



Global and China Automotive Airbag Fabric Industry Report, 2014

Jan. 2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Airbag fabric is mainly used to produce automotive airbag. Affected by technology, certification and supply chain relationship, there are higher barriers to entry for new manufacturers. Globally, the supply of airbag fabric is monopolized by the manufacturers from Japan, Europe and America. Similarly, the supply of airbag yarn (raw material for airbag fabric) is also in a state of oligopoly, basically controlled by American INVISTA, German PHP, Japanese Toray and several other companies.

Benefiting from a burgeoning automobile market in China, the demand for airbag increases rapidly, with domestic demand for airbag fabric reaching 28.94 million meters in 2013. As China introduces more and more laws and regulations about safety products, automotive airbag grows popular and installation rate rises gradually, the demand for airbag fabric in China will be huge, expected to stand at 43.86 million meters in 2018.

In 2014, major airbag fabric producers in China included HMT (Xiamen) New Technical Materials Co., Ltd, Marui Weaving (Nantong) Co., Ltd., Jiangyin DUAL Automotive Textile Co., Ltd., Shanghai Porcher Industries, Ltd., Kolon (Nanjing) Special Textiles Co., Ltd., Toyobo Automotive Textiles (Changshu) Co., Ltd., and N.I. Teijin Airbag Fabric (Nantong) Co., Ltd.

Major Air Bag Fabric Producers in China

Companies in China	Investor	Date of Establishment	Registered Capital	Type
Marui Weaving Nantong Co Ltd	Toray (China) Investment Co Ltd, Marui Group	Apr. 23, 2004	JPY 650.00 million	Foreign joint venture
N.I. TEIJIN AIRBAG FABRIC (NANTONG) CO., LTD.	TEIJIN RONTIER, Asahi Kasei Fibers, Chukoh Chemical Industries, Ltd., Iwasa Orimono	Oct. 31, 2011	JPY 936.0861 million	Foreign joint venture
Jiangyin Dual Automotive Textile Co., Ltd.	DUAL CO., LTD.	Jan. 24, 2008	USD5 million	Exclusively foreign-owned
Shanghai Porcher Industries	PORCHER INDUSTRIES	Oct. 24, 2006	USD3.320 million	Exclusively foreign-owned
Kolon (Nanjing) Special Textiles Co., Ltd.	Kolon Industries, Inc., Kolon (China) Investment Co., Ltd.	Nov. 28, 2002	USD63.97 million	Foreign joint venture
Toyobo Automotive Textiles (Changshu) Co., Ltd.	Toyota Tsusho Corporation, Toyobo Group	Apr. 28, 2011	USD5.60 million	Foreign joint venture
HMT (Xiamen) New Technical Materials Co., Ltd.	Jinwei International	May 12, 2002	RMB105 million	Domestic-funded

Source: ResearchInChina

HMT (Xiamen) New Technical Materials Co., Ltd is one of airbag fabric and airbag suppliers that early realized commercialized mass-production of airbag fabric in China. As of 2014, the company's major customers included Yanfeng Key (Shanghai) Automotive Safety Systems Co., Ltd., Autoliv, GST Automotive Safety (Changshu) Co., Ltd., Jinzhou Jinheng Automotive Safety System Co., Ltd. and BYD Co Ltd.

Global and China Automotive Airbag Fabric Industry Report, 2014 by ResearchInChina focuses on the following:

- Overview of airbag fabric (including definition, definition of technical indicators, technical indicators, development history, industrial policies);
- Global and Chinese airbag fabric market (including market demand, competition among companies, development trend);
- Global and Chinese airbag yarn market (including global and China's capacity, competitive landscape);
- Global and Chinese airbag fabric producers (Japanese Toray, Teijin FRONTIER and South Korean DUAL, covering mainly revenue, net income, revenue structure, production base, airbag fabric business);
- Global and Chinese airbag yarn producers (INVISTA, Zhejiang Hailide New Material, Asahi Kasei Fibers German PHP and three other companies, covering mainly revenue, business performance, airbag yarn business).

1. Overview of Airbag Fabric

1.1 Definition and Development

1.1.1 Definition

1.1.2 Composition

1.1.3 Development History

1.2 Industrial Policy

1.2.1 Industry-related Policy

1.2.2 Industrial Textile Industry-related Policy

2. Airbag Fabric Market

2.1 Airbag Fabric

2.1.1 Global

2.1.2 China

2.2 Competitive Landscape

2.3 Development Trend

2.4 Airbag Yarn

2.4.1 Market Demand

2.4.2 Competitive Landscape

3. Overview of Chinese Automobile Market

3.1 Automobile Market

3.2 Passenger Vehicle and Market Segments

3.3 Commercial Vehicle and Market Segments

4 Major Global and Chinese Airbag Fabric Companies

4.1 Toray

4.1.1 Profile

4.1.2 Operation

4.1.3 Revenue Structure

4.1.4 R&D Costs

4.1.5 Airbag Yarn Capacity

4.1.6 Airbag Base Fabric

4.1.7 Marui Weaving (Nantong) Co., Ltd

4.2 Teijin Frontier

4.2.1 Profile

4.2.2 Operation

4.2.3 N.I. Teijin Airbag Fabric (Nantong) Co., Ltd.

4.3 DUAL

4.3.1 Profile

4.3.2 Airbag Fabric Business

4.3.3 Production Base

4.3.4 Jiangyin DUAL Automotive Textile Co., Ltd.

4.4 Porcher Industries

4.4.1 Profile

4.4.2 Production Base

4.4.3 Shanghai Porcher Industries

4.5 KOLON

4.5.1 Profile

4.5.2 Business Performance

4.5.3 Production Base

4.5.4 Airbag Business

4.5.5 Kolon (Nanjing) Special Textiles Co., Ltd

4.6 Toyobo

4.6.1 Profile

4.6.2 Business Performance

4.6.3 Production Base

4.6.4 Airbag Fabric Business

4.6.5 Toyobo Automotive Textiles (Changshu) Co., Ltd.

4.7 HMT (Xiamen) New Technical Materials Co., Ltd

4.7.1 Profile

4.7.2 Business Performance

4.7.3 Airbag Fabric Capacity and Output

4.7.4 Major Customers

4.7.5 Raw Material Purchase

4.7.6 Major Suppliers

4.7.7 R&D Costs

4.7.8 Main Projects

5. Major Airbag Yarn Companies

5.1 INVISTA

5.1.1 Profile

5.1.2 INVISTA Specialty Fibers (Shanghai) Co., Ltd.

5.2 Zhejiang Hailide New Material Co., Ltd.

5.2.1 Profile

5.2.2 Business Performance

5.2.3 Airbag Yarn Business

5.3 ASAHI KASEI FIBERS

5.4 Polyamide High Performance GmbH

- Production Cost of Airbag
- Development Stages of Airbag Fabric
- Global Automotive Safety System Market Size, 2008-2018E (Unit: USD mln)
- Global Passenger Vehicle Output, YoY Growth Rate and % of Total Automobile Output, 2007-2013
- Global Airbag Fabric Demand, 2007-2018E (Unit: mln meters)
- China's Demand for Airbag Fabric, 2009-2018E (Unit: mln meters)
- Major Airbag Fabric Companies in China, 2014
- Consumption Structure of Nylon 66 in China, 2013
- Global Airbag Yarn Demand, 2013-2018E
- Major Global Chinlon 66 Airbag Yarn Producers and Their Capacities, 2013-2014
- Major Airbag Yarn Producers and Their Capacities in China, 2013
- Performance Comparison between Polyester Airbag Yarn and Chinlon 6
- Number of Automobile Makers and YoY Growth in China, 2003-2014
- Revenue and YoY Growth of China's Automobile Manufacturing Industry, 2003-2014
- Total Profit and YoY Growth of China's Automobile Manufacturing Industry, 2003-2014
- Gross Margin of China's Automobile Manufacturing Industry, 2003-2014
- China's Automobile Output and Sales Volume (by Passenger Vehicle and Commercial Vehicle), 2009-2017E
- China's Automobile Ownership and YoY Growth, 2007-2017E
- China's Passenger Vehicle Output, YoY Growth and % of Total Automobile Output, 2005-2017E
- Market Share of Various Models by Sales Volume in China's Passenger Vehicle Market, 2008-2013
- China's Top10 Manufacturers by Passenger Vehicle Sales Volume, 2008-2013
- China's Bus Output (by Model), 2009-2017E
- China's Bus Sales Volume (by Model), 2009-2017E
- China's Top10 Manufacturers Based on Bus Output and Sales Volume (by Model), 2012-2013
- China's Truck Output (by Model), 2009-2017E

- China's Truck Sales Volume (by Model), 2009-2017E
- China's Top10 Manufacturers Based on Truck Output and Sales Volume (by Model), 2012-2013
- Main Financial Indexes of Toray, FY2009-FY 2014
- Revenue Breakdown of Toray by Business, FY2008-FY2015E
- Revenue Structure of Toray by Region, FY2013
- R&D Costs of Toray, FY2008-FY2012
- Revenue of Toray's Fibers & Textiles Segment, FY2011-FY2015E
- Revenue of Teijin Frontier, FY2009-FY2013
- Revenue Breakdown of Teijin Frontier by Business Segment, FY2013
- Development History of DUAL
- Major Customers of DUAL
- Revenue Breakdown of Porcher Industries by Region and Product, 2014
- Revenue of KOLON, 2013-2014
- Revenue Breakdown of KOLON by Business, 2010-2014
- Revenue of KOLON's Industrial Materials Segment, 2013-2014
- Development History of KOLON's Airbag Business
- Operating Revenue of Toyobo, FY1996-FY2014
- Operating Revenue of Toyobo, FY2014-FY2015E
- Revenue Breakdown of Toyobo by Business Segment, FY2010-FY2014
- Revenue Breakdown of Toyobo by Business Segment, FY2014-FY2015E
- Revenue of Toyobo's Industrial Materials Segment, FY2008-FY2014
- Revenue of HMT (Xiamen) New Technical Materials, 2011-2014
- Airbag Fabric Capacity, Output and Sales Volume of HMT (Xiamen) New Technical Materials, 2011-2014
- Airbag Fabric Revenue and Price of HMT (Xiamen) New Technical Materials, 2011-2014
- Major Customers of HMT (Xiamen) New Technical Materials, 2011-2014

- Raw Material Procurement and % of Total Procurement of HMT (Xiamen) New Technical Materials, 2011-2014
- Changes in Raw Materials Prices of HMT (Xiamen) New Technical Materials, 2011-2014
- Major Suppliers of HMT (Xiamen) New Technical Materials, 2013-2014
- R&D Costs and % of Total Revenue of HMT (Xiamen) New Technical Materials, 2011-2014
- Main Financial Indexes of Zhejiang Hailide New Material, 2009-2014
- Revenue and Gross Profit Breakdown of Zhejiang Hailide New Material by Product, 2009-2014
- Main Financial Indexes of Asahi Kasei Fibers, 2013-2014
- Revenue of Asahi Kasei Fibers by Business Segment, 2013-2014
- Operating Income Breakdown of Asahi Kasei Fibers by Business Segment, 2013-2014

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