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Global Interlayer Films for Automotive Laminated Glass Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Interlayer Films for Automotive Laminated Glass market size is expected to reach $ 2479 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Interlayer films for automotive laminated glass refer to functional polymer films used in automotive laminated safety glazing. The film is typically placed between two or more automotive glass substrates and is bonded with the glass through pre-pressing, de-airing and high-temperature / high-pressure autoclave lamination to form a stable and irreversible composite structure. Automotive laminated glass interlayers are key enabling materials for safety retention, optical performance, acoustic comfort, solar control, anti-penetration and smart-cabin functions.

The primary function of the interlayer is to retain glass fragments after breakage, thereby reducing the risk of glass splashing, foreign-object penetration and occupant ejection. At the same time, the film must meet automotive glazing requirements related to light transmittance, haze, optical distortion, heat resistance, humidity resistance, weatherability and adhesion stability. Beyond these baseline safety functions, automotive interlayers can further provide acoustic damping, UV/IR blocking, HUD optical correction, solar-control performance, privacy design and anti-intrusion properties.

In terms of material systems, PVB interlayers represent the mainstream product category for automotive laminated glass. PVB films can be classified by structure into flat PVB films and wedge-shaped PVB films, and by function into standard PVB films, acoustic PVB films and heat-insulating PVB films. This report also includes SGP/ionoplast specialty interlayers, but these materials are mainly used in high-

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stiffness, high-strength or specialty automotive glazing applications and have not become the mainstream automotive interlayer system.

Currently, PVB and SGP are the two main types of interlayer films used in laminated glass. However, PVB film remains the mainstream choice for automotive laminated glass applications. This is primarily due to factors such as the price of PVB film, its commercialization time/process maturity, and the strength and safety of SGP film. SGP film has not yet been commercially used in automotive laminated glass.

Regarding price, SGP is expected to be used in automotive laminated glass in 2027, with an average price 6-8 times that of PVB film. In 2025, PVB film will be the mainstream interlayer film used in automotive laminated glass, with an overall annual average price of around $7.22 per kilogram.

The market of interlayer films for automotive laminated glass belongs to the functional polymer materials sector driven by automotive safety specifications, optical performance requirements, customer qualification access and functional upgrading, rather than a commodity-grade plastic film market. Positioned in the midstream of the automotive glazing value chain, its direct customers are predominantly automotive glass processors, while end-market demand originates from vehicle OEM projects and the automotive glass replacement market.

PVB remains the dominant material system for automotive laminated glass interlayers. Its demand volume is projected to exceed 300,000 tons by 2032, maintaining an absolute leading share in the overall market demand. Although SGP materials feature higher stiffness and mechanical strength, their automotive application is constrained by cost factors, optical criteria, processing compatibility and qualification barriers. Prior to 2032, SGP will only serve as a specialty material for premium vehicle models, specific glass mounting positions and applications in the certification validation phase, and cannot achieve large-scale substitution of PVB.

In terms of PVB film structure, flat PVB still holds a dominant position, while wedge-shaped PVB stands out as the fastest-growing high-value-added category. The revenue share of wedge-shaped PVB is expected to reach 29.7% of the total PVB film revenue by 2032, mainly fueled by the rising demand for optical correction interlayers adopted in HUD and AR-HUD windshields.

From the perspective of PVB film functions, standard-grade PVB films remain the largest demand segment, while acoustic insulation and heat insulation PVB films

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register a faster growth pace.

By application scenario, windshields constitute the core foundational application area, with HUD windshields, laminated side windows, as well as sunroof and roof glazing serving as the major growth drivers. Automotive safety regulations and occupant protection requirements underpin the steady demand for laminated windshields. Driven by the development of new energy vehicles, high-end passenger cars and smart cockpits, the application boundary of interlayer films is expanding to HUD windshields, acoustic-insulated side windows, panoramic sunroofs and other segments. HUD is defined as a high-value-added subdivision of windshield applications rather than an independent vehicle glass scenario. In addition, the penetration growth of laminated glass in side windows, rear windows and roof glazing will follow a gradual progression instead of a rapid one-off replacement.

In terms of competitive landscape, the global market maintains a high concentration level, with the CR5 concentration ratio reaching 83.5% in 2025. The leading players include Sekisui Chemical, Eastman Chemical, Kuraray, Zhejiang Decent New Material and KB PVB. Global industry leaders boast prominent advantages in premium automotive functional films, global customer qualification layout and mass production batch stability. Chinese manufacturers are expanding their market share in standard PVB films as well as partial acoustic insulation, heat insulation and wedge-shaped PVB products, yet they still face long-term certification and validation cycles to gain entry into the high-end vehicle OEM supply chain.

This report studies the global Interlayer Films for Automotive Laminated Glass production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Interlayer Films for Automotive Laminated Glass and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Interlayer Films for Automotive Laminated Glass that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Interlayer Films for Automotive Laminated Glass total production and demand, 2021-2032, (Tons)
Global Interlayer Films for Automotive Laminated Glass total production value, 2021-2032, (USD Million)

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Global Interlayer Films for Automotive Laminated Glass production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Interlayer Films for Automotive Laminated Glass consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Interlayer Films for Automotive Laminated Glass domestic production, consumption, key domestic manufacturers and share
Global Interlayer Films for Automotive Laminated Glass production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Interlayer Films for Automotive Laminated Glass production by Function, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Interlayer Films for Automotive Laminated Glass production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Interlayer Films for Automotive Laminated Glass market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sekisui Chemical, Eastman Chemical, Kuraray, Zhejiang Decent New Material, KB PVB, Huakai Plastic (Chongqing) Co., Ltd, Chang Chun Group, Anhui Wanwei, Zhejiang Duoli, Jiangsu Aotianli New Material, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Interlayer Films for Automotive Laminated Glass market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/kg) by manufacturer, by Function, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Interlayer Films for Automotive Laminated Glass Market, By Region:

United States

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China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Interlayer Films for Automotive Laminated Glass Market, Segmentation by Function:

Standard Interlayer Film

Sound Insulation Interlayer Film

Heat Insulation Interlayer Film

Global Interlayer Films for Automotive Laminated Glass Market, Segmentation by Materials:

PVB

SGP

Global Interlayer Films for Automotive Laminated Glass Market, Segmentation by Structure:

Wedge-shaped PVB Film

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Flat PVB Film

Global Interlayer Films for Automotive Laminated Glass Market, Segmentation by Application:

Front Windshield

HUD

Side Window

Rear Windshield

Sunroof

Others

Companies Profiled:

Sekisui Chemical

Eastman Chemical

Kuraray

Zhejiang Decent New Material

KB PVB

Huakai Plastic (Chongqing) Co., Ltd

Chang Chun Group

Anhui Wanwei

Zhejiang Duoli

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Jiangsu Aotianli New Material

Jiangsu Jingdun New Material

Taizhou Infini

Suzhou Tolyy Optoelectronics Co., Ltd

Sichuan EM Technology

Suzhou Dongfu Electronic Technology

Jiangxi Huatesheng New Material

Key Questions Answered:
1. How big is the global Interlayer Films for Automotive Laminated Glass market?
2. What is the demand of the global Interlayer Films for Automotive Laminated Glass market?
3. What is the year over year growth of the global Interlayer Films for Automotive Laminated Glass market?
4. What is the production and production value of the global Interlayer Films for Automotive Laminated Glass market?
5. Who are the key producers in the global Interlayer Films for Automotive Laminated Glass market?
6. What are the growth factors driving the market demand?

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