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Industrial Rubber Products

Industry Study with Forecasts for **2014 & 2019**

Study #2620 | April 2010 | \$4800 | 305 pages

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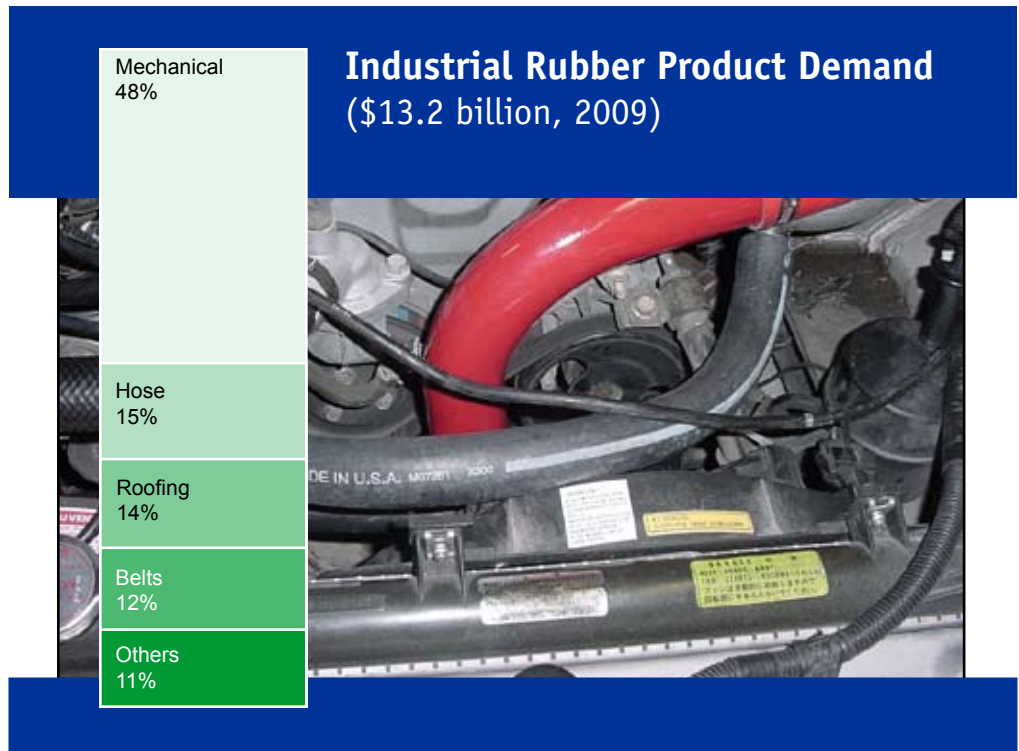
US demand growth for industrial rubber products will be supported by rebounding levels of motor vehicle production, as well as accelerating output in the important machinery industry.

US demand to increase 6% annually through 2014

The US market for industrial rubber products is forecast to rise 6.0 percent per year to \$17.7 billion in 2014, recovering from the declines registered during the 2004-2009 period. Rebounding levels of motor vehicle production will support demand increases, as will accelerating output in the machinery industry. Further growth in both aerospace equipment production and non-residential building construction expenditures will also benefit manufacturers of industrial rubber products. However, competition from suppliers in low-cost countries and moderating raw material costs will hold back price increases, limiting value gains to some degree. In addition, industrial rubber products will continue to face competition from less expensive plastic goods in a number of applications.

Mechanical rubber goods, hose and belt products to exhibit good gains

Sales of mechanical rubber goods will post strong gains through 2014 and will continue to account for the largest share of overall demand. Demand for mechanical rubber goods -- including body seals, vibration control products, wiper blades and a range of miscellaneous products -- will be boosted by rebounding motor vehicle production.



Sales of industrial hose and belt products will exhibit healthy gains, boosted by the wide diversity of uses for these products. Furthermore, hose and belt products have a stronger price outlook relative to mechanical goods.

Motor vehicle market to register fastest gains

The machinery market, including both industrial machinery and off-road equipment, will continue to account for the largest share of industrial rubber product demand through 2014. A wide range of industrial rubber products are utilized in this market, and as machinery output accelerates from the sluggishness experienced during the 2004-2009

period, producers of associated rubber products will benefit.

The motor vehicle market is forecast to register the fastest gains through 2014, boosted by a strong recovery in US motor vehicle production. Automotive manufacturers utilize a variety of industrial rubber products, including mechanical goods, hoses, belts and miscellaneous other items. However, automobile production is forecast to outpace output of light trucks, vans and SUVs, which will restrain market advances to some degree as smaller vehicles tend to utilize less rubber on a per vehicle basis. Growth will also be tempered by the significant pricing pressures exerted by the large automotive companies.

Sample Text, Table & Chart

PRODUCTS

Vehicular Hose -- Sales of vehicular hose are forecasted to increase through 2014. These gains will be supported in this market due to gains in the automotive segment accounted for the last few years, despite sales being negative in the off-road equipment market. Through 2014, gains in the automotive market and in motor vehicle production, particularly the recovery in production of heavy trucks and buses, will require a great deal more hose than passenger cars. Gains will be supported by ongoing growth in shipments of off-road equipment by product advancements leading to higher value sales.

Competition from other materials, particularly thermoplastics, will restrain product demand to some extent. However, rubber products, due to their superior heat and chemical resistance, and flexibility compared to alternative materials and will continue to be the material of choice in many applications. A continued shift toward higher-value rubber products, such as TPEs, will promote value gains in the vehicular segment. 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 or 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 conditions in which it operates. Shipments of low pressure hose are expected to increase more rapidly than high pressure hose through 2014 because of the rapid growth expected in motor vehicle manufacturing. Rubber hose is used in virtually all of the fluid-based systems in motor vehicles.

TABLE IV-1

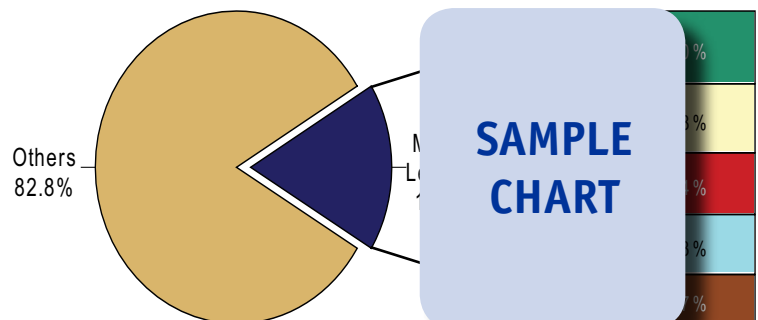
INDUSTRIAL RUBBER PRODUCT SUPPLY & DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Durable Goods Shipments (bil \$)					70
\$ industrial rubber/000\$ durables					25
Industrial Rubber Product Demand					100
Mechanical Goods					50
Hose					20
Belts					75
Roofing					40
Other					15
net exports					100
Industrial Rubber Product Shipments					100
price deflator (2005=100)					13
Ind Rubber Prod Shpts (mil 2005\$)					100

SAMPLE TABLE

CHART VI-1

US INDUSTRIAL RUBBER PRODUCT MARKET SHARE BY COMPANY (\$13.2 billion, 2009)

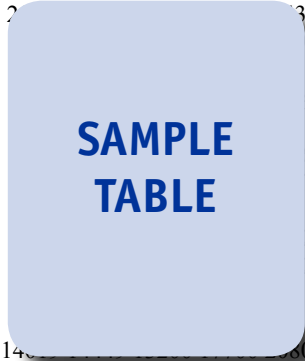


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-5
MACHINERY MARKET FOR INDUSTRIAL RUBBER PRODUCTS
 (million dollars)

Item	1999	2004	2009	2014	2019
Machinery Shipments (bil \$)	2				3.0
\$ rubber/000\$ shpts					3
Machinery Rubber Product Demand					40
By Market:					
Industrial Machinery					55
Off-Road Equipment					75
By Source:					
OEM					20
MRO					20
% machinery					1
Industrial Rubber Product Demand	14				800



COMPANY PROFILES

Tenneco Incorporated
 500 North Field Drive
 Lake Forest, IL 60045
 847-482-5000
<http://www.tenneco.com>

Revenues: \$
 Employment:

Key Products: elastomer and self-lubricate rubber compounds

SAMPLE PROFILE

Tenneco designs, produces and sells automotive emissions control and ride control products and systems for the original equipment, replacement and aftermarket industries. The Company's products and systems are organized into two segments: Ride Control Systems and Products, and Emission Control Systems and Products.

The Company participates in the US industrial rubber product industry through the Ride Control Systems and Products segment, which had 2009 revenues of \$1.7 billion. Of the segment's total 2009 revenues, the US accounted for 36 percent, or approximately \$615 million. Via the Ride Control Systems and Products segment, Tenneco produces such items as vibration control components, suspension technology, struts and shock absorbers. Among these products are CLEVITE elastomeric components engineered to reduce noise, vibration and harshness in automobiles, heavy trucks and other vehicles. In 2009, the original equipment manufacturer (OEM) market accounted for \$1 billion of the Ride Control Systems and Products' total revenues, while the automotive aftermarket industry represented \$721 million. Its

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"Demand for industrial rubber products utilized in industrial machinery is forecast to increase 6.6 percent per year to \$5.1 billion in 2014, improving from the modest declines experienced during the 2004-2009 period. Advances will be stronger than those expected in overall industrial rubber product demand through 2014. Shipments of industrial machinery are forecast to increase 6.9 percent per year through 2014, which will support gains in associated rubber product demand."
 --Section V, pg. 150

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 assesses company market share and profiles industry players.

#2644 June 2010 \$5800

World Industrial Rubber Products

Global industrial rubber product demand will climb 4.3% yearly through 2013. China will surpass the US to become the largest national market, and claim over one-third of all new demand. Advances will be stronger in the hose and belt segments, while mechanical rubber goods remains dominant. This study analyzes the \$79.3 billion world industrial rubber product industry, with forecasts for 2013 and 2018 by market, product, world region and for 27 countries. It also evaluates company market share and profiles industry players.

#2609 March 2010 \$5800

Roofing

Demand for roofing in the US is forecast to reverse previous declines and grow 2.4% per year through 2014. The residential market will remain dominant and grow the fastest, led by new construction applications. Roofing tile will be the fastest growing product segment, while asphalt shingles remain dominant. This study analyzes the 244 million square US roofing industry, with forecasts for 2014 and 2019 by product, market and region. It also evaluates company market share and profiles industry players.

#2603 February 2010 \$4900

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

World Thermoplastic Elastomers

Global TPE demand will rise 6% yearly through 2013, with China making up 42% of new demand. Excluding China, TPE sales will remain concentrated in the developed markets of the US, Western Europe and Japan, especially for higher performance materials such as TPVs and copolyester elastomers (COPEs). This study analyzes the 3.1 million metric ton world TPE industry, with forecasts for 2013 and 2018 by market, type, world region and for 13 countries. It also evaluates market share and profiles industry players.

#2551 October 2009 \$5800

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