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# World Rubber & Tire

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Industry Study with Forecasts for **2013 & 2018**

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**The Freedonia Group**

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Fax: +1 440.646.0484

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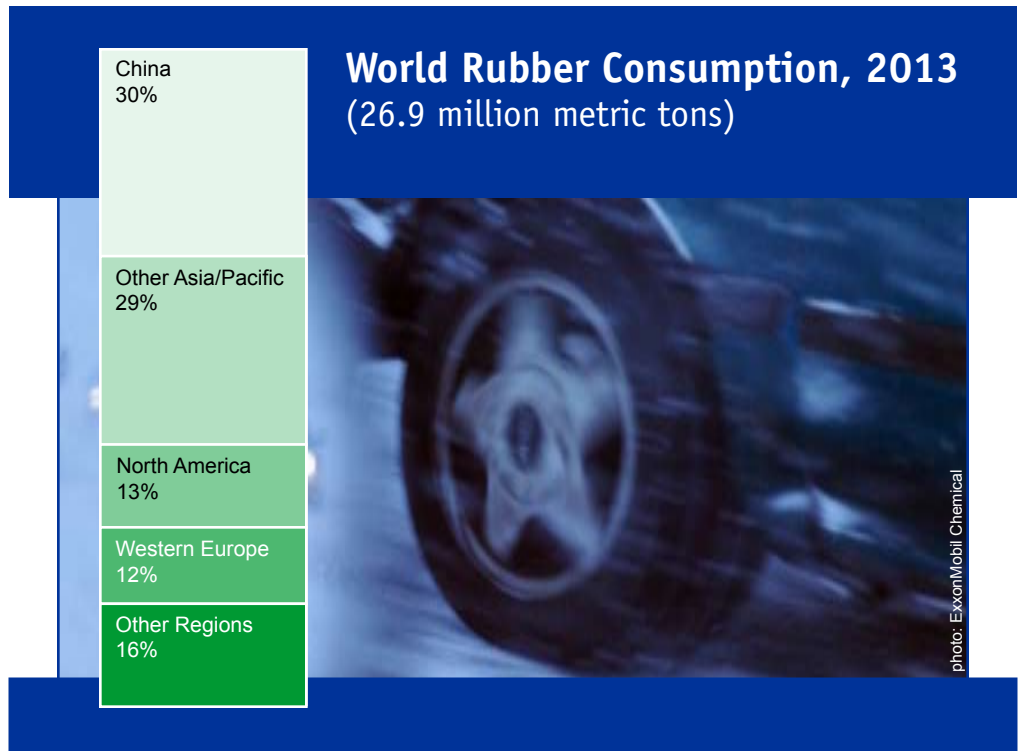
*A healthy recovery in the motor vehicle industries of important producers such as the US, France and Canada will benefit rubber demand; China will consume over one-third of all new global demand.*

## Global demand to rise 4.1% yearly through 2013

World rubber consumption is forecast to rise 4.1 percent per year through 2013 to 26.9 million metric tons. Gains will be exaggerated to some extent by the fact that growth will be rising off a weak recession-plagued 2008 base. A majority of rubber demand is accounted for by the motor vehicle sector, particularly via usage in tires (with non-tire motor vehicle related uses also significant). A healthy recovery in the motor vehicle industries of important producing nations such as the US, France and Canada will benefit rubber demand. The largest national rubber market, China, will consume over one-third of all new rubber demand in the world through 2013, and account for 30 percent of the global rubber market in 2013.

## Asia/Pacific region to stay largest, fastest growing

The Asia/Pacific region is by far the leading rubber consumer, accounting for 56 percent of global rubber demand in 2008. Moreover, the region will post the strongest growth in rubber demand through 2013, despite the fact that the important Japanese rubber market is expected to see a decline due to a fall in motor vehicle production levels in the country after a surprisingly strong performance in 2008. North America and Western Europe will continue to see subpar gains relative to the global average, although both regions will see



an improvement from the declines of the 2003 to 2008 period.

## Non-tire rubber demand to outpace tire rubber

Non-tire rubber demand will outpace tire rubber demand through 2013. Demand for non-tire rubber products will benefit from rising industrialization levels in developing countries. Tire rubber demand will continue to benefit from strong growth in Asia. However, concerns related to the environment and high gasoline prices will boost the popularity of more fuel efficient smaller cars, resulting in a decline in rubber usage per tire through 2013.

## Synthetic rubber demand to rise 4% annually

Through 2013, global synthetic rubber production is forecast to rise 4.0 percent per year to 14.5 million metric tons. Over two million metric tons of additional annual synthetic rubber production capacity will be needed to enable this increase in output. A majority of this new capacity will be added in Asia. China by itself will see over one million metric tons of new capacity brought on-stream by 2013. Russia, South Korea, India and Singapore will each see between 100,000 and 250,000 metric tons of additional capacity by 2013.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### Taiwan: Tire Supply & Demand

Tire demand in Taiwan is expected to increase annually by 5.9 percent to 7.2 million units in 2013. Gains will be supported by a strong domestic market and continued growth in exports from Taiwanese tire plants. Light vehicle tire production in Taiwan is largely focused on light cycle, all-terrain vehicle and industrial vehicle tires, which are produced from tire production and demand numbers in this report (but not capacity numbers).

**SAMPLE  
TEXT**

Replacement tire demand in Taiwan is much slower than in other Asian countries, growing only 0.5 percent per year to 7.2 million units in 2013. Taiwan's motor vehicle registration rate was 304 units per thousand persons in 2008. This is high considering the nation's limited landmass and highly concentrated population centers. Future growth in the country's motor vehicle industry is limited by the above two reasons as well as by slow population growth.

Taiwanese tire production increased strongly over the past decade, prior to a recent decline in the wake of the domestic motor vehicle industry's collapse. Similar to its motor vehicle industry, Taiwan's tire industry has grown largely due to its ability to attract substantial foreign investment. However, the country is also home to several of the world's largest tire producers -- most notably Cheng Shin Rubber (also known as Maxxis International), which was one of the dozen largest tire companies in the world in 2008.

Tire production in Taiwan will increase 5.9 percent annually to 7.2 million units in 2013. Gains will be supported by a strong domestic market and continued growth in exports from Taiwanese tire plants. Light vehicle tire production in Taiwan is largely focused on light cycle, all-terrain vehicle and industrial vehicle tires, which are produced from tire production and demand numbers in this report (but not capacity numbers).

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TABLE VII-35

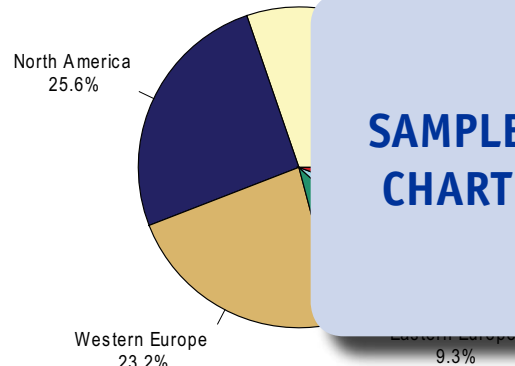
THAILAND -- TIRE PRODUCTION CAPACITY  
 BY COMPANY, YEAR-END 2008  
 (thousand tires per day)

Company	Number of Plants	Capacity	Percent of Total	Type of Tires			
				Light Vehicle	Medium/Heavy Vehicle	Ag. Mining & Industrial	All Other
Total Capacity	18						
Hwa Fong Rubber	1						
Vee Rubber	1						
Michelin Siam	3						
Inoue Rubber	1						
Siamese Rubber	1						
Maxxis International	1						
Bridgestone	3						
Sumitomo Rubber	1						
Goodyear	1						
Deestone	1						
Yokohama Tire Mfg.	1						
Otani Tire	1						
Hihero	1						

**SAMPLE  
TABLE**

CHART III-1

WORLD TIRE DEMAND BY REGION, 2008  
 (1.4 billion units)



**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VII-32**  
**TAIWAN -- RUBBER SUPPLY & DEMAND**  
 (thousand metric tons)

Item	1998	2003	2008	2013	2018
Population (million)					23.5
\$ GDP/capita					70
Gross Domestic Product (bil 2007 US					91
kgs per capita					6
kgs per 000\$ GDP					3
Rubber Consumption					10
By Use:					
Tires & Tire Components					70
Non-Tire Rubber Products					30
By Type:					
Synthetic					30
Natural					0
net exports					0
Rubber Production					0
Synthetic					0
Natural					0



### COMPANY PROFILES

#### Apollo Tyres Limited

7, Institutional Area, Sector 32  
 Gurgaon, Haryana 122001

India  
 91-124-2-  
 http://w

Sales: \$  
 Geograp  
 Africa 2  
 Employ



Key Products: ... and heavy-duty truck, bus, agricultural equipment, and off-the-road and industrial vehicle tires; and retreading material and retreaded tires

Apollo Tyres is a leading Indian manufacturer of tires, tubes and flaps. The Company was 8-percent owned by the Michelin Group subsidiary (France) of Compagnie Generale des Etablissements Michelin (France) as of June 2009.

The Company's tires comprise radius and bias-ply types for passenger cars, light trucks, medium- and heavy-duty trucks, buses, agricultural equipment, and off-the-road and industrial vehicles. These tires are sold under such brand names as DUNLAP, ASPIRE ACELERE, AMAZER, HAWKZ, QUANTUM, TRANSPORT, DURAMILE, RANCER, AMAR and CARGO. Additionally, Apollo Tyres produces DURATREAD retreading material and DURATYRES retreaded tires.

The Company manufactures tires in India, South Africa and Zimbabwe. In India, Apollo Tyres has plants in Kalamassery, Limda and Perambra, which had a combined daily production capacity of 744 tons

"Rubber demand in Taiwan fell significantly during the 2003-2008 period, largely due to the fact that the country's motor vehicle production declined by almost 50 percent during that time. A strong recovery in auto and tire production through 2013 will bolster rubber demand in Taiwan over the same period. Total rubber demand in Taiwan is projected to rise 7.4 percent per year through 2013 to 440,000 metric tons. The faster percentage gains are expected in ..."  
 --Section VII, pg. 267

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Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Division \_\_\_\_\_

Street (No PO Box please) \_\_\_\_\_

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**OTHER STUDIES**

**Motorcycles in China**

Demand for motorcycles in China will grow 7.6% yearly through 2014. Electric motorcycles will surpass gas types as the largest segment in units. New regulations for electric motorcycles will favor lighter vehicles such as mopeds while discouraging electric scooters and three-wheeled trikes. This study analyzes the 117 billion yuan motorcycle industry in China, with forecasts for 2014 and 2019 by product, market and geographic region. It also evaluates company market share and profiles industry participants.

#2658 ..... September 2010 ..... \$5300

**Industrial Rubber Products**

US industrial rubber product demand will rise 6% yearly through 2014, driven mainly by rebounding levels of motor vehicle production and accelerating output in the machinery industry. Mechanical rubber goods will remain dominant and grow the fastest. Machinery will be the fastest growing market. This study analyzes the \$13.2 billion US industrial rubber product industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2620 ..... April 2010 ..... \$4800

**Automotive Aftermarket in North America**

The aftermarket for light vehicle components in North America will increase 2.9% annually through 2014. Mechanical products will remain the largest category while electronics grow the fastest. The dominant professional service provider segment will outpace the DIY market. This study analyzes the \$66 billion automotive aftermarket in North America, with forecasts for 2014 and 2019 by country (US, Canada, Mexico) and product. It also evaluates company market share and profiles industry participants.

#2606 ..... March 2010 ..... \$4800

**World Motorcycles (including Electric Bicycles & Mopeds)**

Global motorcycle demand will grow 7.6% per year through 2013, driven by rising living standards in developing areas that make motorcycles more affordable to use. ICE motorcycles will remain dominant while electric types lead gains. Sales in the Africa/Mideast and Asia/Pacific markets will grow the fastest. This study analyzes the 79.2 million unit world motorcycle industry, with forecasts for 2013 and 2018 by product, world region and for 21 countries. It also evaluates market share and profiles industry players.

#2537 ..... August 2009 ..... \$5700

**Medium- & Heavy-Duty Truck Aftermarket**

The US aftermarket for medium- and heavy-duty (MD/HD) truck parts will grow 3.8% annually through 2013. Exterior and structural components such as tires will remain the largest segment, while electrical and electronic components see the fastest gains. Outsourced service providers will continue to dominate, led by tire dealers. This study analyzes the \$14.2 billion US MD/HD aftermarket, with forecasts for 2013 and 2018 by product and service performer. It also evaluates market share and profiles industry players.

#2481 ..... April 2009 ..... \$4600

**About The Freedonia Group**

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