



Global and China Automotive Fuel Tank Industry Report, 2016-2020

Nov. 2016

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

Automotive fuel tank, one of important auto functional and safety parts, is chiefly classified into plastic fuel tank and metal fuel tank according to the material. Global automotive fuel tank market was about 90.10 million pieces in 2015, 1.5 times as many as the 2009 figure, 24.30 million pieces of which were contributed by China, the world's largest automobile market, 1.8 times the size in 2009. It is expected that global automotive fuel tank market size will exceed 100 million pieces and Chinese market close to 30 million pieces in 2020.

Due to automotive lightweight and the requirements on emission reduction, plastic fuel tank gradually replaces metal one, accounting for about 80% globally and 70% or so in China in 2015, and the figures are predicted to rise to 85% and 80% by 2020, respectively. Major global fuel tank suppliers are Inergy, Kautex, TI Automotive, YAPP Automotive Systems, Yachiyo Industry, etc. The five companies held a combined over 70% share of global plastic fuel tank market in 2015 with Inergy holding the highest proportion, about 27%.

Plastic fuel tank suppliers in the Chinese market consist of three camps: foreign-funded, State-owned, and private in a ratio of 3:4:3. Foreign players have accelerated their expansions in China over recent years. Inergy established its 6th Chongqing-based fuel tank plant in China in May 2015. Kautex broke ground on its Wuhan plant in Oct 2015 for the manufacturing of fuel tanks with the world's latest NGFS technology. Production is slated to begin in 2017. Kautex (Changchun) Plastics Technology opened in April 2016 and will become the center for the production with NGFS technology. TI Automotive put its 900,000 pcs/a plastic fuel tank production facility in Baoding (in Hebei province, China) into operation in June 2016. As these capacities are gradually unleashed, the share of foreign brands in the Chinese plastic fuel tank market will further rise, reaching an estimated over 50% in 2020.

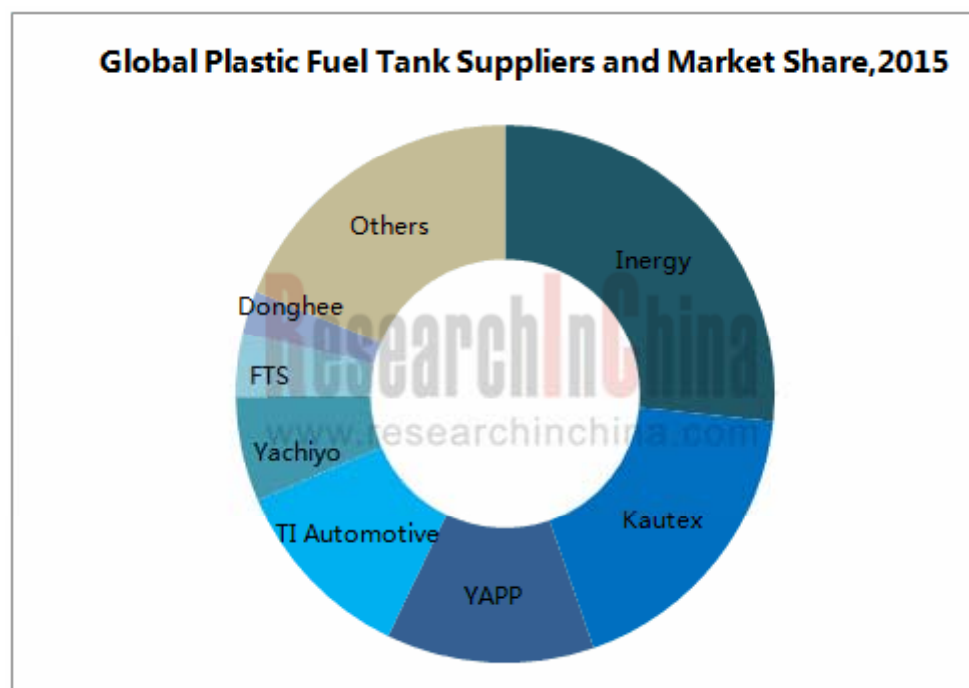
Compared with plastic fuel tank, metal one is low-cost. Some auto models, such as Kia K5, Toyota CROWN, Toyota Reiz, and Lexus NX-Series, now still adopt iron fuel tank.

Luzhou North Chemical Machinery Manufacturing Co., Ltd. and Chengdu Lingchuan Special Industrial Co., Ltd. are the two major metal fuel tank manufacturers in China, together seizing a market share of nearly 40%. Luzhou North Chemical Machinery Manufacturing has developed a fuel tank pattern of 4 production bases + 5 production lines, specifically Luzhou (Sichuan), Qingdao (Shandong), Liuzhou (Guangxi), and Chongqing. The company is pushing the construction of 150,000 unit/a metal fuel tank plant in Indonesia in 2016.

Global and China Automotive Fuel Tank Industry Report, 2016-2020 focuses on the following:

- ⇒ Automotive fuel tank in the world and China (development history, market size, competitive landscape, supply relationship, development trends);
- ⇒ Global and Chinese metal fuel tanks market (market size, competitive landscape, supply relationship);
- ⇒ 10 global and 11 Chinese automotive fuel tank manufacturers (type of products, production capacity, financial operation, output & sales, production bases, major OEM customers).

Global Plastic Fuel Tank Suppliers and Market Share, 2015



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