

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 automotive 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?

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.1.1 Inclusions

4.1.2 Exclusions

4.2 Base Year

4.3 Scope of The Study

4.3.1 Market Segmentation by End-Users

4.3.2 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.2 Currency Conversion

5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Overview

7.1.1 Key Insights

7.1.2 Demand Insights

7.1.3 Pricing Policy

7.1.4 US and China Trade Concerns

7.2 Global Economy: 2019

8 MARKET OPPORTUNITIES & TRENDS

8.1 Electric Vehicles

8.2 Use of Rapid Prototype Process

8.3 Automation In Investment Casting

9 MARKET GROWTH ENABLERS

9.1 Healthcare Industry

9.2 New Materials Usage

10 MARKET RESTRAINTS

10.1 Covid-19-Related Economic Downturn

10.2 Complete Grounding Of Aerospace Industry

10.3 Slow Recovery Of Automotive Industry

11 MARKET LANDSCAPE

11.1 Market Overview

11.2 Market Size & Forecast

11.3 Five Forces Analysis

11.3.1 Threat of New Entrants

11.3.2 Bargaining Power of Suppliers

11.3.3 Bargaining Power of Buyers

11.3.4 Threat of Substitutes

11.3.5 Competitive Rivalry

12 END-USERS

12.1 Market Snapshot & Growth Engine

12.2 Market Overview

12.3 Aerospace & Defense

12.3.1 Market Overview

12.3.2 Market Size & Forecast

12.3.3 Market by Geography

12.4 Healthcare

12.4.1 Market Overview

12.4.2 Market Size & Forecast

12.4.3 Market By Geography

12.5 Automotive

12.5.1 Market Overview

12.5.2 Market Size & Forecast

- 12.5.3 Market By Geography
- 12.6 Industrial Machinery & Heavy Equipment
 - 12.6.1 Market Overview
 - 12.6.2 Market Size & Forecast
 - 12.6.3 Market By Geography
- 12.7 Others
 - 12.7.1 Market Overview
 - 12.7.2 Market Size & Forecast
 - 12.7.3 Market By Geography

13 GEOGRAPHY

- 13.1 Market Snapshot & Growth Engine
- 13.2 Geographic Overview
 - 13.2.1 Key Takeaways

14 NORTH AMERICA

- 14.1 Market Overview
- 14.2 Market Size & Forecast
- 14.3 End-Users: Market Snapshot & Growth Engine
 - 14.3.1 Aerospace & Defense: Market Size & Forecast
 - 14.3.2 Healthcare: Market Size & Forecast
 - 14.3.3 Industrial Machinery & Heavy Equipment: Market Size & Forecast
 - 14.3.4 Automotive: Market Size & Forecast
 - 14.3.5 Others: Market Size & Forecast
- 14.4 Key Countries
 - 14.4.1 US: Market Size & Forecast
 - 14.4.2 Canada: Market Size & Forecast

15 APAC

- 15.1 Market Overview
 - 15.1.1 Key Insights
- 15.2 Market Size & Forecast
- 15.3 End-Users: Market Snapshot & Growth Engine
 - 15.3.1 Aerospace & Defense: Market Size & Forecast
 - 15.3.2 Automotive: Market Size & Forecast
 - 15.3.3 Healthcare: Market Size & Forecast

15.3.4 Industrial Machinery & Heavy Equipment: Market Size & Forecast

15.3.5 Others: Market Size & Forecast

15.4 Key Countries

15.4.1 China: Market Size & Forecast

15.4.2 Japan: Market Size & Forecast

15.4.3 India: Market Size & Forecast

15.4.4 South Korea: Market Size & Forecast

15.4.5 Australia: Market Size & Forecast

16 EUROPE

16.1 Market Overview

16.2 Market Size & Forecast

16.3 End-Users: Market Snapshot & Growth Engine

16.3.1 Aerospace & Defense: Market Size & Forecast

16.3.2 Healthcare: Market Size & Forecast

16.3.3 Automotive: Market Size & Forecast

16.3.4 Industrial Machinery & Heavy Equipment: Market Size & Forecast

16.3.5 Others: Market Size & Forecast

16.4 Key Countries

16.4.1 UK: Market Size & Forecast

16.4.2 France: Market Size & Forecast

16.4.3 Germany: Market Size & Forecast

16.4.4 Italy: Market Size & Forecast

16.4.5 Spain: Market Size & Forecast

17 MIDDLE EAST & AFRICA

17.1 Market Overview

17.1.1 Automotive Industry Insights

17.2 Market Size & Forecast

17.3 End-Users: Market Snapshot & Growth Engine

17.3.1 Automotive: Market Size & Forecast

17.3.2 Industrial Machinery & Heavy Equipment: Market Size & Forecast

17.3.3 Healthcare: Market Size & Forecast

17.3.4 Aerospace & Defense: Market Size & Forecast

17.3.5 Others: Market Size & Forecast

17.4 Key Countries

17.4.1 Saudi Arabia: Market Size & Forecast

- 17.4.2 Turkey: Market Size & Forecast
- 17.4.3 South Africa: Market Size & Forecast
- 17.4.4 Egypt: Market Size & Forecast

18 LATIN AMERICA

- 18.1 Market Overview
- 18.2 Market Size & Forecast
- 18.3 End-Users: Market Snapshot & Growth Engine
 - 18.3.1 Automotive: Market Size & Forecast
 - 18.3.2 Industrial Machinery & Heavy Equipment: Market Size & Forecast
 - 18.3.3 Healthcare: Market Size & Forecast
 - 18.3.4 Aerospace & Defense: Market Size & Forecast
 - 18.3.5 Others: Market Size & Forecast
- 18.4 Key Countries
 - 18.4.1 Brazil: Market Size & Forecast
 - 18.4.2 Mexico: Market Size & Forecast
 - 18.4.3 Rest of Latin America: Market Size & Forecast

19 COMPETITIVE LANDSCAPE

- 19.1 Competition Overview

20 KEY COMPANY PROFILES

- 20.1 Doncasters
 - 20.1.1 Business Overview
 - 20.1.2 Product Offerings
- 20.2 Impro
 - 20.2.1 Business Overview
 - 20.2.2 Product Offerings
- 20.3 Zollern
 - 20.3.1 Business Overview
 - 20.3.2 Product Offerings
- 20.4 Dongying Giayoung Precision Metal
 - 20.4.1 Business Overview
 - 20.4.2 Product Offerings
- 20.5 Precision Castparts Corp
 - 20.5.1 Business Overview

- 20.5.2 Product Offerings
- 20.6 Vestshell
 - 20.6.1 Business Overview
 - 20.6.2 Product Offerings
- 20.7 Signicast
 - 20.7.1 Business Overview
 - 20.7.2 Product Offerings
- 20.8 Investment & Precision Castings
 - 20.8.1 Business Overview
 - 20.8.2 Product Offerings
- 20.9 Hitachi Metals
 - 20.9.1 Business Overview
 - 20.9.2 Product Offerings
- 20.10 Metaltek International
 - 20.10.1 Business Overview
 - 20.10.2 Product Offerings
- 20.11 Arconic
 - 20.11.1 Business Overview
 - 20.11.2 Product Offerings
- 20.12 Consolidated Precision Products
 - 20.12.1 Business Overview
 - 20.12.2 Product Offerings
- 20.13 RLM Industries
 - 20.13.1 Business Overview
 - 20.13.2 Product Offerings
- 20.14 Milwaukee Precision Casting
 - 20.14.1 Business Overview
 - 20.14.2 Product Offerings
- 20.15 Aristo Cast
 - 20.15.1 Business Overview
 - 20.15.2 Product Offerings
- 20.16 George Fischer
 - 20.16.1 Business Overview
 - 20.16.2 Product Offerings
- 20.17 Thompson Investment Casting
 - 20.17.1 Business Overview
 - 20.17.2 Product Offerings
- 20.18 Ningbo Wanguan
 - 20.18.1 Business Overview

20.18.2 Product Offerings

21 REPORT SUMMARY

21.1 Key Takeaways

21.2 Strategic Recommendations

22 QUANTITATIVE SUMMARY

22.1 Market By Geography

22.1.1 Market Size & Forecast

22.2 Market By End-Users

22.2.1 Market Size & Forecast

22.3 North America

22.3.1 End-Users: Market Size & Forecast

22.4 APAC

22.4.1 End-Users: Market Size & Forecast

22.5 Europe

22.5.1 End-Users: Market Size & Forecast

22.6 Middle East & Africa

22.6.1 End-Users: Market Size & Forecast

22.7 Latin America

22.7.1 End-Users: Market Size & Forecast

23 APPENDIX

23.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Global Investment Casting Market
- Exhibit 2 Market Size Calculation Approach 2019
- Exhibit 3 Post COVID-19 Dynamics
- Exhibit 4 Impact of EVs
- Exhibit 5 Benefits of EVs
- Exhibit 6 Impact of Use of Rapid Prototype Process
- Exhibit 7 Impact of Automation in Investment Casting
- Exhibit 8 Impact of Healthcare Industry
- Exhibit 9 Impact of New Materials Usage
- Exhibit 10 Impact of COVID-19-Related Economic Downturn
- Exhibit 11 Impact of Complete Grounding of Aerospace Industry
- Exhibit 12 Impact of Slow Recovery of Automotive Industry
- Exhibit 13 Market Insights
- Exhibit 14 Global Investment Casting Market 2019–2025 (\$ billion)
- Exhibit 15 Five Forces Analysis 2019
- Exhibit 16 Incremental Growth by End-users 2019 & 2025
- Exhibit 17 Global Investment Casting Market by Aerospace & Defense 2019–2025 (\$ billion)
- Exhibit 18 Global Investment Casting Market by Healthcare Industry 2019–2025 (\$ billion)
- Exhibit 19 Global Investment Casting Market by Automotive 2019–2025 (\$ billion)
- Exhibit 20 Global Investment Casting Market by Industrial Machinery & Heavy Equipment 2019–2025 (\$ billion)
- Exhibit 21 Global Investment Casting Market by Other End-users 2019–2025 (\$ billion)
- Exhibit 22 Incremental Growth by Geography 2019 & 2025
- Exhibit 23 Market Share and Growth Momentum
- Exhibit 24 Investment Casting Market in North America 2019–2025 (\$ billion)
- Exhibit 25 Incremental Growth by End-Users in North America 2019 & 2025
- Exhibit 26 Investment Casting Market in North America by Aerospace & Defense 2019–2025 (\$ million)
- Exhibit 27 Aerospace & Defense: Market Dynamics
- Exhibit 28 Investment Casting Market in North America by Healthcare Industry 2019–2025 (\$ million)
- Exhibit 29 Healthcare Industry: Market Dynamics
- Exhibit 30 Investment Casting Market in North America by Industrial Machinery & Heavy

Equipment: 2019–2025 (\$ million)

Exhibit 31 Industrial Machinery & Heavy Equipment: Market Dynamics

Exhibit 32 Investment Casting Market in North America by Automotive Industry
2019–2025 (\$ million)

Exhibit 33 Automotive Industry: Market Dynamics

Exhibit 34 Investment Casting Market in North America by Other End-Users 2019–2025
(\$ million)

Exhibit 35 Other End-users: Market Dynamics

Exhibit 36 Incremental Growth in North America 2019 & 2025

Exhibit 37 Investment Casting Market in US 2019–2025 (\$ billion)

Exhibit 38 Investment Casting Market in Canada 2019–2025 (\$ billion)

Exhibit 39 Auto Sales Estimation in ASEAN 2020 (million units)

Exhibit 40 Investment Casting Market in APAC 2019–2025 (\$ billion)

Exhibit 41 Incremental Growth by End-Users in APAC 2019 & 2025

Exhibit 42 Investment Casting Market in APAC by Aerospace & Defense 2019–2025 (\$
million)

Exhibit 43 Aerospace & Defense: Market Dynamics

Exhibit 44 Global Investment Casting Market in APAC by Automotive Industry
2019–2025 (\$ million)

Exhibit 45 Automotive Industry: Market Dynamics

Exhibit 46 Investment Casting Market in APAC by Healthcare Industry 2019–2025 (\$
million)

Exhibit 47 Healthcare Industry: Market Dynamics

Exhibit 48 Investment Casting Market in APAC by Industrial Machinery & Heavy
Equipment 2019–2025 (\$ million)

Exhibit 49 Industrial Machinery & Heavy Equipment: Market Dynamics

Exhibit 50 Other End-users: Investment Casting Market in APAC 2019–2025 (\$ million)

Exhibit 51 Other End-users: Market Dynamics

Exhibit 52 Incremental Growth in APAC 2019 & 2025

Exhibit 53 Investment Casting Market in China 2019–2025 (\$ million)

Exhibit 54 Investment Casting Market in Japan 2019–2025 (\$ million)

Exhibit 55 Investment Casting Market in India 2019–2025 (\$ million)

Exhibit 56 Investment Casting Market in South Korea 2019–2025 (\$ million)

Exhibit 57 Investment Casting Market in Australia 2019–2025 (\$ million)

Exhibit 58 Investment Casting Market in Europe 2019–2025 (\$ billion)

Exhibit 59 Incremental Growth by End-Users in Europe 2019 & 2025

Exhibit 60 Investment Casting Market in Europe by Aerospace & Defense 2019–2025 (\$
million)

Exhibit 61 Aerospace & Defense: Market Dynamics

Exhibit 62 Investment Casting Market in Europe by Healthcare Industry 2019–2025 (\$ million)

Exhibit 63 Healthcare Industry: Market Dynamics

Exhibit 64 Investment Casting Market in Europe by Automotive Industry 2019–2025 (\$ million)

Exhibit 65 Automotive Industry: Market Dynamics

Exhibit 66 Investment Casting Market in Europe by Industrial Machinery & Heavy Equipment 2019–2025 (\$ million)

Exhibit 67 Industrial Machinery & Heavy Equipment: Market Dynamics

Exhibit 68 Investment Casting Market in Europe by Other End-Users 2019–2025 (\$ million)

Exhibit 69 Other End-users: Market Dynamics

Exhibit 70 Incremental Growth in Europe 2019 & 2025

Exhibit 71 Investment Casting Market in UK 2019–2025 (\$ million)

Exhibit 72 Investment Casting Market in France 2019–2025 (\$ million)

Exhibit 73 Investment Casting Market in Germany 2019–2025 (\$ million)

Exhibit 74 Investment Casting Market in Italy 2019–2025 (\$ million)

Exhibit 75 Investment Casting Market in Spain 2019–2025 (\$ million)

Exhibit 76 Investment Casting Market in Middle East & Africa 2019–2025 (\$ billion)

Exhibit 77 Incremental Growth by End-Users in Middle East & Africa 2019 & 2025

Exhibit 78 Investment Casting Market in Middle East & Africa by Automotive Industry 2019–2025 (\$ million)

Exhibit 79 Automotive Industry: Market Dynamics

Exhibit 80 Investment Casting Market in Middle East & Africa by Industrial Machinery & Heavy Equipment 2019–2025 (\$ million)

Exhibit 81 Industrial Machinery & Heavy Equipment: Market Dynamics

Exhibit 82 Investment Casting Market in Middle East & Africa by Healthcare Industry:2019–2025 (\$ million)

Exhibit 83 Healthcare Industry: Market Dynamics

Exhibit 84 Investment Casting Market in Middle East & Africa by Aerospace & Defense 2019–2025 (\$ million)

Exhibit 85 Aerospace & Defense: Market Dynamics

Exhibit 86 Investment Casting Market in Middle East & Africa by Other End-Users 2019–2025 (\$ million)

Exhibit 87 Other End-users: Market Dynamics

Exhibit 88 Incremental Growth in Middle East & Africa 2019 & 2025

Exhibit 89 Investment Casting Market in Saudi Arabia 2019–2025 (\$ million)

Exhibit 90 Investment Casting Market in Turkey 2019–2025 (\$ million)

Exhibit 91 Investment Casting Market in South Africa 2019–2025 (\$ million)

- Exhibit 92 Investment Casting Market in Egypt 2019–2025 (\$ million)
- Exhibit 93 Investment Casting Market in Latin America 2019–2025 (\$ billion)
- Exhibit 94 Incremental Growth by End-Users in Latin America 2019 & 2025
- Exhibit 95 Automotive Industry: Investment Casting Market in Latin America 2019–2025 (\$ million)
- Exhibit 96 Automotive Industry: Market Dynamics
- Exhibit 97 Industrial Machinery & Heavy Equipment: Investment Casting Market in Latin America 2019–2025 (\$ million)
- Exhibit 98 Industrial Machinery & Heavy Equipment: Market Dynamics
- Exhibit 99 Healthcare Industry: Investment Casting Market in Latin America 2019–2025 (\$ million)
- Exhibit 100 Healthcare Industry: Market Dynamics
- Exhibit 101 Investment Casting Market in Latin America by Aerospace & Defense 2019–2025 (\$ million)
- Exhibit 102 Aerospace & Defense: Market Dynamics
- Exhibit 103 Investment Casting Market in Latin America by Other End-Users 2019–2025 (\$ million)
- Exhibit 104 Other End-users: Market Dynamics
- Exhibit 105 Incremental Growth in Latin America 2019 & 2025
- Exhibit 106 Investment Casting Market in Brazil 2019–2025 (\$ million)
- Exhibit 107 Investment Casting Market in Mexico 2019–2025 (\$ million)
- Exhibit 108 Investment Casting Market in Rest of Latin America 2019–2025 (\$ million)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2019

Table 3 US & China Exim H1 2019

Table 4 Investment Casting Market by Aerospace & Defense: Geography 2019?2025 (\$ million)

Table 5 Global Investment Casting Market by Healthcare Industry: Geography 2019?2025 (\$ million)

Table 6 Investment Casting Market by Automotive Industry: Geography 2019-2025 (\$ million)

Table 7 Investment Casting Market by Industrial Machinery & Heavy Equipment: Geography 2019?2025 (\$ million)

Table 8 Investment Casting Market by Other End-Users: Geography 2019?2025 (\$ million)

Table 9 Doncasters: Major Product Offerings

Table 10 Impro: Major Product Offerings

Table 11 Zollern: Major Product Offerings

Table 12 Dongying Giayoung Precision Metal: Major Product Offerings

Table 13 Precision Castparts Corp: Major Product Offerings

Table 14 Vestshell: Major Product Offerings

Table 15 Signicast: Major Product Offerings

Table 16 Investment & Precision Castings: Major Product Offerings

Table 17 Hitachi Metals: Major Product Offerings

Table 18 MetalTek: Major Product Offerings

Table 19 Arconic: Major Product Offerings

Table 20 Consolidated Precision Products: Major Product Offerings

Table 21 RLM Industries: Major Product Offerings

Table 22 Milwaukee Precision Castings: Major Product Offerings

Table 23 Aristo Cast: Major Product Offerings

Table 24 George Fischer: Major Product Offerings

Table 25 Thompson Investment Casting: Major Product Offerings

Table 26 Ningbo Wanguan: Major Product Offerings

Table 27 Global Investment Casting Market by Geography 2019?2025 (\$ billion)

Table 28 Global Investment Casting Market by Geography 2019?2025 (% Revenue)

Table 29 Global Investment Casting Market by End-users 2019?2025 (\$ billion)

Table 30 Global Investment Casting Market by End-users 2019?2025 (% Revenue)

Table 31 Investment Casting Market in North America by End-users 2019?2025 (\$ million)

Table 32 Investment Casting Market in North America by End-users 2019?2025 (% Revenue)

Table 33 Investment Casting Market in APAC by End-users 2019?2025 (\$ million)

Table 34 Investment Casting Market in APAC by End-users 2019?2025 (% Revenue)

Table 35 Investment Casting Market in Europe by End-users 2019?2025 (\$ million)

Table 36 Investment Casting Market in Europe by End-users 2019?2025 (% Revenue)

Table 37 Investment Casting Market in Middle East & Africa by End-users 2019?2025 (\$ million)

Table 38 Investment Casting Market in Middle East & Africa by End-users 2019?2025 (% Revenue)

Table 39 Investment Casting Market in Latin America by End-users 2019?2025 (\$ million)

Table 40 Investment Casting Market in Latin America by End-users 2019?2025 (% Revenue)

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