A Review of the North American Foundry Industry

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The face of the U.S. foundry industry continues to change. The change in mix by metal types can be seen in Figures 1 and 2.

The Changing Foundry Mix
1965

![Pie chart showing the changing foundry mix in 1965 with Gray Iron 74%, Other 5%, Ductile Iron 2%, Malleable Iron 6%, Steel 10%, Aluminum 3%, and Other 5%]

As can be seen from the chart, the casting market by metal type continues to grow in aluminum and Ductile Iron castings while gray iron and malleable iron castings continue to shrink. Steel castings remain relatively constant at about 10% of the entire market (by volume).

In terms of sales dollars, the U.S. foundry industry had $28.5 billion in sales in 2002. This represented 13.14 million tons of castings shipped. This level of shipments was virtually flat from 2001, but marked the first time in history that the U.S. was not the world leader in casting shipments. The People’s Republic of China (PRC) reported casting shipments of over 14 million tons for 2002. The U.S. does remain the global leader in casting application.

U.S. foundries experienced demand and expansion during the 1990’s. Historical trends point to the fact that casting shipments tend to peak in the mid decade years, and drop of at or near the end of each decade (See Figure 3). The current climate is one of fierce price compression and competition, not