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World Bearings

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

Study #2649 | June 2010 | \$6100 | 428 pages

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INDUSTRY STRUCTURE

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Gains will be supported by ongoing economic growth and improved fixed investment in many developed countries, and by a recovery in global manufacturing output and motor vehicle production.

Global demand to rise 8.5% yearly through 2014

Global demand for ball, roller and plain bearings is expected to increase 8.5 percent per year through 2014 to \$76 billion. Unmounted ball and roller bearings will continue to account for the majority of product sales. Market gains will be supported by ongoing economic growth and improved fixed investment environments in many of the world's developed countries. In addition, both manufacturing output and motor vehicle production will improve from the performance registered during the 2004-2009 period (when global motor vehicle production declined), as countries around the world rebound from the economic downturn of 2009. However, bearing prices will not increase as much as they did during the 2004-2009 period as raw material costs moderate and international competition from producers in developing areas increases, thus holding back value gains to some degree.

Asia/Pacific region to post strongest sales growth

The Asia/Pacific region will post the strongest sales growth through 2014, led by healthy 12.0 percent yearly demand increases in China. Gains will be supported by the country's ongoing industrialization and growing manufacturing output. By 2009, China had become the world's largest manufacturer of motor vehicles, which will provide bearing producers with important new sales



opportunities as output continues to climb. China will account for nearly one-half of all additional global bearing demand through 2014, and by 2019 the country is forecast to have a bearing market larger than that of North America, Western Europe and Japan combined.

Historically, advances in bearing demand in the developed areas of the US, Western Europe and Japan have been much slower than in the developing world. However, this will not be the case in all areas through 2014, as bearing demand in many developed countries bounces back following the slump in durables manufacturing (especially of motor vehicles) that hit between 2007 and 2009. Growth in these areas will be

supported largely by solid recoveries in motor vehicle manufacturing and accelerating growth in durable goods manufacturing output.

Motor vehicle, machinery markets to remain key

The motor vehicle and machinery markets, which together accounted for over 70 percent of all bearing sales in 2009, will remain the largest sources of bearing demand through 2014 as gains improve from those registered during the 2004-2009 period. Advances will also be solid in a variety of smaller markets such as aerospace equipment, electronic devices, railroad equipment and medical equipment.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Bearing Outlook & Suppliers

Bearing demand in India is expected to increase at an annual rate of 10.3 percent per annum to \$2.0 billion in 2014, modestly outpacing overall demand. Production growth will be fueled by favorable local conditions and growth in important export markets. Further advances will be supported by additional investment in new Indian factories. For instance, SKF opened two new plants in India in 2010. The first plant, in Ahmedabad, employs 300 in the manufacture of large-size bearings for such industrial markets as wind power, railway and off-highway equipment. The other Indian plant, in Haridwar, Uttarakhnad, produces ball bearings primarily for the Indian two-wheeler industry. On the other hand, healthy increases in Indian bearing demand will attract competition from foreign suppliers, which will limit output gains through 2014 and lead to a further widening of India's bearing supply deficit.

Shipments of bearings from plants in India are expected to increase at an annual rate of 10.3 percent per annum to \$2.0 billion in 2014, modestly outpacing overall demand. Production growth will be fueled by favorable local conditions and growth in important export markets. Further advances will be supported by additional investment in new Indian factories. For instance, SKF opened two new plants in India in 2010. The first plant, in Ahmedabad, employs 300 in the manufacture of large-size bearings for such industrial markets as wind power, railway and off-highway equipment. The other Indian plant, in Haridwar, Uttarakhnad, produces ball bearings primarily for the Indian two-wheeler industry. On the other hand, healthy increases in Indian bearing demand will attract competition from foreign suppliers, which will limit output gains through 2014 and lead to a further widening of India's bearing supply deficit.

Among the locally headquartered manufacturers of bearings in India are ABC Bearings, Anand Automotive Systems, Harsha Engineering Works, Menon Bearings, National Engineering Industries, NRB Bearings, Sujana Universal Industries and Tata Bearings. In addition to these, foreign bearing firms with Indian production facilities include SKF, Timken and NTN.

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SAMPLE TEXT

TABLE VI-10

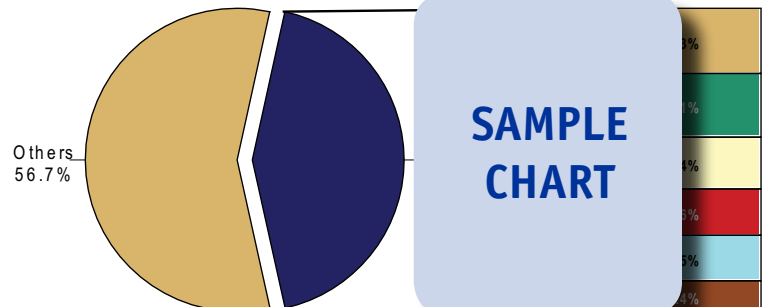
INDIA BEARING SUPPLY & DEMAND

Item	1999	2004	2009	2014	2019
Population (mil persons)	1070	1100	1130	1160	1190
per capita GDP	100	120	140	160	180
Gross Domestic Product (bil 2008\$)	100	120	140	160	180
% fixed investment	30	30	30	30	30
Gross Fixed Investment (bil 2008\$)	30	30	30	30	30
Manufacturing Value Added (bil 2008\$)	50	50	50	50	50
\$ bearings/capita	8	8	8	8	8
\$ bearings/000\$ GFI	8	8	8	8	8
\$ bearings/000\$ MVA	1	1	1	1	1
Motor Vehicle Production (000)	0	0	0	0	0
Bearing Demand (mil \$)	5	5	5	5	5
net exports	0	0	0	0	0
Bearing Shipments (mil \$)	5	5	5	5	5
% India	1	1	1	1	1
Asia/Pacific Bearing Shipments (mil \$)	10	10	10	10	10

SAMPLE TABLE

CHART VIII-1

WORLD BEARING MARKET SHARE BY COMPANY (\$50.5 billion, 2009)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-10
INDIA BEARING DEMAND BY PRODUCT & MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Asia/Pacific Bearing Demand	92	100	100	100	100
% India					10.0
India Bearing Demand					10.0
By Product:					
Roller Bearings					9.5
Ball Bearings					0.7
Plain Bearings					0.3
Other Bearings & Bearing Parts					0.5
By Market:					
Motor Vehicles					3.5
Machinery					3.0
Other					3.0
Aerospace Equipment					0.5
All Other					0.5



COMPANY PROFILES

European Bearing Corporation

5 Building, 14 Novoostapovskaya Street
 Moscow 115088
 Russia
 7495-775-8111
<http://www.ebc.com>



Revenues: \$1.1 billion (2009)
 Employment: 1,000

Key Products: roller bearings; ball bearings; and related bearing products

European Bearing Corporation (EBC) is a leading Russian bearing manufacturer. The Company is 50-percent held by Millhouse Capital UK Limited (United Kingdom), an asset management company.

The Company competes in the world bearing market via the production of more than 9,800 types of bearings and related bearing products. EBC's bearings are employed in such industries as aviation, rail, metallurgy, energy, machine tool, defense, agriculture and mining. These bearings, which feature flanges, shields and seals, are available in sizes ranging from 20 to 2,200 millimeters (mm), and are composed of brass, polyamide or steel cages.

Bearings produced by EBC include ball, roller, large diameter and specialty types. In particular, ball bearings are available in radial, thrust, deep-groove, angular-contact and self-aligning varieties, while roller bearings are offered in needle, thrust, tapered, self-aligning, cylindrical and spherical models. Related bearing products from EBC include polyamide cages that allow bearings to hold operating capacity

"Shipments of bearings from plants in India are expected to increase 10.3 percent per annum to \$2.0 billion in 2014, modestly outpacing demand. Production growth will be fueled by favorable local economic conditions and growth in important export markets. Furthermore, advances will be supported by additional investment in new Indian bearing factories."

--Section VI, pg. 175

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OTHER STUDIES

World Automotive Sensors

Global demand for light vehicle OEM automotive sensors will advance 11.8% annually through 2014. North America will be the fastest growing region, far outpacing the Asia/Pacific and other regions based on a rebounding US market and higher per-vehicle sensor revenues. This study analyzes the \$9.1 billion world automotive sensor industry, with forecasts for 2014 and 2019 by product, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2640 June 2010 \$5700

World Gears

Global gear demand will climb 4.7% yearly through 2013, driven in part by a shift toward more expensive, energy-efficient units. China and India will register some of the strongest market advances, with China expected to claim one-third of all new demand and pass Japan as the second largest market behind the US. This study analyzes the \$135 billion world gear industry, with forecasts for 2013 and 2018 by product, market, world region and for 21 countries. It also evaluates company market share and profiles industry participants.

#2624 04/2010 \$5800

Gears

US demand for gears and gear assemblies will rise 3.9% annually through 2013. Gains will be supported by rebounding levels of motor vehicle production, and by value gains from product improvements and upgrades such as transmissions with higher numbers of speeds. Vehicular gear assemblies will register the strongest growth. This study analyzes the \$25 billion US gears industry, with forecasts for 2013 and 2018 by gear material, product and market. It also evaluates company market share and profiles industry players.

#2593 01/2010 \$4700

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 01/2010 \$5900

Bearings

US ball, roller and plain bearing demand is projected to expand 3% annually through 2013. Gains will be supported in part by sales of high-value, large diameter bearings used in wind energy and heavy equipment markets. Ball and roller bearings will outpace plain bearings, with roller bearings posting the strongest market gains. This study analyzes the \$9.2 billion US bearings industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2547 09/2009 \$4800

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