World Abrasives

Industry Study with Forecasts for 2017 & 2022

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World Abrasives Demand
Industry Study with Forecasts for 2017 & 2022

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Improved manufacturing processes will benefit abrasives market value as these often require greater abrasive use per unit and an increasing amount of higher-priced, value-added abrasives.

World demand to rise 5.8% annually through 2017

Worldwide demand for abrasives products is forecast to expand nearly six percent per annum to $40.0 billion in 2017, with almost all types benefiting from a variety of positive factors. Growth in the Asia/Pacific region will continue to drive gains, with especially strong advances in the large Chinese market. Of equal importance is an expected recovery in the developed regions of the world, notably the US, Western Europe, and Japan, where durable goods manufacturing, the leading outlet for abrasives sales, will accelerate along with continued improvements in the overall economic outlook. Throughout the world, an emphasis on improved manufacturing processes will benefit abrasives market value as not only do these often require greater abrasive usage per unit but also an increasing amount of higher-priced, value-added products overall. These trends are especially apparent in developing countries in the Africa/Mideast region, South America, and Eastern Europe.

China to account for over half of all new demand

Over half of all additional abrasives demand generated between 2012 and 2017 will be attributable to China, the world’s leading national market for these products. While growth in the country will decelerate as its abrasives industry matures, China’s gains will still far surpass those seen in any other major market. Growth in manufacturing activity, increasing living standards, and additional foreign investment will continue to stimulate demand in China. In addition, as the country’s durable goods industries become more sophisticated, the intensity of abrasives use is also expected to increase noticeably. China is also the largest producer of abrasives worldwide, supplying both domestic demand and a growing export market.

Demand in developed areas to improve from several years of declines

Following several years of declines during the 2007-2012 period, demand for abrasives in North America, Western Europe, and Japan is projected to improve (although growth in all of these areas will remain well below the world average). As these markets rebound from their economic malaise, production of durable goods will improve, generating higher demand for abrasives. Sales of abrasives in the Africa/Mideast region, Central and South America, and Eastern Europe are also expected to accelerate, as their durable goods sectors continue to develop. More sophisticated industries generally require a greater amount of abrasives. Additionally, demand for higher-end abrasives products will increase, adding to market value gains.

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China: Abrasives Markets

In 2012, demand for abrasives in China amounted to $8.9 billion. The leading end use markets for abrasives are machinery, electrical equipment, transportation equipment, and other durable goods industries. Because of rising living standards, sales of abrasive products for cleaning, maintenance, and other applications have more than doubled since 2002. China’s massive construction sector also generated a significant amount of demand for abrasives. From 2007 to 2012, abrasives grew nearly 15 percent per annum, the fastest rate worldwide. Abrasives consumption surged as the production of a wide range of durable goods increased rapidly. Hundreds of new factories were opened during this time, greatly boosting product demand.

The Chinese abrasives market is projected to expand 10 percent per year between 2012 and 2017 to $14.4 billion. About 55 percent of global abrasives demand generated between 2012 and 2017 will be attributable to China because of massive gains in manufacturing activity. The transportation equipment segment is expected to record the fastest growth through 2017, as motor vehicle output increases at a rapid pace. For example, GM’s joint ventures in China recently announced plans to invest $11 billion in local factories by 2016 in order to boost motor vehicle production capacity by 30 percent. Additionally, GM announced plans to start the construction of a new Cadillac plant in Jinqiao, Shanghai in mid-2014. The electrical and electronic equipment segment is expected to register the second fastest growth rate through 2017 because of large output gains and inflows of foreign capital. Samsung SDI, for instance, announced that it would form a joint venture in China and build a new factory to produce electric car batteries in 2015. All other segments of the abrasives market will expand between about eight and 10 percent per year during the 2012-2017 period because of a large increase in manufacturing activity.

Table VI-6
CHINA: ABRASIVES DEMAND BY PRODUCT (million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2002</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2022</th>
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<td>Asia/Pacific Abrasives Demand</td>
<td>5455</td>
<td>9640</td>
<td>14950</td>
<td>22050</td>
<td>31450</td>
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<tr>
<td>% China</td>
<td>33.6</td>
<td>46.2</td>
<td>59.5</td>
<td>65.1</td>
<td>68.7</td>
</tr>
<tr>
<td>China Abrasives Demand</td>
<td>1835</td>
<td>4455</td>
<td>8900</td>
<td>14350</td>
<td>21600</td>
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<tr>
<td>Nonmetallic:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coated</td>
<td>1695</td>
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<td>1485</td>
<td>3215</td>
<td>5625</td>
<td>8950</td>
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<tr>
<td>Paper &amp; Other</td>
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<td>635</td>
<td>1300</td>
<td>2180</td>
<td>3320</td>
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<tr>
<td>Bonded</td>
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<td>1915</td>
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<td>5630</td>
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<td>3355</td>
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<td>Superabrasive</td>
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<td>1290</td>
<td>2375</td>
<td>3560</td>
<td>5090</td>
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<tr>
<td>Loose Grains &amp; Powders</td>
<td>240</td>
<td>535</td>
<td>980</td>
<td>1465</td>
<td>1945</td>
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<td>Metallic</td>
<td>140</td>
<td>395</td>
<td>940</td>
<td>1500</td>
<td>2450</td>
</tr>
</tbody>
</table>

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Nippon Resibon Corporation
22-10, Kitahorie 1-chome
Nishi-Ku, Osaka 550
Japan
816-6538-0198
http://www.resibon.co.jp

Sales: $165 million (FY 2013)
Employment: 1,160 (FY 2013)
Key Products: abrasive grinding wheels, cut-off wheels, flap discs, and glass fiber netting discs

Nippon Resibon is a producer and marketer of abrasive wheels and other items. The Company has manufacturing operations in Japan and Thailand.

The Company participates in the world abrasives industry through the production of abrasive wheels in grinding and cut-off types, as well as flap discs and glass fiber netting discs. Grinding wheels are produced in flexible and depressed center styles under the BEST TOUCH and BEST GRIND brand names, respectively. These wheels, which have diameters ranging from 5 to 23 centimeters (cm), are designed for grinding applications on such materials as steel, stainless steel, masonry, stone, and glass. Among Nippon Resibon’s cut-off wheels are BEST CUT types for steel, stone, and masonry end uses; BEST THIN CUT and RSC iron-free varieties for grinding stainless steel; and HIDANO TAKUMI units, which are intended for fast cut applications on general steel substrates.

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