

Cook: principal overseas competitors

EC

France

Acières et Fonderies de L'Est (AFE Group): This group includes five steel foundries, notably the foundries at Feurs (carbon and alloy, stainless and refractory steels with a total monthly output of 1,200 tonnes), Colombier-Fontaine and Sainte Suzanne (500 tonnes a month each).

Acières Hachette et Driout produces steel castings in low-alloy, carbon, wear-resisting and stainless steels up to 6 tonnes. It serves the earth-moving, mining and quarrying industries as well as making valves, components for railways and electrical equipment. It has the capability of producing fully machined castings, and has a monthly production of 900 tonnes.

Manoir Industries produces castings in all types of steel at four different foundries, with a monthly output of about 1,850 tonnes. It produces furnace rolls, beams and supports for the steel industry, furnace grates for heat treatment, petrochemical castings and tube in particular and large high integrity castings for the power generation and nuclear industries.

Forges et Acières Thomé makes carbon steel castings for the automotive, building and municipal engineering industries, for defence and for railways, with a monthly output of 650 tonnes.

Ferry Capitain Group operates steel foundries with a maximum casting weight of 60 tonnes. It makes a wide range of steels, and has a monthly output of about 900 tonnes. Its castings are mainly commercial castings used in many applications from chemical, nuclear and energy industries to mining, machine tools and general engineering. The company's specialities include large gears, rings and milling heads.

Creusot-Loire Industrie uses carbon, low alloy and stainless steels, and specialises in very heavy castings (up to 200 tonnes), for example blades, pumps and turbine casings for power stations. It has a monthly output of 450 tonnes.

Sambre et Meuse has two foundries, one with a monthly output of 1,800 tonnes and the other with 900 tonnes. It makes both commercial and high integrity castings for many applications components for earth-moving equipment, valves, turbine and pump castings, components for railways and for cement, dredging and iron and steel industries.

Grandry Charleville is a medium-sized steel foundry supplying principally valves. It exports 60 per cent of its production which is about 350 tonnes a month.

Federal Republic of Germany

Pleissner operates both iron and steel foundries with shell-moulding facilities. It produces high integrity and commercial castings in carbon, low alloy, high alloy and stainless steel for a wide range of end uses including defence, energy, the nuclear industry as well as general engineering.

Thyssen Guss AG has 11 production plants in West Germany, two in Brazil and one associated company in the United Kingdom. It produces iron, steel and non-ferrous castings across the whole spectrum of applications: aerospace, defence, telecommunications, energy, food and drink processing, machine tools and general engineering.

Diehl group is involved in the manufacture not only of castings but of non-ferrous metals, clocks and watches, machine tools, time controls and other defence technology. Its main castings business is in military tracks where it offers a wide catalogue of different tank track specifications to fit most of the armoured vehicles currently operating in Europe, North America and Soviet Union. It has in-house design capabilities and its product has a reputation for quality and durability. Tracks purchased from Diehl could be fitted to MOD tanks without the need for modification of the existing vehicle.

Belgium

Founderies Magotteaux SA has two foundries based in Belgium and France, one with annual production of more than 10,000 tonnes and one with production of between 2,500 and 5,000 tonnes. It also has associated foundries in North America, Japan, Spain and Brazil. It principally produces commercial castings, including manganese steel for mining, power generation, and the cement and petrochemical industries. It also makes Bruce anchors which are particularly complex castings. It has a United Kingdom sales agent Magotteaux Great Britain Ltd based in York.

Italy

Fonderia Breda produces both high integrity and commercial castings. It has one foundry with a production capability of 12,000 tonnes. It makes castings for a wide range of applications for the petrochemical, iron and steel, shipbuilding, power generation and cement industries and also components for railway and earth-moving equipment.

Portugal

Cometna produces both high integrity and commercial castings and has two foundries, one for iron and one for steel. It specialises in valves for the chemical and petroleum industries and also makes equipment for the ceramic, mining and quarrying industries and railways, and water turbines for electric power stations etc. It has annual production of between 5 and 10,000 tonnes.

Spain

Fundix SA makes high integrity and commercial castings in its four foundries. The sectors it serves are valve and pump bodies, automotive components and ground-engaging wear parts. It has a capacity of 12,000 tonnes per year (including some iron castings), and it exports about 85 per cent of its production.

Fundiciones Especiales Zaragoza (FEZ) has one foundry with an annual production capacity of over 10,000 tonnes. It makes mainly commercial castings for automotive, railway and agricultural applications and also produces valves and components used in civil engineering.

Mettalurgica Madrileña SA is a Madrid-based foundry supplying principally the truck, axle and general engineering industries. It has an annual production of approximately 8,000 tonnes.

Talleres de Amurrio SA produces mainly commercial castings of carbon steel and low alloy steel for the chemical, iron, steel and metals industries. It specialises in electric motor castings and railway crossings. It has an annual capacity of over 2,000 tonnes and has a United Kingdom agent based in Birmingham.

Europe (non-EC)

Georg Fischer AG: This Swiss group had a turnover in 1989 of SFr 2,476 million of which the steel castings foundries contributed SFr 145 million. In addition to the jobbing foundries Fisher produces

automotive castings and other automotive castings and other automotive products. The steel foundries at Shaffhausen and Worms make high integrity components for oil platforms, steam and water turbines and nuclear power stations. The other activities of the group include piping systems, manufacturing technology and dynamic plant engineering and construction. Georg Fischer has an iron foundry in England at Lincoln and a number of United Kingdom subsidiaries to promote sales of its product here.

Voest-Alpine AG: This Austrian company has three foundries (at Linz, Treisen, and Liezen) and produces iron, steel and non-ferrous castings and also operates forges using a variety of forging processes. Its steel castings are made of carbon, low alloy, high alloy and stainless steels, and are used in electrical, heavy engineering, cement, power generation, iron and steel and chemical industry applications. It is state-owned, and has a United Kingdom sales agent based in London.

Lokomo Oy: This Finnish company produces a range of steel castings including manganese steel and super alloys.

Rest of the world

Korea: The 1980s have been a period of dramatic growth in the South Korean foundry industry. Steel castings production has increased from 77,722 tonnes in 1978 to reach 121,000 tonnes in 1988. The production of total castings including iron and non-ferrous metals was 1,198,000 in 1988 and exports of all metal castings amounted to 180,000 tonnes in 1988, more than double the figure of 70,000 achieved in 1980. Prices are about 80 per cent of the equivalent United Kingdom price. Those figures do not include the many castings that are incorporated into machinery and plant equipment in Korea and then exported. The majority of foundry enterprises in Korea are small to medium-sized and most are in private ownership. The large foundries frequently belong to big industrial groups such as Hyundai, GoldStar and Daewoo.

China: Sheffield's twin town of Anshan in Liaoning Province will be the site of one of the largest and most technically advanced steel foundries in East Asia. The major items of foundry equipment have been imported from George Fischer in Switzerland and from West Germany and the line will be fully automated with computer control equipment from the USA. The Chinese are currently seeking Western investment to complete a project which has been planned since 1979. The factory buildings have been built with a combination of national and provincial finance. It is expected that on completion the foundry will have an annual capacity of approximately 35,000 tonnes, making components for construction machinery, high and medium pressure valves and other general castings.

EEI foundry Philippines: EEI owns and operates a large and modern commercial steel foundry plant with a capacity of about 650 tonnes per month. It is a manufacturing licensee of ESCO Corporation in the USA for earth-moving excavation and rigging products as well as for specially designed wear-resistant alloys. It also holds a licence of the manufacture of slurry pumps for Warman International (Australia) and for the patented Angular Spiral Lining System from Waagner-Biro Aktien Gessellschaft (Austria) and it receives strong technical support from these companies. Approximately 50 per cent of EEI's annual production is exported to countries such as Australia, Malaysia, Hong Kong, USA and Canada.

Bradken: This Australian foundry group was formerly a specialised steel foundry company but was bought by ANI in the early 1980s. It was merged with other leading heavy engineering companies into the Contracting and Manufacturing Division of ANI. It makes mining and earth-moving equipment and railway equipment. It has a foundry in Malaysia which is currently the largest alloy steel foundry in South-East Asia. This foundry has a capacity of 5,000 tonnes per year producing mining and dredging components and exports 50 per cent of its total output.

Source: Information from Cook, supplemented by the Foundry Directory & Register of Forges: UK and Western Europe, 15th edition, 1989 (published by Metal Bulletin Books Ltd), and by The French Steel Casting, a guide to French steel foundries published by the Association Professionnelle de l'Acier Moulé.