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A new Market Report on the Bonded Abrasives, Coated Abrasives and Superabrasives Industry....

THE ABRASIVES INDUSTRY IN EUROPE AND NORTH AMERICA: A MARKET / TECHNOLOGY REPORT

By John Briggs, *Enceram*, and Ted Giese, *Abrasive Engineering Society*

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The report provides in-depth information on:

- Market growth prospects for coated, bonded and loose abrasives
- Markets for bonded abrasives by product type, country/region and applications
- Markets for coated abrasives by product type, country/region and applications
- Markets for superabrasives by bond type, country/region and applications
- Markets for loose abrasives for blast cleaning and shot peening
- Markets for synthetic abrasive grains (aluminium oxide, silicon carbide, and diamond/CBN)
- Production statistics for bonded and coated abrasives in Europe and the USA
- Production and consumption of natural abrasives (garnet, pumice, olivine etc) in Europe and the USA
- Synthetic diamond production capacity and trade (by country)
- Growth trends in user sectors (construction, automotive industry, electronics, etc)
- Market shares by company for bonded and coated abrasives, superabrasives and abrasive grains
- Import and export statistics for abrasive grains to and from EU countries, the USA and China
- Import and export statistics for bonded and coated abrasives to and from EU countries, China, Japan, Brazil, Canada and the USA
- Review of technological developments (CMP, aggregated diamond nanorods, etc) and their impact on abrasive products
- Profiles of major multinational, US and European-based abrasives manufacturers; their size, market position and product range
- Over 500 A4 pages and over 300 tables including data on production, consumption, and imports/exports

AVAILABLE NOW – "The Abrasives Industry in Europe and North America: A Market / Technology Report" analyses the bonded abrasives (including superabrasives), coated abrasives and loose abrasives (blasting media etc.) industry sectors, providing up-to-date information on production and trade of these abrasive products and their raw materials.

The recent global economic downturn has affected the abrasives industry just as it has many of the key manufacturing sectors it serves. However, this new report provides data that shows that the industry is now poised to take advantage of the upturn in worldwide economies that is now starting to be realised. Following a period of consolidation, the abrasives industry is emerging leaner and better placed to provide end users with the specialist products now demanded.

The report is over 500 pages in length and provides:

- In-depth analysis of the European and North American abrasives industries, with key additional information on Latin American and Asian countries.
- Detailed statistical information is presented in over 300 tables
- Review of key producers – company history, recent activities, market position, latest financial performance, etc.
- End-user markets assessed and growth patterns identified
- Technology trends identified

The European Union (EU) bonded abrasives market, excluding superabrasives, was valued at around €850 million in 2008. There has been shrinkage in 2009, but the sector is forecast to return to positive growth in 2010. The coated abrasives market, which was valued at €950 million in 2008, will shrink to around €836 million by 2010 and is then forecast to grow by around 3% per year.

The total value of diamond and CBN products sold in the EU in 2008 was around €1.3 billion, excluding single point cutting tools and large stones. Total demand for blast cleaning and related abrasive material in the region is in excess of 850,000 tonnes, worth approximately €285 million; this total includes about 175,000 tonnes of steel and cast iron abrasives.

Overall, therefore, the total market for loose, bonded, coated and superabrasive products in the European Union in 2008 was valued at about €3.4 billion. Germany is the largest national market in the EU, with about 27% of the total. The overall total is expected to shrink to around €2.9 billion in 2010 and then resume slow growth.

Abrasive raw materials, such as silicon carbide and fused aluminium oxide, which are consumed in bonded and coated abrasive products, and loose abrasives, add up to around 200,000 tonnes in the EU, with a corresponding value of €220 million. Around 400 million carats (about 80 tonnes) of superabrasive diamond and CBN grains were consumed in the EU in 2008, for precision engineering abrasive applications.

The total value of abrasive products produced in the USA in 2008 was \$4.8 billion, comprising around \$2.1 billion of coated and related products, \$1.3 billion of bonded products (including superabrasives), \$840 million of abrasive grain for the manufacture of abrasive products, \$360 million of metallic abrasives for shot blasting, and \$200 million of other types. Consumption of abrasives in the US in most categories was higher in 2008 than in the EU, and relied more on imports. The US industry showed a sharp decline in late 2008 and the first half of 2009, which acted as a catalyst for further consolidation within the industry. A slow recovery began in the last half of 2009 and is projected to continue through 2012. The report provides crucial information on the US abrasives sector, and gives key data that provide a concise statistical framework to predict future growth potential.

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7 COMPANY PROFILES

- Abrasive Technology Inc, Almatix Inc, Asahi Diamond Industrial Co
- Baikowski Chimie, Boart Longyear Group, Robert Bosch GmbH (Swiss Industrial Abrasives)
- Carborundum Universal Ltd (Volzhsky Abrazivny Zavod), Casirom SA, Comet dd
- Diametal AG, Diamond Innovations, Disco Corp
- Element Six Ltd, Elfusa Geral de Electrofusao Ltda, ELSID SA, Ervin Amasteel, ESK-SIC GmbH, Eurogrit BV
- Friatec AG
- Grindwell Norton Ltd, Guyson International Ltd
- Hermes Schleifmittel GmbH & Co KG, Husqvarna AB
- Iljin Diamond Co, Ilyich Abrasive Co, Imerys
- Jason Finishing Group (Osborn, Lippert Unipol)
- Karbosan AS, KGS Diamond Group SA, Kinik Co Ltd, Klingspor AG, Kollo Silicon Carbide BV, KWH Mirka Ltd
- Luga Abrasive Plant JSC, Lukas Erzeit
- Meister Abrasives AG, Motim Co Ltd
- Nabaltec GmbH, Navarro SiC SA, Norican Group (Wheelabrator), Noritake Co Ltd, North Cape Minerals
- Orient Abrasives Ltd
- Pometon Powders SpA, Potters Europe
- Rio Tinto Alcan Inc, August Rüggeberg GmbH & Co KG, Pferd-Werkzeuge, Rusal Boxitogorsk JSC
- Saint-Gobain, SAIT Abrasivi SpA, Sandvik AB, Showa Denko KK, Silmet AS, Sovitec SA, H.C. Starck GmbH, Swaty dd
- 3M Co, TAF Srl, Theleico Schleiftechnik GmbH & Co KG, Tosoh Corp, Treibacher Schleifmittel AG, Tyrolit Schleifmittelwerke Swarovski KG
- NV Umicore SA
- VSM AG, Vulkan Inox GmbH
- Washington Mills Electro Minerals Corp, Wheelabrator Allevard SA (Metabrasive Ltd), Winterthur Technology Group (Rappold Winterthur, SlipNaxos, Wendt)
- Zaporozhy Abrazivny Combinat JSC

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ABOUT THE AUTHORS

Author Dr John Briggs has worked as an industrial consultant since 1984, providing marketing and technical data on inorganic materials through the Enceram consultancy. He was the author of the previous five editions of this report. Prior to becoming a consultant, Dr Briggs worked for the Battelle Institute, and subsequently for the Morgan Crucible Group.

Ted Giese has been writing about in the US abrasives industry since 1988, when he became the magazine editor for the Abrasive Engineering Society, a US-based technical society for the abrasives industry. He is also the author of a previous market study on the US market for abrasives. Giese created the Abrasives Mall internet site in 1995 and has also prepared several websites for US abrasives companies. He also publishes news about the industry in the Abrasive User's News Fax, which is now in its 14th year of publication.

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