

## **Global Plastic Automotive Component Market: Key Research Findings 2015**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the global market of plastic automotive components with the following conditions:**

1. Research period: From June to September, 2015
2. Research target plastics: PP (Polypropylene), PA (Polyamide), ABS (Acrylonitrile-butadiene-styrene), PE (Polyethylene), PC (Polycarbonate), POM (Polyacetal), PBT (Polybutylene terephthalate), Modified PPE (Polyphenylether), PPS (Polyphenylene sulfide)
3. Research targets: Auto manufacturers, plastic makers, and R&D institutes, etc.
4. Research methodologies: face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

#### **<What is the Plastic Automotive Component Market?>**

The plastic automotive components in this research indicate PP, PA, ABS, PE, PC, POM, PBT, modified PPE, and PPS, which are thermoplastic resins increasingly used for automobiles. The plastic automotive component market is calculated based on the sales volume (tons) at resin manufacturers where they used those plastic automotive components for interiors, engine rooms, fuel/mechanisms, body panels/exteriors, and electric/electronic parts.

### ◆ **Key Findings**

#### ■ **Global Market Size of Plastic Automotive Components in 2014 Estimated as 8,020 Thousand Tons**

The global plastic automotive component market in 2014 is likely to achieve 8,020 thousand tons, based on the sales volume at manufacturers. The detail of the market size is as follows: PP to attain 4,400 thousand tons, PA 1,080 thousand, ABS 820 thousand, PE 520 thousand, PC 370 thousand, POM 330 thousand, PBT 320 thousand, modified PPE 120 thousand, and PPS to be 60 thousand tons.

#### ■ **Plastic Demands Rose by Increasing Number of Vehicles Sold and Affected Little from Thinner and Smaller Component Needs**

It can be said that plastic automotive components have been adopted in the automobile industry to a certain degree, causing such an automobile to weigh lighter. The demands of plastics used in automobiles are likely to grow further as the automobile industry expands. However, if the ratio of those vehicles for the emerging countries and smaller cars that use smaller amount of plastics increases, the growth rate of the market is likely to decrease. Also, there is no denying that auto parts are required to be thinner and smaller year by year, so that the volume of plastics used in such parts can become smaller, and fewer plastics may be needed than the growing number of vehicles sold. In spite of such negative factors, it seems that expansion in sales volume of vehicles is expected to boost the plastic demands for automobiles as a whole.

■ **New Advantage of Plastic Automotive Components Needed Besides Lightness**

In the future, plastics are expected to be newly applied to external panels of a vehicle, such as back doors and fenders, structural materials including car seats and frames, and window glasses. If such parts will be made of plastics, relatively large amount of plastics should be needed, increasing the plastic demands further. Currently, these vehicle parts are made of high-tensile steel sheets, aluminum, magnesium, or CFRP (carbon-fiber reinforced plastics), much harder than plastics. Being light, therefore, is not attractive enough for the plastics to replace these materials. In addition, introducing plastics need the factories to construct a new manufacturing line apart from steel sheet production. As a result, the plastics for automobiles should have additional advantages besides lightness, for instance, less in number of parts and manufacturing processes achieved through integral molding, and improved designs and safety.

◆ **Report format**

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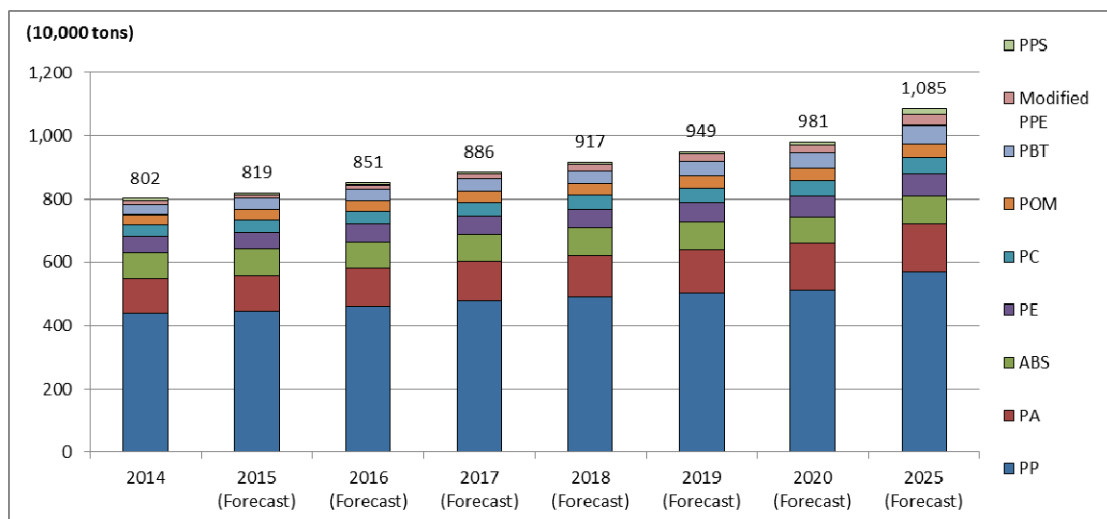
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Format: 197 pages in A4 format

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■ **Figure 1: Transition and Forecast of Global Plastic Automotive Component Market Size**

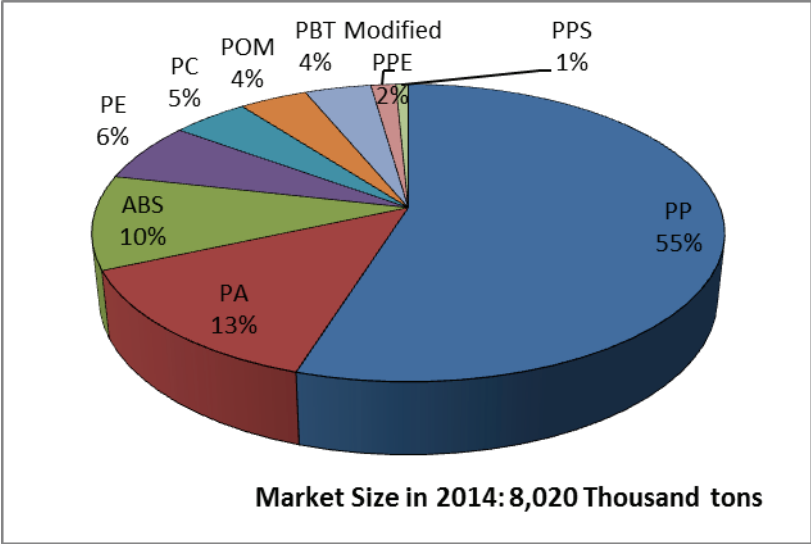


Estimated by Yano Research Institute

Notes:

1. The market size is based on the sales volume at manufacturers.
2. The numeric values of 2015 and beyond are forecast.
3. The plastic automotive component market is calculated based on the sales volume (tons) at resin manufacturers where they used those plastic automotive components for interiors, engine rooms, fuel/mechanisms, body panels/exteriors, and electric/electronic parts.

■ **Figure 2: 2014 Global Plastic Automotive Component Market Share by Plastic Type**



Estimated by Yano Research Institute

Notes:

4. The market size is based on the sales volume at manufacturers.