Trends in Russian Foundry Industry
Revision 2012

Presented by:

Andrew Dibrov,

Vice-President of Russian Association of Foundrymen

General data:

1. Territory – 17.100.000 km^2
2. Population – 143,7 mln.
3. Working force – 80 mln.
4. Total number of foundries – about 1.350

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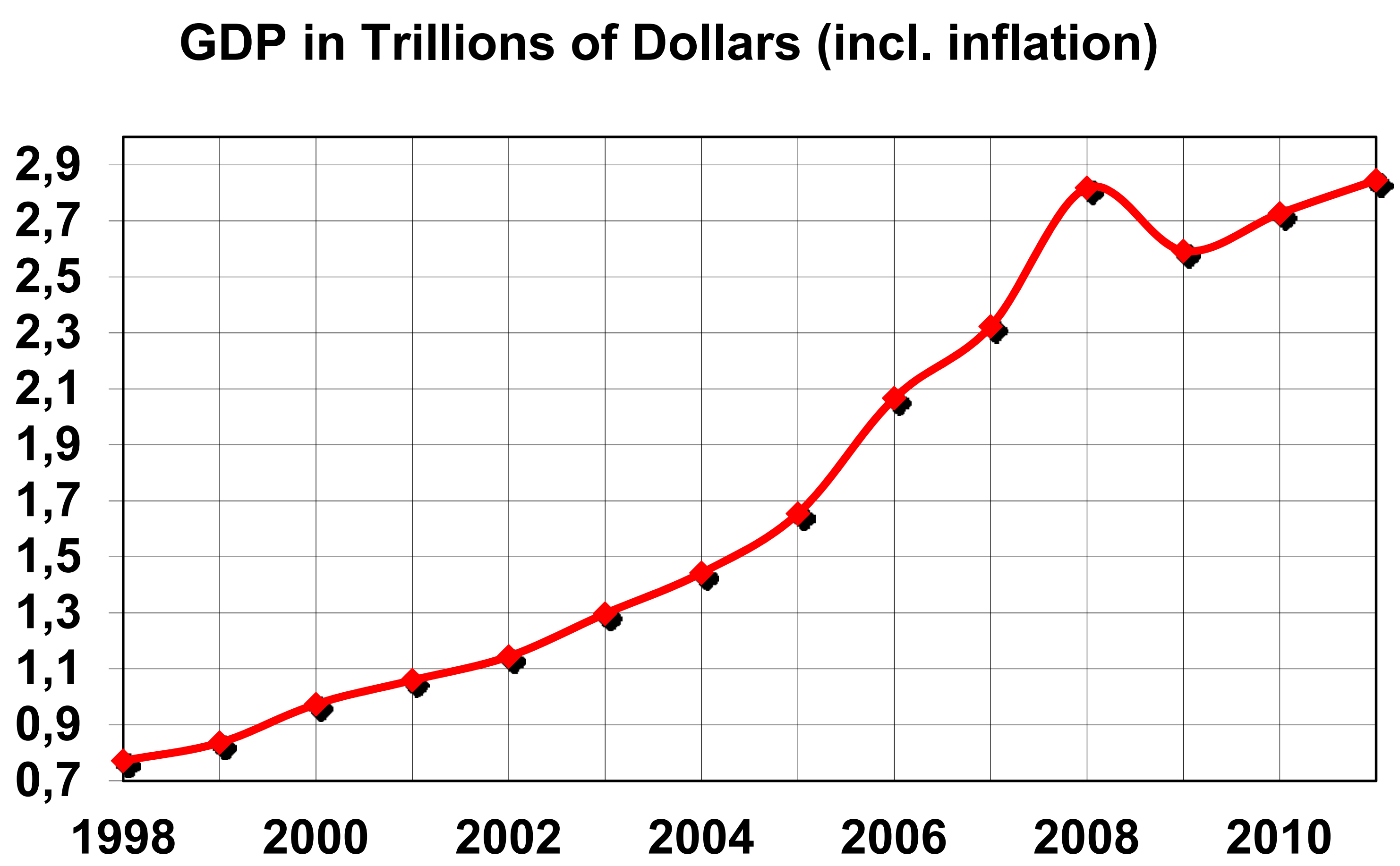

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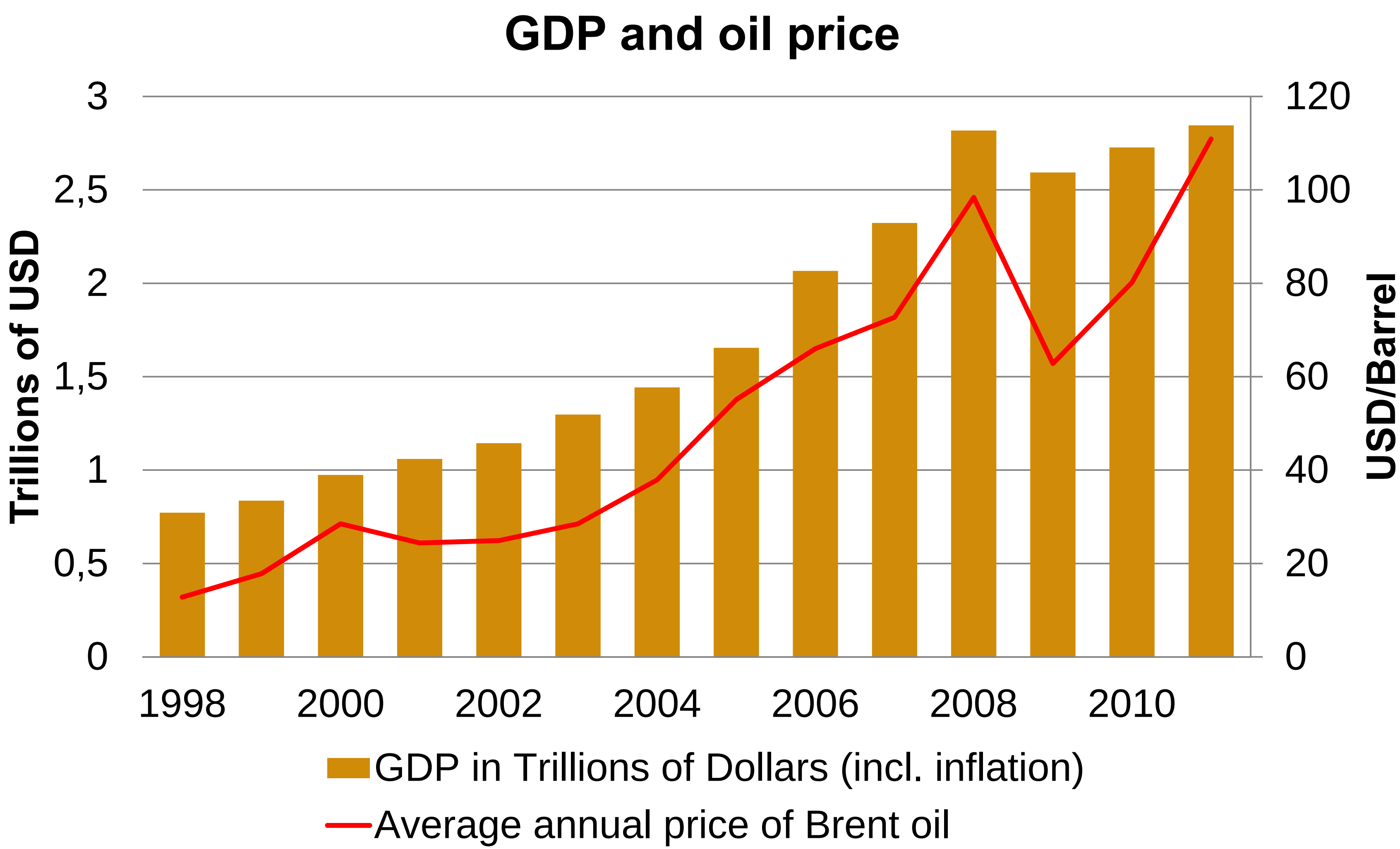

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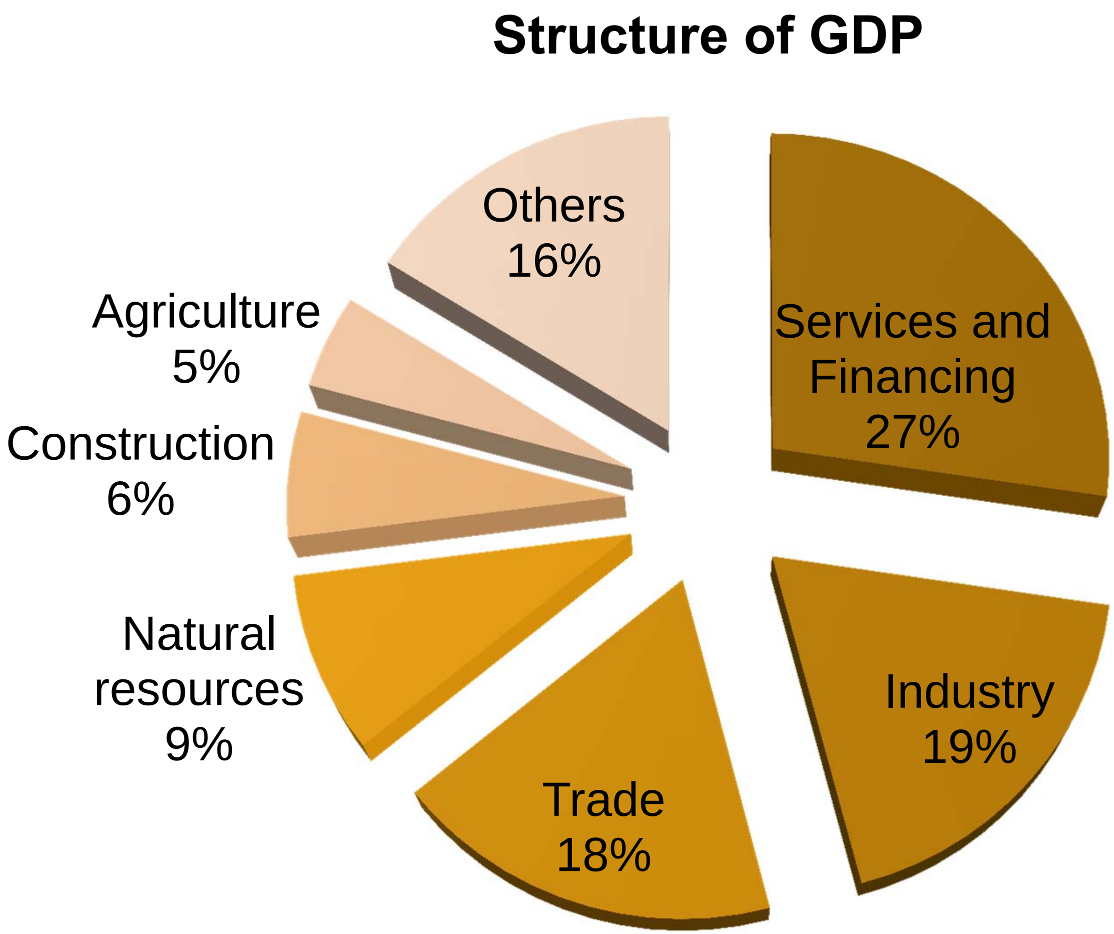

Automobile industry – main consumer of castings is 0,8% of GDP

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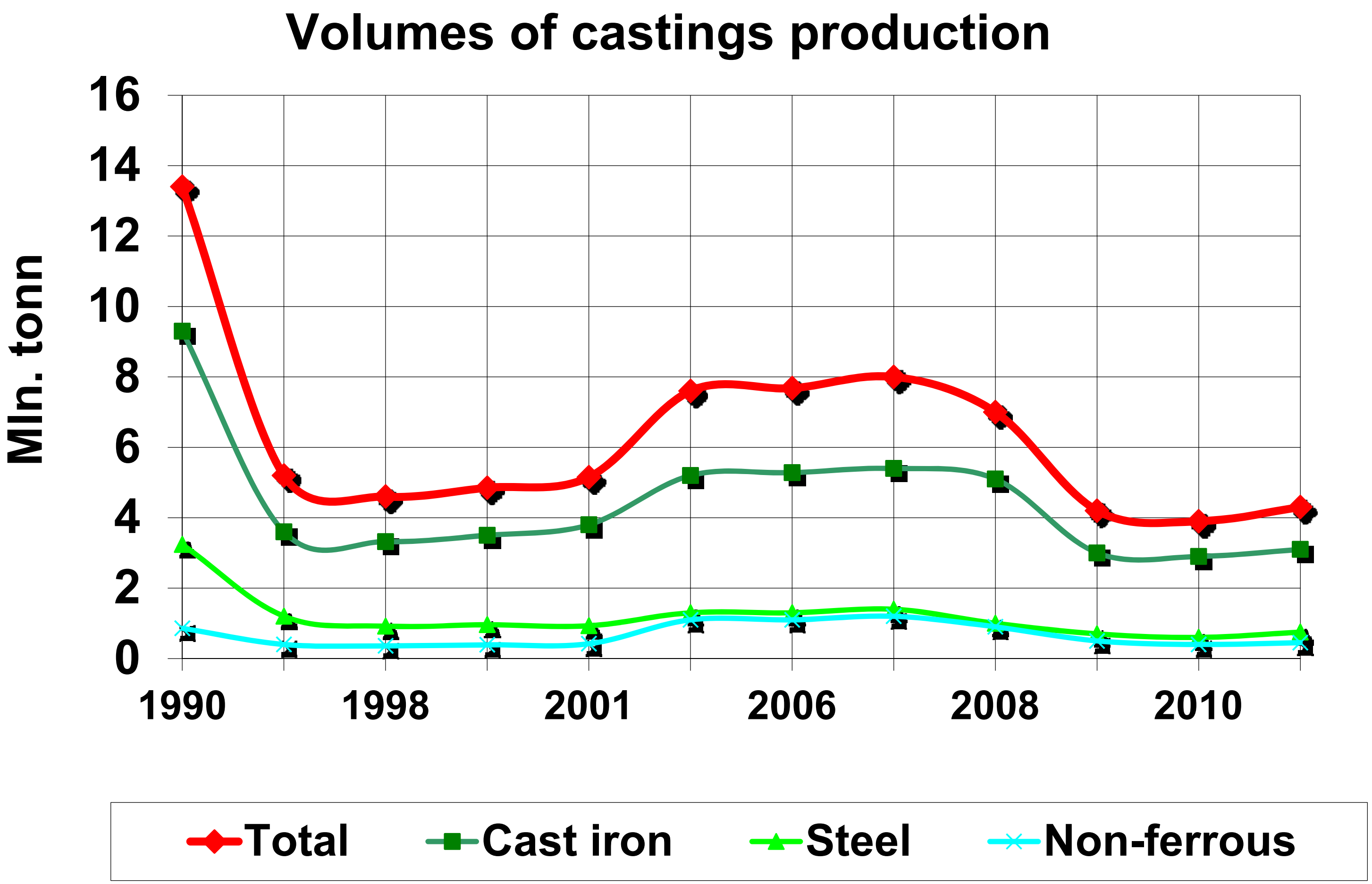

The biggest volume of production was in 1985 – Russia produced 18,5 mln. tons

In 2011 total 1240 foundries produced 4,3 mln. tonn of castings, Export only about 2%

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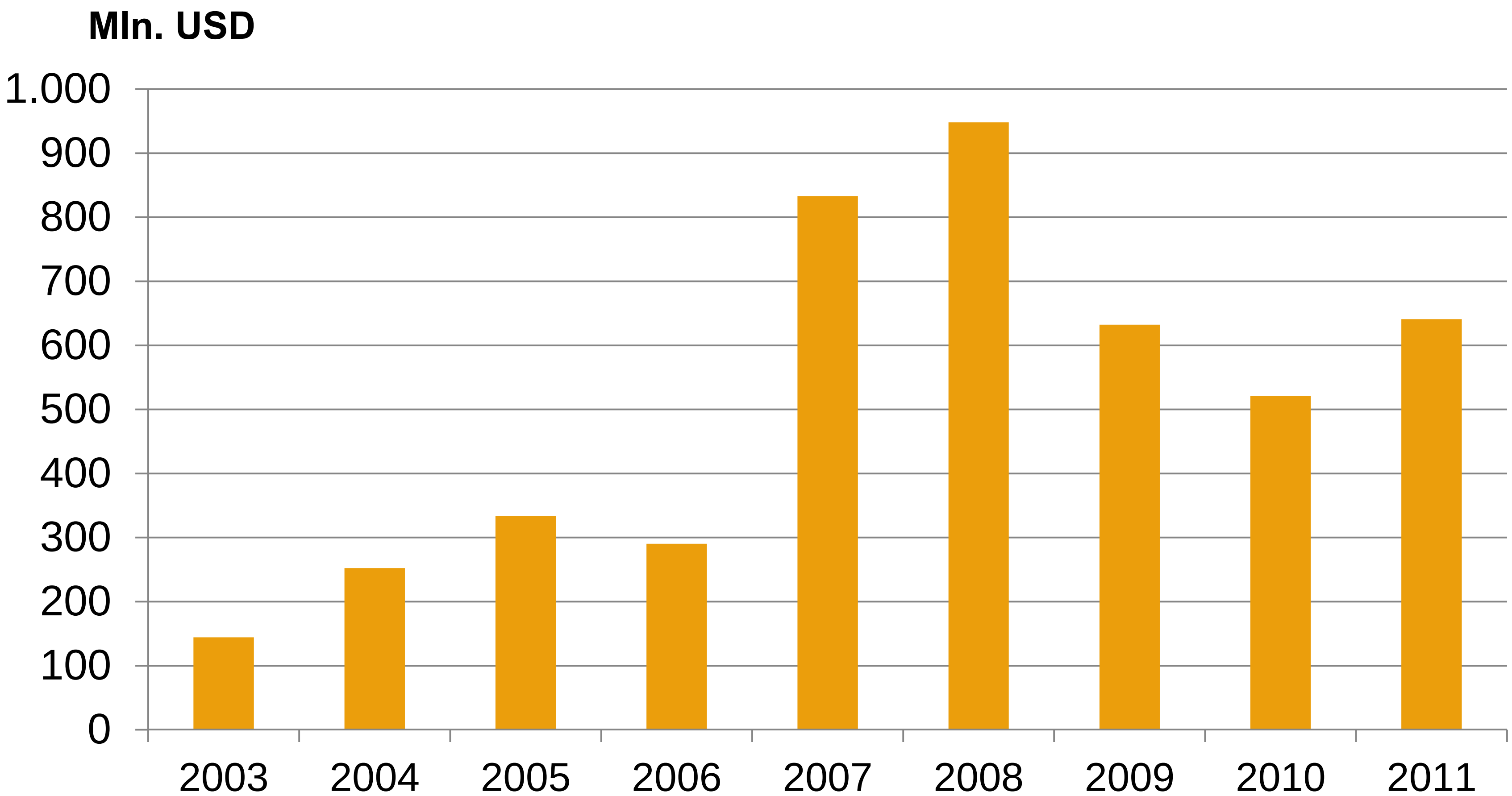
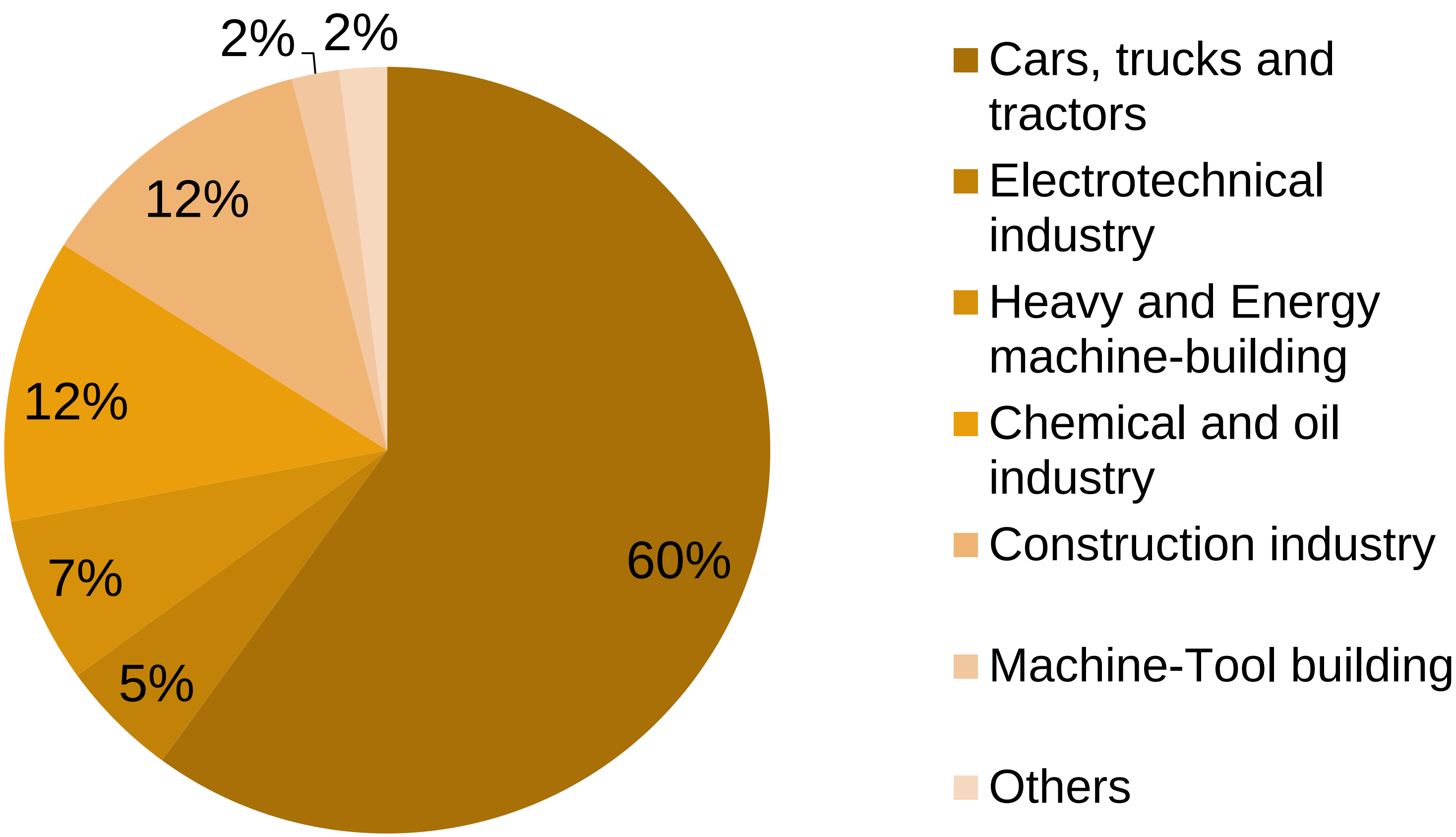
Import of foundry equipment



Production of castings by sectors in 2011г.



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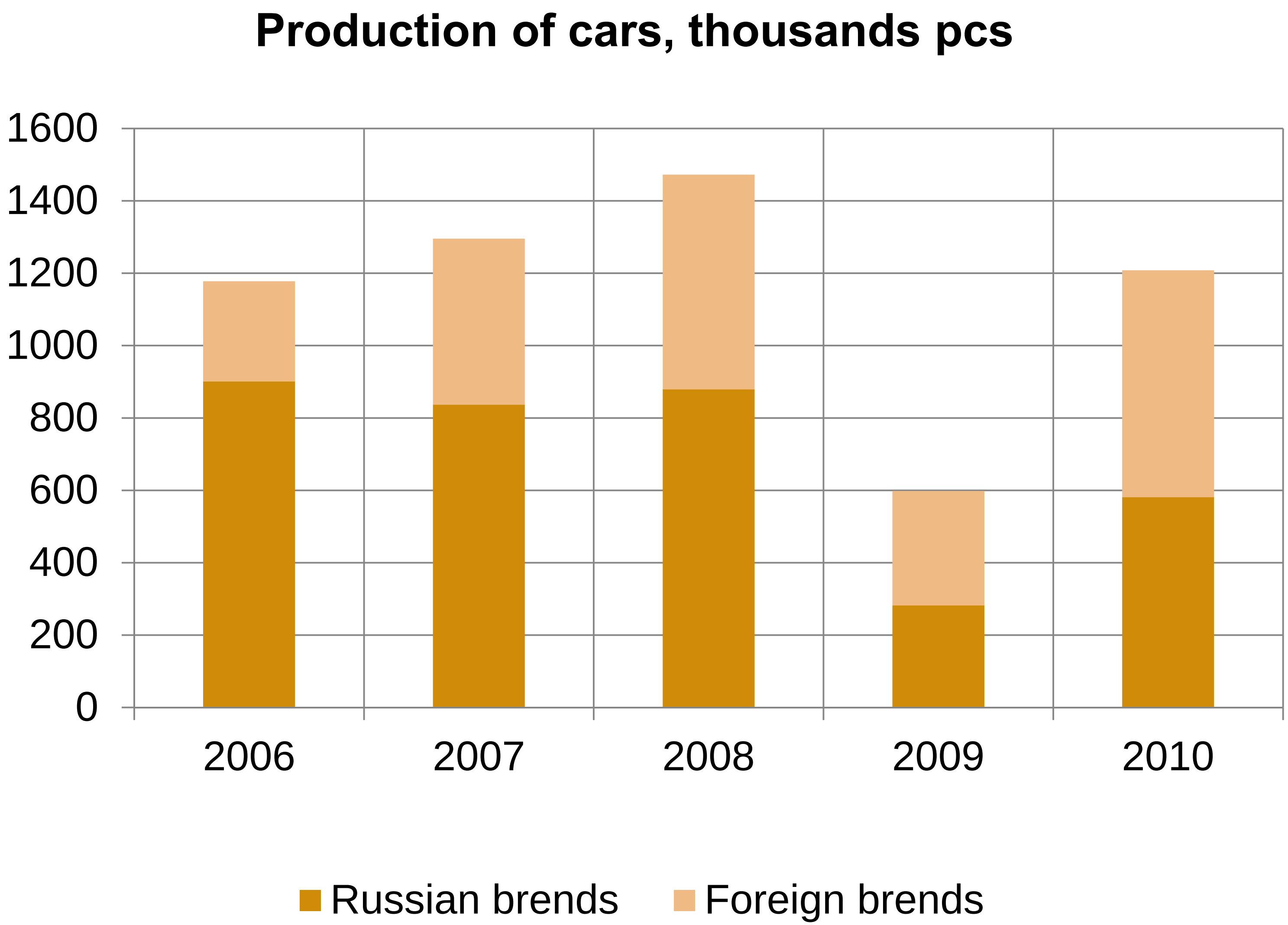
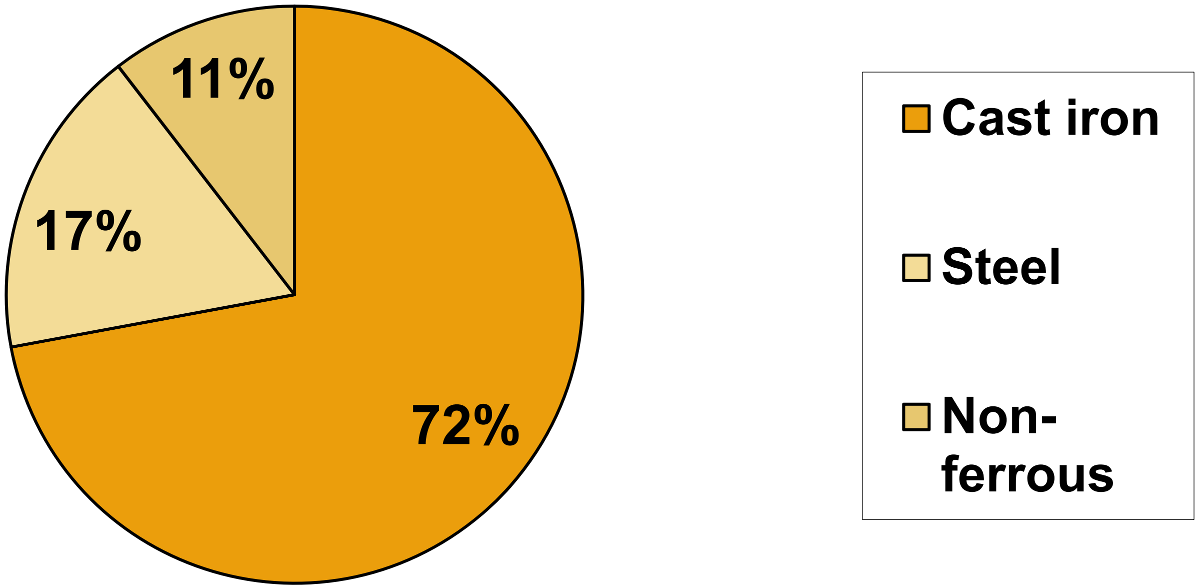


Areas with high quality casting demand:

1. Railway - boogie
2. Oil & gas transport – steel valves
3. Mining – wear parts, Mn steel
4. Defence/military – large steel castings and AL and Mg castings

Main need is in steel castings!

Distribution of castings by alloys in 2011



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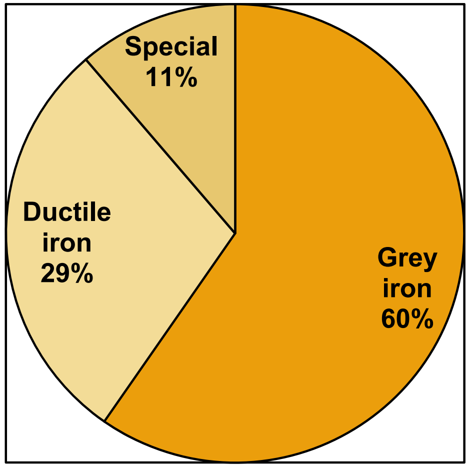
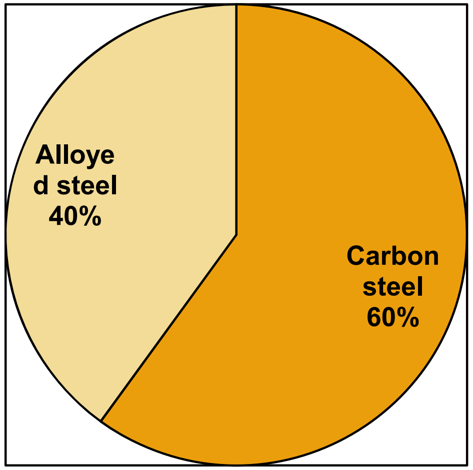
Distribution of castings by alloys in 2011

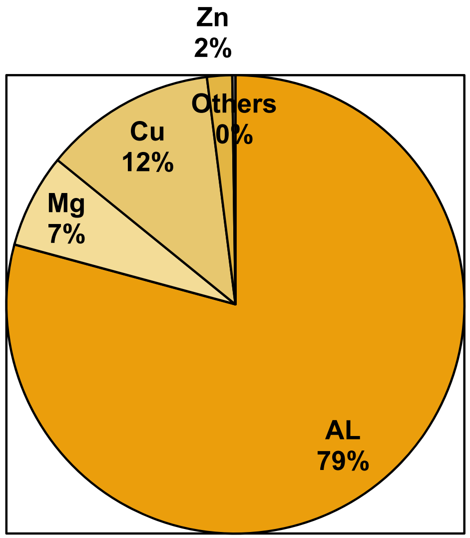
Cast iron - 72%



Steel – 17%



Non-ferrous-11%



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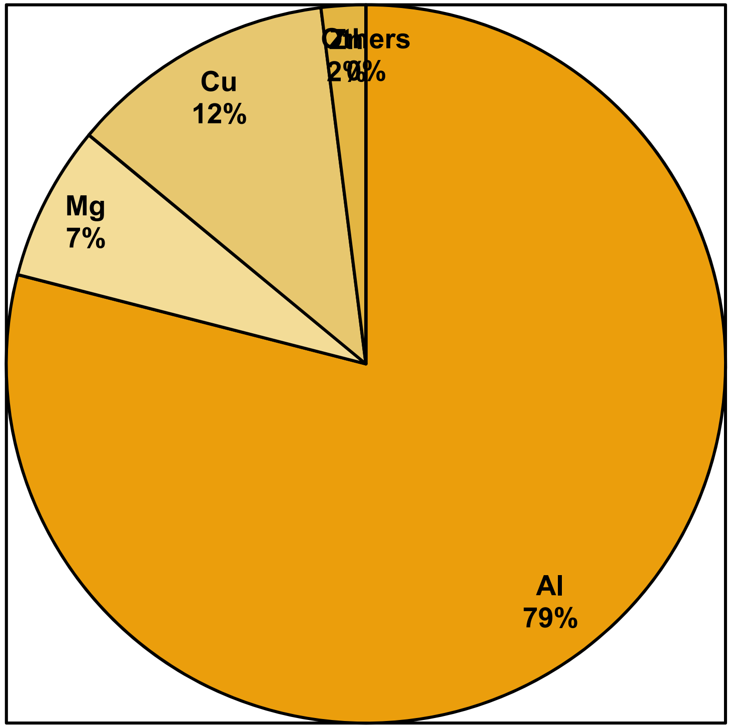
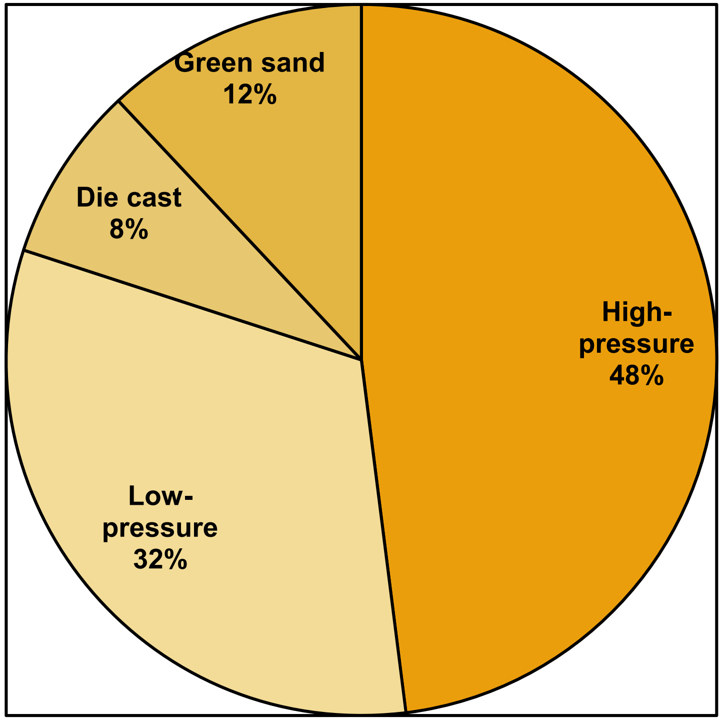
Non-ferrous castings production

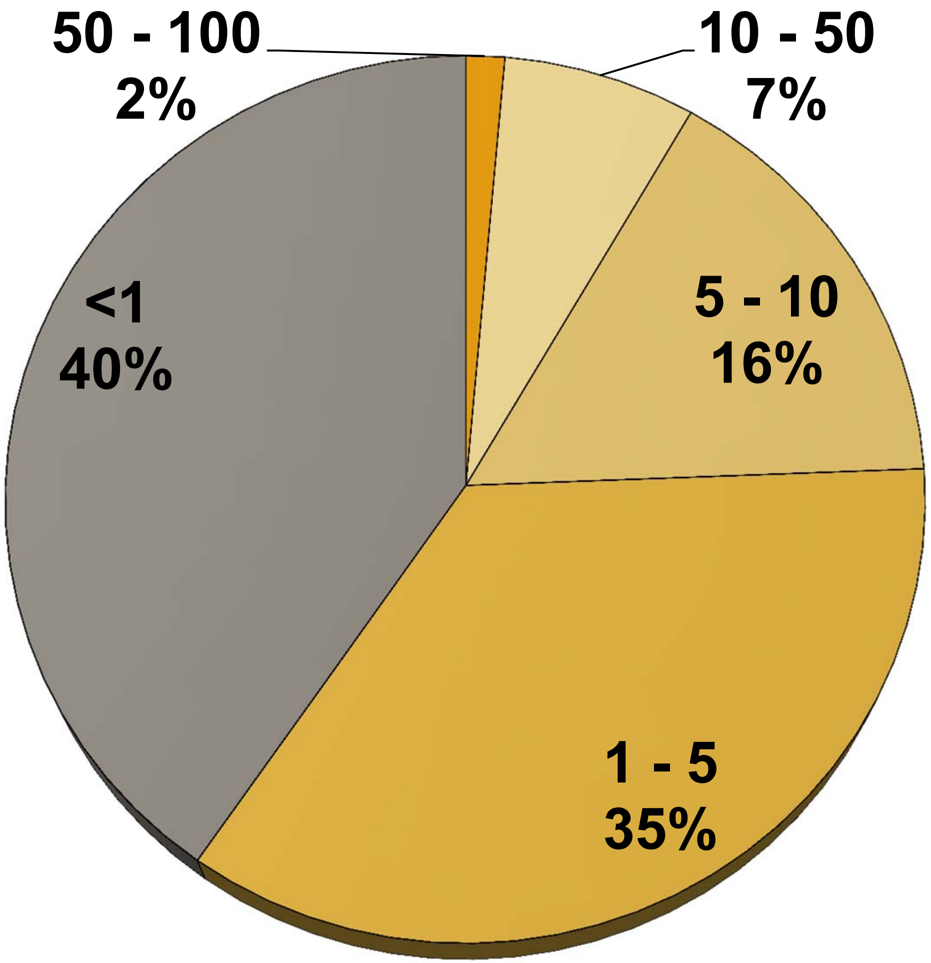
Non-ferrous -11% from total



Aluminium - 79% from total non-ferrous



Distribution of foundries by capacity, 1000 t/year



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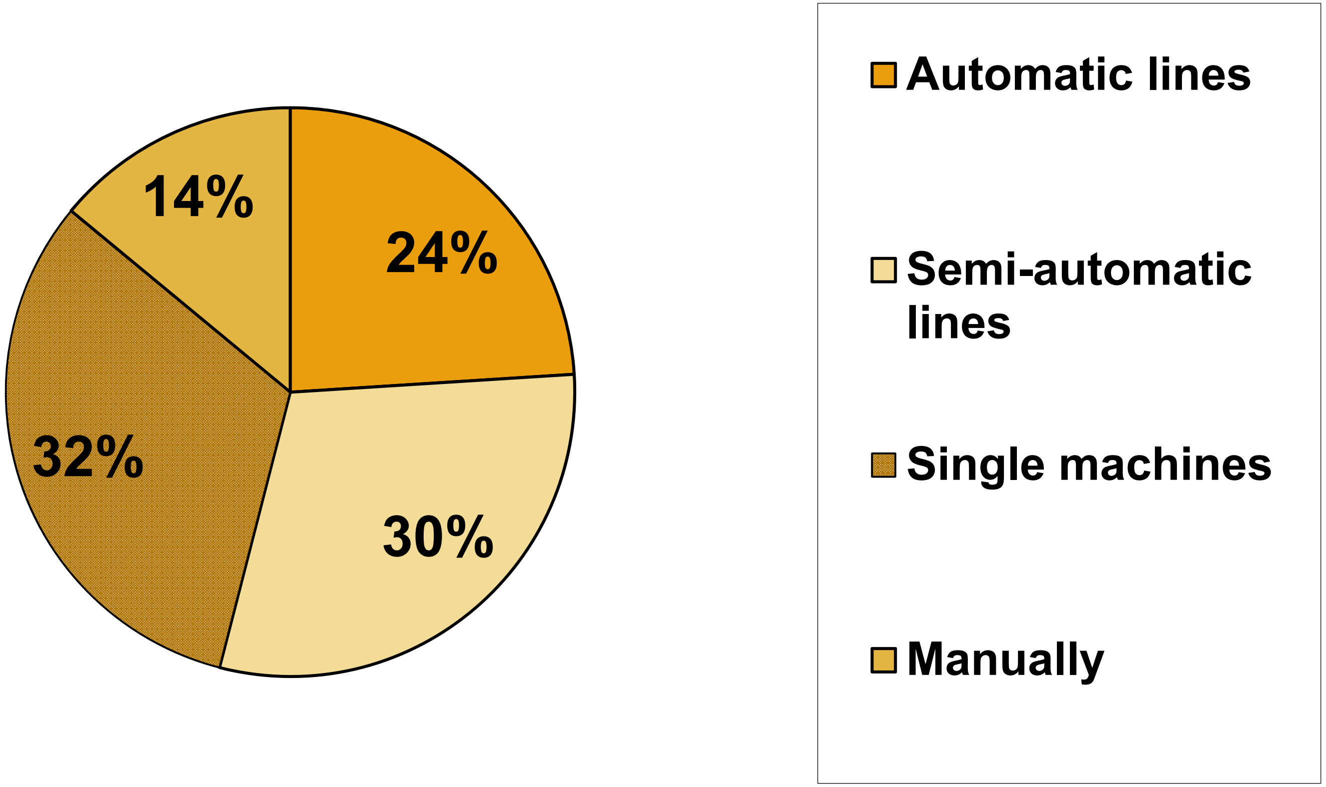
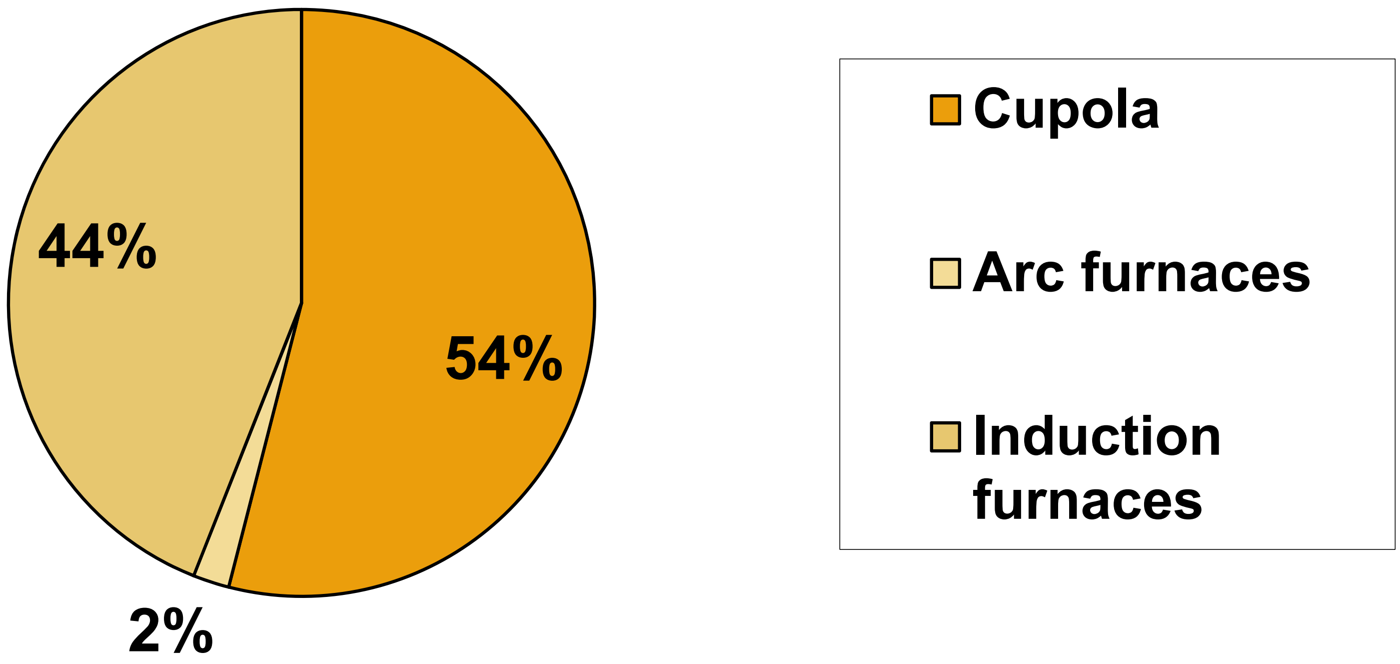
Level of foundries automatization by q-ty of castings produced on:



Melting of cast iron (by q-ty of castings)



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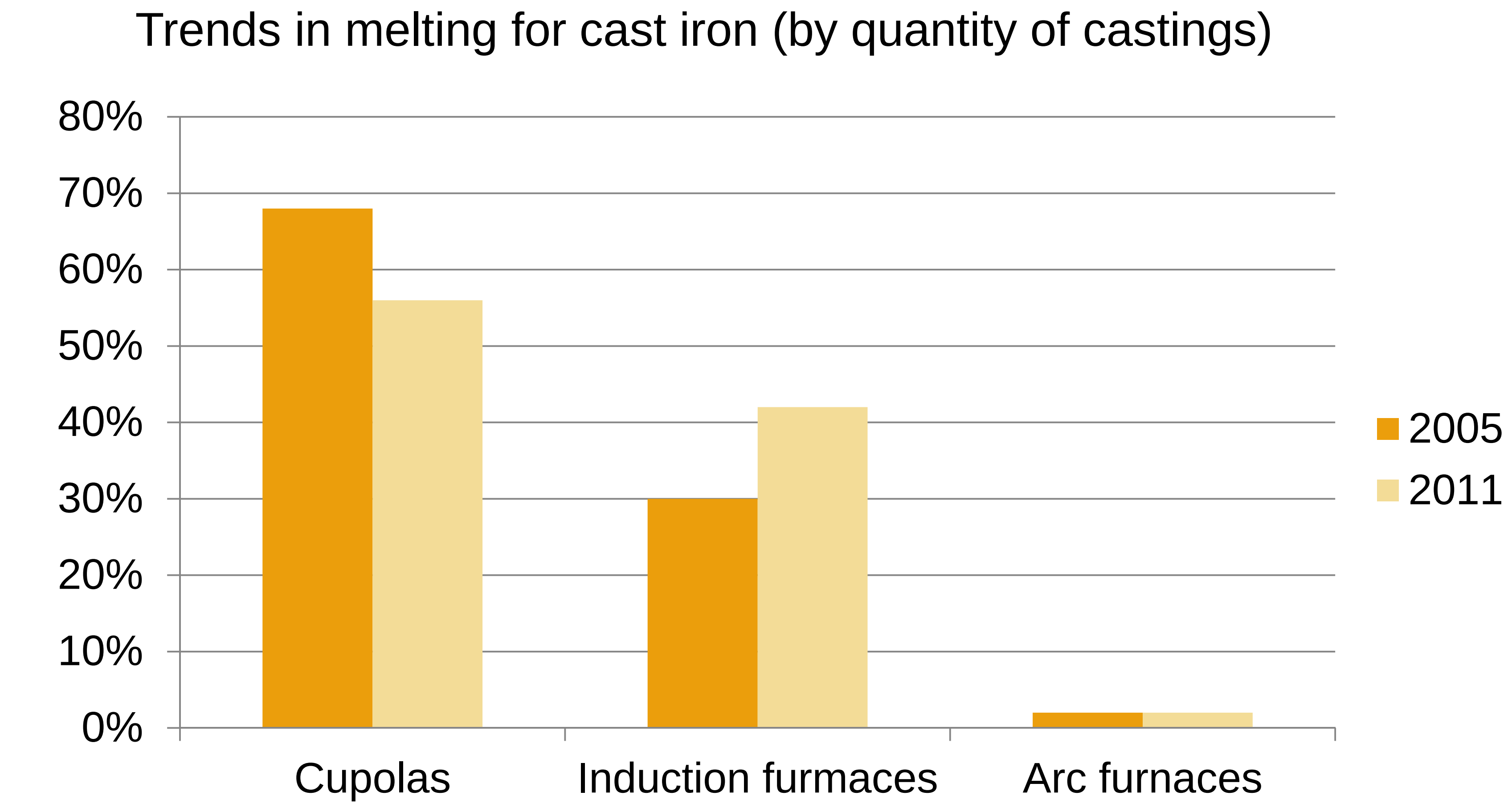

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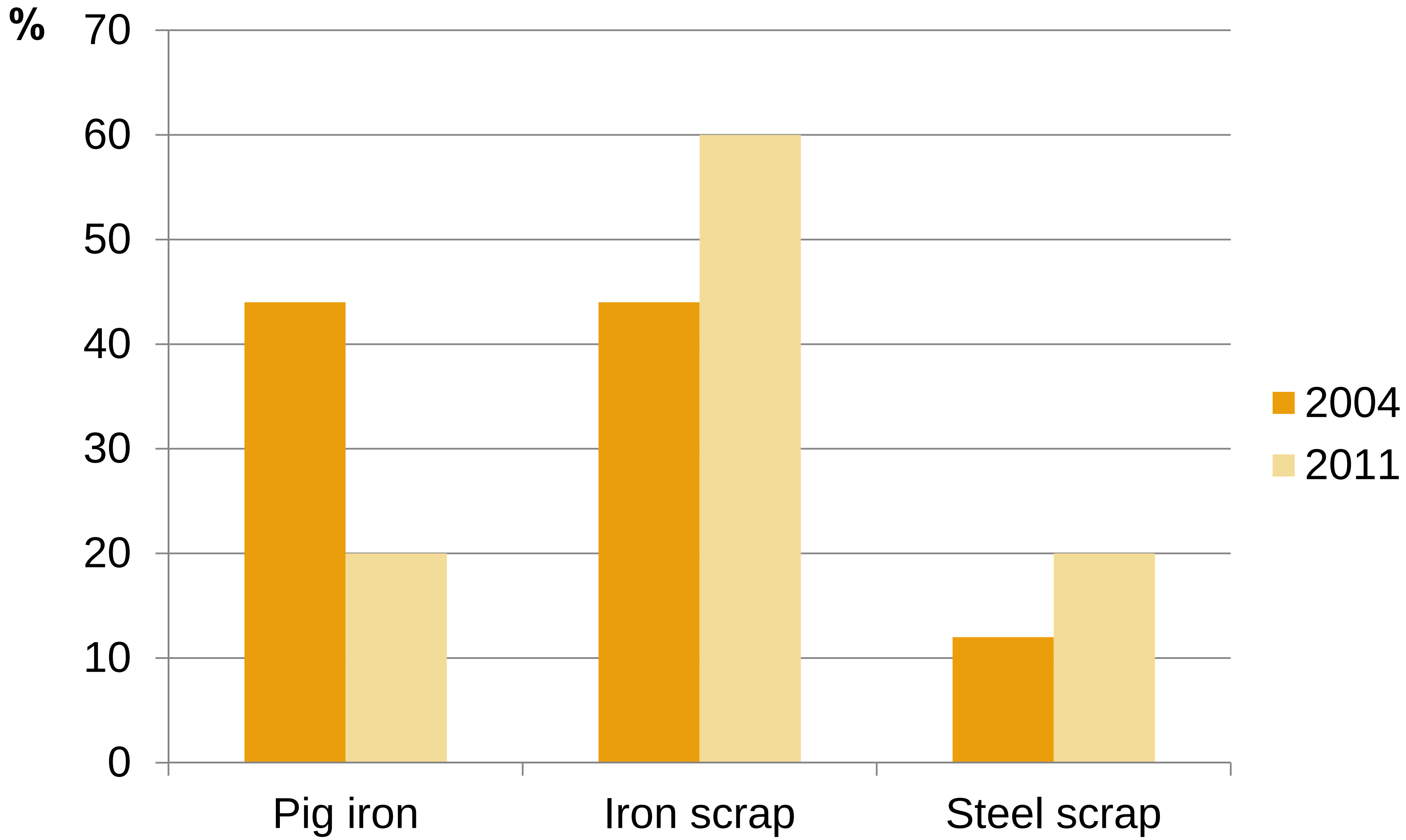
Composition of the melting charge



Deficit of high quality scrap

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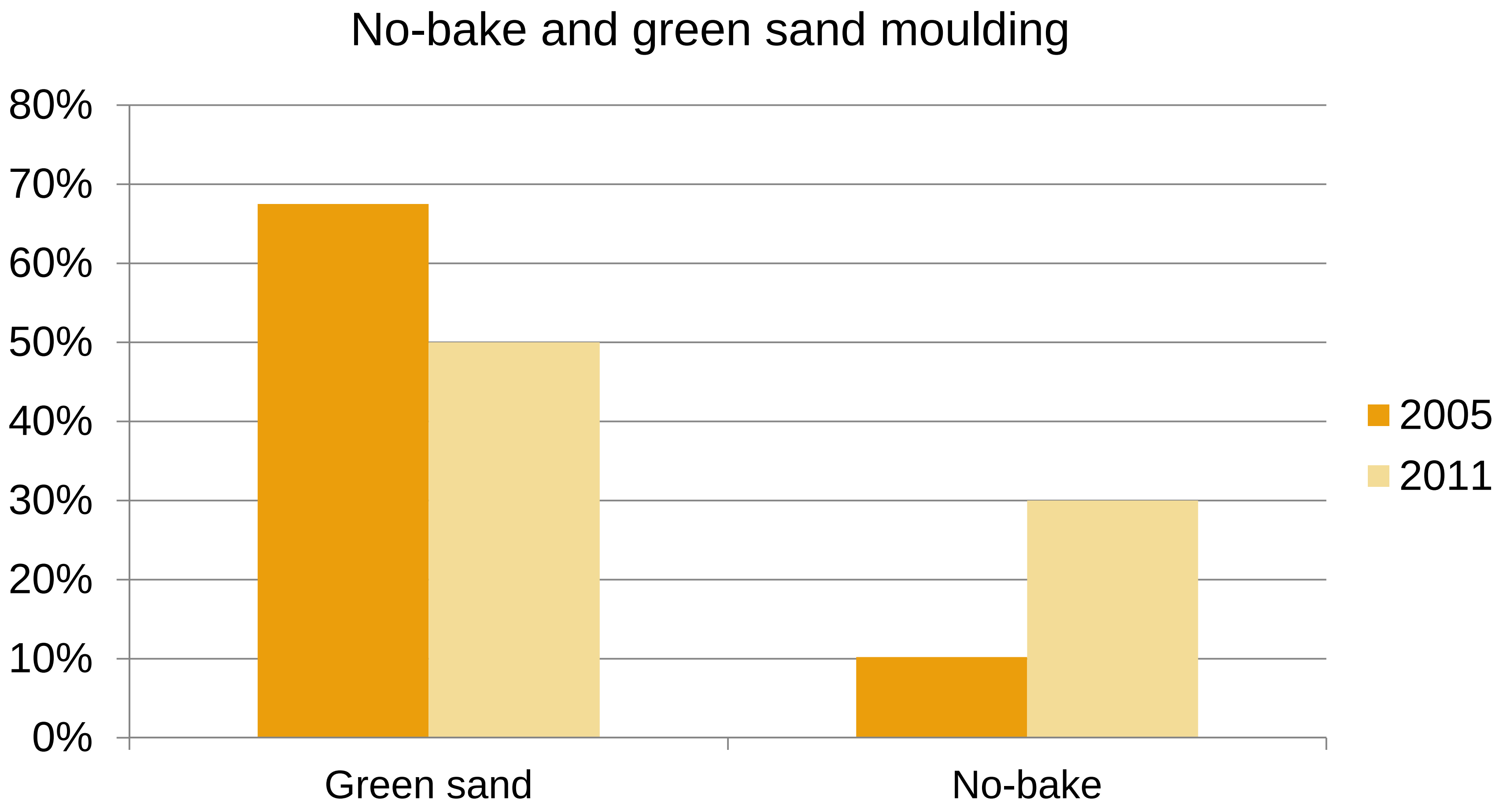

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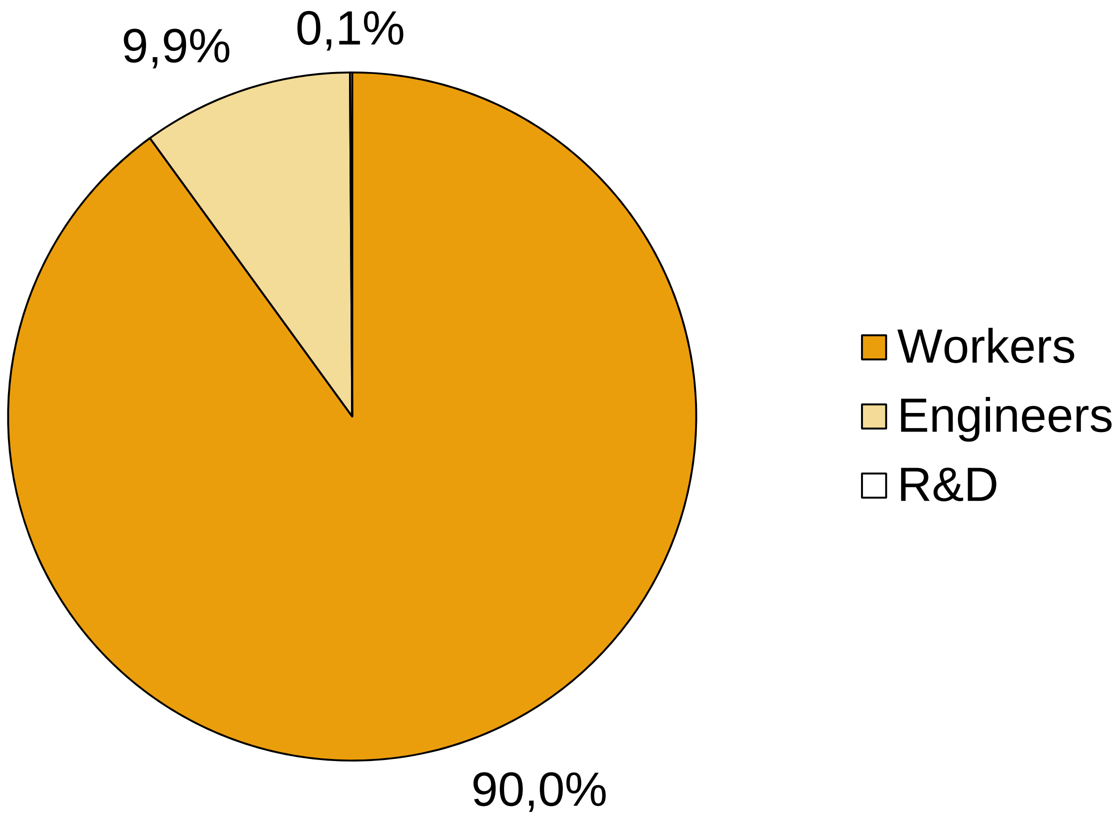
Structure of workers in foundry industry



Need in new technologies and equipment from abroad

Most perspective directions of development:

- Production of No-Bake / Core moulds
- Production of cold-box cores
- Melting in medium frequency induction furnaces and DC arc furnaces
- Growth in production of ductile iron and Al alloys as replacement of malleable iron and steel
- Building of new foundries and reconstruction of existing, more big corporations

Main conclusions:

- Internal market has big enough value and tendency to grow, Russia continues to import castings
- Low level of export – will not change soon
- Growth of expenses for environmental protection
- Lack of skilled workers and engineers – high cost of castings
- Reduction of number of foundries (only in 2009 – minus 300 foundries)

THANK YOU!