

Investment Casting Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Investment Casting Market Report

The global investment casting market by revenue is expected to grow at a CAGR of over 3% during the period 2019–2025.

The global investment casting market size is expected to reach revenue of close to \$18 billion by 2025. The industry is currently under high duress on account of the COVID-19 pandemic. The demand slowdown among the majority of end-users has significantly affected the industry. The fiscal stimulus packages are yet to make a positive impact on the market and are expected to have some bearing only by the end of 2020. The growth rate, which was hovering around 5% to 6%, has now declined significantly post COVID-19. A large part of the demand coming from the automotive and aerospace industry has nosedived in several countries is affecting the market. The growth estimates for automotive, aerospace & defense, and power generation are the most impacted. As of 2020, on the demand side, volumes are declining while prices of the casting products have not been allowed to fluctuate drastically due to high competition. The acceptance of newer and more efficient materials is growing on a global scale. The pre-pandemic level for industrial production is not expected until late 2021 in many end-user sectors.

The following factors are likely to contribute to the growth of the investment casting market during the forecast period:

Increasing Growth of Electric Vehicles

Growing Application of Rapid Prototype Processes

Automation in Investment Casting

High Growth of Healthcare Industry

The study considers the present scenario of the global investment casting market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Investment Casting Market Segmentation

The global investment casting market research report includes a detailed segmentation by end-users and geography. The investment casting demand from the automatic and defense industry is expected to be low in 2020 and will take a minimum of two years to reach the pre-pandemic levels. The aerospace casting industry will be in the red for a long duration than the defense industry (as the defense spending is not dependent on consumer spending). The price escalation by the casting industry is estimated to be a short-term measure to spruce up capital and sustain the operations, which have been shut due to the COVID-19 pandemic.

The demand for investment casting from the medical industry is expected to be volatile during 2020, as there exists low demand for non-critical non-COVID-19 medical devices. On account of the COVID-19 pandemic, the demand for medical devices reduced in H1 2020, and the same is expected to be lower for H2 2020. Several people have delayed their hospital visits and surgical procedures. The demand currently is more for devices related to COVID-19 emergencies.

Segmentation by End-user

Automotive

Aerospace & Defense

Healthcare

Industrial Machinery & Heavy Equipment

Others

INSIGHTS BY GEOGRAPHY

North America was the largest market, followed by APAC and Europe. However, APAC is expected to emerge as one of the leading countries during the forecast period. The demand for investment casting in North America is likely to depend on the automotive, aerospace, and IGT industries. The demand for investment casting, although impacted by COVID-19 related economic pressure in North America, is expected to recover faster (in some of the components if not all) as it constitutes an essential part of the overall functioning of any industrial production plant. Post COVID-19, the challenges have further increased for vendors in North America. The industry is expected to witness low production levels in the short term, and profit margins are expected to shrink. With developing countries of APAC facing an uphill task in controlling the spread of the pandemic, end-user sectors are expected to re-strategize. The resulting shift in the supplier strategy is expected to impact the North American market for investment casting positively.

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

APAC

China

Japan

South Korea

India

Australia

Latin America

Brazil

Mexico

Others

Middle East & Africa

Saudi Arabia

South Africa

Turkey

Egypt

INSIGHTS BY VENDORS

The global investment casting market is highly fragmented, with no global leader providing a full portfolio of products and services across countries. This is mainly due to different regional demands and also the need for proximity to the client's location. The industry is characterized by the presence of diversified companies at local and regional

levels. Not many vendors in the market are investing in advanced technology. Only prominent vendors with deliverables to critical end-users have investments in advanced technology. The procurement of raw materials and the machinery involved in manufacturing are major cost factors. M&A activities are expected to increase as players look to consolidate. The lack of demand on account of COVID-19 is expected to increase consolidation, and at the same time, smaller vendors are looking to exit the high capital intensive market. Vendors must set apart their product and service offerings through a clear and unique value proposition.

Prominent Vendors

Doncasters

Impro

Zollern

Dongying Giayoung Precision Metal

Precision Castparts Corp (PCC)

Vestshell

Signicast

Investment & Precision Castings

Hitachi Metals

MetalTek

Arconic

Consolidated Precision Products

RLM Industries

Milwaukee Precision Castings

Aristo Cast

George Fischer

Thompson Investment Casting

Ningbo Wanguan

KEY QUESTIONS ANSWERED

1. What is the investment casting market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the investment casting market share?
3. How is the growth of the aerospace casting market affecting the growth of the investment casting market?
4. Who are the leading vendors in the global investment casting market, and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the investment casting market shares?

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