

Automotive Aluminum Market Report by Product Form (Cast Aluminum, Rolled Aluminum, Extruded Aluminum), Vehicle Type (Passenger Cars, Light Commercial Vehicles (LCV), Heavy Commercial Vehicles (HCV)), Application (Powertrain, Chassis and Suspension, Car Body), and Region 2024-2032

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Abstracts

The global automotive aluminum market size reached US\$ 30.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 59.6 Billion by 2032, exhibiting a growth rate (CAGR) of 7.6% during 2024-2032. The increasing need for lightweight luxury vehicles, rising awareness about climate change, and the growing number of partnerships between OEMs and aluminum suppliers are some of the major factors propelling the market.

Automotive aluminum is used in the manufacturing of automobiles. It is known for its lightweight properties, strength, and corrosion resistance, which makes it ideal for various applications in vehicles. It can improve fuel efficiency and reduce greenhouse gas emissions as it lessens the overall weight of the vehicle. It is also highly recyclable, which makes it a more environment friendly choice as compared to other materials. It can be used in the frame of the vehicle, wheels, radiators, and body panels.

The increasing need for lightweight luxury vehicles due to rapid urbanization and inflating income levels is strengthening the growth of the market around the world. Moreover, the rising awareness about climate change is propelling manufacturers to opt for sustainable materials like aluminum for vehicles. In addition, the growing number of partnerships between original equipment manufacturers (OEMs) and aluminum

suppliers is influencing the market positively. Apart from this, measures undertaken by governing authorities of numerous countries to promote the production of vehicles that minimize the emission of greenhouse gases are favoring the growth of the market. Furthermore, the increasing adoption of secondary or recycled aluminum in the manufacturing of vehicles for improved safety and reduced carbon emissions is propelling the growth of the market.

Automotive Aluminum Market Trends/Drivers:

Increasing need for fuel efficient vehicles

Stringent fuel efficiency and emissions standards globally are a significant driver for the rising demand for automotive aluminum. Governments are setting ambitious targets to reduce carbon footprints, compelling automotive manufacturers to look for lightweight materials that can improve fuel economy. Aluminum is substantially lighter than traditional steel, which leads to weight reductions in vehicle design. Lighter vehicles consume less fuel and produce fewer emissions, which helps manufacturers comply with regulatory norms. This environmentally sustainable solution is thus becoming a popular choice for modern car components, from chassis to powertrain systems.

Rising safety concerns

As individuals are increasingly prioritizing safety, unique combination of aluminum of strength and lightness is gaining prominence. Aluminum allows for enhanced structural rigidity without adding excess weight, which results in better handling and increased crash safety. Automotive manufacturers are capitalizing on this by employing aluminum in critical areas like the car frame, roll cages, and crumple zones. It meets the consumer demand for safer vehicles and complies with strict safety standards, further driving the demand for aluminum in the automotive industry.

Growing sales of electric vehicles (EV)

The rise in electric vehicle (EV) sales is another key factor driving the demand for automotive aluminum. EVs require lightweight materials to maximize range on a single charge. Traditional metals like steel add substantial weight, thereby limiting the driving range of the vehicle. Using aluminum in place of steel in electric vehicles helps in extending the range, which makes it a material of choice for battery enclosures, body structures, and other key components. As governments and consumers increasingly move towards sustainable transportation, the use of aluminum in EVs is expected to continue its upward trajectory.

Automotive Aluminum Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global automotive aluminum market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on product form, vehicle type and application.

Breakup by Product Form:

Cast Aluminum

Die Casting

Permanent Mold Casting

Sand Casting

Rolled Aluminum

Aluminum Plate

Aluminum Sheet

Aluminum Foil

Extruded Aluminum

Cast aluminum dominate the market

The report has provided a detailed breakup and analysis of the market based on the product form. This includes cast aluminum (die casting, permanent mold casting, and sand casting), rolled aluminum (aluminum plate, aluminum sheet, and aluminum foil), and extruded aluminum. According to the report, cast aluminum represented the largest segment. Cast aluminum in the automotive industry is primarily achieved through three main processes: die casting, permanent mold casting, and sand casting. Die casting is the most common method and involves forcing molten aluminum into a mold under high pressure. This technique is ideal for creating complex shapes and is generally used for components like engine casings and transmission housings. Permanent mold casting uses reusable molds, typically made of steel or iron, and is often employed for making parts that require higher strength, such as wheels. Sand casting, the oldest casting method, uses sand molds to shape the aluminum. This process is generally reserved for larger components or those that require less precision, such as engine blocks.

Breakup by Vehicle Type:

Passenger Cars

Light Commercial Vehicles (LCV)
Heavy Commercial Vehicles (HCV)

Passenger cars hold the largest share in the market

A detailed breakup and analysis of the market based on the vehicle type has also been provided in the report. This includes passenger cars, light commercial vehicles (LCV), and heavy commercial vehicles (HCV). According to the report, passenger cars accounted for the largest market share. In passenger cars, automotive aluminum is widely used to improve fuel efficiency and reduce emissions. The material often replaces heavier metals like steel in various components. Aluminum is commonly used in the construction of the frame of the vehicle, body panels, wheels, and in some cases, the engine block. The use of aluminum allows these vehicles to achieve better mileage while maintaining strength and safety features. With the increasing focus on electric and hybrid cars, the lightweight properties of aluminum also contribute to extending battery life, which makes it a material of choice in modern passenger vehicles.

Light commercial vehicles (LCVs) include vans, minivans, and light trucks used primarily for the transportation of goods. In LCVs, the focus is on durability, load-carrying ability, and fuel efficiency. Aluminum is used in various parts like the bed of the truck, the frame, and sometimes even in the body panels to achieve these goals. Its corrosion-resistant properties make it ideal for long-term use, especially in vehicles that are exposed to harsh conditions or carry potentially corrosive materials. Aluminum also helps in increasing the payload capacity by reducing the weight of the vehicle, which makes LCVs more efficient for commercial use.

Heavy commercial vehicles (HCVs) like buses, heavy trucks, and trailers have different requirements compared to passenger cars and LCVs. They need to be highly durable and capable of carrying heavy loads over long distances. Components such as wheels, fuel tanks, and structural elements in the cabin may be made of aluminum to reduce weight without compromising durability. The reduction in weight allows for higher payload capacities and improved fuel efficiency, which are critical factors in the commercial viability of these vehicles.

Breakup by Application:

Powertrain

Pistons

Engine Blocks

Fuel Systems
Heat Shields
Heat Exchangers
Chassis and Suspension
Suspension Parts
Wheels
Steering Systems
Brake Systems
Car Body
Body Structure
Roof and Trim
Car Interiors
Hang-On Parts

Powertrain dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes powertrain (pistons, engine blocks, fuel systems, heat shields, and heat exchangers), chassis and suspension (suspension parts, wheels, steering systems, and brake systems), and car body (body structure, roof and trim, car interiors, and hang-on parts). According to the report, powertrain represented the largest segment. In the powertrain of a vehicle, aluminum finds a wide range of applications due to its high strength-to-weight ratio and excellent heat dissipation properties. Pistons made from aluminum are lighter, which helps to reduce inertia and improve engine response. Engine blocks are also increasingly made from aluminum to reduce the overall weight of the vehicle, contributing to better fuel efficiency. When it comes to fuel systems, aluminum fuel tanks and lines are corrosion-resistant and lighter than their steel counterparts. Heat shields and heat exchangers benefit from excellent thermal conductivity of aluminum, which helps to manage heat effectively, thereby improving the vehicle's performance and durability.

The chassis and suspension systems are critical to the performance and safety of the vehicle. Aluminum is often used to manufacture various components in these systems due to its high strength and low weight. In suspension parts, aluminum can reduce unsprung mass, which enhances vehicle handling and ride comfort. Wheels made from aluminum are not only lighter but also dissipate heat better, improving brake performance. Steering systems with aluminum components are easier to manage, providing a better driving experience. Aluminum is also being increasingly used in brake systems, where its heat dissipation properties are highly beneficial for maintaining

effective braking.

The role of aluminum in the car body has been transformative for the automotive industry. It is used in the body structure, contributing to weight savings without sacrificing structural integrity. This is particularly important for electric and hybrid cars, where reduced weight can lead to extended battery life. In terms of the roof and trim, aluminum offers a sleek, modern aesthetic along with functional benefits like corrosion resistance. Car interiors can also feature aluminum in the form of dashboards, door panels, and seat frames, which provides a balance of lightweight and high-quality feel. Hang-on parts like doors, hoods, and trunk lids are increasingly being made from aluminum to reduce weight while maintaining functionality and safety.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest automotive aluminum market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The increasing sales of electric vehicles (EVs) represents one of the primary factors bolstering the market growth in the Asia Pacific region. Moreover, the rising presence of multiple aluminum production facilities is contributing to the market growth in the region. Besides this, the growing number of research and development (R&D) activities is influencing the market positively in the region.

North America is estimated to witness stable growth, owing to well established manufacturing facilities, government measures, technological advancements, etc.

Competitive Landscape:

The leading companies are developing high-strength aluminum alloys that offer improved tensile strength and fatigue life, which makes them ideal for critical structural components and allow manufacturers to create thinner, lighter parts without sacrificing safety or durability. They are also using computer-aided design (CAD) technologies to design automotive aluminum parts. This also allows engineers to optimize the properties of the material for specific applications, which results in components that are both lighter and more durable. Moreover, key players are integrating aluminum with other materials like carbon fiber composites or high-strength steel that can offer the lightweight attributes of aluminum and the strength of other materials. This is particularly useful in creating components that need to be both light and extremely durable, such as in electric vehicles, wherein weight impacts battery life.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Alcoa Inc.

Novelis

Rio Tinto Alcan

Constellium

BHP

AMG Advanced Metallurgical

UACJ Corporation

Norsk Hydro ASA

Dana Holding Corporation

Progress-Werk Oberkirch AG

Jindal Aluminium

Kaiser Aluminum

Lorin Industries

Tenneco Inc.

ElringKlinger AG

ThermoTec Automotive

Recent Developments:

In 2021, Constellium announced that it will supply aluminium structural components for the recently introduced all-electric Ford F-150 Lightning.

In 2022, Norsk Hydro ASA invested NOK 300 million in a new car extrusion press at its Tonder, Denmark, business. The new 12-inch, 6000-tonne extrusion press serve the European automotive and EV markets.

In 2023, Novelis recently announced the start-up of its new roll forming development line that will help to meet industry demand for a process that can produce large volumes of high-strength aluminum auto parts.

Key Questions Answered in This Report:

How has the global automotive aluminum market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global automotive aluminum market?

What is the impact of each driver, restraint, and opportunity on the global automotive aluminum market?

What are the key regional markets?

Which countries represent the most attractive automotive aluminum market?

What is the breakup of the market based on the product form?

Which is the most attractive product form in the automotive aluminum market?

What is the breakup of the market based on the vehicle type?

Which is the most attractive vehicle type in the automotive aluminum market?

What is the breakup of the market based on the application?

Which is the most attractive application in the automotive aluminum market?

What is the competitive structure of the global automotive aluminum market?

Who are the key players/companies in the global automotive aluminum market?

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