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World Industrial Rubber Products

Industry Study with Forecasts for **2016 & 2021**

Study #2888 | May 2012 | \$6100 | 392 pages

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Global demand for industrial rubber products will be led by growth in key OEM markets, particularly motor vehicles, and aftermarket demand due to strong emerging developing nations.

Global market to rise 5.8% per annum through 2016

The global market for industrial rubber products is projected to increase 5.8 percent per year to \$140 billion in 2016. Demand gains will be spurred by growth in key original equipment manufacturing (OEM) markets, particularly motor vehicles. In addition, the worldwide motor vehicle park will grow at a more rapid pace based on the emerging strength of developing markets, which will support aftermarket demand.

China, Asia/Pacific region to remain dominant

The Asia/Pacific region, which represented 44 percent of the global market for industrial rubber products in 2011, is forecast to post the fastest growth of any region through 2016. Gains in regional demand will be fueled by ongoing industrialization efforts and rising personal income levels, which will support manufacturing output in a range of industries, from construction machinery to household appliances to motor vehicles. China will remain the largest national market for industrial rubber products, accounting for 27 percent of total global demand in 2016. However, India is expected to post the fastest growth of any country worldwide, outpacing even China.

Demand for industrial rubber products in the US, the second largest national market in the world behind China, will experience an acceleration in growth based on an improved manufacturing climate. Western Europe and Japan will

World Industrial Rubber Product Demand by Region, 2011 (\$105.5 billion)



Asia/Pacific
44%

Western Europe
21%

North America
20%

Other Regions
15%

photo: ConITech AG

see modest increases, in large part because those markets have already matured. Nevertheless, because of the advanced industrial and technological nature of their economies, intensity of product use in these areas will remain among the highest in the world.

Motor vehicle market to post most rapid growth

The motor vehicle market is forecast to post the fastest gains through 2016, reflecting an acceleration in light vehicle production, which will bolster OEM sales of industrial rubber products. However, industrial equipment, which includes industrial machinery as well as off-road vehicles, is forecast to remain the largest market for industrial rubber products.

Mechanical rubber goods to remain leading product segment

Mechanical rubber goods -- which include such products as body seals, vibration control devices, and wiper blades -- are expected to remain by far the largest product segment through 2016. These products are employed heavily in motor vehicles, and segment growth will be largely attributable to the sanguine outlook for global automotive output. Rubber belts and hoses will see the fastest gains of any product segment during that span, bolstered by an improving outlook for pricing relative to mechanical goods.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Outlook & Suppliers

The market for industrial rubber products in China is expected to climb 10 percent annually to second fastest growth rate in Asia. It will be driven by continued manufacturing in China, which will spur development of a number of applications. Much of this will be due to the motor vehicle market and utilization rate in the country. A rapidly growing middle class and rising income levels in the country will support vehicle ownership in China. Through 2016, the nation will maintain status as the largest global automotive manufacturer, and see strong growth in its motor vehicle park. As a result, both OEM and aftermarket demand for certain industrial rubber products -- such as hoses, and gaskets -- will register healthy gains through 2016. Value gains will be limited to some extent by price competition from industrial rubber product suppliers.

Output of industrial rubber products from facilities in China is projected to advance just over 10 percent annually through 2016 to \$39.3 billion, approximating market increases. Gains in production will be driven by strong growth in domestic demand and additional investment in Chinese industrial rubber product manufacturing operations by foreign companies. The country's trade surplus in these products is expected to double through 2016, in large part because Chinese suppliers maintain a significant advantage in pricing over their counterparts in other nations. However, faster output gains through 2016 will be offset by intense competition from industrial rubber product manufacturers in other low cost developing Asia/Pacific countries, such as Thailand, Malaysia, and Vietnam.

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SAMPLE
TEXT

TABLE VI-3

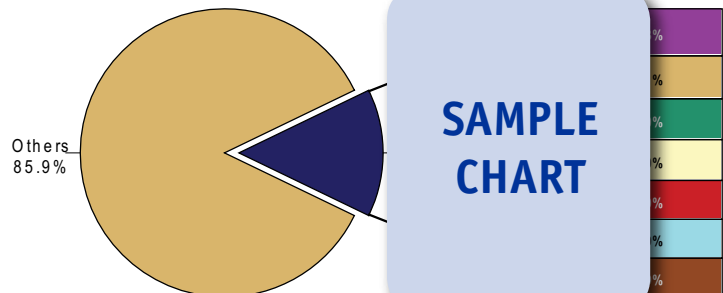
CHINA: INDUSTRIAL RUBBER PRODUCT SUPPLY & DEMAND (million dollars)

Item	2001	2006	2011	2016	2021
Population (million persons)	1.2	1.3	1.4	1.5	1.6
per capita GDP	1,000	2,000	3,000	4,000	5,000
Gross Domestic Product (bil 2010\$)	10,000	20,000	30,000	40,000	50,000
Motor Vehicle Production (000 units)	1,000	2,000	3,000	4,000	5,000
Motor Vehicles in Use (million)	1.0	2.0	3.0	4.0	5.0
Manufacturing Value Added (bil 2010\$)	10,000	20,000	30,000	40,000	50,000
\$ industrial rubber product/capita	100	200	300	400	500
\$ industrial rubber product/000\$ GD	1.0	2.0	3.0	4.0	5.0
\$ industrial rubber product/000\$ MV	100	200	300	400	500
Industrial Rubber Product Demand					
net exports					
Industrial Rubber Product Shipments	4,000	8,000	12,000	16,000	20,000

SAMPLE
TABLE

CHART VIII-1

WORLD INDUSTRIAL RUBBER PRODUCT MARKET SHARE (\$105.5 billion, 2011)



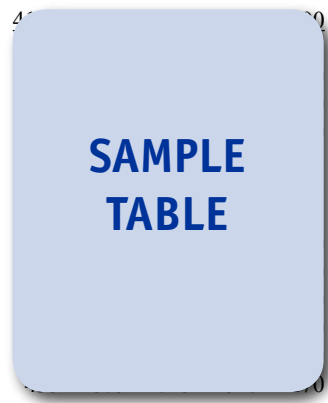
SAMPLE
CHART

**Sample Profile,
 Table & Forecast**

TABLE VI-4

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

Item	2001	2006	2011	2016	2021
Industrial Rubber Product Demand	4,100	10,000	23,800	35,000	45,000
By Product:					
Mechanical Goods					
Hose					
Belts					
Roofing					
Other					
By Market:					
Industrial Equipment					
Motor Vehicles					
OEM					
Aftermarket					
Construction					
Aerospace & Other					



COMPANY PROFILES

Mark IV Industries Incorporated

501 John James Audubon Parkway
 Amherst, NY 14228
 716-689-4000
 http://www.markiv.com

Sales: \$1.2 billion (any)
 Geograph: North America 31%,
 South America 67%,
 Europe 3%
 Region 3%

Key Products

Mark IV Industries manufactures engineered power transmission systems and components. The Company operates through the Power Transmission division, which also operates as the Dayco business unit. Mark IV Industries is owned by an affiliate of Sun Capital Partners Inc. (Boca Raton, Florida), a private equity firm. In July 2011, the Company sold its Mark IV Systemes Moteurs Air Intake and Cooling business (France) to Sogefi SpA (Italy) for approximately \$200 million.

The Company is active in the world industrial rubber products industry through the Dayco unit, which makes a wide range of mechanical power transmission components and systems for original equipment manufacturer (OEM) and aftermarket users. These products, which are mainly sold under the DAYCO brand name, are made using rubber and other materials. The unit's OEM products include such industrial rubber products as belts and dampers. Belts comprise timing, poly rib, raw edge, and other varieties, while dampers include camshaft and crankshaft types. Aftermarket power transmission components and systems include rubber belts and hoses. Among the aftermarket belts are DAYCO POLY COG serpentine types, DAYCO POLYRIB

"Sales of industrial rubber products in China totaled \$23.8 billion in 2011, making the country the largest market for these products in the world. In 2006, China was the second largest industrial rubber product market behind the US, but Chinese demand has more than doubled since that time. Recent market gains have been fueled by the country's rapid industrialization, boosting domestic production of various goods that utilize industrial rubber products. In addition, the rising motor vehicle utilization rate in the country, combined with heightened motor vehicle production levels, has ..."
 --Section VI, pg. 141

OTHER STUDIES

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World Rubber

Global rubber consumption is forecast to rise 4.3 percent annually through 2015 to 30.5 million metric tons, driven by increasing tire output as global motor vehicle production accelerates from a weak base. The Asia/Pacific market will remain dominant and grow the fastest. Non-tire rubber sales will outpace growth in tire rubber sales. This study analyzes the 24.8 million metric ton world rubber industry, with forecasts for 2015 and 2020 by market, world region and for 30 countries. The study also evaluates company market shares and profiles industry players.

#2843 March 2012..... \$5800

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 competitors.

#2860 February 2012..... \$5800

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

About The Freedonia Group

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