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71 Chalk Hill, Watford WD19 4DA, UK. Tel: +44 1923 237910 Fax: +44 1923 211510 Internet: www.mat-tech.co.uk

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THE POWDER METALLURGY INDUSTRY WORLDWIDE 2007 – 2012

By Laurel Sheppard

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- Global sales of powder metallurgy components were over (US)\$21 billion in 2006, which is expected to reach about \$23 billion in 2007 and about \$30 billion by 2012, at an average annual growth rate (AAGR) of about 5%
- The North American and European PM markets will continue to lose global market share to China and other expanding Asian countries, such as India.
- The powder metallurgy market in developing Asia will show growth at around 9%; certain Asian countries will see even higher growth
- The highest growth rates for components will be for those made of higher density materials (7.4-7.6 g/cm³) and advanced materials. Good growth rates (over 8% per year) are also anticipated for PM parts made by metal injection moulding (MIM), with some regions seeing double digit growth
- Annual global production of metal powders for PM now exceeds 1 million tonnes (about 1.1 million tons), with over 80% of the six most common metal powders (except aluminium) used in PM manufacture
- The North American PM iron powders market in 2006 declined about 5% over the previous year, to 377,000 tons; copper PM powder shipments in 2006 dropped 6.4% to 18,200 tons (the North American market for ferrous and copper metal powders for PM had also declined in 2005 compared to 2004).
- European shipments of metal powders for PM applications fared much better than North America, increasing by over 8% in 2006 compared to the previous year, to reach around 192,000 tonnes.
- Japanese shipments of metal powders for PM represented about 139,000 tonnes in 2006, with a similar amount in China.
- The global market for powder metallurgy equipment and tooling is worth about \$700 million
- The report is over 450 pages long and includes over 100 tables. Over 300 key companies are featured

AVAILABLE NOW – “The Powder Metallurgy Industry Worldwide 2007-2012” analyses the current position and future prospects for the global powder metallurgy (PM) industry. In addition, the raw materials (metal powders) supply sector is analysed in detail, as are the main end-user industries. Information concerning the activities of hundreds of powder metallurgy and metal powder companies (including financial results), and equipment suppliers, is also provided.

More than 450 pages long and featuring over 100 tables of statistical data, this third edition of the report updates and extends the information presented in the second edition (published in 2006). There are over 50 more pages in this revised edition.

Powder metallurgy products include automotive and aerospace engine parts, bearings, gears, filters, pump parts, cutting tools, magnets, biomedical implants, and wear parts. In most industrial countries, 70-85% of finished powder metallurgy components are for the automotive industry. Global sales of PM components were over (US)\$21 billion in 2006, which is expected to reach almost \$23 billion in 2007 and almost \$30 billion by 2012, at an average annual growth rate (AAGR) of ~5%.

The North American PM parts business was worth about \$5 billion in 2007, which is expected to increase to \$5.5 billion in 2012. The European PM parts market is estimated at around \$9.5 billion in 2007, which is expected to reach \$11.6 billion in 2012. The Asian market for PM components is estimated at about \$7.62 billion in 2007, and is expected to increase to \$12.6 billion by 2012.

Annual global production of metal powders for PM now exceeds 1 million tonnes (about 1.1 million short tons). North American iron powder shipments for PM use declined about 5% in 2006 compared with 2005, to 377,000 tons (short tons), but are forecast to reach around 465,000 tons by 2012. North American shipments of copper and copper-base powders for PM use dropped 6.4% in 2006, to 18,200 tons. European shipments of metal powders (ferrous plus copper) for PM applications totalled around 192,000 tonnes in 2006, which is forecast to reach almost 200,000 tonnes in 2007 and to reach over 240,400 tonnes by 2012.

The North American PM market continues to suffer because the US automotive industry has been losing ground to Japanese companies, who tend to use less powder metallurgy parts per vehicle. In addition, other Asian automobile makers, particularly those in China and India, are set to pose a major competitive force within the next five years. As the major powder metallurgy markets in North America, Western Europe and Japan are relatively mature, the established PM industry in these areas is increasingly looking to expand into other geographic regions, especially China, India and Eastern Europe.

These and many other facts and figures are given in “The Powder Metallurgy Industry Worldwide 2007-2012”.

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- ◆ Aluminium Powder Co Ltd
- ◆ Argonide Corp
- ◆ **Bodycote International plc**
- ◆ **Böhler-Uddeholm AG**
- ◆ **Borg-Warner Inc**
- ◆ Callo AB
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- ◆ Epson Atmix Corp
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- ◆ Eurotungstene Poudres
- ◆ **Federal Mogul Inc**
- ◆ **Fine Sinter Co Ltd**
- ◆ **GKN plc**
- ◆ Hangzhou Jiangnan Powder Metallurgy Works
- ◆ **Hawk Corp**
- ◆ Hitachi Powdered Metals Co Ltd
- ◆ **Höganäs AB**
- ◆ Huifeng Powder Metallurgy Co Ltd
- ◆ **Inco Specialty Products**
- ◆ JiangDu Leader Powder Metallurgy Co Ltd
- ◆ **Kennametal Inc**
- ◆ Kobelco Metal Powders of America Inc
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- ◆ **OMG (OM Group)**
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- ◆ Pometon SpA
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- ◆ Powdermet Inc
- ◆ **Quebec Metal Powders (QMP)**
- ◆ **Sandvik AB**
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- ◆ **Shanghai Automotive Industry Corp (SAIC)**
- ◆ Sinter Sud Srl
- ◆ Sintex A/S
- ◆ SMC Powder Metallurgy
- ◆ SSI-Sintered Specialties
- ◆ Star Sintered Products Ltd
- ◆ **H.C. Stark GmbH**
- ◆ **Sumitomo Electric Industries KK**
- ◆ **Sundram Fasteners Ltd**
- ◆ TLS Technik GmbH & Co Spezialpulver KG
- ◆ **Umicore**
- ◆ **Zhuzhou Cemented Carbide Group**

(NOTE: Companies in bold are featured in the Extended Company Profiles section of the report)