TURNOVER US\$1075 MILLION
PERCENTAGE SPLIT INTO AREAS**

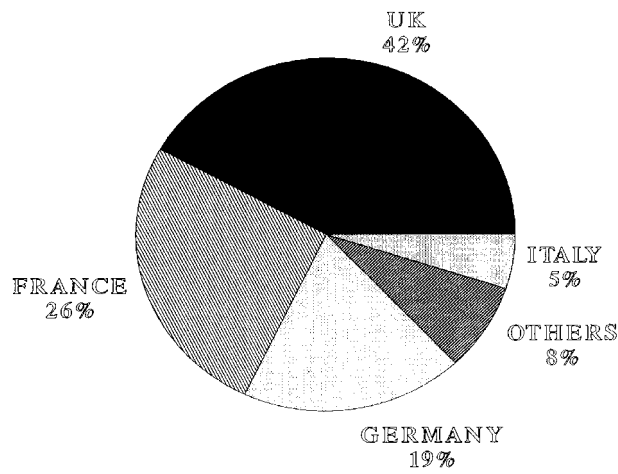


FIGURE 2

**NORTH AMERICAN INVESTMENT CASTING MARKET
APPROXIMATE TURNOVER US\$2135 MILLION
PERCENTAGE SPLIT INTO AREAS**

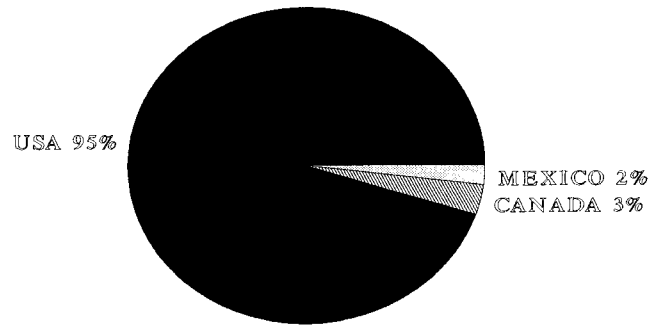


FIGURE 3

**ASIAN INVESTMENT CASTING MARKET
APPROXIMATE TURNOVER US\$840 MILLION
PERCENTAGE SPLIT INTO AREAS**

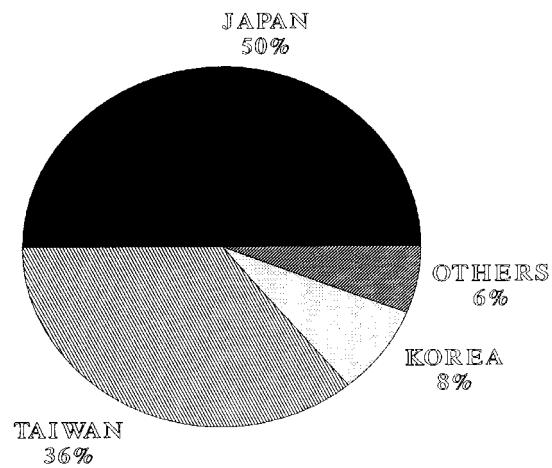


FIGURE 4

Blayson