



Global and China Automobile Fuel Tank Industry Report, 2014-2018

Mar. 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

Fuel tank plays an important role in protecting automotive safety, so vehicle plants put forward strict requirements on synchronous development capabilities, production capacity, financial strength and other aspects of fuel tank suppliers. In China, even in the world, vehicle plants and automotive fuel tank manufacturers maintain stable relationship, so that the market concentration rate is high. This feature is more apparent in the current mainstream plastic fuel tank market.

The international automotive plastic fuel tank enterprises include France-based Inergy, Germany-based Kautex, UK-based TI Automotive, Japan-based YACHIYO and China-based Yapp. These five producers occupy roughly 70% share of the global automotive plastic fuel tank market together.

In China, plastic fuel tanks are supplied by foreign companies (such as Inergy, Kautex, TI Automotive and Yachiyo) as well as local enterprises (including Yapp, Shunrong, Jiangsu Suguang), with a pattern that Yapp takes the lead while evenly matched others follow. Yapp seizes over 30% share in the Chinese plastic fuel tank market; Inergy, Kautex, TI Automotive, Yachiyo, Shunrong and Suguang hold more than 40% market share jointly.

Founded in 1988, Yapp Automotive Parts Co., Ltd. is an automotive plastic fuel tank giant in China. Yapp sold 5.52 million automotive plastic fuel tanks in 2013 (increasing by 19.37% year on year) and 3.05 million ones in H1 2014, keeping a good momentum. Yapp has 13 factories in China and 5 ones overseas, covering multiple automobile production clusters with strong supply capacity. In China, Yapp mainly serves Shanghai Volkswagen, FAW-Volkswagen, Shanghai GM, Changan Ford and SAIC Motor. In 2014, Yapp entered Toyota's supplier system to offer fuel tanks for Sichuan FAW Toyota, which was the first time for Yapp to serve Toyota.

Inergy runs a total of five fuel tank factories in China (respectively located in Wuhan, Beijing, Guangzhou, Shenyang and Ningbo), more than Kautex, Yachiyo, TI Automotive and other foreign companies. Inergy's Beijing Factory mainly supplies products for Beijing Hyundai, Beijing Benz, BAIC Motor and other companies; Wuhan Factory provides products to Nissan and BMW; Ningbo Factory (Ningbo Plastic Omnium Inergy Automotive Systems Co., Ltd.) is a core supplier of Geely Chunxiao Project and will supply products which are expected to be put into production in 2015 to Geely EMGRAND.

The report includes the following aspects:

- Development course, market size, competition pattern, supply, trends of global and China automotive fuel tank industry;
- Technology, market size, competition pattern and supply of global and Chinese plastic fuel tanks;
- Market size, competition pattern and supply of global and Chinese metal fuel tanks;
- Development, product types, capacity, finance, operation, output, sales volume, production base distribution and major OEM customers of major global and Chinese automotive fuel tank manufacturers.

Relationship between Global and Chinese Automotive Plastic Fuel Tank Manufacturers and Vehicle Plants

	Inergy	Kautex	TI Automotive	Yachiyo	Yapp	Shunrong	Suguang
Volkswagen	•	•	•		•		
BMW		•	•				
GM	•	•	•		•		
Ford	•	•	•		•		
Daimler	•	•	•				
Toyota	•	•	•		•		
Honda			•	•			
Nissan	•	•	•				
Suzuki	•						
Mazda		•					
Citroen	•						
Hyundai	•		•				
Haima					•	•	•
FAW					•		
SAIC					•		
Chery					•	•	•
JAC						•	•
Geely						•	•
Great Wall						•	

Source: Global and China Automotive Fuel Tank Industry Report, 2014-2018, ResearchInChina

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 - 1.1.1 Definition
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