

Automotive Heat Shield Market Report By Material (Metallic, Non-Metallic), Product (Single Shell, Double Shell, Sandwich Type), Application (Exhaust System, Turbocharger, Under Bonnet, Engine Compartment, Under Chassis, and Others), Vehicle Type (Passenger Car, Commercial Vehicles, and Others), and Region 2023-2028

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Abstracts

The global automotive heat shield market size reached US\$ 11.1 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 13.4 Billion by 2028, exhibiting a growth rate (CAGR) of 3.2% during 2022-2028. The increasing demand for vehicles across the globe, the implementation of stringent emission standards, the introduction of high-performance engines, and rapid advancements in product development are some of the major factors propelling the market.

An automotive heat shield refers to a component designed to guard vehicles from excessive thermal exposure. It is fundamentally a thermal barrier strategically installed to dissipate, absorb, or reflect the heat generated during the operation of the vehicle. It includes exhaust, turbo, under bonnet, and under chassis heat shields. They are fabricated from various materials, such as high-grade aluminum, stainless steel, and ceramics. They are widely used in the engine compartment, exhaust system, under the bonnet, under the chassis, around the fuel tank, inside the transmission tunnel, and on the firewall. They protect critical components, enhance fuel efficiency, improve safety, reduce noise levels, and prolong the lifespan of vehicles.

The rapid proliferation of electric vehicles (EVs) is contributing to the market growth. EVs generate considerable heat during operation, especially from their batteries and electronic systems, which necessitates the installation of automotive heat shields to ensure effective heat management. Along with this, the escalating demand for

lightweight vehicles owing to their fuel efficiency and environmentally friendly nature is further boosting the market growth. Furthermore, the widespread product utilization in autonomous vehicles to ensure optimal functionality and longevity of numerous electronic systems and sensors, which generate substantial heat, is positively influencing the market growth. Moreover, the significant growth in the automotive aftermarket industry, which replaces and upgrades automotive components, including heat shields, is strengthening the market growth. Other factors, rising concerns regarding environmental pollution, increasing investment in the development of advanced heat shields, and the growing number of aging vehicles, are anticipated to drive the market growth.

Automotive Heat Shield Market Trends/Drivers:

The increasing demand for vehicles across the globe

The rapid expansion of the global middle class, particularly in developing regions, has led to a corresponding rise in disposable income and a higher demand for vehicles.

Furthermore, the increasing urbanization, coupled with rising investment in infrastructural development activities to improve access to rural areas, resulted in the growing demand for personal and commercial vehicles, leading to a surge in automobile production. This amplifies the need for heat shields in order to ensure the longevity and reliability of these vehicles. These shields protect critical components from the detrimental effects of excessive heat, improving vehicle performance and durability.

The implementation of stringent emission standards

Regulatory bodies across the globe are imposing more stringent emission standards on vehicles to combat climate change and protect public health. To comply with these norms, automobile manufacturers are increasingly turning to heat management systems, such as automotive heat shields, which play a critical role in controlling engine heat, enhancing fuel efficiency, reducing noise levels, and in turn, minimizing carbon footprint and lowering greenhouse gas (GHG) emissions. This is particularly crucial for internal combustion engine (ICE) vehicles, where heat management directly affects the combustion process and subsequent emissions. As a result, the increased regulatory pressure to reduce vehicle emissions is thus a significant propellant for the market.

Introduction of high-performance engines and rapid advancements

The automotive industry is continuously evolving, with technological innovations reshaping the landscape. This includes the development of high-performance engines that generate significant heat. To ensure the safe and optimal functioning of these engines, automotive manufacturers install advanced heat management systems, which include a heat shield, among other components. They assist in managing the heat output and protecting other vehicle components from potential damage. Moreover, as technology continues to advance, heat shields are also evolving, with materials and designs being optimized for greater efficiency. In line with this, the recent development

of an active heat shield, which uses phase-change materials to absorb and release heat, thus providing enhanced thermal protection, is positively influencing the market growth. Besides this, the utilization of composite materials that are lightweight, durable, and have improved thermal properties is acting as another growth-inducing factor.

Automotive Heat Shield Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global automotive heat shield market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on material, product, application and vehicle type.

Breakup by Material:

Metallic

Non-Metallic

Metallic dominates the market

The report has provided a detailed breakup and analysis of the market based on the material. This includes metallic and non-metallic. According to the report, metallic represented the largest market segment.

Metallic materials are dominating the market due to their excellent thermal resistance properties and durability. They provide superior thermal reflection, which is crucial in automotive applications where heat from engines and exhaust systems needs to be redirected away from sensitive components. Furthermore, metallic materials can withstand extremely high temperatures, thus providing robust protection for prolonged periods. They are also lightweight yet strong materials, making them ideal for automotive applications. Apart from this, metallic materials exhibit resistance to wear and tear, corrosion, and chemical damage, which ensures reliable protection of vehicle components for an extended period, reducing the need for regular replacements and lowering maintenance costs. Moreover, the ease of manufacturing and versatility of metals act as a growth-inducing factor. They can be easily shaped and customized to fit various areas of a vehicle, making them an ideal choice for diverse applications.

Breakup by Product:

Single Shell

Double Shell

Sandwich Type

Single shell dominates the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes single shell, double shell, and sandwich type. According to the report, the single shell represented the largest market segment.

Single shell heat shields dominate the market due to their versatility, ease of installation, cost-effectiveness, and adequate performance for a wide range of standard automotive applications. They are made from metallic materials, such as stainless steel or

aluminum, which offer a simple yet effective solution for heat management in vehicles. Furthermore, single shell heat shields are widely installed in lower and mid-range vehicle segments, as they effectively reflect radiated heat and provide sufficient protection against heat damage. Apart from this, they are less complex and more cost-effective to manufacture and install compared to multi-shell or sandwiched heat shields. Their straightforward design allows for easier fitting, reducing the time and labor costs associated with their installation. Additionally, single shell heat shields are lightweight compared to more complex variants, which aligns with the automotive industry's ongoing trend towards lighter vehicles to improve fuel efficiency and reduce emissions.

Breakup by Application:

Exhaust System

Turbocharger

Under Bonnet

Engine Compartment

Under Chassis

Others

Engine compartment application dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes exhaust system, turbocharger, under bonnet, engine compartment, under chassis, and others. According to the report, engine compartment represented the largest market segment.

The engine compartment is a dominant segment of the market due to the fundamental role it plays in the functioning of a vehicle. It is the source of the most substantial heat generation, owing to the combustion process or, in the case of electric vehicles (EVs), the battery operations. High temperatures in the engine compartment, if unmanaged, can lead to multiple issues, such as overheating, reduced efficiency, and potential damage to sensitive components, such as wiring, plastic parts, and hoses. Automotive heat shields in the engine compartment aid in protecting critical components from high temperatures, ensuring that the vehicle operates optimally and safely. They play a vital role in heat dissipation, absorption, and reflection, contributing significantly to the overall heat management in the vehicle. Moreover, with the emergence of advanced engines that generate substantial heat and stricter emission regulations, the need for efficient heat shields in the engine compartment has been further amplified.

Breakup by Vehicle Type:

Passenger Car

Commercial Vehicles

Others

Passenger car dominates the market

The report has provided a detailed breakup and analysis of the market based on the

vehicle type. This includes passenger car, commercial vehicle, and others. According to the report, passenger car represented the largest market segment.

The dominance of passenger cars in the market is primarily due to their sheer volume in the global vehicle fleet. Passenger cars constitute the majority of vehicles on the roads, vastly outnumbering commercial and heavy-duty vehicles. They all require heat shields to protect sensitive components from the heat generated by engines, exhaust systems, and other parts. Additionally, passenger car manufacturers continually strive to improve fuel efficiency, reduce emissions, and enhance passenger comfort. Heat shields contribute significantly to these goals by effectively managing heat in the vehicle, reducing fuel consumption and noise, and ensuring passenger comfort by isolating the cabin from engine and exhaust heat. Furthermore, the rising adoption of electric and hybrid passenger cars is facilitating the demand for heat shields to manage heat generated by batteries and electric systems.

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 in the market, accounting for the largest

automotive heat shield market share

The report has also provided a comprehensive analysis of all the major regional markets, which includes 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 represented the largest market segment.

Asia Pacific dominates the market due to the presence of the largest automobile markets. The region has witnessed substantial growth in vehicle production and ownership driven by rising disposable incomes, rapid urbanization, and infrastructural developments. Furthermore, several major global automobile manufacturers are based in this region, contributing significantly to the product demand. The presence of numerous automotive parts manufacturers also creates a vibrant ecosystem conducive to the growth of the heat shield market. Additionally, the imposition of stringent emission regulations by regional governments to incorporate effective heat management systems, such as heat shields, to reduce emissions and improve fuel efficiency is positively influencing the market growth. Moreover, the rising adoption of electric vehicles (EVs) in the region is acting as another growth-inducing factor.

Competitive Landscape:

The top companies are focusing on developing more effective and efficient heat shield solutions. This includes innovations in materials, design, and manufacturing processes, aimed at improving thermal resistance, reducing weight, and lowering production costs. Furthermore, several key players are expanding their manufacturing capabilities by building new facilities or upgrading existing ones to meet growing product demand. Additionally, the growing strategic partnerships and collaboration between leading companies, automotive manufacturers, and material suppliers to combine expertise, share risks, and achieve mutual benefits are propelling the market growth. Moreover, top market players are engaged in mergers and acquisitions to broaden their product offerings, access new markets, and achieve economies of scale.

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:

Autoneum

Carcoustics (Liaoning Dare Industrial Company Ltd.)

Dana Incorporated

DuPont de Nemours Inc

ElringKlinger AG

HAPPICH GmbH (Pelzer Acoustic Products GmbH)

Lydall Inc.

Morgan Advanced Materials Plc
NICHIAS Corporation
Talbro Automotive Components Ltd.
Tenneco Inc.
Zircotec.

Recent Developments:

In April 2023, Autoneum announced the acquisition of the automotive business of Borgers. With this move, Autoneum aims to expand its portfolio of sustainable acoustic and thermal management systems for vehicles.

In June 2023, Carcoustics (Liaoning Dare Industrial Company Ltd.) announced the extension of its production plant in Shenyang, China to meet the rising demand for its acoustical, thermal, and electromagnetic insulation solutions.

In October 2020, Dana Incorporated announced that it will supply a new Thermal Acoustical Protective Shielding (TAPS) package for Jaguar Land Rover, which combines six heat shields with an integrated exhaust manifold gasket to provide thermal and acoustic shielding.

Key Questions Answered in This Report:

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

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

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

What are the key regional markets?

Which countries represent the most attractive automotive heat shield market?

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

Which is the most attractive material in the automotive heat shield market?

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

Which is the most attractive product in the automotive heat shield market?

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

Which is the most attractive application in the automotive heat shield market?

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

Which is the most attractive vehicle type in the automotive heat shield market?

What is the competitive structure of the global automotive heat shield market?

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

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