



**Global and China Automotive Fuel Tank  
Industry Report, 2017-2021**

**Dec. 2017**

## **STUDY GOAL AND OBJECTIVES**

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## **REPORT OBJECTIVES**

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## **METHODOLOGY**

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Global automotive fuel tank market size was about 93.50 million sets in 2016, up 3.8% year on year. Under the twin impact of steady growth in the automobile market and a rapid rise in new energy vehicle, the world's automotive fuel tank market will grow at an average rate of around 3.2% between 2017 and 2021, reaching 110 million sets in 2021.

China, a big producer of automobiles and the largest consumer of fuel tanks worldwide, had an automotive fuel tank market size of approximately 28.05 million sets, 30.0% of the world's total. The figures are expected to attain 35.76 million sets and about 32.6% in 2021. Because of high safety, light weight, anti-corrosion and easy forming and the country's policies on auto environmental friendliness and light-weight, plastic fuel tank now takes the lion's share, up to roughly 80% worldwide and 71% in China in 2016. The share will continue to rise, expected to reach 88% globally and 81% domestically in 2021.

Against the backdrop of carmakers' stringent criteria on selection of fuel tank suppliers and strict requirements on product quality, global fuel tank market is highly concentrated, particularly in plastic fuel tank market. Top 5 global automotive fuel tank suppliers (INERGY, Kautex, YAPP, TI and YACHIYO) seized a combined 75.8% market share in 2016, of which INERGY held the largest share, about 26.7%.

The Chinese plastic fuel tank market presents a competitive landscape with YAAP as a leader and private and foreign-funded enterprises (Kautex, INERGY, TI, Jiangsu Suguang Automotive Parts and YACHIYO) co-existing. YAPP held a 40.2% market share in 2016 with total capacity of 13.60 million sets/a (by the end of Jun 2016). YAPP still makes investment and expands capacity in order to improve competitiveness. It put Yantai-based fuel tank plant into production in Aug 2017 and would expand and retrofit Chongqing-based 300,000 sets/a passenger-car plastic fuel tank lines in Sept.

Besides, foreign companies are accelerating to expand production capacity in China. In June 2016, the 900,000 sets/a plastic fuel tank project of TI Automotive (Baoding) was put into production. In March 2017, Kautex (Wuhan) put into production the fuel tank projects applying the world's cutting-edge NGFS technology, and in the meantime Kautex (Changchun) Plastics Technology Co., Ltd invested RMB300 million for capacity expansion through transformation, and till 2020 lifting its production scale from the current 430,000 sets/a to 750,000 sets/a.

As new energy vehicle becomes the development trend of automobile industry in the future, the fuel tank manufacturers have to enhance their R&D of technologies in the long run, conduct upgrades and renovation so as to be adaptive to the market and seize the initiative. For instance, Yachiyo is pacing up its layout in the development of fuel tanks for PHEV; Faurecia acquired the exclusive use of intellectual property rights about composite hydrogen tank of STELIA Aerospace Composites in May 2017 and is probably to realize the design, production and commercialization of high-pressure hydrogen tank using fuel cell vehicle-used carbon fiber.

Global and China Automotive Fuel Tank Industry Report, 2017-2021 highlights the followings:

- ◆ Global and China automotive fuel tank (development history, market size, competitive landscape, supply relation and development tendency);
- ◆ Global and China plastic fuel tank (market size, competitive landscape, supply relation and production costs);
- ◆ Global and China metal fuel tank (market size, competitive landscape and supply relation);
- ◆ The ten global and ten Chinese automotive fuel tank manufacturers (operation, fuel tank capacity, production & sales, development strategies, etc.



Source: Global and China Automotive Fuel Tank Industry Report, 2017-2021 by ResearchInChina

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##### 1.1.1 Definition

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