

Thermal Spray Coating Equipment and Services Market by Product (Material, Equipment & Services), Process (Combustion Flame & Electrical), End-Use Industry (Aerospace, Automotive, Healthcare, Energy & Power), and Region - Global Forecast to 2030

Market Report | 2024-09-09 | 301 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The thermal spray coating equipment and services market is projected to grow from USD 14.0 billion in 2024 to USD 17.8 billion by 2030, at a CAGR of 4.1% from 2024 to 2030. The aerospace industry is a key driver of the thermal spray coating equipment and services market. Thermal spray coating equipment and services are commonly employed in aircraft engines, turbine blades, aerospace structures, and defense equipment to improve performance, reduce weight, and increase durability.

"By process, the combustion flame segment is estimated to be the largest segment of the thermal spray coating equipment and services market from 2024 to 2030."

Based on the process, the combustion flame is estimated to be the largest segment during the forecast period. The combustion flame process facilitates excellent bond strength and adhesion between the coating and substrate. The high temperatures and velocity of the particles generated by the flame promote strong metallurgical bonding, resulting in a durable and resilient coating. This is particularly crucial for applications where the coating must withstand high temperatures, mechanical stress, or corrosive environments. Hence, these factors are propelling the market growth for the combustion flame segment.

"By material, ceramics is estimated to be the largest segment of the thermal spray coating equipment and services market from 2024 to 2030."

Based on material, ceramics are projected to account for the highest share in the thermal spray coating equipment and services market during the projection period. Ceramic coatings provide high electrical insulating characteristics. They are utilized in

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

situations that need low electrical conductivity or insulation. Examples are electrical components, circuit boards, and high-voltage insulators.

"From 2024 to 2030, by end-use, aerospace is expected to be the largest end-use segment in the thermal spray coating equipment and services market."

Aerospace is estimated to account for the largest share in the thermal spray coating equipment and services market during the forecast period based on end-use. Thermal spray coatings are employed in thermal protection systems (TPS) for spacecraft and re-entry vehicles. TPS coatings, such as ablation and insulating materials, are designed to withstand extreme temperatures during atmospheric re-entry and protect the underlying structures from heat damage.

"The North America region's thermal spray coating equipment and services market is projected to witness the highest share during the forecast period."

North America will register the greatest share in the thermal spray coating equipment and services market from 2024 to 2030. The automobile industry in North America is another significant driver of the thermal spray coating equipment and services market. Coatings are used on automobile components like engine parts, piston rings, and transmission systems to improve performance, reduce friction, and increase fuel economy. Thermal spray coatings are projected to become more prevalent in the automobile industry due to a greater demand for lightweight materials and improved engine performance.

Profile break-up of primary participants for the report:

-□By Company Type: Tier 1 - 40%, Tier 2 - 20%, and Tier 3 - 40%

-□By Designation: C-level Executives - 20%, Directors - 50%, and Others - 30%

-□By Region: North America - 25%, Europe -15%, Asia Pacific - 30%, and Latin America-20%, Middle East & Africa-10%

The thermal spray coating equipment and services report is dominated by players such as

Linde AMT (US), OC Oerlikon Management AG (Switzerland), Hoganas AB (Sweden), Saint Gobain (US), and Curtiss-Wright Corporation (US), Ador Fontech Limited (India), Bodycote (UK), Curtiss-Wright Corporation (US), Kennametal Inc. (US), The Lincoln Electric Company (US), A&A Thermal Spray Coatings (US), Aimtek (US), Alloy Metal Surface Technologies (India), and Wall Colmonoy (US), and others.

Research Coverage:

The report defines, segments, and projects the thermal spray coating equipment and services market size based on product, process, end-use, and region. It strategically profiles the key players and comprehensively analyzes their market share and core competencies. It also tracks and analyzes competitive developments, such as expansions, agreements, and acquisitions undertaken by them in the market.

Reasons to Buy the Report:

The report is expected to help the market leaders/new entrants by providing them with the closest approximations of revenue numbers of the thermal spray coating equipment and services market and its segments. This report is also expected to help stakeholder businesses and the market's competitive landscape better, gain insights to improve the position of their companies, and make suitable go-to-market strategies. It also enables stakeholders to understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (growing demand from the healthcare industry, the reduced maintenance cost of thermally sprayed parts, thermal spray substituting electroplating processes, the boom in the aerospace industry), restraints (stringent regulations, fluctuations in raw material and energy prices), opportunities (use of new measures to conserve energy and harness renewable energy sources, adoption of automation and robotics), and challenges (lack of technical skills, high initial investments and operating costs) influencing the growth of the thermal spray coating equipment and services market.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Market Development: Comprehensive information about lucrative markets - the report analyses The thermal spray coating equipment and services market is across varied regions.

- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the thermal spray coating equipment and services market.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players Linde AMT (US), OC Oerlikon Management AG (Switzerland), Hognas AB (Sweden), Saint Gobain (US), and Curtiss-Wright Corporation (US), Ador Fontech Limited (India), Bodycote (UK), Curtiss-Wright Corporation (US), Kennametal Inc. (US), The Lincoln Electric Company (US), A&A Thermal Spray Coatings (US), Aimtek (US), Alloy Metal Surface Technologies (India), and Wall Colmonoy (US), among others in the thermal spray coating equipment and services

Table of Contents:

1	INTRODUCTION	30
1.1	STUDY OBJECTIVES	30
1.2	MARKET DEFINITION	30
1.3	STUDY SCOPE	31
1.3.1	SEGMENTS CONSIDERED	31
1.3.2	INCLUSIONS & EXCLUSIONS	31
1.3.3	YEARS CONSIDERED	34
1.3.4	CURRENCY CONSIDERED	34
1.4	STAKEHOLDERS	34
2	RESEARCH METHODOLOGY	35
2.1	RESEARCH DATA	35
2.1.1	SECONDARY DATA	36
2.1.1.1	Key data from secondary sources	36
2.1.2	PRIMARY DATA	36
2.1.2.1	Key data from primary sources	37
2.1.2.2	Key industry insights	37
2.1.2.3	Breakdown of primary interviews	38
2.2	BASE NUMBER CALCULATIONS	38
2.3	FORECAST NUMBER CALCULATIONS	38
2.4	MARKET ENGINEERING	39
2.4.1	TOP-DOWN APPROACH	39
2.4.2	BOTTOM-UP APPROACH	39
2.5	DATA TRIANGULATION	40
2.6	STUDY ASSUMPTIONS	41
2.7	RESEARCH LIMITATIONS	41
3	EXECUTIVE SUMMARY	42
4	PREMIUM INSIGHTS	46
4.1	ATTRACTIVE OPPORTUNITIES IN THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET	46
4.2	THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY PROCESS	46
4.3	THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY COUNTRY	47
4.4	NORTH AMERICA: THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY MATERIAL AND COUNTRY	48

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

?

- 5 MARKET OVERVIEW 49
- 5.1 INTRODUCTION 49
- 5.2 MARKET DYNAMICS 49
 - 5.2.1 DRIVERS 50
 - 5.2.1.1 Growing demand for thermal spray coatings from end-use industries 50
 - 5.2.1.2 Increasing adoption in repair and refurbishment applications 51
 - 5.2.1.3 Advancements in thermal spray technologies 51
 - 5.2.2 RESTRAINTS 52
 - 5.2.2.1 Stringent regulations 52
 - 5.2.2.2 Fluctuations in raw material and energy prices 52
 - 5.2.3 OPPORTUNITIES 52
 - 5.2.3.1 Use of new measures to conserve and harness renewable energy sources 52
 - 5.2.3.2 Adoption of automation and robotics 53
 - 5.2.4 CHALLENGES 53
 - 5.2.4.1 Lack of technical skills 53
 - 5.2.4.2 High initial investments and operating costs 54
- 5.3 PORTER'S FIVE FORCES ANALYSIS 54
 - 5.3.1 THREAT OF NEW ENTRANTS 55
 - 5.3.2 THREAT OF SUBSTITUTES 56
 - 5.3.3 BARGAINING POWER OF SUPPLIERS 56
 - 5.3.4 BARGAINING POWER OF BUYERS 56
 - 5.3.5 INTENSITY OF COMPETITIVE RIVALRY 56
- 5.4 KEY STAKEHOLDERS AND BUYING CRITERIA 57
 - 5.4.1 KEY STAKEHOLDERS IN BUYING PROCESS 57
 - 5.4.2 KEY BUYING CRITERIA 58
- 5.5 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 59
- 5.6 VALUE CHAIN ANALYSIS 59
- 5.7 REGULATORY LANDSCAPE 61
 - 5.7.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 62
- 5.8 TRADE ANALYSIS 64
 - 5.8.1 IMPORT ANALYSIS (HS CODE 8515) 65
 - 5.8.2 EXPORT SCENARIO (HS CODE 8515) 65
- 5.9 TECHNOLOGY ANALYSIS 66
 - 5.9.1 KEY TECHNOLOGIES 66
 - 5.9.1.1 High-velocity oxy-fuel (HVOF) spraying 66
 - 5.9.1.2 Cold spray technology 67
 - 5.9.1.3 Plasma-transferred arc (PTA) coating 67
 - 5.9.2 COMPLEMENTARY TECHNOLOGIES 68
 - 5.9.2.1 Laser cladding 68
 - 5.9.2.2 Surface metrology 68
 - 5.9.2.3 Robotic automation 68
 - 5.9.3 ADJACENT TECHNOLOGIES 69
 - 5.9.3.1 Additive manufacturing (3D printing) 69
 - 5.9.3.2 Heat treatment processes 69

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.9.3.3	Wear-resistant alloys	69
5.10	CASE STUDY ANALYSIS	70
5.10.1	USE OF THERMAL SPRAY COATINGS TO IMPROVE PERFORMANCE AND LIFESPAN IN AEROSPACE INDUSTRY	70
5.10.2	USE OF THERMAL SPRAY COATINGS FOR CORROSION PROTECTION IN OFFSHORE OIL & GAS INDUSTRY	70
5.10.3	THERMAL SPRAY COATINGS FOR WEAR PROTECTION IN MINING EQUIPMENT	71
5.11	ECOSYSTEM ANALYSIS	72
5.11.1	ROLE IN ECOSYSTEM	73
5.12	PATENT ANALYSIS	74
5.12.1	LIST OF MAJOR PATENTS	74
5.13	KEY CONFERENCES AND EVENTS, 2024?2025	76
5.14	INVESTMENTS AND FUNDING SCENARIO	77
5.15	PRICING ANALYSIS	78
5.15.1	AVERAGE SELLING PRICE, BY EQUIPMENT, 2023	78
5.15.2	AVERAGE COSTS OF THERMAL SPRAY COATING, 2020-2023 (USD/M?)	79
5.16	MACROECONOMIC OUTLOOK FOR THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET	81
5.16.1	GLOBAL ECONOMIC GROWTH AND GDP TRENDS	81
5.16.2	PURCHASING POWER PARITY (PPP)	81
5.16.3	CHANGES IN ECONOMIC OUTPUT	81
5.16.4	INFLATION	82
5.16.5	INTEREST RATES	82
5.16.6	FOREIGN EXCHANGE RATES	82
5.16.7	BALANCE OF PAYMENTS	83
5.17	IMPACT OF AI/GEN AI ON THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET	83
5.17.1	PROCESS OPTIMIZATION	83
5.17.2	PREDICTIVE MAINTENANCE	83
5.17.3	QUALITY CONTROL AND DEFECT DETECTION	84
5.17.4	INNOVATION IN COATING MATERIALS AND TECHNIQUES	84
5.17.5	CUSTOMIZATION AND FLEXIBILITY	84
5.17.6	COST REDUCTION AND EFFICIENCY GAINS	84
5.17.7	ENHANCED DATA ANALYTICS AND DECISION-MAKING	84
	?	
6	THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY PRODUCT	85
6.1	INTRODUCTION	86
6.2	MATERIALS	86
6.2.1	FAVORABLE GOVERNMENT INITIATIVES TO AID MARKET GROWTH	86
6.2.2	CERAMICS	88
6.2.2.1	Increased corrosion protection with high thermal and electrical insulation to augment segment growth	88
6.2.2.2	Alumina	88
6.2.2.3	Zirconia	88
6.2.2.4	Yttria	88
6.2.3	METALS & ALLOYS	89
6.2.3.1	Increased resistance to corrosion, oxidation, and wear to fuel segment growth	89

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.2.3.2 Nickel 90
- 6.2.3.3 Molybdenum 90
- 6.2.3.4 Aluminum 90
- 6.2.3.5 Cobalt 90
- 6.2.3.6 Zinc 90
- 6.2.4 CARBIDES 91
- 6.2.4.1 Increasing advancements in manufacturing sector to spur market growth 91
- 6.2.5 COMPOSITES 92
- 6.2.5.1 Low weight and high specific strength to drive segment 92
- 6.2.6 OTHER MATERIALS 93
- 6.2.6.1 Resins 93
- 6.2.6.2 Polymers 93
- 6.3 EQUIPMENT 94
- 6.3.1 SUPERIOR COATING QUALITY, PRECISE CONTROL, AND ENHANCED CUSTOMIZATION OPTIONS TO DRIVE MARKET 94
- 6.3.2 FLAME SPRAY EQUIPMENT 96
- 6.3.2.1 Cost-effectiveness and ease of operation to augment segment growth 96
- 6.3.3 PLASMA SPRAY EQUIPMENT 97
- 6.3.3.1 Industrial development with advanced manufacturing capabilities to drive adoption 97
- 6.3.4 HIGH-VELOCITY OXY-FUEL SPRAY EQUIPMENT 98
- 6.3.4.1 Need for high precision and durability in critical applications to aid segment growth 98
- 6.3.5 ELECTRIC ARC SPRAY EQUIPMENT 99
- 6.3.5.1 Growing automotive, construction, and marine sectors in emerging economies to favor market growth 99
- ?
- 6.3.6 HIGH-VELOCITY AIR-FUEL SPRAY EQUIPMENT 100
- 6.3.6.1 Ability to apply coatings with reduced oxidation and improved wear resistance to augment segment growth 100
- 6.3.7 COLD SPRAY EQUIPMENT 101
- 6.3.7.1 Need to create dense and oxide-free coatings without thermal distortion to boost segment growth 101
- 6.3.8 OTHER EQUIPMENT 102
- 6.4 SERVICES 103
- 6.4.1 RISING DEMAND FROM END-USE INDUSTRIES TO SURGE MARKET GROWTH 103
- 7 THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY PROCESS 105
- 7.1 INTRODUCTION 106
- 7.2 COMBUSTION FLAME PROCESS 107
- 7.2.1 INCREASED NEED FOR COST-EFFECTIVE AND VERSATILE COATING SOLUTIONS TO SUPPORT MARKET GROWTH 107
- 7.2.2 WIRE FLAME SPRAYING 107
- 7.2.3 POWDER FLAME SPRAYING 107
- 7.2.4 DETONATION GUN SPRAYING 107
- 7.2.5 CERAMIC ROD SPRAYING 107
- 7.2.6 HIGH VELOCITY OXY-FUEL 107
- 7.3 ELECTRICAL PROCESS 108
- 7.3.1 INNOVATIVE SURFACE TREATMENTS TO REVOLUTIONIZE INDUSTRIAL APPLICATIONS OF ADVANCED ELECTRICAL PROCESSES 108
- 7.3.2 VACUUM PLASMA SPRAYING 108
- 7.3.3 ATMOSPHERIC PLASMA SPRAYING 109

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 7.3.4 ELECTRIC ARC WIRE SPRAYING 109
- 7.3.5 PLASMA SPRAYING 109
- 7.3.6 ARC SPRAYING 109
- 7.3.7 COLD GAS DYNAMIC SPRAY PROCESS 109
- 7.3.8 RADIOFREQUENCY PLASMA 109
- 7.3.9 TWO-WIRE ELECTRIC ARC SPRAYING 110
- 8 THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY END-USE INDUSTRY 111
- 8.1 INTRODUCTION 112
- 8.2 AEROSPACE INDUSTRY 113
- 8.2.1 AEROSPACE TO COMMAND LARGEST END-USE INDUSTRY MARKET SHARE DURING STUDY PERIOD 113
- 8.2.2 FLAME TUBES 114
- 8.2.3 TURBINE BLADES 114
- 8.2.4 LANDING GEARS 115
- ?
- 8.3 AUTOMOTIVE INDUSTRY 116
- 8.3.1 INCREASED DEMAND FOR LIGHTWEIGHT ENGINE COMPONENTS TO FUEL MARKET GROWTH 116
- 8.3.2 SUSPENSION PARTS 116
- 8.3.3 PISTON RINGS 116
- 8.3.4 TURBOCHARGERS 116
- 8.3.5 ENGINE PARTS 116
- 8.3.6 CHASSIS 116
- 8.3.7 CYLINDER LINERS 117
- 8.3.8 EXHAUST PIPES 117
- 8.4 HEALTHCARE INDUSTRY 118
- 8.4.1 RISING DEMAND FOR IMPLANTS TO SPUR MARKET GROWTH 118
- 8.4.2 ORTHOPEDICS 118
- 8.4.3 MEDICAL INSTRUMENTS 118
- 8.4.4 OVER-THE-COUNTER MEDICINES 118
- 8.5 ENERGY & POWER INDUSTRY 119
- 8.5.1 NEED FOR LOW MAINTENANCE AND PRODUCTION COSTS TO BOOST MARKET GROWTH 119
- 8.5.2 BOILERS 119
- 8.5.3 SHAFTS 119
- 8.5.4 HYDRO TURBINES 119
- 8.5.5 POWER GENERATORS 120
- 8.5.6 COMPRESSOR BLADES 120
- 8.6 ELECTRONICS INDUSTRY 120
- 8.6.1 RISING DEMAND FOR CONSUMER ELECTRONICS TO SUPPORT MARKET GROWTH 120
- 8.6.2 ELECTRONIC ENCLOSURES 121
- 8.6.3 INSTRUMENT NUTS 121
- 8.6.4 MAGNETIC TAPES 121
- 8.6.5 DIELECTRIC COATINGS 121
- 8.6.6 SHIELDING 121
- 8.7 AGRICULTURAL MACHINERY INDUSTRY 122
- 8.7.1 INCREASING FOCUS ON ADVANCED AGRICULTURAL MACHINERY TO

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- DRIVE MARKET 122
- 8.7.2 HARVESTER BLADES 122
- 8.7.3 BALERS 122
- 8.7.4 COMPRESSORS 122
- 8.7.5 THRESHING COMPONENTS 123
- 8.7.6 AGRICULTURAL PUMPS AND WASTEWATER TREATMENT EQUIPMENT 123
- 8.8 RENEWABLE ENERGY SECTOR 124
- 8.8.1 GROWING DEMAND FOR DURABLE, EFFICIENT, AND COST-EFFECTIVE SOLUTIONS TO PROPEL MARKET GROWTH 124
- 8.8.2 WIND ENERGY SECTOR 124
- 8.8.3 TIDAL ENERGY SECTOR 124
- 8.8.4 BIOMASS ENERGY SECTOR 125
- 8.8.5 GEOTHERMAL ENERGY SECTOR 125
- 8.8.6 FUEL CELL ENERGY SECTOR 126
- 8.8.7 HYDROGEN PRODUCTION SECTOR 126
- 8.9 OTHER END-USE INDUSTRIES 127
- 8.9.1 FOOD PROCESSING INDUSTRY 127
- 8.9.2 DEFENSE INDUSTRY 128
- 8.9.3 PRINTING INDUSTRY 128
- 9 THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET, BY REGION 129
- 9.1 INTRODUCTION 130
- 9.2 EUROPE 130
- 9.2.1 GERMANY 135
- 9.2.1.1 Increasing R&D investments in automobile industry to propel market growth 135
- 9.2.2 UK 136
- 9.2.2.1 Increased government investments and favorable policies in electronics industry to fuel market growth 136
- 9.2.3 RUSSIA 138
- 9.2.3.1 Growing automotive and aerospace industries to aid market growth 138
- 9.2.4 ITALY 139
- 9.2.4.1 Increased investments in healthcare and renewable energy sectors to boost market growth 139
- 9.2.5 FRANCE 141
- 9.2.5.1 Growth of automotive industry and favorable government policies to support market growth 141
- 9.2.6 BELGIUM 142
- 9.2.6.1 Developing medical devices market and growing aerospace sector to focus on market growth 142
- 9.2.7 REST OF EUROPE 144
- 9.3 ASIA PACIFIC 145
- 9.3.1 CHINA 148
- 9.3.1.1 Massive industrial growth and urbanization to drive market 148
- 9.3.2 JAPAN 150
- 9.3.2.1 Technologically advanced manufacturing base and increased investments in aviation sector to propel market growth 150
- 9.3.3 INDIA 151
- 9.3.3.1 Growth in automotive and aerospace industries to augment market growth 151
- 9.3.4 SOUTH KOREA 153
- 9.3.4.1 Technological advancements in electronics sector and favorable government initiatives to support market growth 153
- ?
- 9.3.5 VIETNAM 154

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.3.5.1	Increasing investments in advanced manufacturing technologies to spur market growth	154
9.3.6	REST OF ASIA PACIFIC	155
9.4	NORTH AMERICA	156
9.4.1	US	160
9.4.1.1	US to command largest market share in North American market during study period	160
9.4.2	CANADA	161
9.4.2.1	Increase in private and public investments and developed aerospace and oil & gas sectors to drive market	161
9.4.3	MEXICO	163
9.4.3.1	Increased private investments in automotive industry and high government focus on renewable energy to aid market growth	163
9.5	LATIN AMERICA	164
9.5.1	BRAZIL	167
9.5.1.1	High population and favorable industrial policies to drive market	167
9.5.2	COLOMBIA	168
9.5.2.1	Rising government investments in automotive, healthcare, and aerospace manufacturing industries to spur market growth	168
9.5.3	ARGENTINA	170
9.5.3.1	Increasing FDI and rising investments in renewable energy sector to propel market growth	170
9.5.4	REST OF LATIN AMERICA	171
9.6	MIDDLE EAST & AFRICA	172
9.6.1	SAUDI ARABIA	176
9.6.1.1	Growth in oil & gas and petroleum industries to augment market growth	176
9.6.2	UAE	177
9.6.2.1	Rise in healthcare expenditure and growth in aviation sector to drive market	177
9.6.3	REST OF GCC COUNTRIES	179
9.6.4	SOUTH AFRICA	180
9.6.4.1	Increased investments in manufacturing sector to propel market growth	180
9.6.5	EGYPT	182
9.6.5.1	Increased focus on development of renewable energy and healthcare sectors to drive market	182
9.6.6	REST OF MIDDLE EAST & AFRICA	183
10	COMPETITIVE LANDSCAPE	185
10.1	INTRODUCTION	185
10.2	KEY PLAYER STRATEGY/RIGHT TO WIN	185
10.2.1	OVERVIEW OF STRATEGIES ADOPTED BY PLAYERS IN THERMAL SPRAY COATING EQUIPMENT AND SERVICES MARKET	185
10.3	REVENUE ANALYSIS, 2019-2023	187
10.4	MARKET SHARE ANALYSIS, 2023	187
10.4.1	RANKING OF KEY MARKET PLAYERS, 2023	188
10.5	BRAND/PRODUCT COMPARISON	190
10.5.1	LINDE AMT	191
10.5.2	OC OERLIKON MANAGEMENT AG	191
10.5.3	HOGANAS AB	191
10.5.4	SAINT-GOBIN	191
10.5.5	CURTISS-WRIGHT CORPORATION	191
10.6	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	192

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.6.1	STARS	192
10.6.2	EMERGING LEADERS	192
10.6.3	PERVASIVE PLAYERS	192
10.6.4	PARTICIPANTS	192
10.6.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	194
10.6.5.1	Company footprint	194
10.6.5.2	Product footprint	195
10.6.5.3	Process footprint	196
10.6.5.4	End-use industry footprint	197
10.6.5.5	Region footprint	198
10.7	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023	198
10.7.1	PROGRESSIVE COMPANIES	199
10.7.2	RESPONSIVE COMPANIES	199
10.7.3	DYNAMIC COMPANIES	199
10.7.4	STARTING BLOCKS	199
10.7.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023	201
10.8	COMPANY VALUATION AND FINANCIAL METRICS	202
10.8.1	COMPANY VALUATION	202
10.8.2	FINANCIAL METRICS	202
10.9	COMPETITIVE SCENARIO	203
10.9.1	PRODUCT LAUNCHES	203
10.9.2	DEALS	205
10.9.3	EXPANSIONS	206
11	COMPANY PROFILE	208
11.1	KEY PLAYERS	208
11.1.1	LINDE AMT	208
11.1.1.1	Business overview	208
11.1.1.2	Products/Services offered	209
11.1.1.3	MnM view	211
11.1.1.3.1	Right to win	211
11.1.1.3.2	Strategic choices	211
11.1.1.3.3	Weaknesses and competitive threats	211
11.1.2	OC OERLIKON MANAGEMENT AG	212
11.1.2.1	Business overview	212
11.1.2.2	Products/Services offered	213
11.1.2.3	Recent developments	215
11.1.2.3.1	Deals	215
11.1.2.3.2	Expansions	216
11.1.2.4	MnM view	217
11.1.2.4.1	Right to win	217
11.1.2.4.2	Strategic choices	217
11.1.2.4.3	Weaknesses and competitive threats	217
11.1.3	BODYCOTE	218
11.1.3.1	Business overview	218
11.1.3.2	Products/Services offered	219
11.1.3.3	Recent development	221
11.1.3.3.1	Deals	221

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 11.1.3.3.2 Expansions 221
- 11.1.3.4 MnM view 222
- 11.1.3.4.1 Right to win 222
- 11.1.3.4.2 Strategic choices 222
- 11.1.3.4.3 Weaknesses and competitive threats 222
- 11.1.4 A&A THERMAL SPRAY COATINGS 223
- 11.1.4.1 Business overview 223
- 11.1.4.2 Products/Services offered 224
- 11.1.5 HANNECARD 225
- 11.1.5.1 Business overview 225
- 11.1.5.2 Products/Services Offered 225
- 11.1.5.3 Recent developments 227
- 11.1.5.3.1 Product launches 227
- 11.1.5.3.2 Deals 227
- 11.1.6 ADOR FONTECH LIMITED 229
- 11.1.6.1 Business overview 229
- 11.1.6.2 Products/Services offered 230
- 11.1.7 CURTISS-WRIGHT CORPORATION 232
- 11.1.7.1 Business overview 232
- 11.1.7.2 Products/Services offered 233
- 11.1.7.3 Recent developments 235
- 11.1.7.3.1 Product launches 235
- 11.1.7.3.2 Deals 235
- 11.1.7.3.3 Expansions 236
- ?
- 11.1.8 HOGANAS AB 237
- 11.1.8.1 Business overview 237
- 11.1.8.2 Products/Services offered 237
- 11.1.8.3 Recent developments 238
- 11.1.8.3.1 Product launches 238
- 11.1.8.3.2 Deals 238
- 11.1.8.3.3 Expansions 239
- 11.1.9 WALL COLMONOY 240
- 11.1.9.1 Business overview 240
- 11.1.9.2 Products/Services offered 240
- 11.1.10 KENNAMETAL INC. 241
- 11.1.10.1 Business overview 241
- 11.1.10.2 Products/Services offered 242
- 11.1.11 SAINT-GOBAIN 244
- 11.1.11.1 Business overview 244
- 11.1.11.2 Products/Services offered 245
- 11.1.12 THE LINCOLN ELECTRIC COMPANY 247
- 11.1.12.1 Business overview 247
- 11.1.12.2 Products/Services offered 248
- 11.1.12.3 Recent developments 249
- 11.1.12.3.1 Product launches 249
- 11.1.12.3.2 Deals 249

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 11.1.13 FISHER BARTON 250
- 11.1.13.1 Business overview 250
- 11.1.13.2 Products/Services offered 250
- 11.1.14 GENERAL MAGNAPLATE CORPORATION 252
- 11.1.14.1 Business overview 252
- 11.1.14.2 Products/Services offered 252
- 11.1.15 SURFACE TECHNOLOGY 253
- 11.1.15.1 Business overview 253
- 11.1.15.2 Products/Services offered 253
- 11.1.15.3 Recent developments 254
- 11.1.15.3.1 Product launches 254
- 11.1.15.3.2 Deals 255
- 11.1.16 BRYCOAT INC. 256
- 11.1.16.1 Business overview 256
- 11.1.16.2 Products/Services offered 257
- 11.1.17 FLAME SPRAY TECHNOLOGIES B.V. 258
- 11.1.17.1 Business overview 258
- 11.1.17.2 Products/Services offered 258
- ?
- 11.2 OTHER PLAYERS 260
- 11.2.1 POLYMET 260
- 11.2.2 PROGRESSIVE SURFACE 261
- 11.2.3 EXLINE, INC. 262
- 11.2.4 GTV VERSCHLEIßSCHUTZ GMBH 263
- 11.2.5 AIMTEK, INC. 264
- 11.2.6 ALLOY METAL SURFACE TECHNOLOGIES 265
- 11.2.7 TSS SRL 266
- 11.2.8 CASTOLIN EUTECTIC 267
- 11.2.9 COAKEN TECHNO CO., LTD. 268
- 11.2.10 ELMET TECHNOLOGIES 269
- 11.2.11 APS MATERIALS, INC. 270
- 11.2.12 KERMETICO INC. 271
- 11.2.13 KYMERA INTERNATIONAL 272
- 11.2.14 PLASMA PROCESSES, LLC 273
- 12 ADJACENT AND RELATED MARKETS 274
- 12.1 INTRODUCTION 274
- 12.2 MARKET INSIGHT LIMITATIONS 274
- 12.3 INTERCONNECTED MARKETS 274
- 12.3.1 CELLULOSE ETHER & DERIVATIVES MARKET 274
- 12.3.1.1 Market definition 274
- 12.3.1.2 Market overview 274
- 12.3.1.3 Hard coatings market, by end-use industry 276
- 12.4 GENERAL MANUFACTURING 277
- 12.4.1 ENHANCED DURABILITY AND WEAR RESISTANCE TO DRIVE ADOPTION 277
- 12.5 TRANSPORTATION 279
- 12.5.1 ENHANCED DURABILITY, REDUCED MAINTENANCE, AND IMPROVED PERFORMANCE TO DRIVE MARKET 279
- 12.5.2 AUTOMOTIVE 279

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.5.3	MARINE	280
12.5.4	AEROSPACE	280
12.5.5	RAILROAD	280
12.6	MEDICAL/DENTAL EQUIPMENT	282
12.6.1	WEAR RESISTANCE, LONGEVITY, AND OPTIMAL PERFORMANCE TO DRIVE MARKET	282
12.7	BUILDING & ARCHITECTURE (INCLUDES HOME FURNISHINGS)	284
12.7.1	ELEVATING DURABILITY AND CORROSION RESISTANCE FOR PROLONGED INFRASTRUCTURE INTEGRITY TO DRIVE MARKET	284
12.8	FOOD MANUFACTURING/PREPARATION EQUIPMENT	286
12.8.1	ENHANCED EQUIPMENT LONGEVITY AND COMPLIANCE WITH HYGIENIC PROCESSING STANDARDS TO DRIVE MARKET	286
	?	
12.9	SPORTING EQUIPMENT	288
12.9.1	DURABILITY AND ENHANCED PERFORMANCE TO DRIVE MARKET	288
12.10	OTHER END-USE INDUSTRIES	290
13	APPENDIX	292
13.1	DISCUSSION GUIDE	292
13.2	KNOWLEDGESTORE: MARKETSDMARKETS' SUBSCRIPTION PORTAL	297
13.3	CUSTOMIZATION OPTIONS	299
13.4	RELATED REPORTS	299
13.5	AUTHOR DETAILS	300

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Thermal Spray Coating Equipment and Services Market by Product (Material, Equipment & Services), Process (Combustion Flame & Electrical), End-Use Industry (Aerospace, Automotive, Healthcare, Energy & Power), and Region - Global Forecast to 2030

Market Report | 2024-09-09 | 301 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

Zip Code*

Country*

Date

2026-03-02

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com