

Automotive Front End Module Market by Component (Radiator, Condenser, Core Support, Headlight, Front Grill, Bumpers, Fenders, Crash Management System, and Others), Vehicle Type, Region, Material and by Aftermarket - Global Forecast to 2020

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Abstracts

The global automotive FEM market is estimated to be USD 89.75 billion in 2015, and is projected to reach USD 119.08 billion by 2020, growing at a CAGR of 5.82% from 2015 to 2020. The increasing vehicle production, growing concerns regarding driver and passenger safety, and rising demand for lightweight FEMs are driving the growth of the FEM market.

Lightweight materials

The initial designs of FEM consisted of heavy steel carriers. However, the growing demand for vehicle weight reduction in recent years has led to lightweight composites being used instead of steel and iron for the structural carriers of FEMs. Using composites for the FEMs helps to improve the fuel efficiency and performance of the vehicle. Thermoplastic resins such as polypropylene (PP) and nylon are the most commonly used materials for composite FEMs. Initially, all-composite FEM designs were focused on compression-moldable glass-mat thermoplastic (GMT) composites with chopped-fiber mats. However, GMT was replaced by injection-molded pelletized long-fiber thermoplastics (LFT) to reduce costs. More recently, LFT is being replaced by inline-compounded (ILC) injection- or compression-molded direct-LFT (D-LFT). However, OEMs are using hybrid metal/composite designs for heavier vehicles for added stiffness and strength. The technology chosen by OEMs for FEMs depends on the overall cost incurred from the adoption of the technology.

Modularization

The trend of FEM modularization is gaining traction, as modularization helps OEMs save on cost, time, and manpower during the manufacturing process. Previously, each and every component of the FEM was assembled by OEMs on the assembly line; this was time-consuming and extended the production process of the vehicle. However, the advent of modularization has enabled OEMs to save on these costs and opt for outsourcing these functions. OEMs save around 20 to 30% of costs through modularization, in comparison with the traditional front-end methods.

Asia-Pacific is projected to have high demand for front-end modules

As of 2014, China is the largest automotive market in the world, and has remained the key driver of regional sales in Asia-Pacific, despite a 7.4% slowdown in GDP growth in 2012–2013. According to MarketsandMarkets Analysis, China is the largest market for automotive FEMs, in terms of both, value and volume. Global OEMs such as Volkswagen and General Motors cater to this market by entering into joint ventures with domestic manufacturers. The Chinese market is witnessing substantial growth in the sales of and demand for automobiles, as the economy and spending capability of the population is growing. Recent infrastructural developments have boosted the growth of commercial vehicles. However, along with vehicle production levels, pollution levels in the country have also increased, worsening the urban air quality. The Chinese government is therefore promoting the adoption of vehicles with lower emissions and higher fuel efficiency.

Break-up of profile of primary participants for the report:

By Company Type: Tier-1 – 56 %, Tier-2 – 42% and Tier-3 – 2%

By Designation: C level – 17%, Director level – 33%, Others – 50%

By Region: North America – 14%, Europe – 28%, Asia-Pacific – 55%, RoW – 3%

List of companies profiled:

Faurecia SA

Denso Corp.

MAHLE GmbH

HBPO Group

Magna International Inc.

Hyundai Mobis

Plastic Omnium Group

Samvardhana Motherson Automotive Systems Group

SL Corporation

Valeo S.A.

Montaplast GmbH

Reasons to buy the report:

This report has focused on various levels of analysis; including industry analysis (industry trends, Porters Five Forces, and PEST analysis), value chain analysis, and company profiles, which together comprise and discuss the basic views on the emerging and high-growth segments of the FEM market, the competitive landscape, drivers, restraints, opportunities, challenges, high-growth regions and countries, and government initiatives.

The report will enable both, new entrants/smaller firms as well as established firms to understand the market, which will in turn, help the firms to acquire a larger market share. Firms purchasing the report could use any one or a combination of the below-mentioned four strategies (market development, product development/innovation, market diversification, and competitive assessment) to strengthen their position in the market.

The report provides insights with reference to the following points:

Market Development: Comprehensive information about lucrative emerging

markets. The report analyzes the markets for FEM across regions

Product Development/Innovation: Detailed insights into R&D activities, upcoming technologies, and new product launches in the global FEM market

Market Diversification: Detailed information about untapped markets, investments, new products, and recent developments in the FEM market

Competitive Assessment: In-depth assessment of strategies, products, and manufacturing capabilities of leading players in the global FEM market

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