

# MARKET REVIEW OF WESTERN EUROPE AND NORTH AMERICA

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- The objective of the presentation is to examine how the major investment casting market areas of Western Europe and North America have developed to date.
- In considering both areas it is important to emphasise the size and contribution both make to the overall World investment casting industry.
- The North American market is by far the largest investment casting market in the World with a US\$ turnover exceeding 50% of World total. Western Europe contributes a level of approximately 20 - 25% of World total.

- Recent estimates when considering a broad overview of the Worldwide investment casting industry turnover (excluding China and Eastern Europe) can be shown in the following approximate way

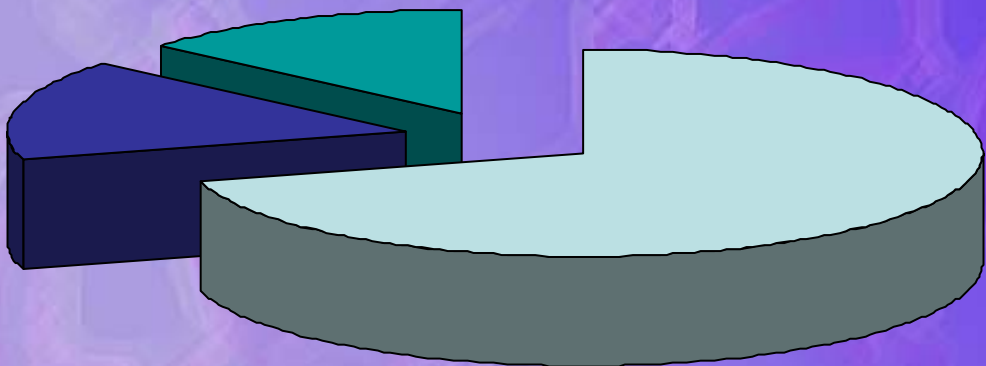
➤	North America	55 - 60%
➤	Europe	20 - 25%
➤	Asia	15 - 20%
➤	Other areas	5 -10%

- It has been possible to obtain turnover levels for each area Western Europe and North America up to the end of year 2000. It is with much appreciation to both Jean-Marc Schissler of the Investment Casting Group within CAEF in Europe and Mike Perry of the ICI in the United States that these figures have been made available.

- For some time now at various market review meetings an attempt to classify turnover levels into certain market categories has been made. In discussing this with Jean-Marc Schissler and Mike Perry 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**

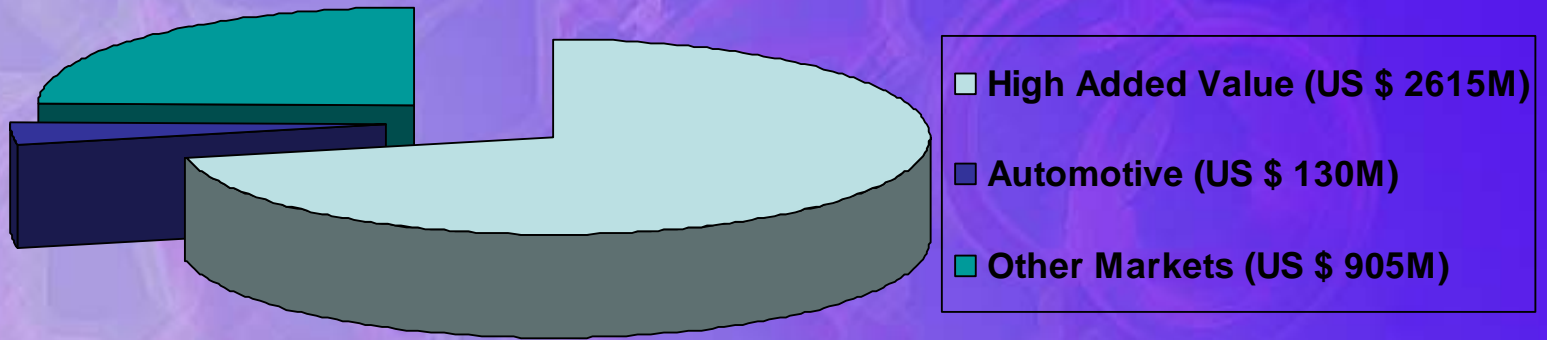
# TURNOVER LEVELS FOR WESTERN EUROPE FOR YEAR 2000



- High Added Value (US \$ 900M)
- Automotive (US \$ 200M)
- Other Markets (US \$ 175M)

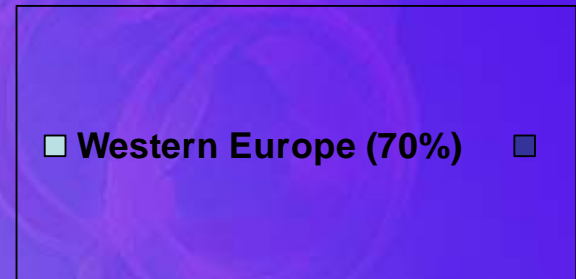
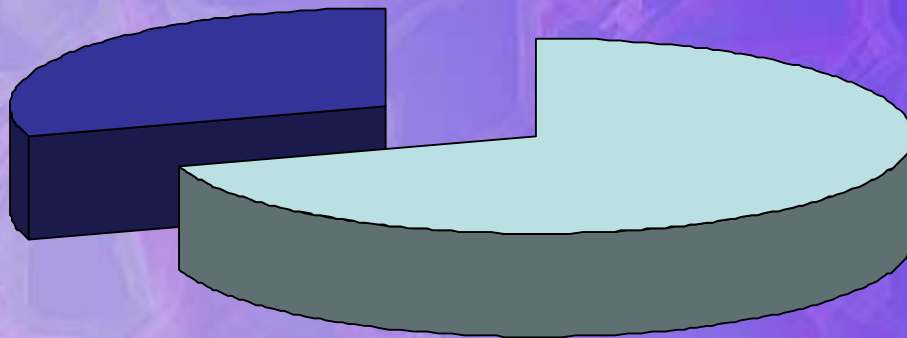
TOTAL US \$ 1275M

# TURNOVER LEVELS FOR NORTH AMERICA FOR YEAR 2000

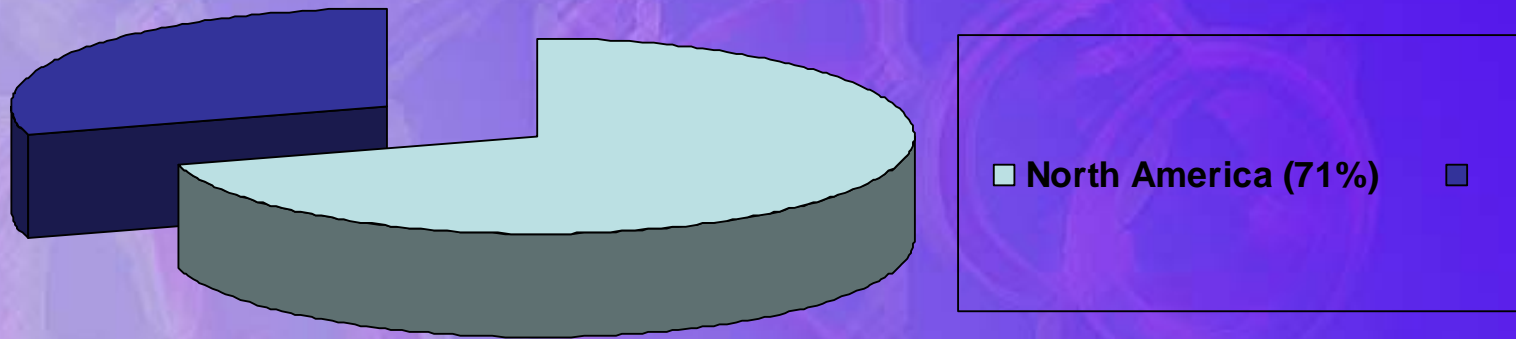


TOTAL US \$ 3650M

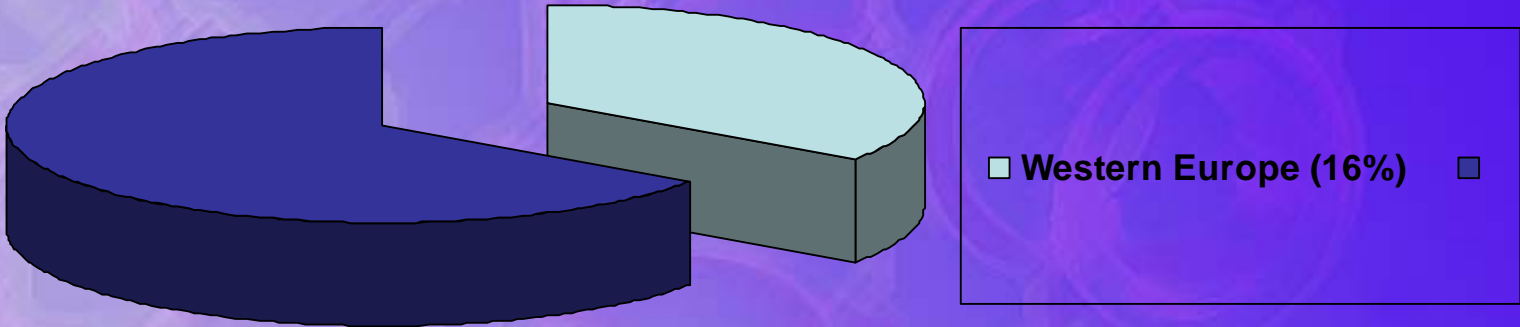
# HIGH ADDED VALUE AS SHARE OF TOTAL MARKET FOR YEAR 2000



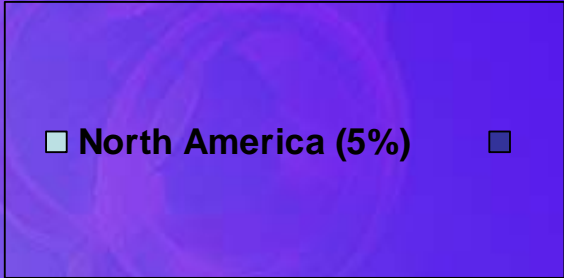
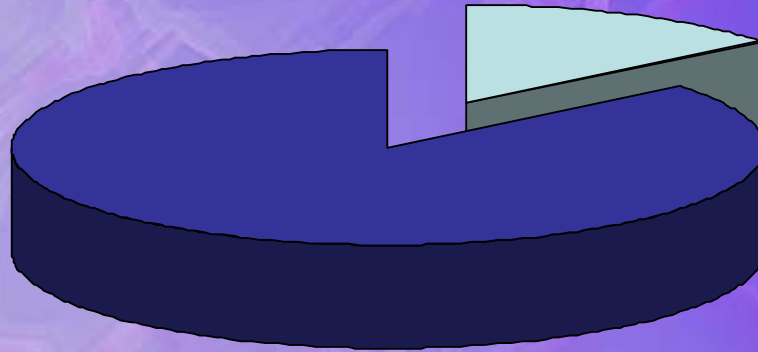
# HIGH ADDED VALUE AS SHARE OF TOTAL MARKET FOR YEAR 2000



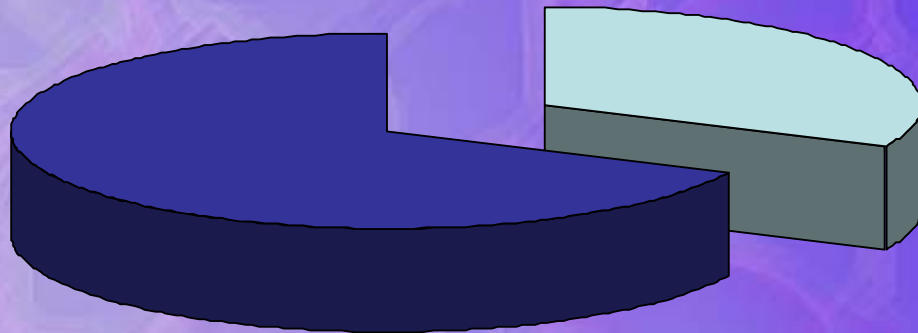
# AUTOMOTIVE AS SHARE OF TOTAL MARKET FOR YEAR 2000



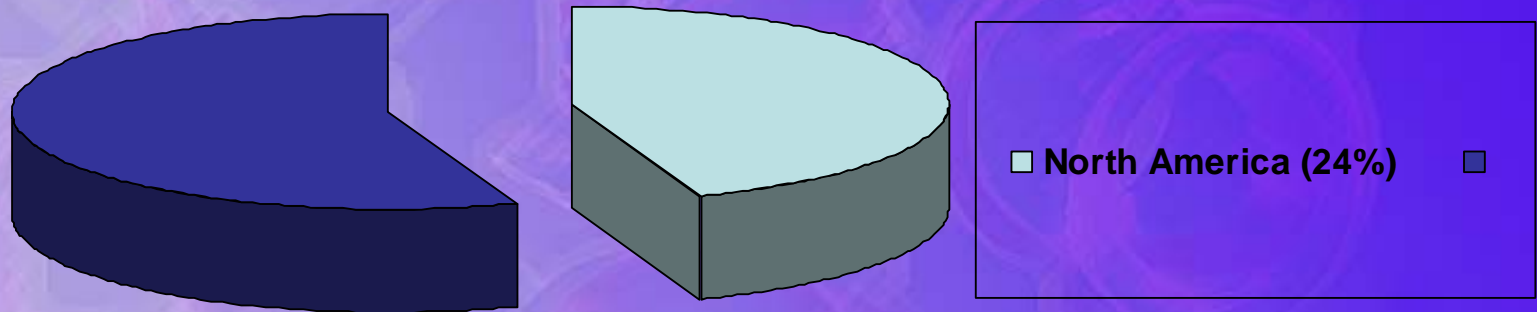
# AUTOMOTIVE AS SHARE OF TOTAL MARKET FOR YEAR 2000



# OTHER MARKETS AS SHARE OF TOTAL MARKET FOR YEAR 2000



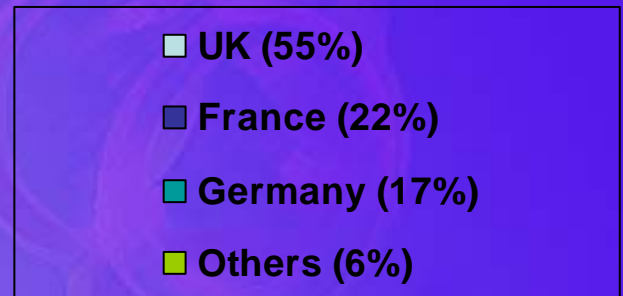
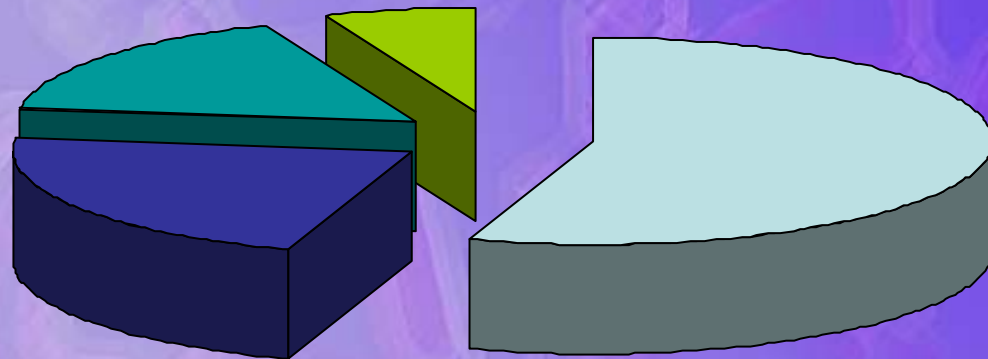
# OTHER MARKETS AS SHARE OF TOTAL MARKET FOR YEAR 2000



## BREAKDOWN OF THE 3 LEADING WESTERN EUROPE AREAS FOR 2000

	High Added Value	Automotive	Other
UK \$ 700M	\$ 608M	\$ 70M	\$ 18M
France \$ 280M	\$ 190M	\$ 48M	\$ 40M
Germany \$ 220M	\$ 89M	\$ 55M	\$ 77M

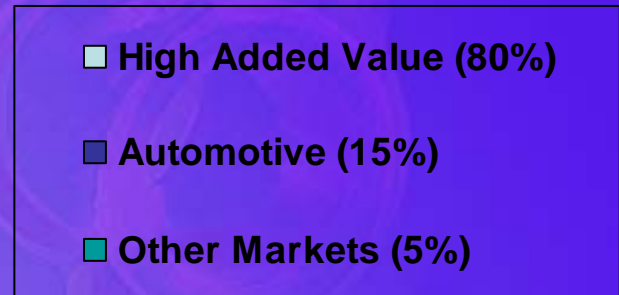
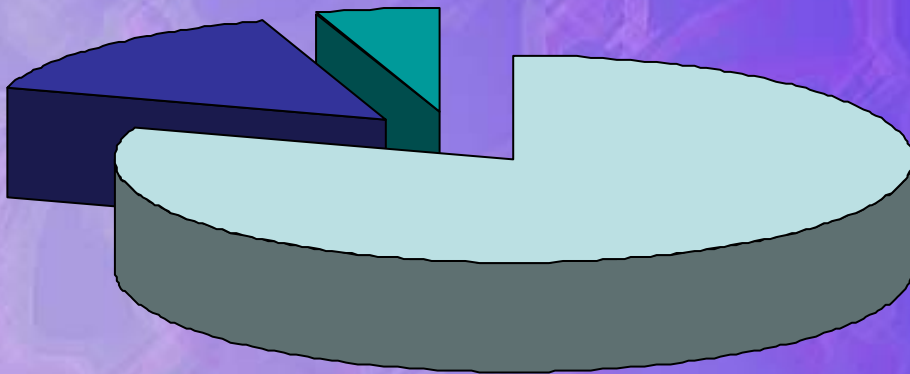
# APPROXIMATE PERCENTAGE TURNOVER BREAKDOWN OF WESTERN EUROPE AREAS FOR 2000



# PERCENTAGE MARKET SPLIT WITHIN THE 3 MAIN WESTERN EUROPE AREAS FOR 2000

## Market Classification

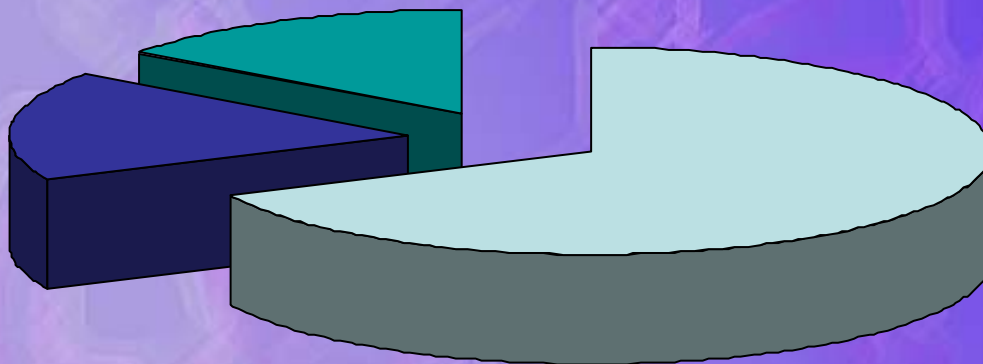
## UK



# PERCENTAGE MARKET SPLIT WITHIN THE 3 MAIN WESTERN EUROPE AREAS FOR 2000

## Market Classification

## France

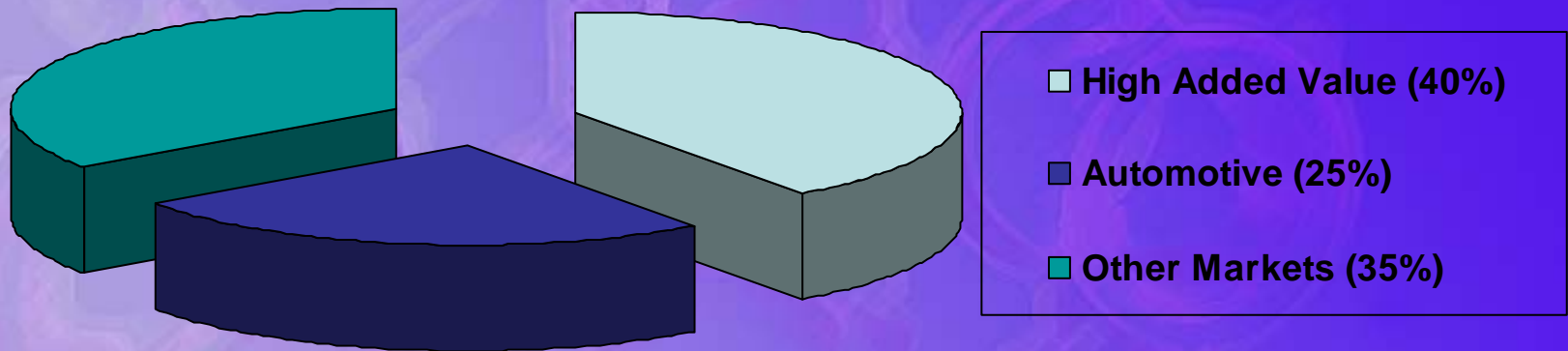


- High Added Value (68%)
- Automotive (17%)
- Other Markets (15%)

# PERCENTAGE MARKET SPLIT WITHIN THE 3 MAIN WESTERN EUROPE AREAS FOR 2000

## Market Classification

## Germany



# Trends for Year 2001

- The investment casting industry in both Western Europe and North America are major contributors to the industry worldwide. We have shown development to end of year 2000 but it will be interesting to discuss trends in 2001 with an aim to explore where the industry is heading into the future. Data for this is not yet available but perhaps it will be possible to gain information during the discussions for the presentation.