

North America Shot Peening Machines Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/N18FAC237367EN.html>

Date: April 2026

Pages: 121

Price: US\$ 3,450.00 (Single User License)

ID: N18FAC237367EN

Abstracts

The North America Shot Peening Machines Market is projected to grow significantly, reaching an estimated US\$ 228.0 million by 2031, up from US\$ 154.0 million in 2024, reflecting a compound annual growth rate (CAGR) of 5.9% from 2025 to 2031.

Executive Summary and Market Analysis

The North American market comprises major economies such as the United States, Canada, and Mexico, all of which have well-established infrastructures that foster growth opportunities in the manufacturing sector. According to the National Institute of Standards and Technology (NIST), the U.S. manufacturing sector was valued at US\$ 2.3 trillion in 2023, representing 10.2% of the total GDP. The U.S. ranks as the second-largest machinery and equipment manufacturer globally and is a leading producer of fabricated metal products. This robust manufacturing base is a key driver for the demand for metal-processing machines, including shot peening machines.

The aerospace and defense industries in North America are particularly strong, benefiting from stable economies, advanced infrastructure, and high technology adoption rates. The commercial aviation sector in Canada is experiencing steady growth, driven by increased private air travel and a rising number of passengers. For instance, in September 2023, Air Canada announced plans to modernize its fleet with the addition of 18 Boeing 787-10 Dreamliners, aimed at reducing carbon emissions while expanding its global network. Such developments are attracting global aircraft manufacturers to establish or expand their operations in Canada, supported by favorable government policies and investments.

In September 2024, Formula Solutions Inc. received a US\$ 1.7 million investment to

enhance its jet engine component production, while the Canadian government invested US\$ 7.44 million to support the establishment of H55, a company specializing in electric propulsion systems. These initiatives are expected to further stimulate the shot peening machines market in North America.

Market Segmentation

The North America Shot Peening Machines Market can be segmented by media, application, and space:

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 includes segments such as Space, Aviation, MedTech, Transportation, and Others, where Transportation is the leading segment.

By Space: The market is categorized into Manufacturing and Maintenance, Repair, and Overhaul (MRO), with Manufacturing being the dominant segment.

Market Outlook

The demand for durable and reliable components is on the rise due to industrial expansion. Increased competition, extended operational hours, and extreme application conditions necessitate high-strength components, which in turn reduces maintenance and downtime. The continuous growth in sectors such as manufacturing, transportation, energy, and oil is driving the need for durable industrial components. According to World Bank data, global manufacturing output reached US\$ 16.2 trillion in 2023, up from US\$ 14 trillion in 2017, indicating a robust demand for high-strength components.

Shot peening, a cold working process that enhances the fatigue strength of components without damaging their surfaces, is increasingly adopted to meet these demands. This process helps prevent issues like galling, cracking, and fretting, further driving the market for shot peening systems.

Country Insights

The North American Shot Peening Machines Market is primarily segmented into the

United States, Canada, and Mexico, with the U.S. holding the largest market share in 2024. The U.S. is a leader in adopting advanced technologies, supported by its strong infrastructure, which facilitates the integration of Industry 4.0 technologies into shot peening processes. This integration is crucial for aerospace applications, where shot peening is essential for preventing crack initiation in critical components.

The U.S. aerospace and defense market is also experiencing growth due to increased government defense spending. The Aerospace Industries Association (AIA) reported a 7.1% increase in air and defense industry sales in 2023, totaling US\$ 892.2 billion, which contributes significantly to the economy. This growth in the aerospace sector is a key driver for the shot peening machines market.

Company Profiles

Key players in the North America Shot Peening Machines Market include Rösler Oberflächentechnik 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 focusing on strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence.

Research Methodology

The research methodology for this report includes comprehensive secondary research, utilizing various sources such as company reports, industry publications, and government documents, followed by primary research through interviews with industry stakeholders to validate findings and gain insights into market dynamics.

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