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Industrial Rubber Products

US Industry Study with Forecasts for **2019 & 2024**

Study #3305 | July 2015 | \$5300 | 307 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or
+1 440.684.9600
Fax: +1 440.646.0484
Email: info@freedoniagroup.com

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Gains will be fueled by increased production of machinery, healthy growth in nonresidential construction spending, and a modest bump in motor vehicle production -- although this market will slow considerably.

US demand to rise 3.4% annually through 2019

Demand for industrial rubber products in the US is forecast to expand 3.4 percent per annum to \$24.4 billion in 2019. Gains will be fueled by increased production of machinery and healthy growth in nonresidential construction spending. A modest bump in motor vehicle production will also provide industrial rubber producers with new sales opportunities, though this market will slow considerably from the robust output increases of the 2009-2014 period. However, competition from suppliers in low-cost countries will continue to restrict price increases for most industrial rubber products, limiting value gains to some degree. Furthermore, these goods will continue to face competition from less expensive plastic products in a number of applications.

Rubber roofing among fastest growing products

Bolstered by strong gains in construction activity, rubber roofing and other construction related products (such as rubber flooring, wall coverings, and geomembranes) are forecast to register the healthiest growth of any major product category through 2019. Suppliers of these products have boosted their manufacturing capacity in response to solid market conditions. For instance, in April 2015 Johns Manville (a Berkshire Hathaway company) completed an expansion at its Scottsboro, Alabama

US Industrial Rubber Product Demand, 2019 (\$24.4 billion)



Mechanical Goods

Hose

Belts

Roofing

Other Products

rubber roofing plant that increased the facility's capacity by 20 percent.

Mechanical goods will continue to account for the largest share of total demand in 2019, although sales gains in this product segment will not be as strong as those forecast for others. Nearly half of all mechanical rubber goods are utilized in motor vehicle applications, where modest output gains will restrain growth to some degree. Sales of both hose and belts will outpace those of mechanical goods, supported by the wide variety of uses for these products. Suppliers of hose and belts will benefit from increased output of the durable goods, particularly machinery, in which they are used.

Construction market to post strongest gains

The construction market for industrial rubber products is expected to post the strongest gains through 2019, bolstered by a robust recovery in nonresidential building activity and an acceleration in residential construction growth. Machinery will remain the largest market for industrial rubber products, recording the largest sales advances in dollar terms, supported by ongoing production increases for both industrial machinery and off-road equipment. Gains in both the motor vehicle and other transportation equipment markets will be relatively restrained, dampened by slowing real output growth.

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Sample Text, Table & Chart

RAW MATERIALS

Thermoset Rubber -- Demand for thermoset rubber in the manufacture of industrial rubber products is expected to decline 1 percent in 2019, slowing from 2018, and trailing the gains registered in 2017 and 2018. Demand is expected to be moderated by moderating growth in industrial machinery and transport equipment, as well as by competition from alternative materials. On the other hand, the automotive market, which will support sales of many applications of rubber segment encompasses natural rubber, as well as numerous synthetic varieties -- including styrene butadiene, polybutadiene, polyisoprene, ethylene-propylene diene (EPDM), nitrile, polychloroprene, and butyl -- as well as materials such as silicone, fluoroelastomers, polysulfide, and Thermoset rubber accounted for 58 percent of elastomer demand in 2014, down from 63 percent in 2009.

The ongoing shift from thermoset rubber to TPEs is continuing as synthetic rubber's displacement of natural rubber over the past decades. Synthetic rubber is a practical alternative to natural rubber, but has not entirely displaced it. Similarly, TPEs are unlikely to completely displace synthetic rubber due to limitations in performance characteristics. Synthetic rubber will continue to be used because of technological innovations in materials formulation and chemical processes, economies of scale in manufacture, and the widespread availability of petrochemical feedstocks. Synthetic rubber may be produced in a wide variety of types, depending on the specific formulation of additives, extenders, catalysts, or other feedstocks employed, as well as the physical conditions under which they are produced. In addition, more materials can be produced through the blending of synthetic elastomers with various other types of polymers. The most widely used types of synthetic rubber are EPDM, styrene butadiene, nitrile, and others including butyl rubber, polybutadiene, and polychloroprene.

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SAMPLE
TEXT

TABLE IV-21

NONFLAT BELT SUPPLY & DEMAND
(million dollars)

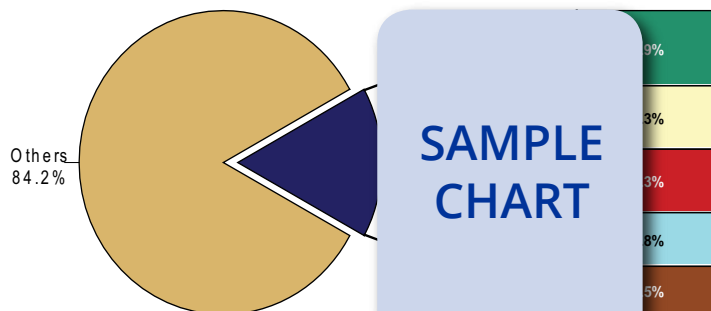
Item	2004	2009	2014	2019	2024
Durable Goods Shipments (bil \$)					
\$ nonflat belts/000\$ durables					
Nonflat Belt Demand					
By Market:					
Machinery					
Motor Vehicles					
Aerospace & Other Transport Equip					
Other Markets					
By Product:					
Industrial Transmission					
Vehicle Transmission					
Other					
net exports					
Nonflat Belt Shipments					
% nonflat Rubber Belt Shipments					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

US INDUSTRIAL RUBBER PRODUCT MARKET SHARE, 2014
(\$20.6 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE V-6
INDUSTRIAL MACHINERY MARKET FOR INDUSTRIAL RUBBER PRODUCTS
 (million dollars)

Item	2004	2009	2014	2019	2024
Industrial Machinery Shipments (bil \$) \$ rubber/000\$ machinery					
Industrial Machinery Rubber Demand					
By Product:					
Mechanical Goods					
Belts					
Hose					
Other					
By Application:					
OEM					
MRO					

Source: The Freedonia Group, Inc.

COMPANY PROFILES

American Roller Company

1440 13th Avenue
 Union Grove, WI 53182
 262-878-8665
 http://www.americanroller.com

Annual Sales
 Employment

Key Products

American Roller Company is a manufacturer of industrial rollers and roller covers. The Company is a subsidiary of CM Acquisitions LLC (Chicago, Illinois), a private equity firm.

The Company is involved in the US industrial rubber product industry via the manufacture and sale of rubber and other specialty rollers and coverings, including urethane, ceramic, hard coat, bowed, and heat-transfer types. These products are designed for use in the metals, pulp and paper, textile, steel, graphic arts, business machine, and other industrial markets.

Rubber-based rollers and/or coverings from the Company are made from such materials as elastomer, neoprene, ethylene-propylene diene monomer, nitrile, urethane, and silicon. Specific products include MILLENIUM rollers, which contain general-purpose elastomers for bag making, abrasive coating, and other end uses; ARCOFLOW rubber rollers, which provide uniform coating film weight for improved finished product quality; EXCELNIP rubber nip rollers, which are engineered for the most demanding cast extrusion and embossing applications; and PELLEX rollers, which are manufactured from mating

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Related Studies

World Thermoplastic Elastomers

This study analyzes the world TPE industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by market (e.g., motor vehicles; consumer goods; asphalt and roofing; adhesives, sealants and coatings; industrial products), product (e.g., SPCs, thermoplastic polyolefins, POEs, thermoplastic polyurethanes, thermoplastic vulcanizates, copolyester elastomers), world region and major country. The study also considers market environment factors, evaluates company market share and profiles industry players.

#3326..... October 2015.....\$6500

Roofing

US demand for roofing is projected to advance 3.9 percent annually to 252 million squares in 2019, valued at \$21.4 billion. Asphalt shingles will remain dominant while roofing tiles, metal roofing, and plastic roofing will grow the fastest. The new building construction market will outpace reroofing, and residential roofing demand will outpace nonresidential. This study analyzes the 208 million square US roofing industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry players.

#3293..... June 2015.....\$5500

Geosynthetics

US demand for geosynthetics is forecast to rise 3.8 percent yearly to 1.3 billion square yards in 2019, valued at \$2.5 billion. Nonwoven geotextiles will remain the dominant product by volume, while geomembranes will grow the fastest from a smaller base. The best market prospects will be in construction and transportation infrastructure. This study analyzes the one billion square yard US geosynthetics industry, with forecasts for 2019 and 2024 by product, market and region. The study also evaluates company market share and profiles industry players.

#3289..... June 2015.....\$5300

World Industrial Rubber Products

Global demand for industrial rubber products will rise 6.6 percent annually to \$158 billion in 2018. More than half of all additional product demand will be accounted for by China. Rubber hose will be the fastest growing product segment. Industrial equipment and construction will be the fastest growing markets. This study analyzes the \$115 billion world industrial rubber product industry, with forecasts for 2018 and 2023 by market, product, world region, and for 27 countries. The study also evaluates company market shares and profiles industry players.

#3230..... December 2014.....\$6300

Gaskets & Seals

The US market for gaskets and seals is expected to expand 3.8 percent annually through 2018 to \$10.6 billion. Compression packings and molded seals and packings will be the fastest growing seals, while expanded graphite gaskets will be the most rapidly growing gasket products. The electrical and electronic products market will lead gains. This study analyzes the \$8.7 billion US gasket and seal industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3226..... October 2014.....\$5100

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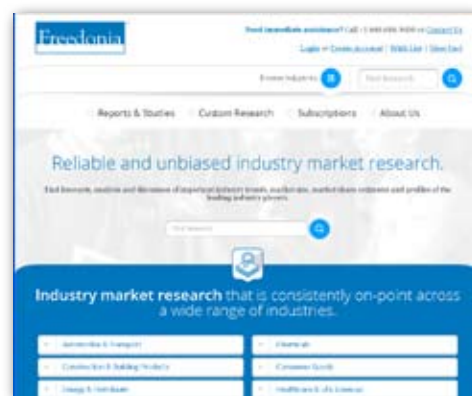
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