

Asia Pacific Shot Peening Machines Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Shot Peening Machines Market is projected to grow significantly, reaching an estimated US\$ 393.2 million by 2031, up from US\$ 246.0 million in 2024. This growth represents a compound annual growth rate (CAGR) of 7.0% from 2025 to 2031.

Executive Summary and Market Analysis

The shot peening machines market in the Asia Pacific region is categorized into several key countries, including China, India, Australia, Japan, South Korea, Singapore, and Malaysia. The market's expansion is primarily fueled by the robust presence of industries such as automotive, aerospace, energy, construction, and medical devices. As Asia Pacific continues to establish itself as a global manufacturing hub, the implementation of shot peening processes is increasingly recognized for its ability to enhance the fatigue life, durability, and overall performance of critical components across various sectors.

Notably, Asia Pacific is home to major automotive manufacturers like Hyundai (South Korea), Toyota (Japan), and Tata Motors (India). Shot peening is extensively utilized for components such as springs, gears, and crankshafts, significantly improving their fatigue resistance. Additionally, countries like Thailand and Indonesia are emerging as automotive centers, further driving the demand for surface enhancement techniques like shot peening.

The aerospace sector in Asia Pacific also plays a crucial role, with significant contributions from companies such as Hindustan Aeronautics Limited (India) and Singapore Technologies Engineering. These companies utilize shot peening technology

to strengthen critical components, including landing gear, turbine blades, and fuselage structures. Furthermore, nations like China, Malaysia, and Vietnam are increasingly adopting shot peening machines to enhance the durability of construction equipment, steel structures, and various machinery parts.

The growth of renewable energy initiatives in the region has also spurred the use of shot peening machines, particularly for turbine components. For instance, wind turbine manufacturers in China (like Goldwind) and India (such as Suzlon) employ shot peening technology to improve the fatigue resistance of their products. The ongoing trend of automotive electrification is expected to further boost the demand for shot peening machines, as electric vehicle (EV) manufacturers require durable and lightweight components. With government backing for infrastructure and renewable energy projects, the Asia Pacific region is poised to remain a vital market for shot peening machines in the years to come.

Strategic Insights

Market Segmentation Analysis

The Asia Pacific Shot Peening Machines Market can be segmented based on various criteria:

By Media: The market is divided into Steel Shots, Ceramic Shots, Glass Beads, and Cut Wire Shots, with Steel Shots holding the largest market share in 2024.

By Application: The market is categorized into Space, Aviation, MedTech, Transportation, and Others, where Transportation is expected to dominate in 2024.

By Space: The market is split into Manufacturing and Maintenance, Repair, and Overhaul (MRO), with Manufacturing leading in 2024.

By Aviation: Similar to the broader application segment, the Aviation market is divided into Manufacturing and MRO, with Manufacturing again holding the largest share in 2024.

Market Outlook

The transportation industry has experienced notable growth in recent years and is expected to continue this trend during the forecast period. This growth is driven by several factors, including rising demand for personal vehicles due to increasing income levels, advancements in electric vehicles, government incentives, urbanization, and significant investments in trade activities. According to the International Organization of Motor Vehicle Manufacturers, global automotive production rose from 91.8 million in 2019 to 93.5 million in 2023, with projections suggesting it could reach approximately 100 million by 2030. The growing adoption of electric vehicles, which currently account for 16% of global vehicle sales, is expected to rise to around 50% by 2030, further driving the demand for shot peening systems.

In addition to the automotive sector, substantial investments in the railway industry by both government and private entities are anticipated to boost the demand for shot peening systems. As urbanization trends continue to grow alongside a rising global population, significant investments in railway fleets and network expansion are expected.

Country Insights

The Asia Pacific Shot Peening Machines Market is also analyzed by country, with China holding the largest market share in 2024. The shot peening machines market in China has seen remarkable growth, driven by rapid industrial expansion in key sectors such as automotive, aerospace, and medical industries. As China focuses on enhancing its production capabilities and the durability of critical components, shot peening has become an essential process for improving material performance.

China is a leading global automotive producer, utilizing shot peening extensively for components like springs, gears, and crankshafts to ensure durability. Major automotive manufacturers, including Zhejiang Geely Holding Group and BYD, incorporate shot peening in their production processes to meet consumer demands for reliable vehicles. The aerospace sector in China, led by state-owned enterprises like the Commercial Aircraft Corporation of China (COMAC), also employs shot peening to enhance the fatigue life of various aircraft components, ensuring compliance with international safety standards.

In the medical sector, shot peening technology is increasingly used in the manufacturing of orthopedic implants, enhancing their fatigue strength and reducing the risk of cracks. Chinese manufacturers, such as Trauson Holdings, leverage shot peening to produce durable medical devices, while collaborations with global players like Zimmer Biomet

bring advanced peening technologies to the region.

Company Profiles

Key players in the Asia Pacific Shot Peening Machines Market include R?sler Oberfl?chentechnik GmbH, Pangborn, Goff Inc., Guyson Corporation, COGEIM EUROPE SRL, Wheelabrator Group, SINTOKOGIO, LTD, Norblast S.r.l, QINGDAO QINGGONG MACHINERY CO., LTD., Engineered Abrasives, Innovative Peening Systems, and OSK-Kiefer GmbH. These companies are actively pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to their customers.

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