

# **Automotive Upholstery Market By Material Type (Leather, Vinyl, Polyester, Nylon, Others), By Application (Seat Covers, Carpets, Dashboards, Others), By Sales Channel (OEM, Aftermarket), By Vehicle Type (Passenger Cars, Commercial Vehicles): Global Opportunity Analysis and Industry Forecast, 2023-2032**

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## **Abstracts**

The global automotive upholstery market size was valued at \$6.3 billion in 2022, and is projected to reach \$12.2 billion by 2032, growing at a CAGR of 7.2% from 2023 to 2032.

Automotive upholstery refers to the interior components and materials used to cover the seats, door panels, headliners, and other surfaces within a vehicle's cabin. It encompasses a wide range of materials, including fabrics, leather, vinyl, and synthetic fibers, as well as foam padding and other cushioning materials. Further, the consumer can often seek customization options for automotive upholstery to meet their personal preferences and style. In addition, automotive upholstery materials are usually supplied to vehicle manufacturers through OEM channels for installation during vehicle assembly, while aftermarket channels further cater to consumers seeking replacement or customization of automotive upholstery post-purchase. It plays a crucial role in enhancing the passenger comfort, aesthetics, and durability of vehicle interiors.

In the ever-evolving automotive industry, the continual growth in the adoption of electric

vehicles (EVs) and autonomous vehicles (AVs) has become a driving factor for ensuring sustainable benefits and cost savings. With frequent transitions toward electrified vehicles, EVs and AVs are expected to play a decisive role in strengthening the demand for automotive upholstery, as EV manufacturers are reshaping the upholstery trends to prioritize comfort, connectivity, and sustainability. According to the International Energy Agency (IEA), more than 26 million electric cars were recorded on roads globally in 2022, representing a 60% increase from 2021. Thus, a rise in the level of vehicle electrification trends is expected to fuel the growth of automotive upholstery market across the globe.

Moreover, the aftermarket customization industry often plays a considerable role in driving the demand for the automotive upholstery industry. Customization shops and retailers deliver a broad range of upholstery options for vehicle owners looking to personalize their vehicles, which in turn, contribute to the market growth. In addition, the growing trend of using recycled materials in automotive upholstery further propels the market growth. For instance, in September 2023, Toyota Motor Group proclaimed that the seat upholstery in a few of its car models would begin to be produced from recycled plastic bottles. The Japanese automaker also stated that they are willing to use more recyclable materials to reach its carbon-neutrality goal by 2050. Such initiatives further pave the market growth.

However, volatile prices of upholstery raw materials are expected to be a limiting factor for the growth of the automotive upholstery market. Automotive upholstery for interior applications is a combination of plastics, thermoplastic polymers, and synthetic leather. Polyester and polypropylene are often used across a range of interior applications in automobiles. The volatility in the prices of these raw materials has viewed an upward trend in the last few years, due to fluctuating oil prices, which in turn, hamper the market growth. Furthermore, the high cost of upholstery materials is posing a considerable challenge for budget-conscious consumers and automakers. Thus, cost considerations may limit the adoption of premium upholstery options, particularly in price-sensitive market segments, hampering the market growth. In addition, compliance issues with stringent emission regulations and standards further add complexities to automakers, especially in the global market, resulting in slowed down market growth.

The automotive upholstery market is segmented into material type, application, sales channel, vehicle type, and region. Depending on the material type, it is categorized into leather, vinyl, polyester, nylon, and others. Depending on the application, it is categorized into seat cover, carpet, dashboard, and others. By sales channel, it is

divided into OEM and aftermarket. By vehicle type, it is fragmented into passenger cars and commercial vehicles. Region-wise, the market is analyzed across North America, Europe, Asia-Pacific, Latin America, and Middle East & Africa.

Key players covered in the report include Adient plc, BASF SE, FORVIA Faurecia, Freudenberg Group, Grupo Antolin Irausa S.A, MarvelVinyls, Sage Automotive Interiors, SEIREN Co., Ltd., The Acme Group, and Toyota Boshoku Corporation. These companies have adopted strategies such as product launches, product development, and others to improve their market positioning.

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Investment Opportunities

Product Life Cycle

Technology Trend Analysis

Regulatory Guidelines

Additional company profiles with specific client's interest

Additional country or region analysis- market size and forecast

Criss-cross segment analysis- market size and forecast

Expanded list for Company Profiles

SWOT Analysis

Key Market Segments

By Material Type

Leather

Vinyl

Polyester

Nylon

Others

By Application

Seat Covers

Carpets

Dashboards

Others

#### By Sales Channel

OEM

Aftermarket

#### By Vehicle Type

Passenger Cars

Commercial Vehicles

#### By Region

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Rest of Asia-Pacific

Latin America

Brazil

Argentina

Rest of Latin America

Middle East and Africa

UAE

Saudi Arabia

Algeria

South Africa

Rest Of Middle East Africa

## Key Market Players

Adient plc

BASF SE

FORVIA Faurecia

Freudenberg Group

Grup%li%Antolin Irausa S.A

MarvelVinyls

Sage Automotive Interiors

SEIREN Co., LTD.

The Acme Group

Toyota Boshoku Corporation

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