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World Rubber

Industry Study with Forecasts for **2015 & 2020**

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Increases in tire output growth due to rising motor vehicle production worldwide, plus strong gains in rubber used in non-tire applications, will spur demand for rubber on a global scale.

World consumption to grow 4.3% per year through 2015

Global rubber consumption is forecast to rise 4.3 percent per year through 2015 to 30.5 million metric tons. Rubber demand will be stimulated by an increase in tire output growth as global motor vehicle production accelerates following a relatively weak 2005-2010 period in many developed nations. Because replacement motor vehicle tires represent by far the largest market for rubber, strong gains in the number of motor vehicles in use throughout the world will significantly boost the amount of rubber consumed. In addition, a pickup in global manufacturing activity through 2015 will spur rubber demand in non-tire applications.

Asia/Pacific region to see fastest demand growth

The Asia/Pacific region is the largest regional market for rubber, accounting for 60 percent of global demand in 2010. In addition, the region will register the fastest growth in rubber consumption through 2015. The massive Chinese rubber market, which alone accounted for nearly one-third of global rubber demand in 2010, will record the best gains of any major nation through 2015. The large amount of motorcycle and bicycle production in the country supports significant demand for rubber used in non-motor vehicle tires. The rubber markets in North America and Western Europe will rebound somewhat from the sales declines recorded during the 2005 to 2010 period. Rubber markets in Eastern Europe and Central and South

World Rubber Consumption (30.5 million metric tons, 2015)



America will also see accelerating gains through 2015, while growth in the small Africa/Mideast market will match the global pace.

Motor vehicle tire rubber to remain dominant

Tire rubber, which accounts for about two-thirds of all rubber demand, is forecast to post slower gains than non-tire rubber sales through 2015. Production of non-motor vehicle tires -- including bicycle, motorcycle and industrial vehicle tires -- will significantly outpace motor vehicle tire output in certain areas of the world, especially developing nations in the Asia/Pacific region. Nevertheless, rubber used in motor vehicle tires, which accounted for 57 percent of tire rubber

sales in 2010, will continue to represent the majority of world tire rubber demand.

Rubber utilized in non-tire applications will register stronger gains through 2015, but will remain the smaller segment of the rubber market. Market gains through 2015 will be fueled by a strengthened outlook for global manufacturing activity, which will boost demand for rubber used in industrial applications like sealing and vibration control. In addition, segment growth will be spurred by an acceleration in motor vehicle production worldwide, which will lead to greater consumption of rubber used in automotive products such as belts, hoses and gaskets. The Asia/Pacific region is a key producer of non-tire rubber products, and it is expected to account for 80 percent of world market growth in volume terms through 2015.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Rubber Supply & Demand

China's rubber market more than tripled in size by 2010, posting the fastest gains of any country in the world. In 2010, China was the largest global consumer of rubber for nearly one-third of the world total, up from 14

Rubber consumption in China is projected to rise year to year through 2015, moderating from 2010 growth of 10 percent to 5 percent. Despite this slowdown, China alone will account for 36 percent of new global demand by 2015. The tire and non-tire forecast for 2015 is 8.5 million metric tons, with the latter performance well above the 2010 level.

Non-tire rubber in China is expected to register gains that will average 8 percent annually through 2015, reaching 1.8 million metric tons in 2015. Despite these healthy increases, this performance will represent a significant slowdown from the segment growth registered during the 2000-2010 period. Although much smaller than the tire rubber segment, the Chinese non-tire rubber sector accounted for more than one-quarter of the global non-tire rubber market in 2010. China has become the global manufacturing base for many low-cost products, such as shoes and industrial rubber goods. Gains through 2015 will be fueled by China's expanding industrial base, which will create demand for such products as conveyor belts, impact-absorbing devices and factory flooring. In addition, continued growth in the Chinese motor vehicle market will support increases in non-tire rubber sales.

Consumption of tire rubber in China is projected to advance 5 percent per year to 8.5 million metric tons in 2015. Despite the slower growth than the non-tire rubber segment, tire rubber in China, which accounted for 36 percent of the global total, will

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CHART VI-4

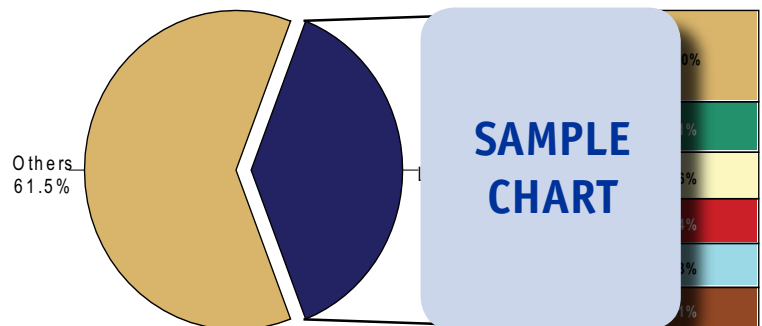
CHINA: SYNTHETIC RUBBER PRODUCTION CAPACITY BY COMPANY, YEAR-END 2010 (thousand metric tons per year)

Company	Annual Capacity	Percent of Total	Type of Rubber				
			SBR	BR	EP/EPDM	HR	All Other
Total Capacity	2,000	100%					
Sinopec	1,000	50%					
PetroChina	500	25%					
Shen Hua Chemical	200	10%					
YPC-GRPO	100	5%					
Shandong Hunuang	100	5%					
Bridgestone	100	5%					
Ningbo Shunze	100	5%					
TSRC-UBE	100	5%					
Chang Shou Chemical	100	5%					
Nantex	100	5%					
Shanxi Synthetic Rubber	100	5%					
Shanxi-Nairit	100	5%					

SAMPLE CHART

CHART VIII-2

WORLD SYNTHETIC RUBBER PRODUCTION CAPACITY BY COMPANY, YEAR-END 2010 (12.7 million metric tons)



SAMPLE CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Asahi Kasei Corporation

Jinbocho-Mitsui Building
 105 Kanda Jinbocho 1-chome
 Chiyoda-ku
 Japan
 813-329
 http://www

Sales: \$
 Geograp
 11% and
 Employ

**SAMPLE
PROFILE**

Key Products: polybutadiene rubber and styrene-butadiene rubber

Asahi Kasei Corporation comprises seven segments: Chemicals, Homes, Health Care, Fibers, Electronics, Construction Materials and Others. With the exception of the Others segment, the Company's segments operate through nine Japanese subsidiaries and joint ventures, with Asahi Kasei functioning as a holding company for group operations.

The Company participates in the world rubber industry through the Chemicals segment, which had FY 2011 sales of \$8.7 billion. The segment, which does business as Asahi Kasei Chemicals Corporation (Japan), manufactures synthetic rubber, organic and inorganic industrial chemicals, and other chemical products. Synthetic rubber from Asahi Kasei Chemicals comprises ASADENE, TUFdene and ASAPRENE polybutadiene rubber (BR) and styrene-butadiene rubber (SBR) for use in advanced silica rubber tires, belts, hoses, vibration dampers, footwear, electric cables and other applications.

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TABLE VI-3

CHINA: RUBBER SUPPLY & DEMAND
 (thousand metric tons)

Item	2000	2005	2010	2015	2020
Population (million)					
\$ GDP/capita					
Gross Domestic Product (bil 2009\$)					
kgs per capita					
kgs per 000\$ GDP					
Rubber Consumption					
By Use:					
Tires & Tire Components					
Motor Vehicle					
Other					
Non-Tire Rubber Products					
By Type:					
Synthetic					
Natural					
net exports					
Rubber Production					
Synthetic					
Natural					

**SAMPLE
TABLE**

"Rubber production in China is projected to increase 7.3 percent annually to 5.4 million metric tons in 2015. The vast majority of gains will come from the large synthetic rubber segment, which is expected to advance 8.1 percent per year over the period. Growth will be fueled by continued increases in production capacity by a number of synthetic rubber manufacturers in the country in an attempt to meet the requirements of the rapidly growing domestic market for these materials. In contrast, ..."
 --Section VI, pg. 149

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World Tires

World tire demand will rise 4.7 percent yearly through 2015 to 3.3 billion units. The large motor vehicle market will grow faster as motor vehicle industries rebound. Stronger growth will occur among industrial and other tires, including bicycle, motorcycle and off-road types. The Asia/Pacific region will remain the largest and fastest growing market. This study analyzes the 2.6 billion unit world tire industry, with forecasts for 2015 and 2020 by market, world region and for 30 major countries. The study also evaluates company market share and profiles industry players.
#2860 February 2012 \$5800

Silicones

US demand for silicones is forecast to climb 5.6 percent annually to \$4.1 billion in 2016. Silicone resins and elastomers will be the fastest growing products, with elastomers overtaking silicone fluids as the largest segment by 2016. The industrial market will remain dominant while the construction segment grows the fastest as it rebounds from previous declines. This study analyzes the \$3.1 billion US silicone industry, with forecasts for 2016 and 2021 by product, market and application. It also evaluates company market share and profiles industry players.
#2879 April 2012 \$4900

World Rubber Processing Chemicals

Global demand for rubber processing chemicals will rise 4.7 percent yearly to 1.4 million metric tons in 2015. China will remain the largest and fastest growing market. Accelerators and processing aids will be among the fastest growing types, while antidegradants will remain the largest segment. This study analyzes the 1.1 million metric ton world rubber processing chemical industry, with forecasts for 2015 and 2020 by type of rubber, chemical, market, world region and for 27 countries. The study also evaluates company market shares and profiles industry players.
#2863 March 2012 \$6100

World Thermoplastic Elastomers

Global demand for thermoplastic elastomers (TPEs) will rise 6.3 percent annually through 2015. Gains will be driven by rebounding motor vehicle production in the US and Western Europe. Advances will also be fueled by the rising use of TPEs in the developing countries, where these materials are continuing to penetrate new applications. This study analyzes the 4.1 million metric ton world TPE industry, with forecasts for 2015 and 2020 by market, product, world region and for 15 countries. The study also evaluates company market share and profiles industry players.
#2803 September 2011 \$6400

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