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March 1981

ASBESTOS

1980 International Asbestos Manufacturing Industry Review

The Cover Story
—See Page 28—



devoted to the International Asbestos Industry

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We're helping industry use asbestos wisely with ads like this one.

We want our customers to continue taking advantage of the unique properties of asbestos. Too often, their ability to do so is hindered by decisions based on emotion rather than factual information. So we're calmly and repeatedly explaining the facts about asbestos-containing products in a series of full page, four-color ads, appearing regularly in *Industry Week* and the industrial edition of *Business Week*.

The advertising program is designed to let industry management know that in an extensive range of finished products, such as asbestos/cement sheets and pipe, gasketing materials, asphalt-based coatings, latex and resin-bound papers, and friction materials, the asbestos is "locked in" by various binders to form environmentally safe materials. This ad lets them know that by following certain practices, asbestos can be handled and processed safely.

Our investment in advertising is not nearly as large as that directed toward developing safer ways to ship, handle, and use asbestos. But in many ways, it's equally important. We think it's part of our job as the world's leading producer of asbestos. And part of our continuing commitment to the future of asbestos.

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Asbestos is not a problem when handled properly.

You can do something about it.

In thousands of finished products, asbestos serves an essential function that has not been duplicated on a cost performance basis. Like other naturally-occurring minerals, asbestos can be a potential health hazard when inhaled. However, with technological advances and established work practices, along with industry and Federal regulations, it can be safely processed, transported, and handled. In addition, there are virtually no hazards associated with the proper end use of products in which the asbestos fibers have been encapsulated or "locked-in" by environmentally safe binders. For this reason, we advocate the elimination of its use in friable products in which it cannot be safely bound. As the world's leading asbestos supplier, we are vitally concerned with its safe handling and application.

For more information, please write to Denis Kelleher, Asbestos Fiber Division, Johns-Manville, Ken-Caryl Ranch, Denver, Colorado 80217.



Use of personal protective equipment provides increased safety for a variety of work situations.



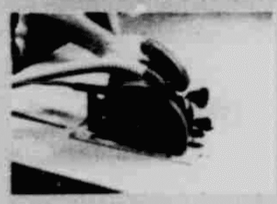
Floors and all work surfaces should be kept free of fiber accumulations by using industrial vacuum cleaners equipped with proper exhaust filters. Asbestos should be vacuumed, never swept.



Fiber handling technology has evolved a diverse range of special packaging to assure safer handling and shipping.



Totally enclosed, negative pressure automatic bag openers facilitate in-plant dust control.



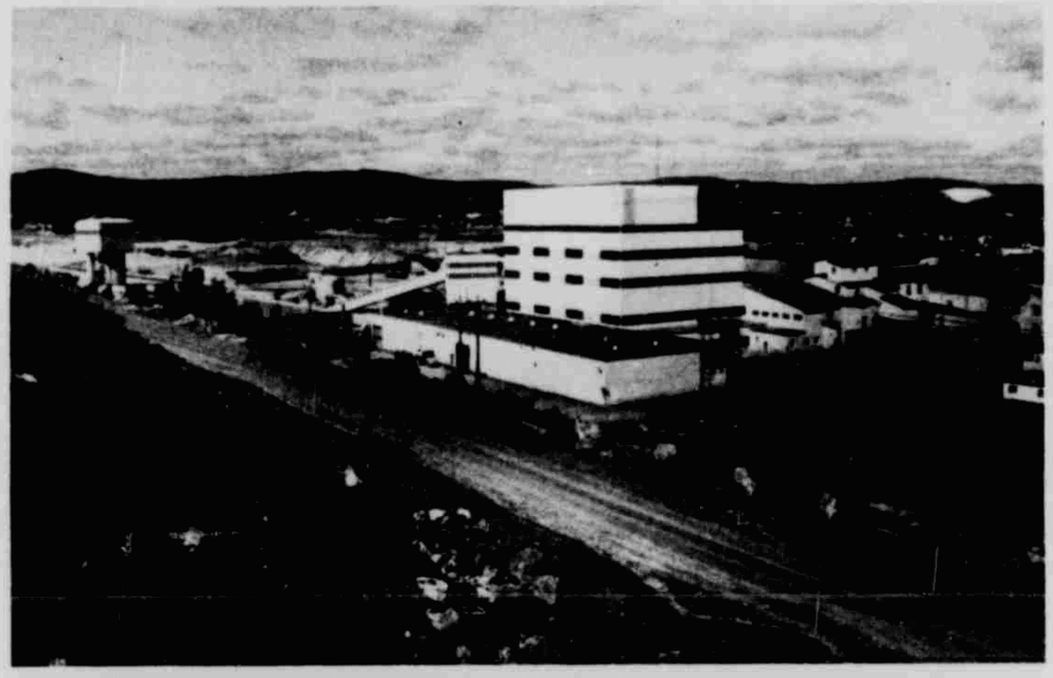
Fabrication tools require proper hooding and should be connected to a source of exhaust air that includes a fabric bag filter. When practical, wet cutting should be employed.

JM Johns-Manville

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ASBESTOS

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International Asbestos Manufacturing 1980 Industry Review

U.S. Product Imports

In compiling U.S. Bureau of the Census statistics for the past seven annual periods to August, it is calculated that the total value of all asbestos-containing products imported into the United States were slightly less than the prior year although the value was up over the other six years under review. Product categories responsible for the 1980 decrease were asbestos textiles and asbestos-cement pipes. Total value for all products in the year to August 1980 reached US$33,088,132, a 3.7% drop from 1979 ($34,355,059) but an increase of 8.1% over 1978 ($30,598,414), 11.6% over 1977 ($29,637,523), 65.6% over 1976 ($19,984,210), 36.6% over 1975 ($24,227,826) and 80.2% over 1974 ($18,360,227).

Comparing quantities, imports of *asbestos yarn, cloth and tape* were down 15.5% from 1979, down 21.7% from 1978, up 6.7% over 1977, up 19% over 1976, down 2.0% from 1975 and down 0.5% from 1974. Imports of *asbestos-cement pipes, tubes and fittings* dropped 72.5% below 1979, 59.3% below 1978, 49.8% below 1977, 11.4% below 1976, 49.5% below 1975 and 38.5% below 1974, making the latest annual period the lowest in the past seven years. The amount of *other asbestos-cement products* imported into the U.S. increased 61.1% over 1979, 221.2% over 1978, 58.7% over 1977, 213.7% over 1976, 65.3% over 1975 and 47.0% over 1974. Imports of *other asbestos articles* rose 1.6% over 1979, dropped 9.6% from 1978 and were up 4.7% over 1977, 14.3% over 1976, 13.4% over 1975 and 50.5% over 1974.

U.S. IMPORTS OF ASBESTOS YARN, CLOTH & TAPE

Principal sources in 1980 included Canada—32.5%, Mexico—32.0%, Taiwan—9.6%, West Germany—6.5%, United Kingdom—6.3%.

Year to August 1980— 8,182,486 lbs. valued at $13,346,282 ($1.63 per lb.)
Year to August 1979— 9,685,062 lbs. valued at $15,124,587 ($1.56 per lb.)
Year to August 1978—10,450,344 lbs. valued at $16,589,044 ($1.59 per lb.)
Year to August 1977— 7,666,978 lbs. valued at $14,784,257 ($1.93 per lb.)
Year to August 1976— 6,876,990 lbs. valued at $ 9,952,008 ($1.45 per lb.)
Year to August 1975— 8,346,483 lbs. valued at $11,140,270 ($1.33 per lb.)
Year to August 1974— 8,227,759 lbs. valued at $ 7,211,755 ($0.88 per lb.)

U.S. IMPORTS OF ASBESTOS-CEMENT PIPES, TUBES & FITTINGS

Principal sources in 1980 included Mexico—88.7% and Canada—10.9%.

Year to August 1980— 8,146,219 lbs. valued at $1,349,322 (17¢ per lb.)
Year to August 1979—29,606,894 lbs. valued at $4,506,300 (15¢ per lb.)
Year to August 1978—20,033,092 lbs. valued at $2,349,425 (12¢ per lb.)
Year to August 1977—16,215,625 lbs. valued at $1,724,187 (11¢ per lb.)
Year to August 1976— 9,192,970 lbs. valued at $ 911,021 (10¢ per lb.)
Year to August 1975—16,125,671 lbs. valued at $1,466,765 (9¢ per lb.)
Year to August 1974—13,243,692 lbs. valued at $ 899,065 (7¢ per lb.)

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Asbestos Roofing Sheets and Pipes Producers

Based in Eastern Nigeria require technical partners capable of handling both factory and administration.

Management fee will be paid and possibility of equity participation is also acceptable, provided certain result is guaranteed.

Market for products is no problem.

—Reply—
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U.S. IMPORTS OF OTHER ASBESTOS-CEMENT PRODUCTS

Principal sources in 1980 included Canada—82.7%, Belgium—7.4%, Mexico—6.5%.

Year to August 1980—71,789,882 lbs. valued at $12,095,199 (17¢ per lb.)
Year to August 1979—44,565,985 lbs. valued at $ 8,604,578 (19¢ per lb.)
Year to August 1978—22,350,071 lbs. valued at $ 4,693,368 (21¢ per lb.)
Year to August 1977—45,223,782 lbs. valued at $ 7,112,457 (16¢ per lb.)
Year to August 1976—22,882,933 lbs. valued at $ 3,610,490 (16¢ per lb.)
Year to August 1975—43,426,447 lbs. valued at $ 6,065,923 (14¢ per lb.)
Year to August 1974—48,832,297 lbs. valued at $ 6,074,241 (12¢ per lb.)

U.S. IMPORTS OF OTHER ASBESTOS ARTICLES

Principal sources in 1980 included Canada—40.1%, Japan—17.8%, United Kingdom—16.1%, Brazil—10.2%.

Year to August 1980—$6,297,329
Year to August 1979—$6,199,594
Year to August 1978—$6,966,577
Year to August 1977—$6,016,622
Year to August 1976—$5,510,691
Year to August 1975—$5,554,868
Year to August 1974—$4,185,166

U.S. Product Exports

Total value of all asbestos-based products exported from the United States in the year ended August 1980, at US$133,184,639, decreased 5.1% from 1979 ($140,350,636) but remained ahead of the prior years—28.1% over 1978 ($103,997,594), 75.4% over 1977 ($75,912,352), 133.3% over 1976 ($57,089,565), 113.2% over 1975 ($62,478,339) and 151.2% over 1974 ($53,027,036).

U.S. EXPORTS OF ASBESTOS YARN, CLOTH & TAPE

Principal destinations in 1980 included Mexico—39.9%, Saudi Arabia—18.1%, Australia—6.0%, Korea—5.4%, Netherlands—5.1%.

Year to August 1980— 4,883,886 lbs. valued at $ 7,629,838 ($1.56 per lb.)
Year to August 1979— 5,816,594 lbs. valued at $ 6,995,100 ($1.20 per lb.)
Year to August 1978—10,690,682 lbs. valued at $ 8,439,029 ($0.79 per lb.)
Year to August 1977—17,108,562 lbs. valued at $10,749,851 ($0.63 per lb.)
Year to August 1976—16,542,879 lbs.
Year to August 1975—12,345,006 lbs.
Year to August 1974—18,027,429 lbs.

U.S. EXPORTS OF ASBESTOS INSULATION

Principal destinations in 1980 included Saudi Arabia—39.3%, Canada—14.0%, Venezuela—7.7%, Nigeria—6.0%.

Year to August 1980—$6,219,122
Year to August 1979—$4,686,992
Year to August 1978—$4,997,775

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U.S. EXPORTS OF ASBESTOS-CEMENT PRODUCTS

Principal destinations in 1980 of asbestos-cement shingles and clapboard included West Germany—41.1%, Mexico—20.1%, Italy—18.7%, Bahamas—5.2%.

Principal destinations in 1980 of other asbestos-cement articles included Saudi Arabia—59.8%, Canada—15.2%, Bahamas—9.3%.

Year to August 1980—42,962,417 lbs. valued at $13,502,162 (31¢ per lb.)
Year to August 1979—60,263,097 lbs. valued at $19,292,554 (32¢ per lb.)
Year to August 1978—56,908,826 lbs. valued at $15,346,292 (27¢ per lb.)
Year to August 1977—58,015,001 lbs. valued at $14,144,486 (24¢ per lb.)
Year to August 1976—53,456,671 lbs.
Year to August 1975—73,536,492 lbs.
Year to August 1974—71,960,099 lbs.

U.S. EXPORTS OF GASKETS, PACKINGS & SEALS

Principal destinations in 1980 included the USSR—17.2%, Canada—13.5%, Mexico—12.7%, Saudi Arabia—8.8%.

Year to August 1980— 5,972,872 lbs. valued at $19,465,318 ($3.26 per lb.)
Year to August 1979—19,213,887 lbs. valued at $18,195,119 ($0.95 per lb.)
Year to August 1978—10,423,867 lbs. valued at $15,098,633 ($1.45 per lb.)
*Year to August 1977— 5,953,116 lbs. valued at $14,364,621 ($2.41 per lb.)
*Year to August 1976— 4,623,273 lbs.
*Year to August 1975— 6,054,573 lbs.
*Year to August 1974— 6,616,871 lbs.

*Gaskets and packings, only.

U.S. EXPORTS OF BRAKE LININGS & DISC BRAKE PADS

Principal destination in 1980 was Canada—75.0%.

Year to August 1980—$50,581,427
Year to August 1979—$56,231,124
Year to August 1978—$41,480,113

U.S. EXPORTS OF CLUTCH FACINGS & LININGS

Principal destinations in 1980 included Canada—26.4%, Taiwan—12.4%, Mexico—11.1%, West Germany—8.5%, United Kingdom—8.2%, Japan—6.9%.

Year to August 1980—$10,184,725
Year to August 1979—$10,018,135
Year to August 1978—$ 8,404,885

U.S. EXPORTS OF OTHER ASBESTOS ARTICLES

Principal destinations in 1980 included Canada—30.0%, Ireland—10.5%, United Kingdom—7.6%, South Africa—6.8%, Taiwan—6.5%.

Year to August 1980—$25,602,047
Year to August 1979—$24,931,612

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Canadian Product Imports

Our calculations indicate that C$25,265,000 worth of asbestos-based materials were imported by Canada in the year to June 1980, 12.8% less than the $28,959,000 reported for the 1979 like period. However, the 1980 value remained above all but one of the other review years, i.e., 3.2% over 1978 ($24,483,000), 17.3% over 1977 ($21,533,000), 20.7% over 1976 ($20,936,000), 3.8% below 1975 ($26,251,000) and 38.5% over 1974 ($18,247,000). A statistical breakdown, by product category, for the years 1980 back to 1974 is as follows:

Vinyl-Asbestos Floor & Wall Tiles—$188,000 in 1980 vs. $372,000 in 1979, $288,000 in 1978, $120,000 in 1977, $94,000 in 1976, $299,000 in 1975, $75,000 in 1974. Principal 1980 source was the United States—99.9%.

Asbestos Cloth, Dryer Felts & Sheets—$2,683,000 in 1980 vs. $4,178,000 in 1979, $3,530,000 in 1978, $3,629,000 in 1977, $3,399,000 in 1976, $3,519,000 in 1975, $2,193,000 in 1974. Principal 1980 sources were the United Kingdom—66.9% and the United States—19.1%.

Asbestos Packings—$3,045,000 in 1980 vs. $2,670,000 in 1979, $2,151,000 in 1978, $1,810,000 in 1977, $1,626,000 in 1976, $1,968,000 in 1975, $1,600,000 in 1974. Principal 1980 sources were the United Kingdom—49.7% and the United States—49.5%.

Asbestos Brake Linings—$7,659,000 in 1980 vs. $7,839,000 in 1979, $5,620,000 in 1978, $4,215,000 in 1977, $5,768,000 in 1976, $5,510,000 in 1975, $4,794,000 in 1974. Principal 1980 source was the United States—89.7%.

Asbestos Clutch Facings—$1,506,000 in 1980 vs. $1,616,000 in 1979, $1,486,000 in 1978, $987,000 in 1977, $642,000 in 1976, $1,070,000 in 1975, $1,300,000 in 1974. Principal 1980 sources were the United States—$63.7%, Australia—24.5% and Japan—10.8%.

Asbestos-Cement Shingles & Siding—$53,000 in 1980 (all from the United States) vs. $58,000 in 1979, $78,000 in 1978, $86,000 in 1977, $209,000 in 1976, 123,000 in 1975, $113,000 in 1974.

Asbestos-Cement Boards & Sheets—$695,000 in 1980 vs. $611,000 in 1979, $609,000 in 1978, $385,000 in 1977, $455,000 in 1976, $962,000 in 1975, $765,000 in 1974. Principal 1980 sources were the United States—73.2% and Belgium-Luxembourg—23.5%.

Other Asbestos Building Materials—$2,651,000 in 1980 (96.8% from the United States) vs. $6,502,000 in 1979, $6,627,000 in 1978, $7,246,000 in 1977, $5,692,000 in 1976, $10,214,000 in 1975, $4,920,000 in 1974.

Other Asbestos Basic Products—$6,785,000 in 1980 vs. $5,113,000 in 1979, $4,094,000 in 1978, $3,075,000 in 1977, $3,051,000 in 1976, $2,586,000 in 1975, $2,587,000 in 1974. Principal 1980 sources were the United States—82.3% and the United Kingdom—11.9%.

Canada Product Exports

The value of asbestos-containing products exported from Canada reached a record C$39,543,000 in the year to August 1980, 23.9% higher than the $31,922,000 recorded in 1979 and up 43.5% over 1978 ($27,562,000), 102.3% over 1977 ($19,550,000), 161.8% over 1976 ($15,107,000), 170.3% over 1975 ($14,631,000) and 275.1% over 1974 ($10,541,000). Canadian exports by product category were as follows:

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Asbestos Cloth, Dryer Felts & Sheets—$5,309,000 in 1980 vs. $5,454,000 in 1979, $2,832,000 in 1978, $1,646,000 in 1977, $2,093,000 in 1976, $2,811,000 in 1975, $2,710,000 in 1974. Principal 1980 destinations were the United States—76.5% and the United Kingdom—19.3%.

Asbestos Brake Linings & Facings—$3,033,000 in 1980 vs. $3,733,000 in 1979, $3,369,000 in 1978, $2,715,000 in 1977, $1,457,000 in 1976, $1,964,000 in 1975, $1,112,000 in 1974. Principal 1980 destinations were the United States—75.6% and Australia—6.6%.

Asbestos-Cement Building Materials—$19,969,000 in 1980 vs. $15,532,000 in 1979, $15,476,000 in 1978, $10,763,000 in 1977, $8,514,000 in 1976, $6,437,000 in 1975, $3,381,000 in 1974. Principal 1980 destinations were the United States—71.1%, Thailand—9.8% and the United Kingdom—7.6%.

Other Basic Asbestos Products—$13,232,000 in 1980 vs. $7,203,000 in 1979, $5,885,000 in 1978, $4,426,000 in 1977, $3,043,000 in 1976, $3,349,000 in 1975, $3,338,000 in 1974. Principal 1980 destinations were the United States—88.0% and West Germany—5.1%.

The Market Will Improve

"I am optimistic about the future of asbestos," reports *J. R. M. Hutcheson, President of Johns-Manville Canada Inc.* Despite the depressed state of the construction industry in its major markets and the current wave of anti-asbestos regulations being passed in many industrialized nations, Mr. Hutcheson reports encouraging prospects for the Asbestos Industry in Canada. *Asbestos has unique qualities* which are passed on to the finished products, making them very competitive. Until substitutes are found which match the inherent qualities of asbestos, some uses will continue. The short fiber market is expected to remain weak due to increasingly severe regulations governing the use of asbestos in certain products, a situation which has, in many cases, caused higher production costs. The market for longer fibers, used mainly in construction materials, is dependent on the revival of economies in North America and Europe. Increased demand, however, from Third World, Far East and Latin American countries provides a brighter future for asbestos utilization. In the years ahead "the expansion of these markets should compensate for the stabilization of demand in traditional markets." Finally, states Mr. Hutcheson, in a world where energy is getting scarce and very expensive, the Asbestos Industry is fortunate in having a low degree of energy dependency, so that the faster energy prices grow the more competitive asbestos-containing products become. [Excerpted from articles in "The Northern Miner" and the "QAMA Bulletin," the latter a publication of the Quebec Asbestos Mining Association]

Reagan's Economic Program

Much has been reported, of late, on U.S. President Reagan's efforts to better the nation's economy and slow the rate of inflation. Mr. Reagan concedes that his economic program will not produce an instant cure but if it clears Congress, some positive effects should be noted by the end of 1982. A 1.1% rise in inflation-adjusted gross national product and an 11.1% increase in prices, as measured by the consumer price index, is projected for the year 1981. Substantial improvement is expected in 1982,

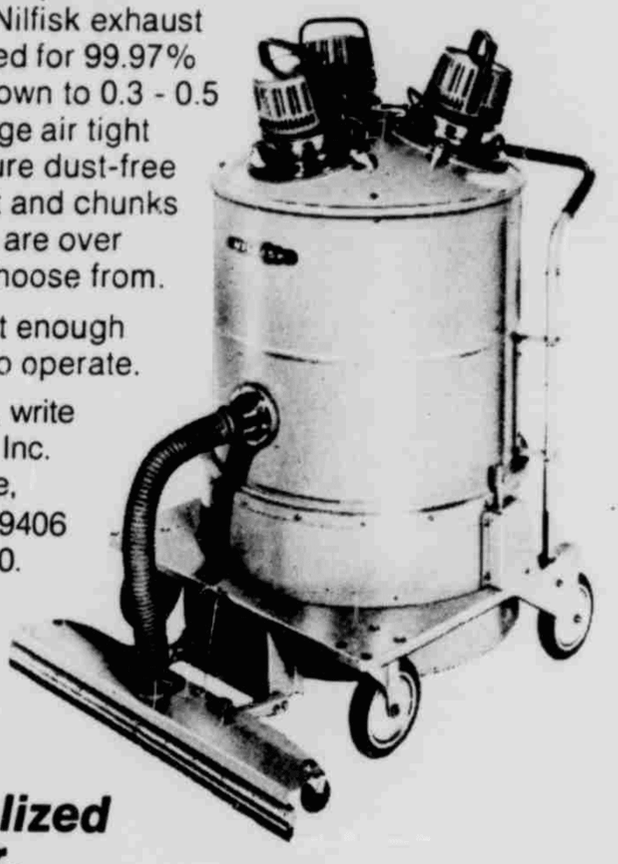
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To meet clean air standards you not only need a centralized dust collector, you also need a decentralized dust collector.

Clean air standards being what they are, you may not be meeting them even with a central dust collector. And this year, standards are being tightened even further.

So you ought to look at the Nilfisk GA 73 portable industrial vacuum cleaner. It picks up where central systems leave off. And it does that with Nilfisk's exclusive multi-stage filtration system. The oversize main filter resists early dust clogging, and can be shaken and cleaned at all times without exposing the operator.

In addition special Nilfisk exhaust filters can be installed for 99.97% average retention down to 0.3 - 0.5 microns. Heavy gauge air tight container liners insure dust-free disposal of fine dust and chunks of debris. And there are over 50 attachments to choose from.



Yet the GA 73 is light enough for a single person to operate.

For more information, write to Nilfisk of America, Inc. 201 King Manor Drive, King of Prussia, PA 19406 or call (215) 277-3900.

NILFISK GA 73.

The decentralized dust collector.

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with real GNP rising 4.2% and prices climbing 8.3%. As this is written, the Reagan administration has just announced it is seeking to cut over $34-billion from federal loan and guarantee programs during the next 18 months. Hardest hit will be housing, with proposed cuts aimed mostly at reducing subsidies to middle and upper income families. Among the several proposed reductions are curtailments in the Federal Housing Administration's mortgage insurance program and the guarantee program of the Government National Mortgage Association. Other cuts are aimed at reducing rural housing and electrification lending, eliminating the Economic Development Administration and the National Consumer Cooperative Bank, cutting back the loan authority of the Small Business Administration and the Export-Import Bank and trimming several student loan programs. The only credit program slated for an increase is the President's Economic Support Fund, proposed to gain an additional $900-million for international security loans.

Market Studies

Business Communications Company, Inc., Stamford, Connecticut, foresees almost *zero growth through 1985 for the entire pipe industry—except for plastic pipe* which should experience a 14% growth rate in current dollars, equivalent to about 6% per year in real terms. BCC noted a negative growth market for *asbestos-cement pipe* because of several environmental/health constraints and because plastic pipe is often a good substitute.

Based on findings from another study, *BCC predicts growth for fillers, extenders and reinforcements in plastics* will increase from a 1980 level of 5.1-billion pounds annually to about 11.9-billion pounds in 1990. This represents a compound increase of 8.8% per year. *Consumption of asbestos in these products* is calculated at 518-million pounds in 1980, 645-million pounds in 1985 and 803-million pounds in 1990, an average annual increase of 4.5%.

Schape Associates, Manchester, England, issued a report of a survey taken to compare, on the basis of unit area covered, the *total energy in the manufacture of corrugated sheeting containing aluminum, asbestos cement and plastic-coated steel.* In their conclusions it was noted that for both single-skin and double-skin cladding, the asbestos-cement sheets required less energy than did the products containing aluminum and steel, indicating that the inherent thermal insulation properties are considerably greater in asbestos cement.

Gorham International, Gorham, Maine, has undertaken a *major, multi-client study on Asbestos and Asbestos Replacements in the 1980's—Business and Market Opportunities.* The one-year study is designed to assess the worldwide markets and business opportunities for asbestos and asbestos replacement materials. It will also evaluate the impact of regulatory programs, emerging technologies and market forces threatening the Asbestos Industry. Among the subscribers to the study (70% North American and 30% overseas) are asbestos producers (20%), asbestos replacement producers (35%), end product manufacturers and fabricators (25%) and potential new market entrants (20%).

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A feeling for felt

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Brief Comments About A Few Products

[THE BULK OF THIS SECTION IS BASED ON ARTICLES WHICH APPEARED IN THE QAMA BULLETIN]

Asbestos-Cement Finished Sheets—Asbestos applications are so numerous and varied that it would be difficult to compile an exhaustive list, especially as these applications are evolving according to the changing pace of consumer needs and tastes. Several products containing asbestos, in order to make use of the unique characteristics of the fiber, are under development to satisfy new requirements of the market. One of the newer products developed in recent years is the asbestos-cement finished sheet, a decorative material which lends itself particularly well to exterior and interior architectural facings. Contrary to tradtional corrugated and flat sheets, used primarily for functional purposes for the cladding of industrial buildings, colored or textured asbestos-cement finished sheets are more specialized, sophisticated products with aesthetic value. Made of a mixture of Portland cement and asbestos fibers (12% to 15% content), generally Grade 4, the finished sheets, like all fibrocement products, do not present a risk to the health of users because the fibers are bound in the mix. Due to their asbestos content, the sheets provide excellent resistance to pressure; are economical and simple and quick to install; are noncombustible, thereby protecting against fire spread and smoke emission; withstand humidity and sharp changes in temperature; and offer dimensional stability because of low linear heat expansion coefficient.

Asbestos Cement For Home Renovation—Although principally used in industrial and commercial building, asbestos cement is also a choice material for home renovation. The first such application in the Eastern Townships of Quebec was a home repair and renovation project at Black Lake, under the direction of an architectural firm retained by Lac d'Amiante du Quebec Ltee. Prior to installation, the architects were entrusted with the task of researching the use of asbestos-containing construction materials toward promoting their use in home building and to emphasize their numerous qualities. After several months of research and visitations with manufacturers of asbestos-cement materials, *products by Eternit, of Belgium*, were selected for wall and roof coverings. Rectangular sheets of slate measuring 60″ x 30″ were selected to cover a double-pitch roof. Of mineral origin, the slate is a compressed material, made of artificial Portland cement and reinforced with uniformly distributed fibers. Its composition ensures the roofing is fireproof, watertight and resistant to all chemical and atmospheric agents. Bardit and Granitex panels were selected for the wall coverings. According to the architects, although designed according to European standards, the materials "were adapted to Canadian needs with no trouble at all."

Asbestos-Cement Pipes—The U.S. Environmental Protection Agency has published results of a study which concludes that *asbestos-cement pipes* used in aqueduct systems *offer a lesser health hazard* than do polyvinyl chloride or plastic pipes. The agency reported that asbestos-cement pipes present the least risk when neutral (low acid) water is involved. The risk increases with pipes made of PVC, vinyl, epoxy and plastic, in that order.

Flooring Felts—There are market areas where asbestos is losing its competitiveness by virtue of problems faced by manufacturers in con-

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— Machinery for asbestos-cement since 1912, therefore take advantage of our experience.

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— Production of special sheets up to 9 mt length.

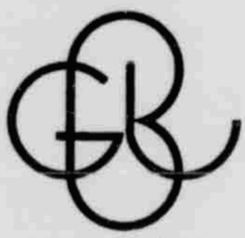
— Auxiliary machines for special sheet profiles.

— Complete plants with high production for pressure and sewage pipes.

— Special plants for preparation of wet and dry Asbestos.

— Machines for finishing pipes.

— Complete projects, know-how, technical assistance for sheet and pipe lines.



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forming to stiff governmental regulation. In flooring felts, which contain 85% asbestos fiber, the manufacturers have been driven by regulatory and environmental pressures to use glass fiber as a substitute, even though the production of glass fiber mats is more expensive.

Protective Coatings—The common factor in most protective coatings is the combination of asphalt and asbestos fiber, the two components which lend their unique properties to protect against harsh weather, corrosion, dampness and water infiltration. Asphalt coatings are used for the coating of new roofing and the maintenance and restoration of old roofing; as protective agents on the outer surfaces of reservoirs, tanks, railway cars and other metal structures with high exposure to atmospheric conditions; to waterproof concrete or masonry foundation walls; to prevent rust on steel beams and automotive undercoatings; and to fill and seal cracks and joints in chimneys, flashing, air vents, etc. An asphalt coating is a viscous liquid solution to which is added 2% to 15% asbestos fibers, depending on the product and its intended use. The mix is then homogenized to produce a smooth, uniform coating which can be applied cold. The asbestos fibers act as a binding agent to increase cohesion, viscosity, elasticity and plasticity of the mix. Being inert, the asbestos is not subject to aging, thereby enhancing the resistance and durability of the coatings. The asphalt-asbestos combination is also found in bituminous mixes used for road and street surfaces, for bridge roadways and for airport runways.

Asbestos In Plastics—Combined with plastics, asbestos fibers serve effectively as an additive, a reinforcing agent and a filler (the latter usage increases the viscosity of resins). Certain automobile air conditioning castings are made according to the following formula: 55% asbestos, 35% polyester and 10% glass fiber. Asbestos-containing resins are particularly suitable for the molding of intricate and odd-sized shapes which are more difficult and more costly to achieve with metals. Once molded they offer superior rigidity and exceptional resistance to tension, impact, corrosion, chemical agents and wear. Their dielectric properties and resistance to high temperatures make them ideal thermal and electrical insulations. Because of their high resistance to corrosion, asbestos-reinforced plastics are frequently used in the chemical industry in the form of tubes, pipes, valves, tanks and liquid containers, agitators, pumps and fume ducting systems—in fact, in any area where equipment might be subjected to strong alkaline conditions or exposed to chemical salts in high concentrations. Asbestos-reinforced plastics are found in the insulation of electrical cables, in circuit breakers and in household appliances. Because of their moisture resistant properties, they are used in the manufacture of doors and paneling, boat hulls and decks, pressurized containers, various types of decorative facings and rocket tubes. Asbestos composites are used in a variety of missile parts—as thermal insulation barriers between the engine and the propellent and as exhaust pipes, electrical conduits, turbine wheels, bulkheads and ducts. The materials find highly specialized and sophisticated applications in the field of electromagnetic wave transmission, i.e., in highspeed radar scanners which monitor aerial and maritime navigation and in domes for high-gain antennae used in space communications.

Petroleum Extraction—Short asbestos fibers constitute 5% of the composition of drilling mud used in the extraction of petroleum and natural

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gas. The fiber makes it possible to retain the small pieces of clay shale which break off the rock and hinder drilling operations. The shale sticks to the fiber and is thus brought up with the mud. When drilling is completed, the drilling mud is collected and properly disposed of in accordance with prevailing government regulations.

Lubricated Packings—The use of asbestos in these products eliminates friction and heat buildup to avoid the expansion of mechanical parts and prolong the life of the equipment. Where dirt and grit are present, a compound of oil, soap (wax) and asbestos shorts forms a shield around the moving parts which serves as a protection against the abrasive particles, extending the life of the machinery.

Adhesives & Sealers—Short asbestos fibers lend their thixotropic qualities to such adhesives as resorsinol, furfural, epoxy, rubber, silicates and phenolic compounds. Although only 5% of the bulk of the adhesives, the asbestos content enables the material to maintain fluidity and even consistency, provides resistance to heat and humidity, improves dielectric qualities, aids in resin blending and reduces the cost to manufacture the product. When combined with resins or cements in sealants and caulking compounds, the asbestos content eliminates running or cracking from sudden temperature change or aging.

Substitute Sealants & Coating Compounds—According to *E. Wormser, of Gibson-Homans*, the largest manufacturer in the United States of sealing and coating compounds, if asbestos were banned in roof cements the market would be flooded with products so inferior in quality they could not perform the purpose for which they were intended. His analysis is based on the results of several studies and tests conducted at Gibson-Homans in an attempt to locate and develop valid substitutes for asbestos. In spite of the tremendous amount of money and effort spent "to try to find a substitute raw material that will produce satisfactory roof coatings and roof cements, to the best of our knowledge no one has found such a material. As the result of our company's vast research, by complicated formulating techniques, utilizing a variety of ingredients and techniques, we are now able to produce solvent base asphalt roof coatings and roof cements which do not include asbestos fiber. We do not yet offer these asbestos-free roof coatings and cements for sale in the United States because they are about 15% more expensive to produce and we believe they are not as good as comparable products made with asbestos. It is difficult to justify selling an inferior product for more money." Mr. Wormser further pointed out that such production goes against the current trends in industry and government policies regarding energy consumption. The formulae followed to produce the asbestos-free substances require from 30% to 70% more energy during the manufacturing process. He also stated that the hazards of asbestos fiber have been thoroughly researched and documented and are readily controllable; but we know little or nothing about the hazards of the variety of raw materials we use to make asbestos-free roof coatings and cements.

Companies & Their Products

Armstrong World Industries, Inc., Lancaster, Pennsylvania, is the new name of the former Armstrong Cork Company approved by shareholders

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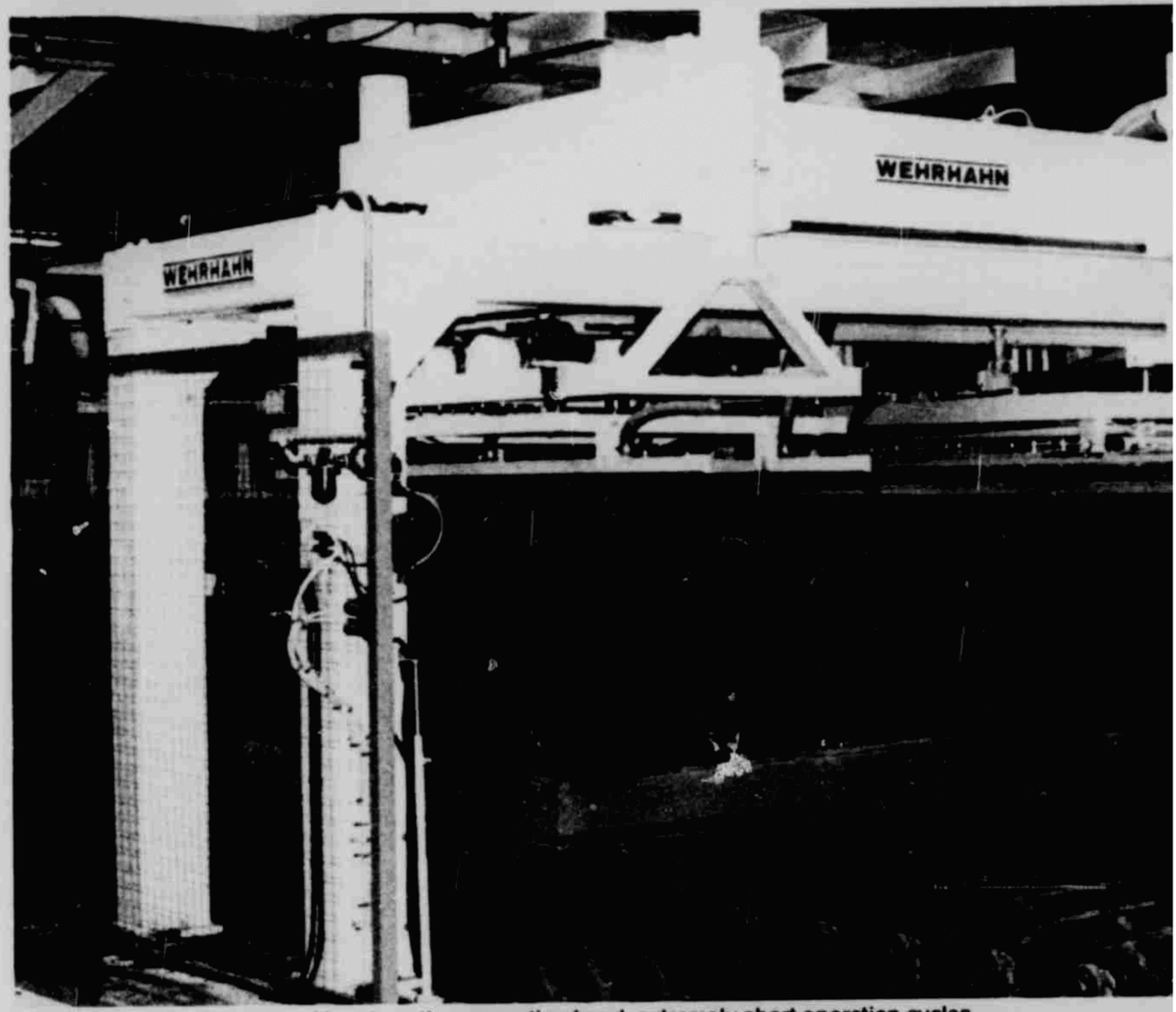
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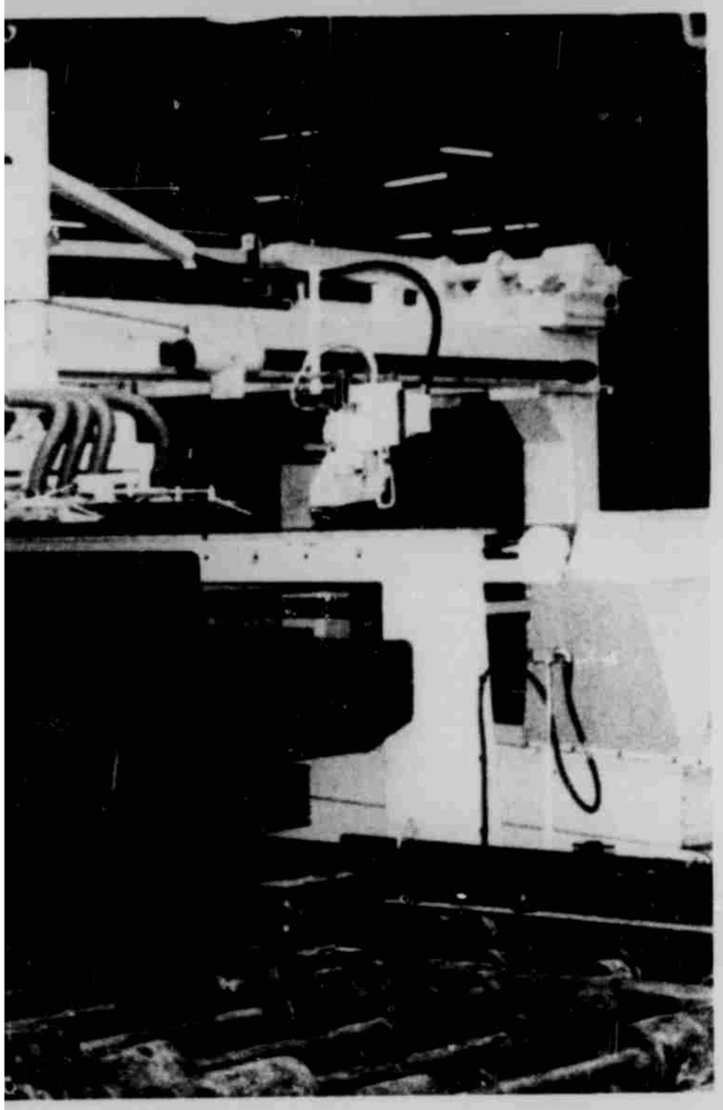


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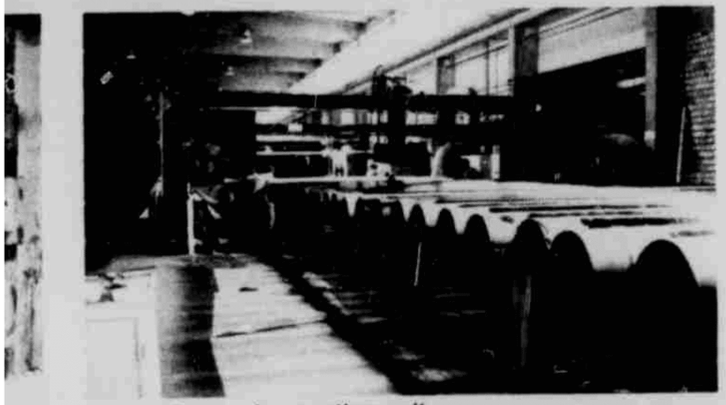
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at the annual meeting held April 1980. Armstrong and its affiliated companies operate over 50 manufacturing plants in seven countries and have sales offices around the globe to serve world markets for floor coverings, ceilings, furniture, pipe insulation, textile mill supplies, gasketing materials and industrial adhesives.

Asarco Incorporated, New York City, purchased 3.8-million shares of its own stock from *Bendix Corporation*, Southfield, Michigan, for $55.00 a share, or $210.9-million. The transaction, announced January 1981, is the first step in Asarco's plans to retrieve 6.1-million, or 20.6% of its shares outstanding, from the aerospace and automotive concern. Bendix agreed last year to sell the block back to Asarco as part of its plan to redeploy assets and focus on high technology. . . . A factbook was issued by Asarco to assist in evaluating the company. It discusses Asarco's business, products, plant locations, production, corporate and financial history, management and associated companies. Copies are available from Asarco.

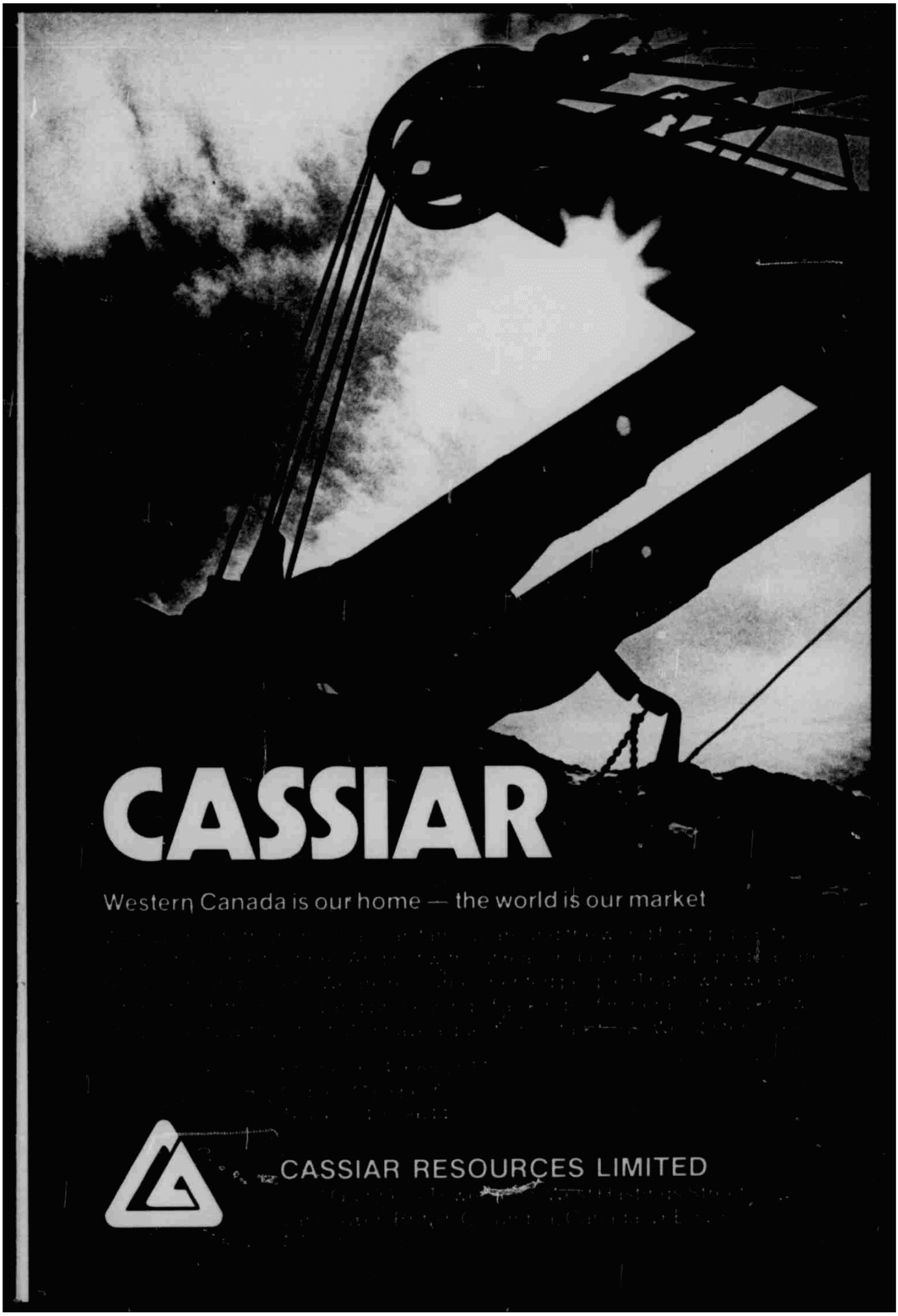
BBA Group Ltd., Cleckheaton, England, is an international manufacturer of automotive and industrial products. *Chairman D. M. Pearson* reported that 1980 was the most difficult trading period the company had seen for many years. The worldwide recession in the vehicle industry, together with generally unfavorable economic conditions in the United Kingdom, had a severe effect on trading results for friction materials and asbestos textiles.

Bendix Automotive of Canada Ltd. permanently closed its operation at Windsor, Ontario, leaving 490 people out of work. The plant, which made and assembled automobile brakes, will be sold and production moved to the parent company's plant at South Bend, Indiana. Reportedly, the reason for the decision was the sharp downturn in the automotive industry which left Bendix with substantial excess plant capacity in North America and associated fixed costs.

Capco Pipe Company, Inc., Birmingham, Alabama is the new name of the former Cement Asbestos Products Company. The company, which recently purchased *Robintech's polyvinyl chloride pipe plant* at Evansville, Indiana, is a maker of PVC and asbestos-cement pipe. Capco was founded in 1963 and is a wholly-owned subsidiary of Asarco. *President W. T. Whitley* believes that the several special challenges which have faced the a-c pipe industry in the U.S. peaked in 1980.

Cape Industries Ltd., London, England, in October 1980, acquired the insulation materials business operated by *Newalls Insulation Co. Ltd.*, a wholly-owned subsidiary of *Turner & Newall Ltd.* The £13.3-million deal includes glass fiber, calcium silicate and rock fiber production facilities. . . . *Cape Automotive Ltd.* purchased the whole of the share capital of *Ceecol Motor Factors Ltd.*, a U.K. private company engaged in the distribution of automotive products to the motor trade. . . . *Deutsche-Kap-Asbest-Werke*, a West German manufacturer of asbestos products, moved its entire operation to Phillippi, near Cape Town, South Africa. A new factory is under construction at a cost of R1.7-million and will employ 200 workers. It will produce asbestos yarns and fabrics for local consumption and for export and will be operated by the newly-formed *Kapasit Asbestos (Pty) Ltd.* . . . Agreement has been reached for the disposal of friction material interests in South Africa through the sale by *Cape In-*

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vestments S.A. (Pty) Ltd. to *Maccabee Industrial Finance Ltd.*, a subsidiary of *Malbak Ltd.*, Johannesburg, of the whole of the share capitals of *Don International (Pty) Ltd.* and *Don Friction (Pty) Ltd.*, of Benoni, South Africa. The consideration of approximately £1.1-million will be satisfied in cash. . . . Cape Marine Board, made by *Cape Boards and Panels Ltd.*, is the world's leading noncombustible board for use in shipbuilding, with over 90% of production being exported to fire protect ships being built on every continent of the world. . . . For the six months to June 30, 1980, *Cape Group turnover* was £108-million compared with £102-million for the corresponding period of 1979. Profit before tax was £5.1-million vs. £6.2-million (the latter figure includes £1.4-million profit from the *Mining Division* prior to its sale in June 1979). The *Building and Insulation Division* continued to make excellent progress despite depressed economic conditions. *The Automotive and Engineering Division* suffered as a result of the extremely depressed state of the original equipment and replacement markets and by the difficulties to export profitably due to the strength of sterling. According to *Cape Group Chairman G. A. Higham*, business prospects in the United Kingdom are currently uncertain both as to the depth and duration of the current recession. . . . Early last year Cape Industries published a booklet entitled *"Cape Review 1980"* which discusses the significant change in direction from the Group's traditional activities as a principal manufacturer of asbestos products and as a major world producer of asbestos fiber. Today, less than 20% of Group trading profit is derived from asbestos-related activities.

CertainTeed Corporation, Valley Forge, Pennsylvania, reported at mid-year that the asbestos-cement and PVC pipe and the utility supply distribution businesses had been hit by federal budget cutbacks for water and sewer projects as well as by the plunge in new construction activity. As stated by *F. Timpe, President of the Pipe and Plastics Group*, 1980 saw some rearrangement of the opportunities and competition for a-c pipe and that *CertainTeed intends to continue to produce and market a-c water and sewer pipe* in the Northeast, for just as long as those communities continue to take advantage of its outstanding cost effectiveness. He expressed the hope that the still unresolved issue of the health effects of making and using a-c pipe will graduate, with a new administration, from a political to the scientific and technical area where it belongs. . . . For the year ending December 31, 1980, total company sales were $868.2-million, down from $916.2-million in 1979. Net income was $273,000 vs. $22.2-million.

Eternit-France has developed a process of recycling polyethylene asbestos bags for use as raw material to make tubes for electrical cables and wiring. Instead of being piled on dumps or simply discarded the used bags are turned into a useful, inexpensive raw material.

Everite Ltd., Johannesburg, Republic of South Africa, announced it has developed a *self-help, low-cost housing scheme* which could help provide a solution to black housing problems currently prevalent in South Africa, particularly in rural areas and on farms. Economists estimate that the demand for black housing in that country up to the year 2000 will be over 4-million units. . . . Early last year Everite was awarded a *R100,000 contract* to supply the pipes required for the pipe bridges portion of the latest sewer outfall project of the municipality of Germiston. To meet the specifi-

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cations of 48 D-load crushing strength, Everite designed a pipe with a 44 mm wall and a 5 mm additional wall thickness, with a relatively low mass of 500 kg per meter. . . . Everite embarked on a *campaign to promote the use of color* in low-income housing development. According to *L. Lewis, Everite Building Materials Product Manager,* the judicious use of durable color to walls, doors and roofs is a relatively inexpensive planning treatment which has a profound psychological impact, achieved by a departure from the monotonous effects of "colorless" neighborhoods. As part of the campaign, the company developed an attractive range of fade- and pollutant-free paints, designed specifically for use on fiber-reinforced cement products. . . . Everite introduced *general purpose Weather Board,* suitable for indoor and outdoor use as cladding, partitioning, protective screening, wall paneling and farm buildings. The board, which is cut into narrow strips, provides a cottage-like effect, normally achieved only with timber. . . . *Burger and Gerstner,* a subsidiary of Everite, was recently awarded a *contract to supply and erect 170 roofs* on homes in Pimville Township by the West Rand Administration Board. Bigsix and 6 mm Profile B roofing sheets were specified.

Frenzelit Werke, Bad Berneck, West Germany, reports very good sales in 1980 of its special asbestos products. The materials represent an important branch of industry, states *Dr. W. Wagner, Chairman,* and given proper processing and handling there is no reason why progress should not continue. The company has embarked on an expansion program which includes the installation of extractor systems and soundproofing and enlarging production facilities. Frenzelit makes Lehr roll discs for the glass and stainless steel industries, special yarns for brake linings, expansion joints for cement works and automobile gaskets.

Hellenic Industry for Building Materials (Hellenit) is the largest producer of asbestos-cement products in Greece. From a modest beginning in 1960, current production at the plant at Chalkis is 30,000 tons per year of high and low pressure pipes, 50,000 tons of corrugated and flat sheets and 25,000 tons of other special moulded products. Hellenit's second factory, near Thessalonika, was established in 1968 and annual production capacity presently stands at 45,000 tons of high and low pressure pipes and over 50,000 tons of flat and corrugated sheets. . . . The second largest a-c product producer in Greece is *Amiantit,* 90% owned by *Edok-Eter,* a large construction firm and 10% owned by Amiantit's Managing Director. The plant near Patras has the capacity to annually produce some 30,000 tons of high and low pressure pipes, 7,000 tons of flat sheets, 5,000 tons of small diameter sanitary pipes for buildings and 4,000 tons of pipe fittings. . . . *Evpa* is Greece's third a-c products maker, with output of some 30,000 tons per annum at facilities just outside Athens.

Humes Ltd., Melbourne, Australia, together with *Hume Industries (Far East) Ltd.,* Singapore, and a local Indonesian company, *P. T. Kenjana Sakti,* recently formed *P. T. Hume Sakti Indonesia* as a new associate

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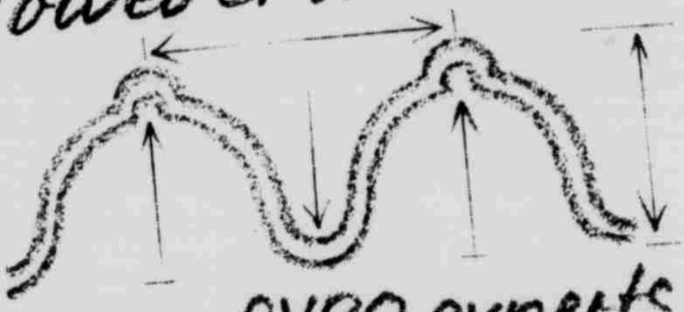
THE COVER: Spectacular use is made of Hardie's Super Six corrugated asbestos-cement sheets at Australian Griffith University, Queensland. The sheets were used for upper walls, fascias and awnings. The flowing lines of the fascias are in striking contrast to the building's articulated glass and concrete facade.

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company. The first factory is now under construction near Jakarta for the production of 300 mm to 2,100 mm pipes.

Interasbest G.m.b.H., St. Johann/Tirol, Austria, received two contracts from *Turners Building Products Ltd.*, Nigeria, for two complete asbestos-cement corrugated sheet manufacturing plants. Interasbest has delivered, assembled and started the systems, with official openings occurring in March 1980. Each plant is fully automatic and capable of a daily output of 160 tons of sheets.

James Hardie Industries Ltd., Sydney, via *Chairman J. B. Reid*, notes that Australian markets are showing some improvement in consumption of building products. The pipe business is also more active, aided by Hardie's ability to supply pipes up to 750 mm in diameter. Group sales for the year ended March 31, 1980, rose 57.2% to A$534-million and operating profit before extraordinary items increased 25.6% to $27.1-million.

Jim Walter Corporation, Tampa, Florida, announced that its *Celotex Roofing Products Division* is now producing five rigid board insulations to meet any roof insulation need, code requirement and principal fire insurance classification. One of the products is Celotex Thermax roof insulation, a strong, lightweight board consisting of asphalt-saturated asbestos facers integrally laminated to both sides of an isocyanurate foam core which has been reinforced with glass fibers for dimensional stability. . . . In August 1974 the *U.S. Federal Trade Commission* filed a complaint alleging the Panacon purchase by Celotex violated Section 7 of the Clayton Act. In that action, the Commission sought divestiture of both the Philip Carey Company (the roofing manufacturing division of Panacon) and Carey Canada Inc. (the Canadian asbestos mining subsidiary). In September 1980 the *U.S. Court of Appeals for the Fifth Circuit vacated the order*, holding that the Commission failed tc support by substantial evidence the appropriate geographic market by which the acquisition must be judged as to any anti-competitive effect, and remanded the case to the FTC for reconsideration. *Jim Walter Chairman J. W. Walter* said the decision substantiates the company's belief that the Panacon acquisition served to intensify competition in the roofing materials business rather than weaken or constrain it. . . . *Operations* of Jim Walter for its second fiscal quarter ended February 28, 1981, was *below current Wall Street earnings estimates* and resulted in a small loss. The results were particularly affected by low demand for building materials, higher interest expenses, the adverse impact of inflationary operating costs on profit margins and continuing losses from coal mining and coking operations. Mr. Walter said that record high interest rates are taking their toll on all phases of construction activity in the United States and hopefully the current downward trend in the prime rate will continue in order to permit an early upturn in residential and nonresidential building.

Johns-Manville Corporation, Denver, Colorado, reports that its financial statements for 1979 and 1980 are being qualified by its auditors due to a growing concern over the impact on the company of asbestos-related lawsuits. The qualification will remain until J-M can determine the ultimate cost of a rapidly growing number of cases, which are becoming increasingly expensive to litigate, and that could take several years. The company has been *named a defendant in over 5,000 suits by more than 9,300 individuals* as of January 1, 1981, and the cost of settling asbestos cases

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has soared to some $23,000 per claim. Clouding the issue is a J-M suit against several of its insurance carriers which could take years to litigate. The case could be precedent-setting. J-M claims its insurance companies should share in paying for cases filed after coverage expired if the victim was exposed to asbestos during the period of the policy. The insurance companies maintain that only carriers covering J-M when a claim is filed should be liable. . . . In May 1980, *Johns-Manville Canada* announced the halting of the asbestos-cement pipemaking operations at its plant at Scarborough, Ontario. Reason given was a declining market for the products, a determination made after an intensive economic analysis of the future of a-c markets. Other operations continue at the plant at Port Union.

National Asbestos Corporation (Societe Nationale de l'Amiante; SNA), a Quebec government agency, purchased most of the Canadian interests of *Turner & Newall* for the sum of C$35.5-million. The mutual sales pact included $32.3-million for *Bell Asbestos Mines Ltd.* (100% owned by T&N) and $3.2-million for *Atlas Turner Inc.*, Montreal, and its sister company, *Turners Building Products Ltd.*, Mission, British Columbia. The latter two manufacturers were 90% owned by T&N, with the remaining 10% held by *Cassiar Resources.* Atlas Turner and TBP are makers of asbestos-cement pipes for municipal water supply and sewage and a-c building sheets and tiles. All of the pipe products are consumed within Canada but the sheet materials are marketed domestically and to the United States. . . . Speaking before the Quebec National Assembly, *Provincial Minister of Energy and Resources, Y. Berube,* reported that "already the SNA is the largest transformer of asbestos in Canada." He emphasized that after just 18 months the *SNA is a financially balanced group* and should finish its second year with a cumulative profit of over $1-million. He said that from May 19 to September 30, 1980, the new Bell and Atlas subsidiaries have generated net operating profits of $3.5-million, profits which largely surpass the costs of loans necesssary for their acquisition. With these latest acquisitions, SNA is now involved with asbestos fiber, asbestos-cement products, friction materials, asbestos paper and extracting magnesium hydroxides and carbonates from asbestos tailings. In addition, its $2.7-million research effort continues toward developing new uses and markets, within the Province, for locally-produced asbestos.

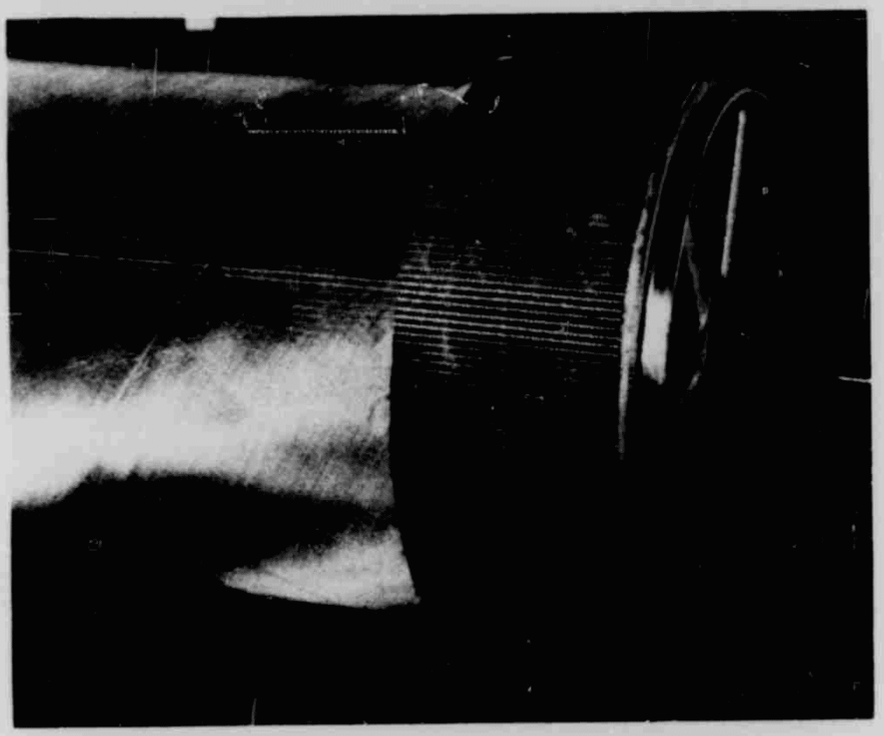
National Gypsum Company, Dallas, Texas, just announced its *Gold Bond Building Products Division* had sold the assets of the fiber cement plant at New Orleans, Louisiana, to a group of investors organized as *International Building Products Inc.* Terms of the sale were not disclosed. . . . National reported last month it had *ended talks to sell its Cement Division to General Dynamnics Corporation* but would continue trying to divest itself of the operations.

Nicolet Inc., Ambler, Pennsylvania, experienced several changes in 1980. As announced by *President J. J. Finnegan,* the company closed its Norristown Plant and the parent company was sold. The new owners have indicated a *desire to remain in the asbestos business.* They are, however, continuing efforts to develop non-asbestos sheet packing, millboard ano monolithic products.

Nippon Asbestos Co. Ltd., Tokyo, Japan, is likely to have an 81% increase in pretax recurring profit, to nearly Y3-billion, reports the Japan Economic Journal. Nippon Asbestos' *sales have been brisk* in such key

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products as insulation materials, sealers and heating, air conditioning, transporting and refrigerating equipment.

Pilot Manufacturing Company, Torrance, California, has modified its orbital pipe machining tool system to include a rugged tool support stand. Designed for easy attachment and detachment, the stand provides a convenient working height as well as a self-support capability which greatly facilitates set-up for machining operations.

Raybestos-Manhattan, Inc., Trumbull, Connecticut, in October 1980, announced it had initiated litigation against *Hi-Shear Industries, Inc.*, North Hills, New York, in connection with Hi-Shear's acquisition of shares of common stock of R/M. Following several legal maneuvers, *Raybestos lost the series of lawsuits intended to block the offer.* Finally R/M reached an agreement to work constructively with its new major shareholder. The agreement provides for dropping all pending legal actions involving the two companies and calls for two Hi-Shear directors to sit on a new nine-member R/M board. Hi-Shear, a maker of precision aerospace fasteners and industrial piping parts and less than one-third the size of R/M, now owns approximately 35% of Raybestos' some 2.3-million common shares outstanding. . . . Meanwhile, last October R/M and *A.V.C. Corporation*, Radnor, Pennsylvania, announced the signing of a definitive agreement for the merger of A.V.C. into a subsidiary of Raybestos. Following certain revised terms of the agreement, Hi-Shear agreed to vote in favor of the transaction. A.V.C. makes industrial metal fasteners and precision-formed parts. . . . R/M *closed its $8-million asbestos manufacturing plant at Cork, Ireland*, November 16, 1980. The depressed automotive industry in the U.S. and the consequent drop in orders for disc brake pads were reasons cited for the closure. . . . *R/M and Holding Fiasa S.A. de C.V.* established a joint venture *(Itapsa S.A. de C.V.)* to make and market drum brake linings and disc brake pads. The venture will result in expanded production of friction materials at Los Reyes La Paz, Mexico City. . . . R/M recently introduced an *asbestos-free clutch facing* called Cam-Lok, which reportedly holds all the frictional qualities of its predecessor, the Raybestos Vee-Lok facing. . . . Last month *Raybestos reported a net loss* for the fourth quarter and full year ended December 28, 1980.

Southern Asbestos Cement Ltd., Madras, India, awarded a contract to *Farben Industrial Development S.p.A.*, Torino, Italy, to supply a new plant for the manufacture of asbestos-cement pressure pipes, 4 and 5 meters long in diameters from 80 mm to 1,000 mm. The plant, located near Indore, will have capacity to produce up to 36,000 tons of pipe per year. Start-up is planned for 1982.

Southern Textile Corporation, Charlotte, North Carolina, continues to offer both asbestos and non-asbestos textiles. According to *President E. C. Bratt*, demand for asbestos remains surprisingly strong but for those who for various reasons cannot use asbestos, Southern offers glass fabrics, rope, yarn and braided products augmented by a complete line of Goldengard products featuring aramid fibers in a variety of blends. Southern Textile is a subsidiary of *H. K. Porter Company, Inc.*, Pittsburgh, Pennsylvania. . . . As a matter of interest, *Porter's Thermoid Division* recently completed a $3.4-million expansion project at the *Bellefontaine, Ohio, Works* which includes new hosemaking equipment including vacuum extrusion and a sophisticated electronic monitoring system and advanced spiraling machinery with larger yarn capacity. Recent installations at the *AMCO*

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ASBESTOS

Lac d'Amiante du Québec, Ltée is the second largest producer of asbestos in Canada, with sales representatives on every continent of the world. LAQ's two mines produce a full range of grades, from the long 3 group for spinning and weaving, to the short 7's for paper, brake linings and floor tiles. Western Hemisphere representatives below can provide prompt service and local warehousing as required.

SALES REPRESENTATIVES

California: A.J. Lynch & Co.
Los Angeles, Oakland

Illinois, Indiana, Wisconsin
Jensen-Souders Associates, Inc., Chicago

Michigan: Matteson-Ridolfi, Inc., Detroit

New England, New York
Northern New Jersey
D.H. Litter Company, Inc.
New York, N.Y., Ballardvale, Mass.

Ohio
Lawlor Distributors, Inc., Cleveland

Pennsylvania, Delaware, Maryland
Virginia, Southern New Jersey
Van Horn, Metz & Company, Inc.
Conshohocken, Pa., Baltimore, Md.,
Carnegie, Pa.

Argentina
Tradimex S.A.I.Y.C., Buenos Aires

Brazil: Cargill Agricola S.A.
Sao Paulo, Rio de Janeiro

Bolivia: Tennant S.A., La Paz

Canada (Ontario, Quebec)
St. Lawrence Chemical (Sales) Co. Ltd.
Rexdale, Ontario
Montreal, Quebec

Dominican Republic
A. Amanzio, Mexico City

Mexico
I.C.C. Mexicana S.A.
Mexico City

Peru: Tennant (Peru) S.A., Lima

Puerto Rico
Juan Vater & Co., Inc., Santurce

Venezuela
Connell Brothers Co., Ltd., Caracas

General agent for Argentina, Brazil, Bolivia, Peru and Venezuela is Amalgamet Canada Ltd., Toronto. We're also represented in Europe, Asia and Africa. For more information contact: Lac d'Amiante du Québec, Ltée, P.O. Box 608, Black Lake, Québec, Canada GON 1AO, (418) 423-4226. Cable: LAQBESTOS BLACK LAKE, Telex: 05-833586.

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Works, Huntington, Indiana, include energy-saving condensation tanks and a pelletizer to handle the disposal of dust created during the manufacture of friction products.

The Stragari Mining & Industrial Combine has undertaken an expansion program at the *Kolubara asbestos mine and plant* located near Kragujevac, in Serbia, Yugoslavia. Some 836-million Dinars is being invested to enlarge the asbestos board factory and to construct an asbestos paper manufacturing facility. Upon completion in late 1982, production capacity will quadruple to 15,000 tons of material per year.

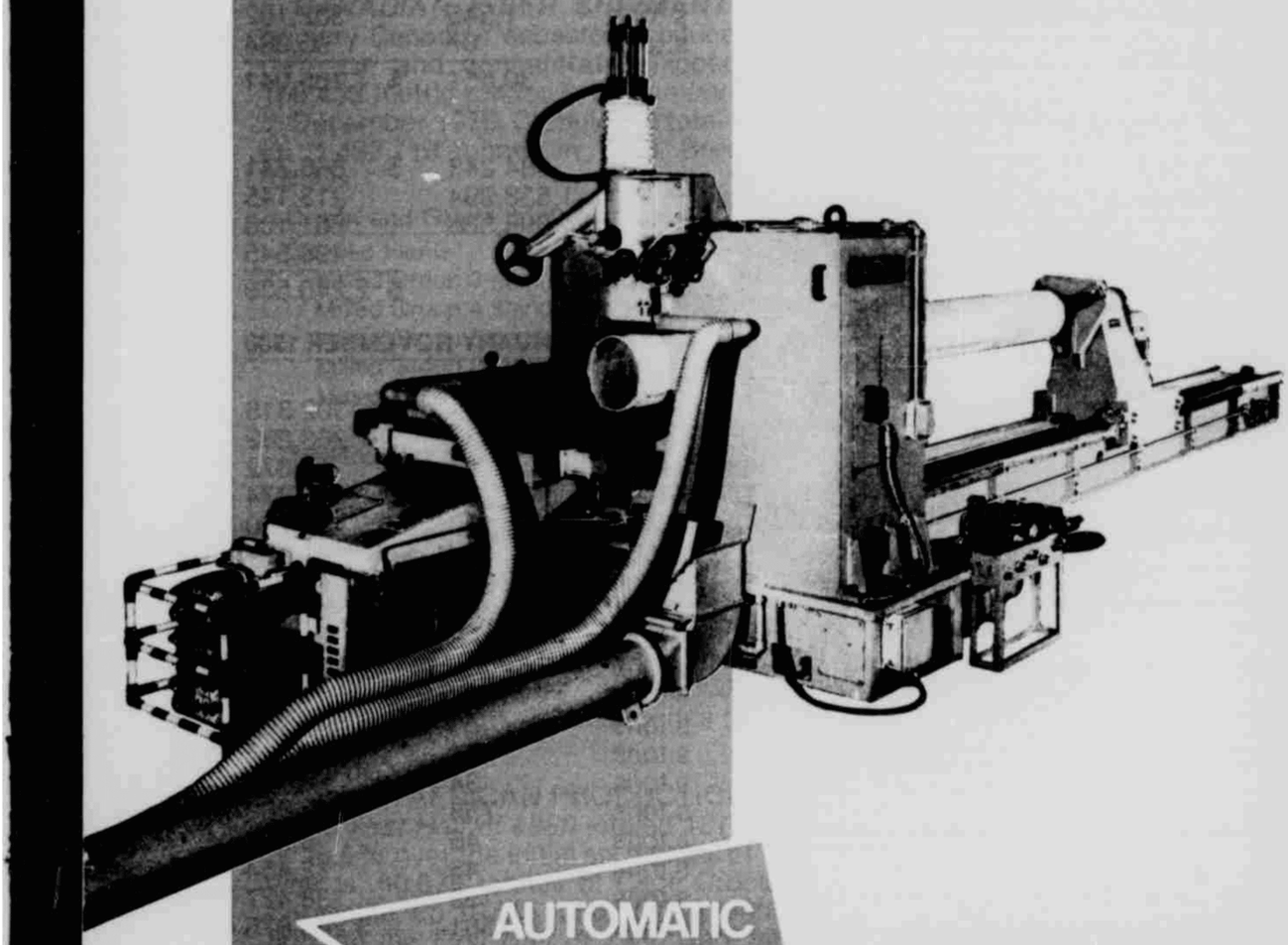
Supradur Manufacturing Corporation, Wind Gap, Pennsylvania, agrees that 1980 was a difficult year for the Asbestos Industry because of a soft economy and government restrictions. *President K. F. Netter* notes, however, that indications point to an abatement of these problems in 1981. He further stated that although Supradur has diversified its business interests over the last several years, it is *still heavily committed to the asbestos-cement siding and roofing business.* One of the company's most recent product brochures is concerned with *mineral fiber roofing shingles,* including Western Shakes which resemble handsome wood shake shingles and Supra-Slate which features the look and durability of natural stone. . . . *Supradur recently acquired Terry Burners Inc.,* Montreal, Quebec, a maker of heating equipment.

Turner & Newall Ltd., Manchester, England, *sold its interests* in asbestos mining and manufacturing in Canada, in Hardie-Ferodo and Acmil Plastics in Australia and in Ets. Dagard in France. Their sale realized £17-million which has been used to reduce borrowings. . . . T&N announced that its manufacturing subsidiary in Zimbabwe, *Turner Holdings (Pvt) Ltd.,* is having discussions with *Mashonaland Holdings Ltd.,* an industrial firm listed on the Zimbabwe Stock Exchange, which, if successful, will lead to a *merger of the two companies.* . . . *Extensions to the Ferodo factory at Salisbury, Zimbabwe,* were officially opened in October 1980. The facility will produce brake and clutch linings for the automotive aftermarkets in Zimbabwe, Zambia, Mozambique, Malawi and Botswana. . . . *Turnall A.C. (Pvt) Ltd.,* at its asbestos-cement pipe plant at Bulawayo, Zimbabwe, has rebuilt the existing four-meter Mazza pipe machine to incorporate two vats and to operate at a higher speed. The Z$1.5-million program increased capacity one-third, for a production output of 37,000 metric tonnes per annum. . . . *TAC Construction Materials Ltd.* has a range of asbestos-cement internal lining products called Tacliners, designed for use as part of insulated double cladding systems. . . . TAC received orders worth £1.6-million for its *Everite a-c pressure pipes* for use in the distribution of drinking water. The largest order is to be shipped to the Middle East. . . . Firefly 800 is a *non-asbestos millboard from TBA Industrial Products Ltd.* which consists of inorganic fibers and inert fillers bonded together to produce a board with properties similar to asbestos millboard but with higher flexural strength. . . . *T&N Chairman S. Gibbs* reports that competitive materials continue to make inroads into some of the traditional markets served by asbestos products. However, the pace at which legislative changes in Europe are being introduced is slow enough for manufacturers and users of asbestos products to adapt their processes to them and in most cases to anticipate them. Furthermore, the combination of technical characteristics possessed by asbestos fiber remains difficult to match.

Next Issue: The Kinergy Vertical Flow Story

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Imports Into the United States

From: U.S. Bureau of the Census

		NOVEMBER 1980	
UNMANUFACTURED ASBESTOS:			
Amosite, Canada	s.tons	54	$ 302,318
Crocidolite, South Africa	s.tons	19	11,414
Chrysotile Crudes, Canada	s.tons	122	15,760
Chrysotile Spinning Fibers, Canada	s.tons	158	158,002
South Africa	s.tons	99	84,839
Zimbabwe	s.tons	60	59,683
Chrysotile, Other, Canada	s.tons	28,503	6,679,650
Mexico	s.tons	4	289
Other Crudes & Fibers, Canada	s.tons	1,545	362,102
Zimbabwe	s.tons	87	90,984
		30,651	$ 7,765,041
MANUFACTURED ASBESTOS PRODUCTS:			
Asbestos yarn, cloth, tape, etc.	Lb	484,248	$ 866,741
A-C pipes, tubes & fittings	Lb	1,558,994	213,145
Other asbestos-cement articles	Lb	4,596,566	861,108
Other asbestos articles		..	299,545
			$ 2,240,539
		JANUARY-NOVEMBER 1980	
UNMANUFACTURED ASBESTOS:			
Amosite, Canada	s.tons	54	$ 302,318
South Africa	s.tons	307	263,262
Crocidolite, Canada	s.tons	57	11,672
South Africa	s.tons	8,297	5,189,374
Chrysotile Crudes, Canada	s.tons	122	15,760
Zimbabwe	s.tons	22	29,592
Chrysotile Spinning Fibers, Canada	s.tons	5,514	4,196,766
South Africa	s.tons	397	338,294
Sweden	s.tons	23	2,520
Zimbabwe	s.tons	602	575,008
Chrysotile, Other, Brazil	s.tons	64	11,959
Canada	s.tons	303,882	69,349,200
Germany, Fed. Rep.	s.tons	21	2,368
Mexico	s.tons	34	1,574
South Africa	s.tons	758	432,262
Sweden	s.tons	46	5,040
Yemen	s.tons	46	12,454
Zimbabwe	s.tons	159	138,427
Other Crudes & Fibers, Canada	s.tons	12,361	3,286,675
Germany, Fed. Rep.	s.tons	22	28,607
India	s.tons	46	13,890
Japan	s.tons	29	9,212
Mexico	s.tons	2	3,500
South Africa	s.tons	1,452	913,265
United Kingdom	s.tons	1	2,512
Zimbabwe	s.tons	358	370,738
		334,676	$85,506,249

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U.S. IMPORTS—CONTINUED

MANUFACTURED ASBESTOS PRODUCTS:

Asbestos yarn, cloth, tape, etc.	Lb	6,898,379	$11,542,240
A-C pipes, tubes & fittings	Lb	9,970,493	1,453,057
Other asbestos-cement articles	Lb	59,168,856	11,132,632
Other asbestos articles			5,377,257
			$29,505,186

January-November 1979: U.S. imports of unmanufactured asbestos totaled 523,498 short tons, valued at $126,199,423; imports of manufactured asbestos products were valued at $29,419,655.

CANADIAN FIBER SHIPMENTS—According to Statistics Canada, primary Canadian asbestos producers' shipments (including tonnage for own use and concentrate shipped from Asbestos Hill) amounted to 108,433 metric tonnes in *December 1980* compared with 136,091 tonnes in December 1979. Cumulative total for the *Year 1980* is 1,291,371 tonnes vs. 1,492,719 tonnes in 1979. Breakdowns for 1980 and 1979 are as follows:

Origin and Grade (Metric Tonnes)	Year 1980	Year 1979
Quebec Plants		
Milled Group 3 spinning fibers	11,236	16,172
Milled Group 4 shingle fibers	369,505	404,959
Milled Group 5 paper fibers	146,941	160,119
Milled Group 6 stucco fibers	202,440	226,150
Milled Group 7 refuse	392,865	520,580
	1,122,987	1,327,980
Newfoundland and British Columbia Plants	168,384	164,739
	1,291,371	1,492,719

CANADA'S FLOOR TILE OUTPUT—For the period *January-September 1980,* Canadian manufacturers *produced* 6,210,466 square meters (31,988 metric tonnes) of vinyl-asbestos floor tile. Production for the first nine months of 1979 reached 6,061,479 m² or 29,777 tonnes. . . . *Shipments* for the same 1980 period totaled 6,128,828 m² (31,489 tonnes) vs. 6,239,749 m² or 30,569 tonnes the prior year. [Statistics Canada]

SOUTH AFRICAN PRODUCTION & EXPORTS—Asbestos *production* in the *First Half of 1980* totaled 137,936 metric tonnes, up 19,676 tonnes or 16.6% over the initial six months of 1979. Breakdown for the latest half-year is: 60,678 tonnes of Cape Crocidolite, up 8.8%; 52,195 tonnes of Chrysotile, up 19.5%; and 25,063 tonnes of Amosite, up 33.2%. . . . *Exports* in the *First Half of 1980* were valued at R45,993,850, down 1.5% from the R46,716,758 reported for the like period a year earlier. By variety of asbestos, values for the latest six months are: Cape Crocidolite—R26,966,493, down 14.3%; Amosite—R9,956,862, up 32.5%; and Chrysotile—R9,070,495, up 17%. [Department of Mineral and Energy Affairs, South Africa]

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Exports From the United States

From: U.S. Bureau of the Census

		NOVEMBER 1980	
UNMANUFACTURED ASBESTOS:			
Asbestos crudes, fibers & stucco	s.tons	3,499	$ 1,323,253
Asbestos sand & refuse	s.tons	1,165	289,217
		4,664	$ 1,612,470
MANUFACTURED ASBESTOS PRODUCTS:			
Asbestos yarn, cloth, tape, etc.	Lb	557,412	$ 643,916
Asbestos-Cement shingles & clapboard	Lb	966,436	225,169
Other asbestos-cement articles	Lb	3,446,818	1,531,332
Asbestos gaskets	Lb	32,972	132,446
Asbestos packings & seals	Lb	337,870	1,190,399
Asbestos insulation		..	345,663
Brake linings & disc brake pads		..	6,260,822
Clutch facings & linings		..	719,042
Other asbestos articles		..	1,500,735
			$ 12,549,524

		JANUARY-NOVEMBER 1980	
UNMANUFACTURED ASBESTOS:			
Asbestos crudes, fibers & stucco	s.tons	37,280	$ 15,935,967
Asbestos sand & refuse	s.tons	12,220	3,520,329
		49,500	$ 19,456,296
MANUFACTURED ASBESTOS PRODUCTS:			
Asbestos yarn, cloth, tape, etc.	Lb	5,555,157	$ 7,854,466
Asbestos-Cement shingles & clapboard	Lb	9,585,265	2,468,994
Other asbestos-cement articles	Lb	32,097,032	12,767,963
Asbestos gaskets	Lb	908,134	3,352,396
Asbestos packings & seals	Lb	4,208,739	14,358,215
Asbestos insulation		..	5,866,325
Brake linings & disc brake pads		..	50,005,201
Clutch facings & linings		..	9,033,362
Other asbestos articles		..	23,461,128
			$129,168,050

January-November 1979: U.S. exports of unmanufactured asbestos reached 42,208 short tons, valued at $15,204,970; exports of manufactured asbestos products were valued at $124,856,787.



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Exports From Canada

From: Statistics Canada

NOVEMBER 1980

UNMANUFACTURED ASBESTOS:		***Milled Gp 3***	***Milled Gp 4&5***	***Shorts Gp 6-9***
Western Europe	s.tons	419	32,025	10,433
Eastern Europe	s.tons	204	2,768	481
Middle East	s.tons	..	1,144	730
Africa	s.tons	..	2,165	331
Asia	s.tons	135	16,013	12,039
Oceania	s.tons	..	871	98
So. & Cen. America & Antilles	s.tons	192	7,117	4,820
United States	s.tons	183	5,529	23,938
		1,133	67,632	52,870

The total amount of unmanufactured asbestos exported in *November 1980* was 121,635 short tons (110,347 metric tonnes), valued at C$58,427,000.

MANUFACTURED ASBESTOS PRODUCTS:

Asbestos cloth, dryer felts & sheets	C$	362,000
Asbestos brake linings & facings		207,000
Asbestos-Cement building materials		850,000
Other basic asbestos products		900,000
	C$	2,319,000

JANUARY-NOVEMBER 1980

UNMANUFACTURED ASBESTOS:		***Milled Gp 3***	***Milled Gp 4&5***	***Shorts Gp 6-9***
Western Europe	s.tons	5,258	296,468	125,162
Eastern Europe	s.tons	1,830	19,001	1,977
Middle East	s.tons	100	10,874	1,088
Africa	s.tons	21	31,109	15,917
Asia	s.tons	3,290	128,626	120,207
Oceania	s.tons	7	18,309	1,119
So. & Cen. America & Antilles	s.tons	1,287	75,899	45,530
United States	s.tons	3,791	61,098	270,227
		15,584	641,384	581,227

The total amount of unmanufactured asbestos exported in *January-November 1980* was 1,238,195 short tons (1,123,272 metric tonnes), valued at C$576,832,000.

MANUFACTURED ASBESTOS PRODUCTS:

Asbestos cloth, dryer felts & sheets	C$	4,145,000
Asbestos brake linings & facings		2,866,000
Asbestos-Cement building materials		16,013,000
Other basic asbestos products		11,934,000
		C$34,958,000

January-November 1979: Canadian exports of unmanufactured asbestos totaled 1,484,653 short tons (1,346,849 metric tonnes), valued at C$601,024,000; exports of manufactured asbestos products were valued at C$33,060,000.

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Birthday Greetings to . . .

H. D. S. Hardie, Personnel & External Relations Director, Turner & Newall Ltd., Manchester, England, April 15.
K. S. Jackson, Vice-President/Operations, Bell Asbestos Mines Ltd., Thetford Mines, Quebec, April 15.
Denis M. Kelleher, Marketing Manager, Asbestos Fiber Division, Johns-Manville Sales Corporation, Denver, Colorado, April 16.
Jean Marc Leblond, Manager-Marketing, Bell Asbestos Mines Ltd., Thetford Mines, Quebec, April 16.
Adi K. Patell, Sales Administrator, Carey Canada Inc., East Broughton Station, Quebec, April 16.
G. A. Higham, Chairman, Cape Industries Ltd., London, England, April 17.
Kerry A. Rickert, General Superintendent of Manufacturing, Capco Pipe Company, Inc., Van Buren, Arkansas, April 18.
Robert A. Clifton, Physicist & Asbestos Specialist, Division of Nonmetallic Minerals, U.S. Bureau of Mines, Washington, D.C., April 20.
Neal B. Norris, Market Manager (Felt), Asbestos Fiber Division, Johns-Manville Sales Corporation, Denver, Colorado, April 21.
Richard L. Brown, Director of Exploration, Asarco Incorporated, New York City, April 22.
Robert D. Phillips, Chicago Plant Manager, Roofing Products Division, The Celotex Corporation, a component of Jim Walter Corporation, Chicago, Illinois, April 22.
William T. Cavanaugh, President, American Society for Testing and Materials, Philadelphia, Pennsylvania, April 24.
Robert A. DeWitt, Vice President & Group Executive, Jim Walter Corporation, Tampa, Florida, April 27.
W. Jerry Rooney, Vice President of Marketing, Nicolet Inc., Ambler, Pennsylvania, April 28.
Calvin M. Edwards, Manager of Manufacturing, Southern Textile Corporation, Charlotte, North Carolina, April 29.
Wayne Gallant, Vice President-Finance & Secretary-Treasurer, Atlas Turner Inc., Montreal, Quebec, April 30.
R. L. Hennebach, President & a Director, Asarco Incorporated, New York City, May 2.
Hans Thoeni, Chairman, Everite Group of Companies, Braamfontein, Johannesburg, Republic of South Africa, May 4.
M. E. Mealin, General Manager, Everite Ltd., Braamfontein, Johannesburg, Republic of South Africa, May 6.
J. Randall Plummer, Vice President, Pars Manufacturing Company, Ambler, Pennsylvania, May 6.
R. J. Lambson, Managing Director, Everite Group of Companies, Braamfontein, Johannesburg, Republic of South Africa, May 10.
H. A. Hudson, a Director, James Hardie Industries Ltd., Sydney, New South Wales, Australia, May 11.
D. G. A. Say, a Director, James Hardie Industries Ltd., Sydney, New South Wales, Australia, May 11.
Robert J. Muth, Esq., a Vice President, Asarco Incorporated, New York City, May 13.
G. J. Leathley, General Mine Superintendent, Cassiar Mine, Cassiar Resources Division, Brinco Mining Ltd., Cassiar, British Columbia, May 13.

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Asbestos Stock Quotations

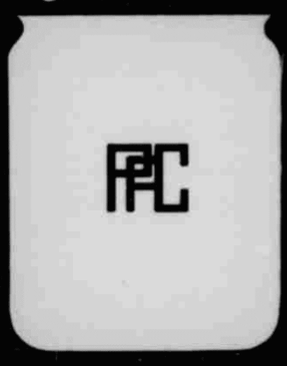
FEBRUARY 17, 1981

Abitibi Asbestos	80¢*	G&W (pfd 5.75)	57½
Advocate Mines	1¼*	IC Industries	30
Armstrong World Ind.	15¼	IC Ind. (pfd 3.50)	45½
Armstrong (pfd 3.75)	28½	Johns-Manville	21¾
Asarco	35⅞	J-M (pfd 5.40)	43
Asbestos Corporation	29¾*	Kennecott	23⅞
Bendix	61¾	Lear Siegler	35
Bendix (pfd)	49⅝	Lear Siegler (pfd 2.25)	86¼
Brinco	10⅞*	McAdam Mining	88¢*
Carlisle	93½	National Gypsum	20½
CertainTeed	12¼	Pathfinder	48¢*
Charter Conso.	pence 226	Porter H. K. (pfd 5.50)	75⅛
Colt Industries	49⅝	Raybestos-Manhattan	22¾
Colt Ind. (pfd 1.60)	38½	Rio Algom	32*
Colt Ind. (pfd 4.25)	106	Rio Algom (pfd 5.80)	54*
Conwest	7*	Rio Algom (pfd 8.5%)	4¼*
GAF Corporation	13½	St. Gobain	FRENCH FRANCS 137.40
GAF (pfd 1.20)	16¾	Supradur	Bid 5; Asked 5½
General Mining	17.375	Union Carbide	54½
Genstar	30½	United Asbestos	6⅜
Genstar (pfd 1.68)	27	Walter, Jim	31¼
Gulf & Western	15⅛	Walter, Jim (pfd 1)	8¾
G&W (pfd 2.50)	37⅝	Walter, Jim (pfd 1.60)	33¼
		Transpacific Asbestos	56¢*

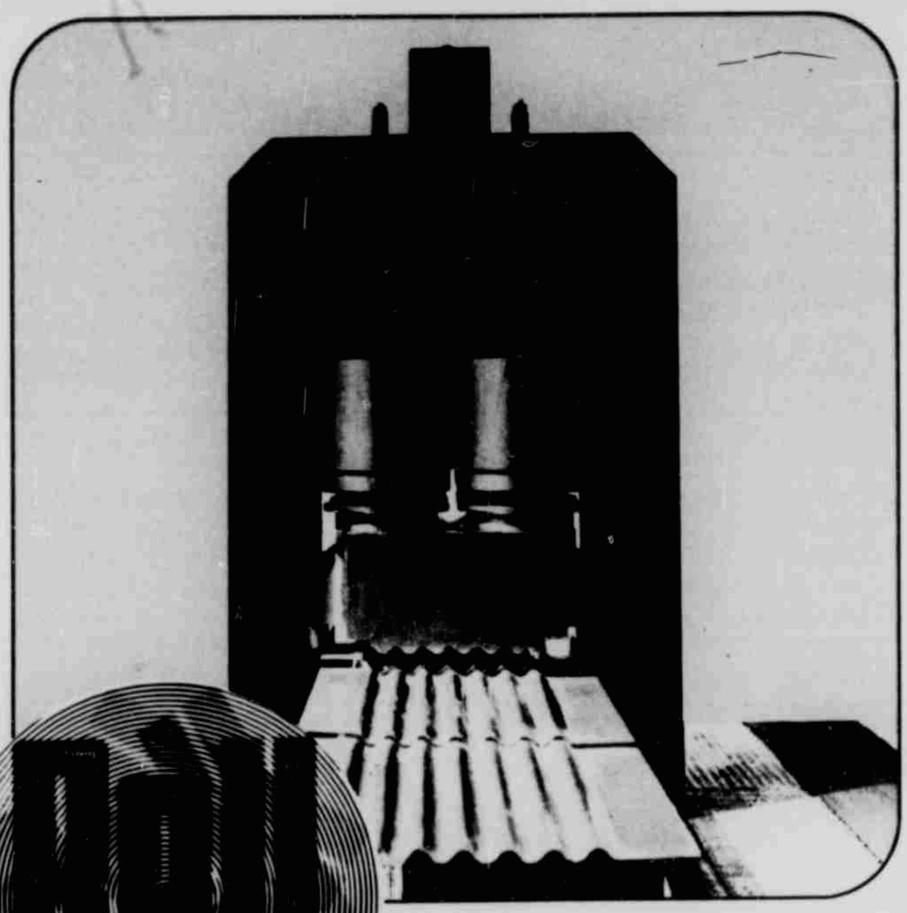
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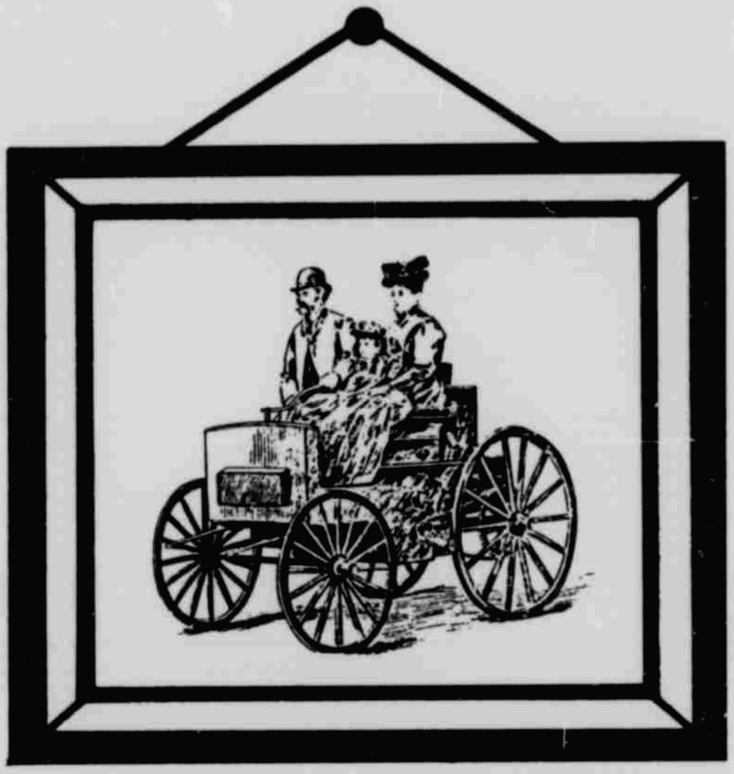
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