

# Gasket & Seal Market in the US

## Industry Study with Forecasts for 2020 & 2025

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The fastest gains in gasket and seal sales will be exhibited by metallic gaskets. Metallic gaskets are the preferred product in a number of applications due to their strength and suitability. As a result, metallic gaskets are expected to replace nonmetallic gaskets in many installations.

Molded seal and packing demand will also increase at an above average rate through 2020, with gains stemming from favorable market conditions for a number of equipment and process manufacturing industries, many of which will experience an acceleration in output that will help boost overall product sales.

### Motor vehicle applications to remain dominant

Motor vehicles will remain the largest market for gaskets and seals, accounting for 43 percent of all demand in 2020 due to the high number of gaskets and seals used on the average vehicle. However, after posting the fastest gains of any market between 2010 and 2015, growth in motor vehicle gasket and seal sales will be considerably slower through 2020 due to an anticipated moderation in motor vehicle production.

### Aerospace markets to rise fastest

Among major gasket and seal markets, aerospace equipment will register the most rapid increases through 2020. Although aerospace equipment production will slow compared to recent periods, the rate of output growth will

be above that for most other equipment, boosting associated gasket and seal demand. In addition, aerospace equipment utilizes a number of high-value products that will contribute to overall value gains.

### US to have smaller trade deficit

US shipments of gaskets and seals will increase at a rate similar to that of demand through 2020. This will leave the US with a relatively small trade deficit. The majority of gaskets and seals manufactured in the US are sold domestically, and advances in domestic production will largely be supported by demand gains.

### Study coverage

This Freedonia industry study analyzes the \$8.9 billion US gasket and seal market for 2015. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product (metallic gaskets, nonmetallic gaskets, molded seals and packings, body seals, shaft seals, compression packings, other) and market (motor vehicles, machinery, electrical and electronic products, aerospace equipment, marine and rail equipment, other). The study also evaluates company market share data and provides a competitive analysis of industry participants such as Cooper Standard, Dana, EnPro Industries, Federal-Mogul, Flexitallic, Freudenberg, Henniges Automotive, John Crane, Parker-Hannifin, SKF, Toyoda Gosei, and Trelleborg.

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### GASKET SUPPLY & DEMAND

**Fiberglass** -- Demand for fiberglass gaskets is forecast to increase million, outpacing all other parts used in a wide range of applications, which include high pressure vessels, automotive components, and industrial machinery. The material to be used in these gaskets can be manufactured in a variety of configurations based on the requirements of the application. However, similar to other gasket materials, lower cost products will

**TABLE VI-4**

### OEM MOTOR VEHICLE GASKET & SEAL DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Motor Vehicle Production (000 units)					
\$ OEM G&S/vehicle					
OEM Motor Vehicle G&S Demand					
Body Seals:					
Automobiles					
Light Trucks & Vans					
Medium & Heavy Vehicles					
All Other Gaskets & Seals:					
Automobiles					
Light Trucks & Vans					
Medium & Heavy Vehicles					
% OEM					
Total Motor Vehicle G&S Demand					

Source: The Freedonia Group

The glass fibers used in these gaskets are typically textile glass fibers. They are manufactured by drawing molten glass into strands of various diameters and then treating them with various proprietary finishing methods in order to impart them with certain performance characteristics. The glass strands are then wound, chopped, or woven into a variety of configurations, including chopped strand, continuous roving, fiber, preform, reinforcing mat, and woven roving. The type of fiber used, the arrangement of the fiber within the product, and the type of fiber used in the product all affect the performance characteristics of glass fibers. E-glass (electrical grade) is the most widely used type of glass fiber and is suitable for a variety of general purpose applications. S-glass, which was originally developed for aerospace use, is more expensive than E-glass but is designed to provide superior strength, as well as impact, temperature, and fatigue resistance. C-glass (chemical grade) is more resistant to acid, alkalis, and water, but is used less frequently than E- and S-glass.

In order to protect the textile glass fibers from breaking during manufacturing and handling, a protective coating called sizing is applied.

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**TABLE V-3**

### O-RING DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Molded Seal & Packing Demand					
% O-rings					
O-Ring Demand					
Nitrile Rubber					
FKM Fluoroelastomers					
Other					

Source: The Freedonia Group

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

## Related Studies

### World Bearings

World demand for bearings will rise 6.1 percent yearly through 2020 to \$104.5 billion. Unmounted ball and roller bearings will continue to be the largest bearing type, while the fastest growing markets will be in aerospace and motorcycles. China will remain the largest bearings user, though India will post the fastest gains. This study assesses the \$77.7 billion bearings market, with forecasts for 2020 and 2025 for supply and demand, plus demand by market, in six regions and 17 countries. The study also evaluates company market share and profiles global players.

#3442..... August 2016 ..... \$6400

### Air & Fluid Filters

Sales of air and fluid filters in the US will expand 3.8 percent annually to \$9.7 billion in 2020. Advances will be fueled by a positive economic outlook and increasing consumer attention to domestic indoor air quality and tap water purity. The utilities and consumer segments will be the fastest growing markets. Air filters will slightly outpace the dominant fluid filters segment. This study analyzes the \$8.1 billion US filter industry, with forecasts for 2020 and 2025 by filter medium, product, and market. The study also evaluates company market share and profiles industry players.

#3379..... April 2016 ..... \$5500

### World Industrial Valves

World demand for industrial valves will rise 4.3 percent annually through 2019 to \$98.5 billion. Market growth in developing areas will outpace product demand in developed countries. The expansion and upgrading of water infrastructures will help sales increases. This study analyzes the \$80 billion world industrial valve industry, with forecasts for 2019 and 2024 by product and market for six world regions and 25 major countries. Total demand is given for an additional seven countries. The study also evaluates company market share and profiles industry players.

#3369..... January 2016 ..... \$6300

### World Gaskets & Seals

World demand for gaskets and seals will rise 5.3 percent per annum to \$70.8 billion in 2019. Growth in the machinery market will outpace motor vehicles. India will be the fastest growing national market, while China will post by far the largest advances in value terms. This study analyzes the \$54.7 billion world gasket and seal industry, with forecasts for 2019 and 2024 by market and application for six world regions and 18 major countries. Total demand is given for an additional 9 countries. The study also evaluates company market share and profiles leading competitors.

#3345..... December 2015 ..... \$6200

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

## About The Freedonia Group

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