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World Industrial Rubber Products

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

Study #2609 | March 2010 | \$5800 | 356 pages

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Higher living standards in developing areas will help stimulate demand for automobiles and other industrial rubber product-containing durables, boosting industrial rubber product sales.

World demand to climb 4.3% yearly through 2013

Global demand for industrial rubber products is forecast to climb 4.3 percent annually through 2013 to \$97.8 billion. Market advances in developing areas will be fueled by healthy economic growth, ongoing industrialization efforts and rising personal income levels, bolstering manufacturing output and fixed investment expenditures. In addition, higher living standards will help stimulate demand for automobiles and other industrial rubber product-containing durables, boosting both original equipment manufacturers' (OEM) and maintenance/repair/operations (MRO) industrial rubber product sales.

Hose, belt segments to post strongest advances

Mechanical rubber goods -- which include body seals, vibration control products, wiper blades and a variety of miscellaneous goods, such as bellows, bumpers, duct covers, mallets, pads, plates and trim -- comprised the largest product segment in 2008. Suppliers of mechanical rubber products will benefit from continued gains in global motor vehicle production through 2013, as these products are highly represented in this market. Advances will be stronger in the hose and belt segments, reflecting their wide diversity of applications and stronger price outlook compared to mechanical goods.



China to surpass US as largest national market

China, which will surpass the US to become the largest national market for industrial rubber products, will account for over one-third of all additional demand generated through 2013. India will also record strong gains, and sales growth is expected to be healthy as well in a number of lower-volume markets, including Thailand, Indonesia and Malaysia. Advances will continue to be solid in Eastern Europe, reflecting the ongoing shift of durable goods manufacturing to that region, primarily from Western Europe.

Although slumping in the shorter term, industrial rubber product demand in the US is expected to recover by 2013. Advances will benefit from a turnaround in motor vehicle production, as well as by recovery in the manufacturing sector. Western Europe and Japan will experience sluggish gains, reflective of the maturity of these markets. However, these areas -- along with Australia and Canada -- will remain the most intensive users of industrial rubber products because of the advanced industrial and technological nature of their economies. The large numbers of industrial rubber product-containing equipment in use will also help bolster aftermarket industrial rubber product demand.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Outlook & Suppliers

Demand for industrial rubber products in China is projected to reach \$4 billion in 2013, representing 10% of worldwide demand. Suppliers will be attracted by investment and manufacturing incentives. For example, motor vehicle demand is growing at a 6% annual pace through 2013, making China the largest automobile market in the world. Demand may be dampened somewhat by price volatility among industrial rubber product suppliers, limiting future growth.

Industrial rubber product shipments by facilities in China are forecast to climb 9.7 percent annually through 2013 to \$4 billion, mirroring demand. Output gains will be fueled by robust domestic market conditions and additional investment in Chinese industrial rubber product manufacturing operations by foreign firms. The nation's trade surplus in these products will also widen, due in large part to the pricing advantages that Chinese suppliers have over manufacturers in developed countries. However, aggressive competition from industrial rubber product suppliers in other low-cost developing Asia/Pacific nations will prevent Chinese industry output from growing at an even faster rate through 2013.

China is home to hundreds of industrial rubber product producers, including local leaders such as Anhui Zhongding, China National Chemical, Yinhe Depreaux and Zhejiang Double Arrow Rubber. Heavy production is increasingly taking place via multinational operations. For example, in 2008 the NOK-Freudenberg Group China had sales of \$203 million. NOK-Freudenberg Group China is a joint venture between Freudenberg and NOK, which manufacture control products and seals. Bridgestone has operations in China to produce hoses and vibration control components.

137

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TABLE VI-6

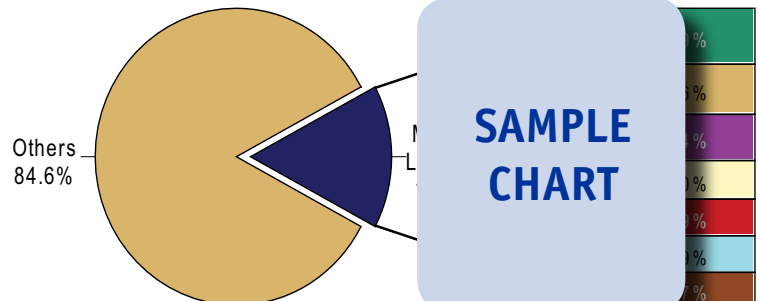
CHINA: INDUSTRIAL RUBBER PRODUCT DEMAND BY PRODUCT & MARKET (million dollars)

Item	1998	2003	2008	2013	2018
Industrial Rubber Product Demand					
By Product:					
Mechanical Goods					
Hose					
Belts					
Roofing					
Other Products					
By Market:					
Industrial Equipment					
Motor Vehicles					
Construction					
Aerospace & Other Markets					

SAMPLE TABLE

CHART VIII-1

WORLD INDUSTRIAL RUBBER PRODUCT MARKET SHARE BY COMPANY, 2008 (\$79.3 billion)

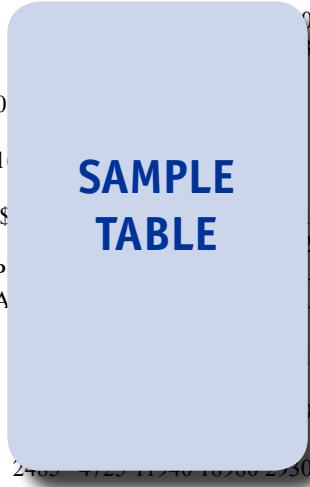


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-5
CHINA: INDUSTRIAL RUBBER PRODUCT SUPPLY & DEMAND
 (million dollars)

Item	1998	2003	2008	2013	2018
Population (million persons)					1,370
per capita GDP					1,000
Gross Domestic Product (bil 2007\$)	30				
Motor Vehicle Production (000 units)	1				
Manufacturing Value Added (bil 2007\$)					1,000
industrial rubber product/capita					10
industrial rubber product/000\$ GDP					8
industrial rubber product/000\$ MVA					7
Industrial Rubber Product Demand					10
net exports					10
Industrial Rubber Product Shipments	2,400	4,125	11,710	16,700	27,300



COMPANY PROFILES

Mitsuboshi Belting Limited
 4-1, Hamazoe-dori 21-chome
 Nagata-ku, Kobe 653
 Japan
 81-78-67
 http://www

SAMPLE PROFILE

Sales: \$
 Employe

Key Pro belts, sheets, and
 geomem

Mitsuboshi Belting is primarily a manufacturer of industrial rubber belts. The Company also makes interior and exterior products for construction, automotive and other applications. Mitsuboshi Belting operates via two segments: Belting Business and Other Businesses.

The Company participates in the world industrial rubber products industry through both segments. Via the Belting Business segment, which had FY 2009 sales of \$454 million, Mitsuboshi Belting is engaged in the manufacture and sale of power transmission and conveyor belts, and related equipment. The Company's power transmission belts include timing, flat, V-belt, V-ribbed and other models made using rubber. Among these products are round and trapezoid tooth timing belts; DRYFLEX flat belts; standard, thin and MAXSTAR WEDGE narrow-wrapped V-belts; raw edge V-belts; RIBSTAR V-ribbed belts; and variable-speed belts. These belts are designed for use in tooling machines, textile machinery, automobiles, household appliances, office equipment, agricultural machinery and various other applications. Mitsuboshi Belting makes conveyor belts using rubber, among other

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“Demand for industrial rubber products in China totaled \$11.8 billion in 2008, making the nation the second largest market for these products globally. In 2003, China was the third largest industrial rubber product market behind the US and Japan, but product sales in the country have more than doubled since then, stimulated by the country's rapid industrialization during this span, boosting domestic production of industrial rubber product-containing durable goods and resulting in ...”
 --Section VI, pg. 135

OTHER STUDIES

World Specialty Silicas

World specialty silicas demand will rise 6.3% yearly through 2014, driven by growth in key silica markets such as tires, rubber, chemicals and agricultural products. Precipitated silica will remain the dominant product type and lead gains. The Asia/Pacific region will grow at the fastest pace. This study analyzes the two million metric ton world specialty silica industry, with forecasts for 2014 and 2019 by product, market, world region and for 14 countries. It also evaluates company market share and profiles industry participants.

#2644 June 2010 \$5800

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 Carbon Black

World demand for carbon black is forecast to rise 4.3% annually through 2013. Growth in the non-tire rubber product market will outpace growth in the dominant motor vehicle tire sector, while the smaller special blacks market will rise the fastest. The Asia/Pacific region will post the strongest gains. This study analyzes the 9.4 million metric ton world carbon black industry, with forecasts for 2013 and 2018 by market, world region and for 25 countries. It also evaluates company market share and profiles industry players.

#2596 February 2010 \$5700

World Rubber & Tire

Global rubber consumption will rise 4.1% yearly through 2013. The Asia/Pacific region will remain the largest and fastest-growing market. Non-tire rubber demand will outpace tire rubber. Tire rubber will continue to benefit from strong growth in Asia, despite a decline in rubber usage per tire. This study analyzes the 22 million metric ton world rubber industry, with forecasts for 2013 and 2018 by type, market, world region and for 30 countries. It also evaluates company market share and profiles industry players.

#2575 January 2010 \$5900

About The Freedonia Group

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