

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



Industrial Rubber Products

US Industry Study with Forecasts for **2012 & 2017**

Study #2361 | May 2008 | \$4600 | 289 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Overview	5
Manufacturing Sector Overview	9
Motor Vehicle Outlook	12
Nonresidential Fixed Investment Trends	15
Construction Sector Overview	18

RAW MATERIALS & OVERVIEW

General	24
Raw Materials	25
Elastomers	26
Thermoset Rubber	27
EPDM	28
Styrene Butadiene	29
Nitrile	30
Other Thermoset Rubbers	31
Butyl Rubber	31
Polybutadiene Rubber	31
Polychloroprene Rubber	32
Polyisoprene Rubber	32
Natural Rubber	32
Other	33
Thermoplastic Elastomers	34
Competitive Materials	35
Environmental & Regulatory Issues	36
Regulatory Agencies & Legislation	37
Rubber Recycling	38
Historical Trends	39
Industrial Rubber Product Pricing Trends	41
International Issues & Foreign Trade	43
World Industrial Rubber Product Demand	44
Trends in US Foreign Trade	46
Imports	48
Exports	50

PRODUCTS

Supply & Demand	53
Mechanical Rubber Goods	56
Products	58
Vibration Control Products	60
Body Seals	62
Wiper Blades	65
Other	67
Production Methods	70
Markets	73
Leading Producers & Market Share	76
Rubber Hose	78
Products	80
Vehicular Hose	82
Fluid Power Hose	84
Water Hose	86
Air Hose	88
Other Industrial Hose	90

Markets	91
Leading Producers & Market Share	93
Rubber Belts	95
Products	96
Flat Belts	97
Conveyor & Elevator Belts	98
Transmission & Other Flat Belts	100
Nonflat Belts	101
Markets	104
Leading Producers & Market Share	105
Rubber Roofing	106
Products	108
Markets	110
Leading Producers & Market Share	111
Other Industrial Rubber Products	112
Products	113
Floor & Wall Coverings	115
Rollers & Roll Coverings	118
Sheet & Film	121
All Other Industrial Rubber Products	123
Markets	127
Leading Producers	129

MARKETS

Overview	130
Original Equipment Manufacturing	134
Maintenance/Repair/Operations	135
Machinery & Equipment	137
Industry Outlook	138
Industrial Rubber Product Demand	139
Industrial Machinery & Equipment	141
Off-Road Equipment	144
Motor Vehicles	146
Industry Outlook	147
Industrial Rubber Product	
Demand by Vehicle Type	149
Industrial Rubber Product	
Demand by Sector	150
Industrial Rubber Product	
Demand by System	152
Steering & Suspension	154
Structural Systems	155
Wiper & Trim Systems	158
Engines	159
Transmission & Powertrain	161
Air Conditioning	162
Brake Systems	163
Other Systems	164
Construction	165
Building Construction Outlook	166
Industrial Rubber Product Demand	168
Aerospace & Other Transportation Equipment	171
Industry Outlook	171
Industrial Rubber Product Demand	174
Other Markets for Industrial Rubber	177

INDUSTRY STRUCTURE

General	179
Industry Composition	180
Market Share & Leading Producers	185
Acquisitions & Divestitures	190
Cooperative Agreements	195
Marketing & Distribution	197
Product Development & Manufacturing	199

COMPANY PROFILES

American Biltrite	202
American Roller	203
Avon Automotive Holdings	204
Avon Rubber	206
Berkshire Hathaway	209
Biltrite Corporation	210
Bridgestone Corporation	211
Carlisle Companies	216
Chardon Rubber	218
Continental AG	220
Cooper-Standard Holdings	223
Dana Holding	226
Delphi Corporation	227
Eaton Corporation	229
EnPro Industries	230
Federal-Mogul Corporation	232
Fenner plc	234
Flint Group	237
Freudenberg & Company	239
Goodrich Corporation	242
Goodyear Tire & Rubber	243
Habasit AG	244
Harco Industries	245
HBD Industries	246
Henniges Automotive	248
Inteva Products	250
JPS Industries	251
JSJ Corporation	252
KN Rubber	253
Lancaster Colony	255
LORD Corporation	256
Mark IV Industries	257
nora systems	259
Parker-Hannifin Corporation	260
Pretty Products	263
ROL Manufacturing of Canada	264
RPM International	265
SaarGummi technologies	266
Tenneco Incorporated	268
Tokai Rubber Industries	269
Tomkins plc	270
Total SA	272
Toyoda Gosei	274
Trelleborg AB	276
Trico Products	281
Veyance Technologies	282
West American Rubber	285
Yamashita Rubber	287
Yokohama Rubber	288

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 Macroeconomic Overview 9
 2 Manufacturers' Shipments12
 3 Motor Vehicle Indicators.....15
 4 Nonresidential Fixed Investment.....18
 5 Construction Expenditures23

RAW MATERIALS & OVERVIEW

1 Elastomer Demand in Industrial Rubber Products27
 2 Industrial Rubber Product Demand, 1997-200740
 Cht Industrial Rubber Product Demand, 1998-200741
 Cht World Industrial Rubber Product Demand by Region, 200746
 3 US Foreign Trade in Industrial Rubber Products48
 4 US Industrial Rubber Product Imports by Source.....50
 5 US Industrial Rubber Product Exports by Destination.....52

PRODUCTS

1 Industrial Rubber Product Supply & Demand55
 Cht Industrial Rubber Product Demand by Type56
 2 Mechanical Rubber Goods Supply & Demand.....58
 3 Mechanical Rubber Goods Demand by Product59
 Cht Mechanical Rubber Goods Demand by Product, 200759
 4 Vibration Control Supply & Demand.....62
 6 Body Seal Supply & Demand.....65
 7 Wiper Blade Supply & Demand.....67
 8 Other Mechanical Rubber Goods Supply & Demand.....69
 9 Mechanical Rubber Goods Demand by Production Method.....73
 10 Mechanical Rubber Demand by Market75
 Cht Mechanical Rubber Goods Demand by Market76
 Cht US Mechanical Rubber Goods Market Share by Company, 200778

11 Rubber Hose Supply & Demand.....79
 12 Rubber Hose Demand by Product.....81
 Cht Rubber Hose Demand by Product, 2007....81
 13 Vehicular Hose Supply & Demand84
 14 Fluid Power Hose Supply & Demand.....86
 15 Water Hose Supply & Demand.....88
 16 Air Hose Supply & Demand89
 17 Other Industrial Hose Supply & Demand...91
 18 Rubber Hose Demand by Market.....92
 Cht Rubber Hose Demand by Market, 200793
 Cht US Hose Market Share by Company, 2007 .94
 19 Rubber Belt Supply & Demand96
 20 Rubber Belt Demand by Type.....97
 21 Flat Belt Supply & Demand98
 22 Nonflat Belt Supply & Demand 103
 23 Rubber Belt Demand by Market..... 104
 Cht Rubber Belt Demand by Market, 2007 105
 Cht US Belt Market Share by Company, 2007 106
 24 Rubber Roofing Supply & Demand 108
 25 Rubber Roofing Demand by Product..... 110
 26 Rubber Roofing Demand by Market 111
 Cht Rubber Roofing Market Share by Company, 2007..... 112
 27 Other Industrial Rubber Product Supply & Demand..... 113
 28 Other Industrial Rubber Product Demand by Type 114
 Cht Other Industrial Rubber Product Demand by Type, 2007..... 115
 29 Rubber Floor & Wall Covering Supply & Demand..... 118
 30 Roller & Roll Covering Supply & Demand 121
 31 Rubber Sheet & Film Supply & Demand .. 123
 32 All Other Industrial Rubber Product Supply & Demand..... 126
 33 Other Industrial Rubber Product Demand by Market 128
 Cht Other Industrial Rubber Product Demand by Market, 2007..... 128

MARKETS

1 Industrial Rubber Product Demand by Market & Application..... 131
 Cht US Industrial Rubber Product Demand by Market 132
 Cht Additional Industrial Rubber Product Demand by Market, 2007 Vs. 2012 133
 2 Industrial Rubber Product Demand in OEM Applications 135
 3 Industrial Rubber Product Demand in MRO Applications 137
 4 Machinery & Equipment Shipments..... 139

5 Machinery & Equipment Market for Industrial Rubber Products 141
 6 Industrial Machinery & Equipment Market for Industrial Rubber Products 144
 7 Off-Road Equipment Market for Industrial Rubber Products 146
 8 Motor Vehicle & Parts Shipments 148
 9 Industrial Rubber Product Demand by Motor Vehicle Type..... 150
 10 Industrial Rubber Product Demand by Motor Vehicle Application 152
 11 Industrial Rubber Product Demand by Motor Vehicle System 153
 Cht Industrial Rubber Product Demand by Motor Vehicle System, 2007..... 154
 12 Motor Vehicle Steering & Suspension System Demand for Industrial Rubber Products 155
 13 Motor Vehicle Structural System Demand for Industrial Rubber Products 157
 14 Motor Vehicle Wiper & Trim System Demand for Industrial Rubber Products 159
 15 Motor Vehicle Engine Demand for Industrial Rubber Products 161
 16 Motor Vehicle Transmission & Powertrain Demand for Industrial Rubber Products 162
 17 Motor Vehicle Air Conditioning Demand for Industrial Rubber Products 163
 18 Motor Vehicle Brake System Demand for Industrial Rubber Products 164
 19 Other Motor Vehicle System Demand for Industrial Rubber Products 165
 20 Building Construction Expenditures 168
 21 Construction Market for Industrial Rubber Products 170
 22 Aerospace & Other Transportation Equipment Shipments 174
 23 Aerospace & Other Transportation Equipment Market for Industrial Rubber Products 176
 24 Other Markets for Industrial Rubber Products 178

INDUSTRY STRUCTURE

1 US Industrial Rubber Product Sales by Company, 2007 184
 Cht US Industrial Rubber Product Market Share by Company, 2007 186
 2 Selected Acquisitions & Divestitures..... 192
 3 Selected Cooperative Agreements..... 196

[Click here to purchase online](#)

Increases in US demand for industrial rubber products through 2012 will be buoyed by an acceleration in motor vehicle production, as well as by strong growth in the aerospace industry.

US demand to reach \$18.6 billion in 2012

US demand for industrial rubber products is forecast to advance 2.8 percent per annum through 2012 to \$18.6 billion. Increases will be buoyed by an acceleration in motor vehicle production, as well as by strong growth in the aerospace industry. Motor vehicle production is expected to recover from the relative declines of the 2002-2007 period, which will fuel demand for a myriad of industrial rubber products utilized in vehicular applications. On the other hand, product demand will be somewhat restrained by a slowdown of machinery and equipment production, as this represents the largest market for industrial rubber products.

Mechanical rubber goods remains key segment

Mechanical rubber goods comprise the largest product segment in the US market, accounting for just under half of aggregate demand in 2007. Among these products are body seals, vibration control products, wiper blades and a variety of miscellaneous goods. Suppliers of mechanical rubber products will benefit from an improved outlook for motor vehicles through 2012, as these products are highly represented in this market. Rubber hose and belt demand will also be fueled by the turnaround in motor vehicle production, as well as from strong growth in the aerospace and other transportation industries. Demand for rubber roofing membranes will be supported by continued strength in



nonresidential building construction expenditures, as well as accelerating growth in residential building construction. However, other miscellaneous industrial products are expected to advance at the fastest pace through 2012, aided by solid growth in building construction expenditures, which will spur demand for rubber floor and wall coverings and geomembranes.

OEM demand to outpace MRO, construction uses

Original equipment manufacturing (OEM) demand for industrial rubber products is projected to advance at the fastest pace, benefiting from an improved outlook for motor vehicles, as

well as from strong growth in the aerospace industry. Demand for industrial rubber products in construction applications will not grow quite as strongly as in OEM applications. Advances will be supported by strong growth in nonresidential construction expenditures through 2012, as most rubber roofing and flooring products are utilized in nonresidential applications. Growth in maintenance/repair/operations (MRO) demand will lag the gains of both construction-related and OEM sales, but will approximate increases during the 2002-2007 period. Machinery and equipment MRO applications will register the strongest gains, as industrial rubber products are required to keep manufacturing and other businesses running.

Sample Text, Table & Chart

PRODUCTS

Vehicular Hose -- Demand for vehicular hose is forecast to advance 1.1 billion. Growth is spurred by the replacement of worn hoses, which is expected to rebound in the near period. Gains will be aided by the use of these hoses in the production of medium/heavy trucks and buses, which require overall more hose than passenger cars. Demand will be somewhat restrained on the other hand, by increasing pricing pressures from automakers.

Competition from alternative materials, particularly thermoplastic elastomers, will also restrain product demand to some extent. Nevertheless, rubber still provides superior heat and chemical resistance, and flexibility compared to any alternative materials. In addition, the higher operating temperatures and increased concerns about cabin noise will prevent the use of plastic hoses, or in some cases cause manufacturers to switch to rubber hoses. Among the various rubber materials, a continued shift from thermoset rubber to TPEs will promote value gains in the vehicular segment, since TPEs tend to be premium priced. However, product innovations stressing more durable materials in vehicular hose for both the motor vehicle and off-road equipment markets will extend replacement schedules and thus reduce the number of times vehicular hose needs to be replaced in the lifespan of a vehicle or piece of equipment.

Vehicular hose is typically classified as low pressure (lower than 300 pounds per square inch of psi) or high pressure (higher than 300 psi). Motor vehicles tend to utilize low pressure hose, while off-road equipment typically uses high pressure hose due to the demanding environments in which it operates. Rubber hose is used in virtually all of the fluid-based systems and subsystems in motor vehicles. Types of rubber hose utilized in motor vehicles include air conditioning, fuel tank fill, vent, gas line, gas tank vent, power steering reservoir, radiator, vacuum

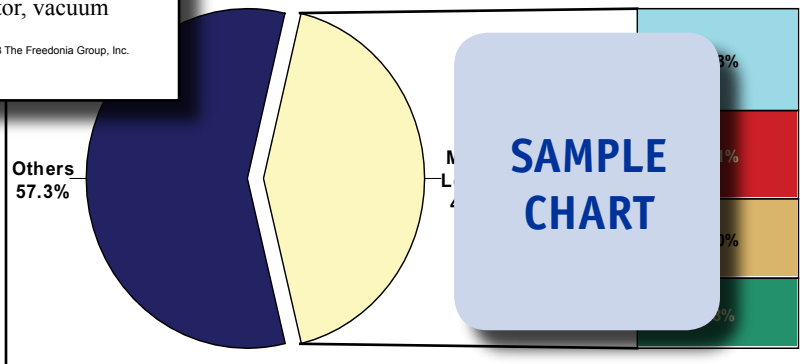
TABLE IV-20

NONFLAT BELT SUPPLY & DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Durable Goods Shipments (bil \$)	200	200	200	200	215
\$ nonflat belts/000\$ durables					4
Nonflat Belt Demand					5
Machinery & Equipment					5
Motor Vehicles					0
Aerospace & Other Transport Eqpt					0
Other Markets					0
net exports					5
Nonflat Belt Shipments					0
Industrial Transmission					0
Vehicle Transmission					0
Other					0
% nonflat					7
Rubber Belt Shipments	1401	1470	1655	1620	2045

CHART VI-1

US INDUSTRIAL RUBBER PRODUCT MARKET SHARE BY COMPANY, 2007 (\$16.2 billion)



Sample Profile, Table & Forecast

COMPANY PROFILES

Eaton Corporation

Eaton Center
 1111 Superior Avenue
 Cleveland, OH 44114
 216-523-5000
<http://www.eaton.com>

Sales: \$ (2007)
 US Sales: \$ (2007)
 Employed: (2007)

Key Products: hoses, tubing

Eaton is a manufacturer. It operates in four segments: Industrial and Truck.

The Company is active in the US industrial rubber products industry via the Fluid Power segment, which had 2007 sales of \$4.5 billion. The segment manufactures hydraulic power systems for industrial, automotive, mobile and aerospace applications. These systems include hoses and fittings, pumps, motors and hydraulic power units; valves, cylinders, and other control and sensing products; hoses, tubing, seals and various other fluid conveyance products; aerospace fuel systems; and filtration systems for oil and gas, fine chemicals, and food and beverage applications. Rubber and thermoplastic hoses and tubing products from the Fluid Power segment include types for hydraulic and industrial transfer applications.

Through the Fluid Power segment, Eaton produces rubber hoses under such brand names as AEROQUIP, BOSTON, WEATHERHEAD and SYNFLEX. AEROQUIP hoses from the Company are made from such materials as ethylene-propylene diene monomer (EPDM), silicone rubber and other synthetic rubbers. These hoses are designed for use in

TABLE V-5

MACHINERY & EQUIPMENT MARKET FOR INDUSTRIAL RUBBER PRODUCTS (million dollars)

Item	1997	2002	2007	2012	2017
Machinery & Equipment Shpts (bil \$)	25	25	25	25	25
\$ rubber/000\$ shpts					
Machinery/Eqp Rubber Prdt Demand					
By Market:					
Industrial Machinery/Equipment					
Off-Road Equipment					
By Application:					
OEM					
MRO					
% machinery & equipment					
Industrial Rubber Product Demand	13288	14129	16150	18350	21350

SAMPLE TABLE

SAMPLE PROFILE

“Demand for industrial rubber products utilized in industrial machinery and equipment is forecast to advance 2.8 percent per year through 2012 to \$4.9 billion, matching the gains of the 2002-2007 period. Gains will be aided by the ongoing need to maintain and repair the existing stock of machinery and equipment through 2012. Growth will be hampered, on the other hand, by ...”

--Section V, pg. 141

OTHER STUDIES

World Roofing

This study analyzes the global roofing industry. It presents historical demand data for the years 1997, 2002 and 2007, and forecasts for 2012 and 2017 by roofing product (e.g., tile, modified bitumen, shingles and panels, built-up and roll, metal, elastomeric, plastic, fiber cement); market, world region and for 29 countries. The study also considers market environmental factors, details industry structure and competitive strategies, evaluates company market share and profiles major competitors.

#2368 06/2008..... \$5800

World Rubber & Tire

World rubber consumption will rise 4% yearly through 2011, driven by solid growth in motor vehicle production and a stronger world economy. Non-tire rubber will outpace and overtake tire rubber demand based on opportunities in the automotive, industrial, consumer and construction sectors. This study analyzes the world tire and rubber industry, with forecasts for 2011 and 2016 by type, market, world region and for 30 countries. It also evaluates company market share and profiles leading competitors.

#2282 02/2008..... \$5500

Automotive Aftermarket in China

The aftermarket for light vehicle components and parts in China will grow 17.9% annually through 2011. Gains will be driven by the dramatic increase in the light vehicle park and increasing aftermarket spending per vehicle. Mechanical products will remain the largest segment while electronics grow the fastest. This study analyzes the ¥33.7 billion automotive aftermarket in China, with forecasts for 2011 and 2016 by product and service performer. It also evaluates market share and profiles major players.

#2262 12/2007..... \$4900

Gaskets & Seals

US demand for gaskets and seals will grow 3.6% annually through 2010. Gains will be supported by an improved economic outlook and increasing penetration of more advanced materials. Molded seals and packings, plastic gaskets, expanded graphite gaskets and metallic gaskets will grow the fastest. Aerospace will see the most rapid gains by market. This study analyzes the \$7.3 billion US gasket and seal industry for 2010 and 2015 by product and market. It also evaluates market share and profiles major firms.

#2150 02/2007..... \$4300

Geosynthetics

US geosynthetic demand will grow 4.4% annually through 2010, based on a recovery in nonbuilding construction and a wider range of uses. Geotextiles will remain dominant while geogrids, geonets and geocomposites will grow the fastest. The construction market will continue as the largest end use and show the fastest gains. The study analyzes the US geosynthetic industry for 2010 and 2015 by product, market and region. It also evaluates company market share and profiles major geosynthetic manufacturers.

#2153 01/2007..... \$4300

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)