

Automotive Glass Market by Type (Laminated, Tempered), Application (Windshield, Sidelite & Backlite, Side & Rearview Mirror), Smart Glass (Technology, Application), Vehicle Type (ICE & Electric), Material, Aftermarket and Region - Global Forecast to 2027

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Abstracts

The automotive glass market is estimated to grow from USD 23.6 billion in 2022 to USD 30.6 billion by 2027, at a CAGR of 5.4% over the forecast period. The market is driven by the growing demand for smart glass technologies. Increasing average glass usage per vehicle and the growing trend of use of laminated side glazing are expected to increase automotive glass market value. Countries such as China and the US are experiencing high demand for premium luxury cars, thereby driving the automotive glass market.

“Passenger Car is the largest glass market.”

Passenger cars have showcased the largest demand for glass and smart glass as they contribute to ~60% of global vehicle production. The growing average glass usage per vehicle has also increased significantly in the last couple of years, owing to increased demand for luxury vehicles and SUVs. Vehicle manufacturers have started increasing the size of windshields to merge with the vehicle's roof. These extended windshields give the vehicle a sporty look and extend the driver's field of view. The global SUV share in the total passenger vehicle segment increased from ~35% in 2018 to ~45% in 2021. This increase in demand for SUVs is majorly observed in the Asia Pacific region. As SUVs are larger than passenger cars, the average glass area in these vehicles is usually more than hatchbacks or sedans. Alternatively, key luxury car manufacturers

such as Mercedes, Audi, BMW, and Volvo, among others, have started incorporating smart glass technology in their respective models, which would drive the demand for smart glass globally.

The Asia Pacific is the largest passenger car automotive glass market. Countries such as China, Japan, and India are the major automotive glass markets in the Asia Pacific.

“Sunroof is the largest and fastest-growing segment for the Automotive Smart Glass.”

The quick shading, light & heat adjustment, and protection from harmful sun rays make smart glass the most widely used for sunroof application. Luxury cars and SUVs hold the largest penetration of sunroofs. The major technology used in sunroofs is a suspended particle device (SPD), which prevents UV rays from entering the vehicle, thus lowering power consumption for air conditioning. These further increases vehicle efficiency, making it an ideal choice for sunroof application. Therefore, with the growing developments in smart glass, the market size of sunroof applications is expected to grow significantly.

Key OEMs such as Mercedes-Benz, Lincoln, and BMW use smart glass in their sunroofs. Major players in the sunroof segment for the automotive industry include Research Frontiers, SPD Control System, Gentex Corporation, Citala, and Asahi Glass.

“Asia Pacific: Largest market for Automotive Glass”

The Asia Pacific is estimated to be the largest automotive glass market during the forecast period. Increasing vehicle production and demand for ICE and electric vehicles makes it the largest automotive glass market. Increasing production and sales of SUVs in India and China are also driving the automotive glass market size, as the average area of glass required in SUVs is more than that in sedans and passenger cars. Further, growing number of vehicles in the region has increased problem of traffic and vehicle collision and accidents. For instance, according to NCRB report, in India, total road accidents reported were 4.03 lakh in 2021, up from 3.54 lakh in 2020. According to primary interviews, extreme weather condition and traffic collision are major reasons for demand for laminated and toughened glass in the aftermarket, especially windshields. Further, as the vehicle ownership rate in China and India are below global average, the automotive glass OE and aftermarket are projected to have a significant growth with increase in vehicle ownership rates in the forecast period.

Due to government incentives, stringent emission standards are expected to boost the

automotive glass market with the growing demand for electric vehicles. The automotive glazing of a typical electric vehicle adds more enhanced features, thereby improving driving comfort. As China is the largest EV market, the automotive glass market is expected to grow prominently in Asia Pacific.

The study contains insights provided by various industry experts. The break-up of the primaries is as follows:

By Company Type: Supply-side- 90% and Demand-side - 10%

By Designation: C level—10%, D level—20%, and Others—70%

By Region: North America—20%, Europe—10%, Asia Oceania—60%, RoW—10%

Some of the key players in the automotive glass market are Saint-Gobain (France), Asahi Glass (Japan), Fuyao Glass (China), Samvardhana Motherson (India), Webasto (Germany), Xinyi Glass (China), Nippon Sheet Glass (Japan), Gentex Corporation (US), Corning (US), and Magna International (Canada).

Research Coverage

The report covers the global automotive glass market in terms of volume (thousand square meters/ '000 units) and value (USD million). It explains the qualitative and quantitative aspects of the automotive glass market based on glass type (laminated, tempered, and others), application (windshield, sidelite, backlite, rear quarter glass, side view mirror, and rearview mirror), smart glass market by technology (SPD, EC, LC/PDLC, Photochromic, and Thermochromic), smart glass by application (sunroofs, windscreen, sidelite/backlite, and side/rearview mirrors), by vehicle type (passenger car, LCV, truck, and bus), device embedded glass, by application (rearview mirror and windshields), aftermarket by vehicle type (passenger car and commercial vehicles), electric vehicle (BEV, PHEV and FCEV), electric commercial vehicle (trucks and buses), windscreen by application (head-up display, windscreen with ADAS, windscreen with rain sensor, heated windscreen and water repellent windscreen) and by region (Asia Pacific, Europe, North America, and RoW).

Reasons to Buy the Report:

The report will help the market leaders/new entrants in this market with information on

the closest approximations of the revenue numbers for the overall automotive glass market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

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