

Market Survey on Plastic Automotive Parts Industry 2015

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Abstracts

Plastic automotive parts generally refer to all plastic parts and components of an automobile except for the frame, and are generally known as plastic parts of automobiles. Plastic is widely used in automobiles. Commonly, plastic parts of a complete automobile can be classified as interior parts, exterior parts and functional structural parts based on their functions.

As the automotive industry develops and technologies advance, plastic parts have been replacing partial metallic parts and exhibiting a fast development trend in recent years, particularly in the current situation where environmental protection and energy-saving are deeply rooted in people's heart, while to make lighter and more energy-saving automobiles becomes an orientation of developing complete automobiles in future. As plastic features broad design space, low manufacturing cost, light weight, wide application, diversified functions and excellent performance, it can be used to achieve new breakthroughs in aspects of lightening body weight, promoting safety and reducing manufacturing costs of automobiles. Therefore, in the automotive industry of the new century, particularly in selection of materials for new energy automobiles, plastic plays an increasingly significant role.

The plastic automotive parts industry is largely dependent on the automotive industry. With continuous and fast development of the automotive market and an increasing inventory of automobiles in China, there is also an increasing demand for plastic parts in the market. Presently the demand for plastic automotive parts in the China market is growing positively. In aspect of supply, plastic automotive parts enterprises can basically satisfy the needs in the domestic OEM and after-sales service markets. Similar to the automotive parts industry, the plastic automotive parts industry is generally dominated by Sino-foreign/joint venture enterprises; however, with constantly improved

technologies and management and product upgrading of plastic automotive parts enterprises, domestic plastic automotive parts enterprises will gain increasingly bigger shares in the market.

It is estimated that the plastic consumption of each economy car in China is about 50kg-60kg, that of a light-duty or medium-sized truck is only 40kg-50kg, and that of a heavy-duty truck can reach up to 80kg. Medium and advanced cars in China generally have models introduced from advanced countries, each with plastic consumption equivalent to that of each car in the advanced countries in 1990s, i.e. 100-130kg/each, accounting for 7%-10% of the car weight. Based on the auto production in 2013 and the proportion of plastic used in automobiles presently in China, it is calculated that the current automotive plastic consumption in China is around 1.8364 million – 2.3351 million tons, whereas if calculated based on the consumption proportion in advanced countries in Europe and America, the theoretical automotive plastic consumption in China is 7.0359 million tons, 4.7008 million-5.1995 million tons above the actual consumption. This means the potential development of automotive plastic consumption is over 4 million tons.

In the following years, there will be an increasing demand for plastic parts in the domestic market along with fast and constant development of the national economy; plastic parts have a broad space for sales, a sound prospect of development and great potential in the domestic market.

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