

Table of contents

| | |
|--|-----------|
| I - Executive Summary | 5 |
| II - Structure of the composite industry in 2006 | 8 |
| 1 - Overall composite industry structure | 8 |
| 2 - Overview of composites in Automotive applications | 9 |
| a) Industry quantification | 9 |
| b) Economics | 12 |
| c) Competitive environment and profitability | 17 |
| 3 - Main recent historical trends in Automotive applications | 18 |
| a) Limited past growth | 18 |
| b) Strong rise in resin prices | 20 |
| c) Strong growth of carbon fibre volume and price | 21 |
| III - Main dynamics and vision of the composite industry for Automotive applications in 2012-2015 | 22 |
| 1 - Main dynamics | 22 |
| a) Penetration of composites in the Automotive industry | 22 |
| b) General trend towards "customisation" in the automotive industry in developed countries | 24 |
| c) Increase in low-end and high-end segments in developed countries | 26 |
| d) The composite industry will shift towards low cost countries | 27 |
| e) Consolidation and structure of the industry | 30 |
| f) Future growth in volume and in value | 32 |
| 2 - Regulation | 34 |
| a) CO2 emissions | 35 |
| b) Recycling | 38 |
| c) VOC emissions | 40 |
| IV - Some Success Stories | 41 |
| 1 - Polytec | 41 |
| 2 - Beijing FRP Autoparts | 42 |
| V - Glossary | 45 |
| VI - Case studies* | 46 |
| 1 - Trends | |
| A - The European Automotive industry will use more and more composites | 46 |
| B - Changing demands for composites in the Automotive industry | 51 |
| C - Nanocomposites in Automotive: research activities and business realities | 56 |
| 2 - Successful partners | |
| Pescarolo Sport - Huntsman: a successful partnership | 60 |

