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Global Automotive Heat Shield Market Size study & Forecast, by Product (Single Shell, Double Shell, Sandwich) by Application (Exhaust System, Turbocharger, Under Bonnet, Engine Compartment, Under Chassis) and Regional Forecasts 2025-2035

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Abstracts

The Global Automotive Heat Shield Market is valued at approximately USD 13.18 billion in 2024 and is anticipated to grow at a CAGR of 4.90% over the forecast period 2025-2035. Automotive heat shields are critical components designed to manage and redirect thermal energy within vehicles, ensuring the safety, efficiency, and durability of engines and surrounding systems. These components are manufactured using diverse materials such as metallic and non-metallic substrates and are deployed across a wide range of applications including exhaust systems, turbochargers, engine compartments, under-bonnet regions, and under-chassis areas. The market is propelled by increasing automotive production, stringent emission and thermal management regulations, and the rising integration of advanced engine technologies in passenger cars, light commercial vehicles (LCVs), and heavy commercial vehicles (HCVs).

The growing emphasis on vehicle thermal efficiency and component longevity has accelerated demand for innovative heat shield designs. In 2023, the automotive sector witnessed a notable surge in engine performance optimization and emission compliance initiatives, which required manufacturers to adopt advanced multi-layer and sandwich heat shield configurations. Additionally, the global expansion of LCV and HCV segments, especially in emerging economies, has generated opportunities for heat shield suppliers to deliver tailored solutions that enhance fuel efficiency and reduce maintenance costs. Nonetheless, increasing adoption of electric vehicles and alternative propulsion systems may impose moderate constraints on traditional heat shield demand throughout the forecast period.

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The detailed segments and sub-segments included in the report are:

By Product:

- Single Shell
- Double Shell
- Sandwich

By Application:

- Exhaust System
- Turbocharger
- Under Bonnet
- Engine Compartment
- Under Chassis

By Material:

- Metallic
- Non-metallic

By Vehicle Type:

- Passenger Car
- Light Commercial Vehicle (LCV)
- Heavy Commercial Vehicle (HCV)

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Single-shell heat shields are expected to dominate the market, maintaining the largest share due to their widespread application in conventional passenger cars and cost-effective design. These shields offer reliable thermal protection in exhaust systems and under-bonnet applications. Meanwhile, sandwich and double-shell designs are witnessing rapid adoption in high-performance vehicles, turbochargers, and heavy-duty engines, driven by the need for enhanced thermal resistance, weight optimization, and durability. In short, single-shell configurations lead in established applications, while advanced multi-layered designs represent high-growth opportunities.

When segmented by material, metallic heat shields currently account for the largest revenue contribution, attributed to their superior thermal conductivity, corrosion resistance, and compatibility with various engine types. Non-metallic shields, including ceramic and composite variants, are increasingly favored in lightweight vehicles and premium performance segments, providing effective heat insulation while reducing overall vehicle weight. The nuanced market landscape highlights that while metallic materials dominate revenue, innovative non-metallic solutions are accelerating adoption in next-generation vehicles.

North America dominated the automotive heat shield market in 2024, driven by mature automotive manufacturing, stringent emission and safety standards, and high adoption of advanced engine technologies. Europe follows, fueled by high-performance vehicle production and rigorous environmental regulations. Asia Pacific is projected to be the fastest-growing region during the forecast period, supported by robust vehicle production in China and India, rising adoption of commercial vehicles, and increasing investments in thermal management technologies. Latin America and the Middle East & Africa are witnessing gradual growth due to infrastructure development, expanding automotive sales, and rising demand for thermal efficiency in engines.

Major market players included in this report are:

Dana Incorporated

Tenneco Inc.

Federal-Mogul LLC

Mahle GmbH

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Faurecia S.A.

NTN Corporation

Toyota Boshoku Corporation

Valeo S.A.

Hyundai Mobis

Infineon Technologies AG

Magna International Inc.

Hutchinson SA

Riken Corporation

SKF Group

Denso Corporation

Global Automotive Heat Shield Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8

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analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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CHAPTER 10. COMPETITIVE INTELLIGENCE

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