

# Opportunities for Composites in European Automotive Market 2013-2018

<https://marketpublishers.com/r/OC6DA6CE952EN.html>

Date: March 2013

Pages: 157

Price: US\$ 4,900.00 (Single User License)

ID: OC6DA6CE952EN

## Abstracts

Composites shipments in the European automotive market is expected to grow to \$2,270 million in 2018. The major drivers of European automotive market are low-cost of materials weight reduction, fines for excessive CO2 fleet emissions, e-mobility, and pressurized containers for gas fuelled cars. The market for products made of composites such as interior headliners, fenders, pickup boxes, door modules, instrument panels, running boards, and front-end carriers is expected to almost double by 2018 from 2012 levels driving this market.

Lucintel, a leading global management consulting and market research firm, has analyzed the composites in European automotive market by segments and has come up with a comprehensive research report "Opportunities for Composites in European Automotive Market 2013-2018." This report provides an analysis of the composites in European automotive market including an analysis of market trend, competitive landscape, company profiles, emerging trend, and key drivers of industry growth. The study also includes trends and forecasts for the European automotive market through 2018, segmented by resin group, application type, by material, and type of resin which are listed below.

European Automotive Composite Market by Resin Group:

Thermoset

Thermoplastic

European Automotive Market by Applications:

Automotive Switches

Automotive Connectors

Pickup Box/Bed

Hoods

Bumper Beams

Front-End Module Carriers

Air Intake Manifold

Engine Valve Covers

Interior Headliners

Truck Cab Roofs

Head Lamp Reflectors/Housing

#### European Automotive Market by Material Type:

SMC/BMC

SFT

LFRT

GMT

CFRTPC

PU Composites

Others

## European Automotive Market by Types of Resin:

Polypropylene

Polyamide

Polyester

PBT

Polyurethane

Others

On the basis of its comprehensive research, Lucintel forecasts that the European automotive market will grow moderately during 2013-2018. BASF, DuPont, Sabic, Ticona, DSM and RTP are among the major suppliers of composite materials to this industry. Regular innovation of products is very important for companies to sustain their successful positions in the market.

This unique report from Lucintel will provide you with valuable information, insights, and tools needed to identify new growth opportunities and operate your business successfully in this market. This report will save hundreds of hours of your own personal research time and will significantly benefit you in expanding your business in this market. In today's stringent economy, you need every advantage that you can find.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. EUROPEAN AUTOMOTIVE COMPOSITES MARKET

2.1: Market overview

2.2: Challenges

2.3: Key growth drivers

### 3. APPLICATIONS

3.1: Interior

3.1.1: Interior headliners

3.1.2: Load floor

3.1.3: Instrument panel

3.1.4: Door module

3.1.5: Air bag housing

3.2: Exterior

3.2.1: Underbody shields

3.2.2: Bumper beam

3.2.3: Front end module

3.2.4: Running boards

3.2.5: Door handles

3.2.6: Deck lid

3.2.7: Hoods

3.2.8: Headlamp reflectors

3.2.9: Fenders

3.2.10: Pickup box

3.3: Under-the-hood

3.3.1: Air intake manifold

3.3.2: Air cleaner housing

3.3.3: Air duct

3.3.4: Air resonator

3.3.5: Engine cover

3.3.6: Rocker covers

3.3.7: Heating and cooling system

3.3.8: Connectors

## **4. EUROPEAN AUTOMOTIVE COMPOSITES MARKET ANALYSIS**

- 4.1: Overview
- 4.2: European automotive industry
- 4.3: Automotive composites market by resin group
- 4.4: Automotive composites market by type of material
- 4.5: Automotive composites market by type of base resin
- 4.6: Automotive composites market by application

## **5. MATERIALS AND MANUFACTURING PROCESS**

- 5.1: Thermoplastic composites
  - 5.1.1: SFT
  - 5.1.2: LFRT
  - 5.1.3: D-LFT
  - 5.1.4: GMT
  - 5.1.5: LWRT
  - 5.1.6: CFT
  - 5.1.7: Polyurethane composites
- 5.2: Thermoset composites
  - 5.2.1: SMC
  - 5.2.2: BMC
- 5.3: Processes
  - 5.3.1: Injection molding
  - 5.3.2: Compression molding
  - 5.3.3: Others
  - 5.3.4: Automotive composites market by process

## **6. COMPETITIVE ANALYSIS**

- 6.1: Overview
- 6.2: Competitive analysis by application
  - 6.2.1: Interior headliners
  - 6.2.2: Air intake manifolds
  - 6.2.3: Front end carriers
  - 6.2.4: Engine valve covers
  - 6.2.5: Bumper beams
  - 6.2.6: Light truck pickup box/bed
  - 6.2.7: Headlamp reflectors

- 6.2.8: Truck cab roofs
- 6.2.9: Automotive connectors
- 6.2.10: Tailgates

## **7. TRENDS – EUROPEAN COMPOSITES MARKET**

- 7.1: Overview
- 7.2: Trends – European Automotive Industry
  - 7.2.1: Trends - Light Vehicle Sales
  - 7.2.2: Trends - Light Vehicle Production
- 7.3: Trends - automotive composites market by resin group
- 7.4: Trends - automotive composites market by type of material
- 7.5: Trends - automotive composites market by type of resin
- 7.6: Trends - automotive composites market by application

## **8. FORECAST FOR EUROPEAN AUTOMOTIVE COMPOSITES MARKET**

- 8.1: Overview
- 8.2: Forecast for European automotive industry
- 8.3: Forecast - automotive composites market by resin group
- 8.4: Forecast - automotive composites market by type of material
- 8.5: Forecast - automotive composites market by type of resin
- 8.6: Forecast - automotive composites market by application

## **9. MATERIALS SUPPLIERS**

- 9.1: Thermoplastic composites
  - 9.1.1: BASF
  - 9.1.2: DuPont
  - 9.1.3: SABIC innovative plastics
  - 9.1.4: Ticona
  - 9.1.5: RTP
- 9.2: Thermoset composites
  - 9.2.1: DSM composite resin
  - 9.2.2: Menzolit GmbH
  - 9.2.3: Lorenz GmbH
  - 9.2.4: TETRA-DUR GmbH
  - 9.2.5: MITRAS
  - 9.2.6: Ranger



## List Of Figures

### LIST OF FIGURES

#### Chapter 1. Executive Summary

Figure 1.1: Key growth drivers and market demand challenges

Figure 1.2: Porter's five forces model for the European automotive composites market (molders perspective)

#### Chapter 2. European Automotive Composites Market

Figure 2.1: CARS 21 integrated approach to reduce road transport CO2 emissions

Figure 2.2: Market drivers and impact analysis

#### Chapter 3. Applications

Figure 3.1: Interior headliner

Figure 3.2: Load floor and trunk separator

Figure 3.3: Instrument panel

Figure 3.4: Door module

Figure 3.5: Air bag housing

Figure 3.6: Automotive underbody system

Figure 3.7: Bumper beam

Figure 3.8: Front-end carrier (including bumper beam and other accessories)

Figure 3.9: Automotive running board

Figure 3.10: Door handle

Figure 3.11: Deck lid

Figure 3.12: Carbon fiber Hood of Audi A4

Figure 3.13: Headlamp reflectors

Figure 3.14: BMW E46 fenders

Figure 3.15: Composites pickup box/bed

Figure 3.16: Air intake manifold

Figure 3.17: Air cleaner housing

Figure 3.18: Air duct

Figure 3.19: Air cleaner housing

Figure 3.20: Engine cover

Figure 3.21: Air Cleaner housing

Figure 3.22: Heating and cooling systems

Figure 3.23: Automotive connectors

#### Chapter 4. European Automotive Composites Market Analysis

Figure 4.1: European automotive materials in 2012

Figure 4.2: Market share of top car manufacturers in Europe (by car sales) in 2012

Figure 4.3: Top 10 car manufacturers in Europe: sales in 2012 and % change



(2011-2012)

Figure 4.4: European automotive composites market (million pounds) by resin group

Figure 4.5: European automotive composites market (\$M) by resin group

Figure 4.6: European automotive composites market (million pounds) by material in 2012

Figure 4.7: European automotive composites market (\$M) by material in 2012

Figure 4.8: European automotive composites market (million pounds) by type of base resin in 2012

Figure 4.9: European automotive composites market (\$M) by type of base resin in 2012

Figure 4.10: European automotive composites market (million pounds) by application group in 2012

Figure 4.11: European automotive composites market (\$M) by application in 2012

## Chapter 5. Materials and Manufacturing Process

Figure 5.1: Composite material/processes used for automotive applications

Figure 5.2: Composite material suppliers/molders automotive applications

Figure 5.3: Classification automotive applications and composites usages

Figure 5.4: Typical injection molding equipment

Figure 5.5: Typical compression molding equipment

Figure 5.6: Typical spray-up equipment

Figure 5.7: European automotive composites market (million pounds) by process in 2012

Figure 5.8: European automotive composites market (\$M) by process in 2012

Figure 5.9: Applicability of various composites manufacturing technologies by annual production volume and part weight

## Chapter 6. Competitive Analysis

Figure 6.1: Environmental impact vs. cost – smc, aluminum, and steel

Figure 6.2: VW beetle front lip spoiler (PU RIM)

Figure 6.3: Audi TT rear spoiler (PU RIM)

Figure 6.4: BMW E92 3-series side skirts (ABS plastic)

Figure 6.5: European automotive materials 2012

Figure 6.6: European automotive composites market (million pounds) by application in 2012

Figure 6.7: European auto interior headliner market in 2012

Figure 6.8: European auto air intake manifold market in 2012

Figure 6.9: European auto front-end carrier market in 2012

Figure 6.10: European auto engine valve covers market in 2012

Figure 6.11: European auto bumper beam market in 2012

Figure 6.12: European light truck pickup box/bed market in 2012

Figure 6.13: European auto headlamp reflector market in 2012

Figure 6.14: European truck cab roof market in 2012

Figure 6.15: European auto connectors market in 2012

Figure 6.16: Cost comparison of SMC vs. sheet metal on tailgates

Figure 6.17: Cost comparison of SMC, sheet metal, and RTM on tailgates

Figure 6.18: Cost comparison of SMC and sheet metal

Chapter 7. Trends – European Composites Market

Figure 7.1: Trend in European automotive composites market 2007-2012

Figure 7.2: Trend in European vehicle production and GDP growth rate (2007-2012)

Figure 7.3: European auto production trend 2007-2012

Figure 7.4: Trend in European light vehicle production by OEM 2011-2012

Figure 7.5: Trend in European automotive composites market (million pounds) by resin group 2007-2012

Figure 7.6: Trend in European automotive composites market (\$ m) by resin group 2007-2012

Figure 7.7: Trend in European automotive composites market (million pounds) by material 2007-2012

Figure 7.8: Trend in European automotive composites market (\$ m) by material 2007-2012

Figure 7.9: Trend in European automotive composites market (million pounds) by type of resin 2007-2012

Figure 7.10: Trend in European automotive composites market (\$ m) by type of resin 2007-2012

Figure 7.11: Trend in European automotive composites market (million pounds) by application 2007-2012

Figure 7.12: Trend in European automotive composites market (\$ m) by application 2007-2012

Chapter 8. Forecast for European Automotive Composites Market

Figure 8.1: Composite materials consumption trend and forecast (lb/vehicle) in European automotive industry

Figure 8.2: European car sales by consumer segment 2012

Figure 8.3: European auto production forecast 2013-2018

Figure 8.4: Forecast for European automotive composites market (million pounds) by resin group 2013-2018

Figure 8.5: Forecast for European automotive composites market (\$ M) by resin group 2013-2018

Figure 8.6: Composite materials life cycle analysis

Figure 8.7: Competitive analysis – European auto composite materials

Figure 8.8: Forecast for European automotive composites market (million pounds) by material 2013-2018

Figure 8.9: Forecast for European automotive composites market (\$M) by material 2013-2018

Figure 8.10: Forecast for European automotive composites market (million pounds) by type of resin 2013-2018

Figure 8.11: Forecast for European automotive composites market (\$M) by type of resin 2013-2018

Figure 8.12: Forecast for European automotive composites market (million pounds) by application 2013-2018

Figure 8.13: Forecast for European automotive composites market (\$M) by application 2013-2018

Chapter 9. Materials Suppliers

Figure 9.1: Renault Megane CC and VW EOS: SMC deck lids

## List Of Tables

### LIST OF TABLES

Chapter 1. Executive Summary

Table 1.1: Market parameters for end products

Table 1.2: Market parameters for composites materials in European automotive and attributes of usage

Chapter 2. European Automotive Composites Market

Table 2.1: Lightweight materials in automotive industry

Chapter 4. European Automotive Composites Market Analysis

Table 4.1: Polypropylene usage in leading car models in Europe

Table 4.2: Penetrations of composites in major applications

Chapter 5. Materials and Manufacturing Process

Table 5.1: Property requirement by automotive application group

Table 5.2: Composites manufacturing process selection

Table 5.3: Composites manufacturing process comparison

Chapter 6. Competitive Analysis

Table 6.1: List of key material properties of major competing material

Table 6.2: Cost-level comparison matrix of various interior headliner substrate materials

Table 6.3: Air intake manifold material composition

Table 6.4: Manufacturing processes for developing front-end carriers

Chapter 7. Trends – European Composites Market

Table 7.1: Market share – European auto sales by big 10 OEMs in 2011-2012

Table 7.2: European auto production CAGR for the last three and last five years

Table 7.3: Top-selling cars in Europe 2011-2012

Table 7.4: Trend growth rates in European automotive composites market by resin group

Table 7.5: Growth rates in European automotive composites market by materials 2007-2012

Table 7.6: Growth rates in European automotive composites market by type of resin 2007-2012

Chapter 8. Forecast for European Automotive Composites Market

Table 8.1: Forecast growth rates in European automotive composites market 2013-2018

Table 8.2: Forecast growth rates in European automotive composites market by material (\$ M) 2013-2018

Table 8.3: Forecast growth rates in European automotive composites market by type of resin 2013-2018

## I would like to order

Product name: Opportunities for Composites in European Automotive Market 2013-2018

Product link: <https://marketpublishers.com/r/OC6DA6CE952EN.html>

Price: US\$ 4,900.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/OC6DA6CE952EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970