

Growth Opportunities for Composites in the North American Automotive Market, December 2016

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Abstracts

The future of the North American automotive composites market looks good with opportunities in various applications such as exterior, interior, power train system, chassis system, under body system, and others. The North American automotive composites market is expected to reach an estimated \$3.5 billion by 2021 and it is forecast to grow at a CAGR of 6.0% from 2016 to 2021. The major drivers of growth for this market are increasing automotive production and increasing demand for lightweight materials to achieve higher fuel efficiency and reduce greenhouse gas emissions. The US government has set new standards requiring light vehicles to achieve a Corporate Average Fuel Efficiency (CAFE) standard of 36.6 mpg by 2017 and 54.5 mpg by 2025. The federal proposal to improve CAFE standards serves as a major stimulus to incorporate lightweight materials such as composites.

Emerging trends, which have a direct impact on the dynamics of the industry, include increasing penetration of thermoplastic and carbon composites. Strategic alliances between OEMs, carbon fiber and resin suppliers in the automotive industry are also the emerging trends.

A total of 84 figures / charts and 22 tables are provided in this 165-page report to help in your business decisions. Sample figures with some insights are shown below. To learn the scope of, benefits, companies researched and other details of this report, download the report brochure.

By Application Type (Value (\$M) and Volume (M lbs) from 2010 to 2021): Interior
Exterior Under the body systems Chassis Power trains Others

By Resin Composite Type (Value (\$M) and Volume (M lbs) from 2010 to 2021):

Polypropylene (PP) Composites Polybutylene terephthalate (PBT) Composites
Polyamide (PA) Composites Vinyl ester Composites Polyester Composites Phenolic
Composites Other Composites

By Material Type (Value (\$M) and Volume (M lbs) from 2010 to 2021): Sheet Molding
Compound (SMC) Bulk Molding Compound (BMC) Glass Mat Thermoplastic (GMT)
Short Fiber Thermoplastic (SFT) Long Fiber Thermoplastic (LFT) Continuous Fiber
Thermoplastic (CFT) Phenolic Composites Polyurethane (PU) Composites Natural Fiber
Composites Other composites

By Fiber Composite Type (Value (\$M) and Volume (M lbs) from 2010 to 2021): Glass
Fiber Composites Carbon Fiber Composites Natural Fiber Composites

By Resin Group Type (Value (\$M) and Volume (M lbs) from 2010 to 2021):
Thermoplastic Composites Thermosets Composites

By Country Type Volume (M lbs) shipment for 2015

USA Mexico Canada

Continental Structural Plastics, IDI composites, DuPont, and Interplastic Corporation are
among the major suppliers of composites in the North American automotive market.

On the basis of its comprehensive research, Lucintel forecasts that the power train
system is expected to be the largest market and chassis system are expected to show
higher growth during the forecast period of 2016 to 2021.

Within the North American automotive composites market, sheet molding compound
(SMC), bulk molding compound (BMC), glass mat thermoplastic (GMT), short fiber
thermoplastic (SFT), long fiber thermoplastic (LFT), continuous fiber thermoplastic
(CFT), phenolic composites, polyurethane (PU) composites, natural fiber composites
and other carbon thermoset composites are the major materials.

SFT is expected to remain the largest market by value and volume, mainly driven by
small complex shaped components in under the hood applications.

By resin type, polypropylene (PP) composites are expected to remain the largest market
by value and volume consumption. High resistance to abrasion, low friction
characteristics, electrical resistance, heat resistance, and good chemical resistance are

the properties which drive the PA composite demand in automotive.

This report answers following 10 key questions:

Q.1. What are some of the most promising, high-growth in the market by application type (interior, exterior, power train, chassis, under the body systems, and others), resin group (PP composites, PBT composites, vinyl ester composites, polyester composites, PA composites, epoxy composites, phenolic composites, and other composites), material (SMC, BMC, LFT, SFT, GMT, Phenolic composites, PU composites, and other composites), fiber composite group (glass fiber composites, carbon fiber composites, and natural fiber composites), resin group (thermoset composites and thermoplastics composites) Country (US, Canada, and Mexico) in North America?

Q.2. Which product segments will grow at a faster pace and why?

Q.3. What are the key factors affecting market dynamics? What are the drivers and challenges in the market?

Q.4. What are the business risks and competitive threats in this market?

Q.5. What are the emerging trends in this market and reasons behind them?

Q.6. What are the changing demands of customers in the market?

Q.7. What are the new developments in the market and which companies are leading these developments?

Q.8. Who are the major players in this market? What strategic initiatives are being implemented by key players for business growth?

Q.9. What are some of the competitive products in this area and how great a threat do they pose for loss of market share through product substitution?

Q.10. What M&A activity has occurred in the last 5 years?

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