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Global Thermal Spray Acoustic Booth Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermal Spray Acoustic Booth market size is expected to reach $ 155 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Thermal Spray Acoustic Booth refers to a purpose-engineered enclosed industrial system used to create a controlled operating environment for thermal spray processes, particularly plasma spray, HVOF/HVAF, electric arc spray, flame spray, and automated robotic thermal spraying. The system typically integrates sound-insulated wall and roof structures, acoustic access doors and observation windows, ventilation and silencing components, dust and fume extraction interfaces, lighting, electrical controls, and process safety interlocks. Its principal functions are to reduce the transmission of intense process noise, contain overspray particles and fumes, protect personnel from light and radiation generated during spraying, and isolate operators from robots, manipulators, and other moving equipment. Depending on component size, spray process, production volume, and automation requirements, Thermal Spray Acoustic Booth products range from compact enclosed units and modular walk-in rooms to large crane-access structures and fully integrated robotic coating cells. The market primarily serves industrial thermal spray production and repair environments where acoustic control, process containment, occupational safety, ventilation, and equipment integration must be addressed as a coordinated engineering system. Oerlikon Metco describes thermal spray booths as isolating the process from personnel and the environment against noise, emissions, and motion hazards, while specialist equipment suppliers similarly integrate acoustic containment with extraction and safety systems.

Key Findings

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In 2025, global Thermal Spray Acoustic Booth production reached approximately 602 Units.The average price is around 170,000

Europe and North America concentrate a substantial share of globally oriented high-end Thermal Spray Acoustic Booth suppliers

HVOF HVAF and plasma spraying represent the most demanding process segments for dedicated acoustic containment

Aerospace power generation and high-value industrial repair are major applications for advanced automated booth systems

Integrated robotic cells are becoming strategically more important than standalone enclosure-only configurations

Market Trends

Thermal Spray Acoustic Booth products are evolving from relatively independent acoustic structures into integrated thermal spray production environments in which noise control, airflow, dust extraction, equipment motion, process safety, and digital control are engineered together. High-end customers increasingly require the booth to communicate with spray controllers, industrial robots, manipulators, exhaust systems, doors, roof sections, and safety interlocks, particularly in automated HVOF and plasma applications. Progressive Surface, for example, integrates a ventilated acoustical enclosure with robot control, dust collection, exhaust, process recipes, and safety functions, while FST positions soundproof booths as part of complete turnkey systems incorporating robotics, turntables, extraction, and centralized controls. The broader thermal spray equipment market is also moving toward more scalable and digitally connected platforms: Oerlikon Metco launched Surface Two in July 2025 with expanded automation, IIoT connectivity, and capability for larger components. This development supports the longer-term direction toward modular automated coating cells in which the Thermal Spray Acoustic Booth becomes an integrated process infrastructure component rather than an isolated noise-control product.

Market Dynamics

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Drivers

The fundamental demand driver for Thermal Spray Acoustic Booth is the combination of high acoustic intensity and multiple occupational hazards generated by industrial thermal spraying. Plasma and high-velocity combustion spraying require effective separation of personnel from process noise, overspray powder, fumes, intense light, and automated equipment movement, making engineered containment particularly important in continuous production environments. Oerlikon Metco explicitly identifies noise, emissions, and motion hazards as core issues addressed by spray booth design. Occupational safety requirements also reinforce the use of engineering controls: OSHA requires a hearing conservation program for workers exposed at or above an eight-hour time-weighted average of 85 dBA and requires feasible engineering or administrative controls under higher exposure conditions, while the European occupational-noise framework establishes exposure action values and an 87 dB(A) daily exposure limit. In parallel, continued investment in automated thermal spray capacity for aerospace, turbines, precision components, and industrial repair supports demand for larger and more highly integrated booth systems.

Restraints

The market is constrained by its highly customized project structure and relatively low degree of product standardization. Booth size, acoustic performance, ventilation capacity, dust characteristics, access configuration, robot envelope, workpiece handling method, and local safety requirements can vary substantially between installations, limiting the economies of scale available to manufacturers. Customers also have the option of combining thermal spray equipment from one supplier with locally fabricated acoustic and extraction infrastructure, particularly in price-sensitive or less technically demanding applications. This creates pricing pressure on suppliers whose competitive advantage is primarily structural fabrication rather than thermal spray engineering. In addition, replacement cycles are relatively long because the booth structure itself can remain in service after spray guns, robots, controls, or other process equipment have been upgraded, while smaller flame spray or arc spray applications may not require the same level of acoustic investment as high-energy plasma and HVOF installations.

Opportunities

The most attractive opportunities are associated with automation upgrades, replacement of aging thermal spray facilities, integrated environmental control, and

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increasingly sophisticated production cells. Customers upgrading from manual or semi-automatic spraying to robotic processing generally require corresponding investment in safety barriers, access control, interlocks, ventilation, and acoustic containment, creating opportunities that extend beyond new thermal spray capacity. Large workpieces and complex aerospace or energy components also increase demand for opening roofs, crane access, large powered doors, and customized robot envelopes. Digital integration represents another opportunity: thermal spray platforms are increasingly capable of monitoring operating conditions, production data, and equipment status, creating scope for booth ventilation, extraction, access, and safety information to become part of a unified equipment-management architecture. Oerlikon Metco's IIoT solutions already emphasize connected thermal spray system monitoring, illustrating the broader shift toward data-enabled coating operations.

Challenges

A major long-term challenge is maintaining a clear value proposition between specialist Thermal Spray Acoustic Booth suppliers and general industrial acoustic enclosure companies. Structural noise-control capability alone has a relatively accessible technical barrier, while high-end thermal spray projects require additional knowledge of airflow, powder and fume behavior, automated motion, workpiece loading, heat management, and process interlocks. Suppliers therefore need to demonstrate not only acoustic performance but also complete system compatibility and operational safety. Project-based demand can create uneven annual order intake, particularly for smaller manufacturers dependent on a limited number of aerospace, turbine, or large industrial projects. Another challenge is increasing integration of auxiliary equipment into complete thermal spray platforms, which may reduce the visibility of the booth as a standalone purchasing category even as its engineering value remains important. Changes in ownership and equipment portfolios also require continuous tracking; Linde Advanced Material Technologies acquired Kermetico's Equipment & Parts Division in December 2025, transferring a significant HVAF equipment portfolio to the new owner.

Industry Chain Analysis

The upstream portion of the Thermal Spray Acoustic Booth industry consists primarily of structural steel and fabricated frames, acoustic insulation materials, sheet-metal panels, sound-rated doors and windows, ventilation components, silencers, ducting, filtration and dust-collection equipment, electrical components, sensors, lighting, safety switches,

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PLC hardware, and industrial control devices. For technically demanding installations, robots, manipulators, turntables, overhead loading systems, and thermal spray process equipment also influence booth design even when these components are purchased separately. Material content is important, but engineering hours, customized fabrication, acoustic design, airflow calculations, integration, installation, and commissioning account for a meaningful portion of project value because booth configurations are rarely identical across customers.

The midstream market consists of global thermal spray equipment manufacturers, specialist booth and extraction manufacturers, industrial acoustic engineering companies with thermal spray expertise, and regional turnkey system suppliers. Value is created by converting standardized structural and control components into a process-specific environment that meets acoustic, ventilation, safety, maintenance, and production requirements simultaneously. Downstream customers are principally thermal spray production facilities and repair operations serving aerospace, power generation, industrial machinery, automotive and transportation, medical and precision manufacturing, oil and gas equipment, and other wear- or corrosion-critical applications. Supplier profitability therefore depends less on raw-material conversion alone and more on engineering content, project management, integration capability, qualification experience, installation efficiency, and aftermarket service.

Segment Insights

By thermal spray process, HVOF/HVAF and plasma spraying constitute the most technically demanding portions of the Thermal Spray Acoustic Booth market because their operating characteristics place greater requirements on noise attenuation, ventilation, dust management, and personnel isolation. Electric arc and flame spraying remain meaningful applications, particularly in general engineering, corrosion protection, and repair, but booth specifications can vary more widely according to equipment power and operating environment. Multi-process booths represent an important higher-value configuration where customers need one enclosure to accommodate more than one spraying technology. FST's multi-process equipment and turnkey references demonstrate the industry trend toward combining APS, HVOF, and other processes within integrated controlled installations.

By supply scope, Integrated Thermal Spray Cells generally represent the highest-value segment because acoustic containment is combined with robots, workpiece manipulators, controls, extraction, and coordinated safety architecture. Booth with

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Ventilation & Dust Control configurations form another important category for customers seeking a complete environmental-control package while retaining separate process equipment. Enclosure-only Thermal Spray Acoustic Booth products remain relevant for retrofits, locally integrated projects, and cost-sensitive installations. The market is therefore gradually shifting toward higher engineering content rather than uniform growth across all booth types, with automation intensity and system integration becoming increasingly important determinants of project value.

Downstream Market Opportunities

Aerospace and power generation provide some of the strongest opportunities for advanced Thermal Spray Acoustic Booth systems because these industries combine high-value coated components with demanding process repeatability, automated handling, safety, and production control requirements. FST's documented turnkey projects cover aerospace customers, industrial gas turbines, medical implants, hydraulics, and general engineering, illustrating the breadth of thermal spray applications requiring controlled production cells. Aerospace engine and turbine-component applications are particularly attractive for large robotic systems, while industrial repair creates recurring opportunities for HVOF, plasma, and arc-spray facilities. Medical and precision manufacturing offer a smaller but technically demanding opportunity where process control and repeatability can justify higher-specification equipment. Across downstream industries, the strongest opportunities tend to occur where the cost of process interruption, operator exposure, coating inconsistency, or contamination is high enough to support investment in a professionally engineered integrated booth.

Regional Insights

Europe and North America represent the strongest concentration of internationally active high-end Thermal Spray Acoustic Booth suppliers and complex automated coating-cell demand. The supplier base includes global thermal spray equipment groups, specialized turnkey system manufacturers, and experienced acoustic and extraction engineering companies, enabling these regions to serve aerospace, industrial gas turbine, automotive, medical, and advanced manufacturing projects. Europe has a particularly diversified supply structure spanning thermal spray system OEMs and specialist booth engineering companies, while North America has strong capabilities in robotic thermal spray integration and large customized production cells. The high

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installed base of thermal spray equipment and continued automation investment support replacement, modernization, and brownfield retrofit opportunities in both regions.

Asia-Pacific has a more fragmented supply structure. Japan maintains a technically established domestic thermal spray ecosystem with specialist thermal spray equipment and industrial sound-control companies, while China has developed a broader group of localized manufacturers capable of supplying customized Thermal Spray Acoustic Booth systems at competitive project costs. India also has a relatively active group of small and medium-sized thermal spray and acoustic chamber manufacturers serving domestic and export markets. By contrast, South Korea, Taiwan, and Southeast Asia currently show a greater reliance on imported core equipment, local integration, or collaborative supply models. Regional competitive advantage therefore differs substantially: European and North American suppliers are stronger in complex turnkey automation and international reference projects, while Asian regional suppliers increasingly compete through localization, shorter delivery chains, customized fabrication, and cost efficiency.

Competitive Landscape Analysis

The Thermal Spray Acoustic Booth market is fragmented and engineering-driven rather than dominated by a small number of standardized-volume manufacturers. The confirmed Core Formal List contains 22 manufacturers, the report-oriented competitive list extends to approximately 26 suppliers, and the broader relevant vendor pool covers about 50 entities once integration companies, regional suppliers, potential manufacturers, and other adjacent participants are considered. The core competitive group includes global thermal spray system manufacturers such as Oerlikon Metco, Progressive Surface, Flame Spray Technologies and Metallisation, together with specialized European, North American, Japanese, Chinese, and Indian manufacturers that compete through acoustic engineering, extraction capability, thermal spray process knowledge, customization, or regional service. Official supplier portfolios show increasingly close integration between booths, robots, process controls, dust extraction, workpiece handling, and safety systems, shifting competition toward turnkey engineering capability rather than enclosure fabrication alone. Global platform suppliers retain advantages in installed base, reference projects, process expertise, and multinational service, while regional manufacturers can compete effectively in customized and price-sensitive applications through local fabrication and installation. Strategic portfolio changes are also reshaping the surrounding thermal spray equipment

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ecosystem, including Linde Advanced Material Technologies' December 2025 acquisition of Kermetico's Equipment & Parts Division. Future differentiation is expected to depend increasingly on complete-cell engineering, automation compatibility, documented acoustic performance, dust and fume management, digital monitoring, and lifecycle service rather than booth structure alone.

Report Scope

This report studies the global Thermal Spray Acoustic Booth production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Thermal Spray Acoustic Booth and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Thermal Spray Acoustic Booth that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Thermal Spray Acoustic Booth total production and demand, 2021-2032, (Units)

Global Thermal Spray Acoustic Booth total production value, 2021-2032, (USD Million)

Global Thermal Spray Acoustic Booth production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Thermal Spray Acoustic Booth consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Thermal Spray Acoustic Booth domestic production, consumption, key domestic manufacturers and share

Global Thermal Spray Acoustic Booth production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

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Global Thermal Spray Acoustic Booth production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Thermal Spray Acoustic Booth production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Thermal Spray Acoustic Booth market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include OC Oerlikon Corporation AG, Progressive Surface, Inc., Flame Spray Technologies B.V., Metallisation Limited, SciTeeX Sp. z o.o., Climavent Systems Ltd, Thermach LLC, Coaken Techno Co., Ltd., MEC, McLaughlin & Associates Thermal Spray, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Thermal Spray Acoustic Booth market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Thermal Spray Acoustic Booth Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Thermal Spray Acoustic Booth Market, Segmentation by Type:

HVOF and HVAF Spray Booths

Plasma Spray Booths

Electric Arc and Flame Spray Booths

Multi-process Thermal Spray Booths

Others

Global Thermal Spray Acoustic Booth Market, Segmentation by Supply Scope:

Enclosure-only Booth

Booth with Ventilation and Dust Control

Integrated Thermal Spray Cell

Others

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Global Thermal Spray Acoustic Booth Market, Segmentation by Noise Reduction Performance Parameters:

Basic Model: Noise Reduction 20–28 dB (A)

Standard Industrial Model: Noise Reduction 28–35 dB (A)

High-End Heavy-Duty Model: Noise Reduction 35–42 dB (A)

Ultra-Quiet Research Model: Noise Reduction >42 dB (A)

Global Thermal Spray Acoustic Booth Market, Segmentation by Application:

Aerospace and Defense

Energy and Power Generation

Automotive and Transportation

Others

Companies Profiled:

OC Oerlikon Corporation AG

Progressive Surface, Inc.

Flame Spray Technologies B.V.

Metallisation Limited

SciTeeX Sp. z o.o.

Climavent Systems Ltd

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Thermach LLC

Coaken Techno Co., Ltd.

MEC

McLaughlin & Associates Thermal Spray, Inc.

United Coatings Technologies Co.

Sonora Technology Co., Ltd.

Plasma Giken Co., Ltd.

GTV Verschleißschutz GmbH

Linde Advanced Material Technologies Inc.

Ducol Co., Ltd.

GuangZhou SANXIN Metal S&T Co., Ltd.

Parat Technologies

INNOVATOR SURFACE TECHNOLOGIES

Airo Shot Blast Equipments

Zhengzhou Lijia Repentu Jixie Youxian Gongsi

Foshan Advanced Machinery Equipment Co.

Astro Alloys, Inc.

Finiprak Engineers

Spray Blast

Hezhong Keji (Guangdong) Youxian Gongsi

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Key Questions Answered

1. How big is the global Thermal Spray Acoustic Booth market?
2. What is the demand of the global Thermal Spray Acoustic Booth market?
3. What is the year over year growth of the global Thermal Spray Acoustic Booth market?
4. What is the total value of the global Thermal Spray Acoustic Booth market?
5. Who are the Major Players in the global Thermal Spray Acoustic Booth market?
6. What are the growth factors driving the market demand?

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