

Global ICE & BEV Seatbelt Material Market Size Study & Forecast, by Component (Retractor, Buckle, Anchor, and Others), Type of Component by Material (Steel/Aluminum, Polycarbonate, and Nylon), Vehicle Type, and Regional Forecasts 2025-2035

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Abstracts

The Global ICE & BEV Seatbelt Material Market is valued at approximately USD 84.3 billion in 2024 and is expected to expand at a robust CAGR of more than 14.50% over the forecast period 2025-2035. As the global automotive industry accelerates toward electrification, and safety regulations tighten globally, seatbelt materials have emerged as a critical innovation frontier. This transformation is not merely a by-product of automotive evolution—it represents a strategic imperative. Seatbelts, once simple textile-based restraints, have evolved into dynamic systems engineered with specialized materials like steel-aluminum alloys, polycarbonates, and high-performance nylons to match the distinct performance needs of both internal combustion engine (ICE) and battery electric vehicles (BEVs). These materials offer enhanced tensile strength, reduced weight for fuel efficiency, and compatibility with advanced safety mechanisms, including pretensioners and load limiters.

Driven by the convergence of vehicle electrification, safety innovation, and lightweighting imperatives, the demand for high-performance seatbelt materials is scaling at an unprecedented pace. In ICE vehicles, the emphasis remains on durable, cost-effective materials that perform under extended mechanical stress. Meanwhile, BEVs, characterized by compact cabin architecture and reduced mechanical noise, demand seatbelt systems that are not only lightweight but also acoustically optimized and sustainability-compliant. The rising popularity of premium electric cars from manufacturers like Tesla, BYD, and Lucid has further underscored the market's shift toward advanced seatbelt designs made with recyclable or carbon-neutral material

composites. Technological innovation in retractors and buckles, coupled with integration of sensors and IoT-enabled functionalities, are also redefining material standards across safety components.

Geographically, North America continues to maintain a stronghold in the ICE & BEV Seatbelt Material Market, owing to rigorous safety mandates from regulatory bodies such as the NHTSA and FMVSS, alongside a mature automotive manufacturing ecosystem. Europe follows closely, led by automotive safety benchmarks set by Euro NCAP and growing demand for lightweight safety systems in high-end vehicles. Countries like Germany and Sweden are particularly driving R&D in sustainable materials like bio-based polyamides. Asia Pacific, however, is expected to witness the fastest growth during the forecast timeline. Booming vehicle production, rising EV penetration, and government initiatives in countries such as China, India, South Korea, and Japan are catalyzing substantial investments in advanced safety systems, thereby increasing demand for performance seatbelt materials tailored to both cost and innovation.

Major market player included in this report are:

BASF SE

Autoliv Inc.

Toray Industries Inc.

ZF Friedrichshafen AG

Toyobo Co., Ltd.

Joyson Safety Systems

DSM Engineering Materials

Hyosung Advanced Materials

Sumitomo Riko Company Limited

Kolon Industries Inc.

Teijin Limited

Continental AG

Daicel Corporation

GWR Safety Systems

Takata Corporation

Global ICE & BEV Seatbelt Material 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 up to 8 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:

By Component:

Retractor

Buckle

Anchor

Others

By Type of Component by Material:

Steel/Aluminum

Polycarbonate

Nylon

By Vehicle Type:

Passenger Car

Light Commercial Vehicle (LCV)

Heavy Commercial Vehicle (HCV)

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

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 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 competitive structure of the market.

Demand side and supply side analysis of the market.

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