

DID YOU KNOW?



...that when you cook, wash your clothes, feed your baby, you are using rubber?

...that rubber is essential to keep the world connected? Kilometres of hoses and cables are encased in rubber deep in our oceans?

...that kilometres of rubber belts are used to transport critical raw materials?

...that the vehicle is made of more than 100 rubber components? If you weigh all the rubber components present in the car, they weigh as much as the four tyres?

...that whenever there is a fixed part and one that moves, you need a rubber piece between them?

...that from your shoes to airplanes, every time you move you use rubber?

...that diversification and focus per application are key for the industry, with the effect of distributing competence in terms of technology and marketing?



BELGIUM
www.federplast.be



FINLAND
www.kumiteollisuus.fi



FRANCE
www.lecaoutchouc.com



GERMANY
www.wdk.de



ITALY
www.federazionegommaplastica.it



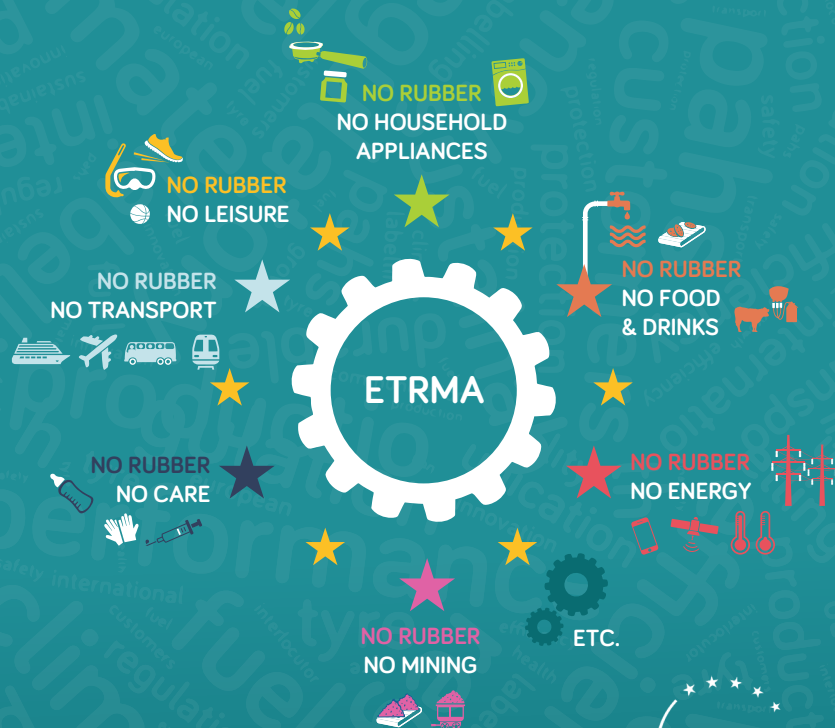
THE NETHERLANDS
www.vereniging-nvr.nl



SPAIN
www.consorciocaucho.es

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THE RUBBER GOODS INDUSTRY AT A GLANCE



Rubber is unique,
strategic and
not replaceable.



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FACTS & FIGURES

General rubber goods (GRG) are found in the sky, deep in the earth and everywhere in between!

Major markets are :

63%



Transport (automotive, rail, ships, aviation, aerospace, ...)

10%



Household appliances

8-10%



Industrial applications (construction, mining, agriculture, farming, machinery, ...)

10-12%



Energy/offshore

4-5%



Food contact (drinking water, baby care, medical devices, ...)

1-2%



Leisure and sports equipment

Rubber is a material that is unique and strategic which cannot be replaced:

Rubber products, in terms of costs are not important, but they are an essential enabler of other industries. Without rubber their products do not work.

TPMS and ABS would not exist without very specific gaskets made by two or three companies in the world.

Helicopters: there is a very strategic piece in the rotor that is in rubber and is only produced by two companies in the world.

Hoses used in Arctic conditions: Rubber is the only material that allows flexibility, durability and safety in very low temperatures. Because of its ability to withstand very high and very low temperatures, rubber is also used in the space industry.

An innovative and technology driven industry:

Drivers for innovation include high technology customers, high performance requirements and regulatory pressure.



As much as **5%** of the industry's investments are in **R&D**.

A fragmented sector

More than **6000** companies present in Europe



98% are SMEs and many are micro-enterprises (<10 employees).

However, most of the GRG turnover is produced by about 20 companies organised in several small units (50 to 100 people in each factory supported by technical centre) according to their product-lines.

A highly integrated value chain

in order to respond to the requirements of its customers, the sector needs to develop a very close relationship with its customers. This is a growing trend.

The sector provides employment for 160.000 employees

and many of these have very specific know how to respond to the technological needs of the industry.



Turnover about 30 Billion

European, American and Japanese companies dominate the world market.

These include 46 of the first 50 ranking GRG producers in the world, with 17, 15 and 14 companies respectively. This is linked to the high technological value added provided by companies in these countries. In 2014, the top three companies were European.



The trade balance is positive

With **€4.3 B of exports** compared to **€3.4 B of imports**



This is driven by the high value added products.

Technical and scientific support network:



ERRLAB is the European Research and Rubber Laboratories. It was launched in 2015 and creates a European informal network of laboratories of more than **100** doctors, engineers and technicians. <http://www.errlab.eu/>