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Automotive Heat Shield Market by Application (Engine, Exhaust, Under Bonnet, Under Chassis, Turbocharger), Product (Single Shell, Double Shell, Sandwich), Function (Acoustic, Non-Acoustic), Material, Vehicle Type, EV, and Region - Global Forecast to 2025

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Abstracts

“Growing advancements in advanced automotive technologies to fuel the demand for the automotive heat shield”

The global automotive heat shield market is estimated to grow at a CAGR of 3.4% during the forecast period, from USD 11.7 billion in 2020 to USD 13.9 billion by 2025. OEMs demand lightweight, contaminant-free, and cost-effective heat shields, which are used for different heat-producing components of a vehicle. The materials used in the fabrication of heat shields are aluminum, nylon fibers, and ceramics. These materials need to be lightweight and multifunctional to meet the high demand from OEMs. For instance, Dana Holding Corporation is utilizing the cooling property of aluminum to integrate it as cooling plates that enhance the heat transfer of insulated gate bipolar transistor (IGBT) switches. These heat shields are lightweight, recyclable, and cost-effective solutions, providing superior heat transfer and cooling abilities. Highly engineered heat shields are manufactured through a rotating injection fiber process that reduces the weight of the heat shield significantly and enhances acoustic performance.

“Exhaust system heat shield is projected to be the largest heat shield application in 2020.”

The exhaust system heat shield retains the heat in the exhaust system of the vehicle

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and acts as a thermal barrier for exhaust components. Exhaust system heat shields are used in the muffler, exhaust manifolds, catalytic convertor, and exhaust down pipe. These heat shields can reduce 70% of the heat radiating from the exhaust system. A majority of vehicles are equipped with exhaust system heat shields to reduce the amount of heat radiated by the exhaust system and to protect the other parts of a vehicle. Higher production of passenger cars in Asia Pacific countries such as China, India, and Japan is attributing to the growth of the market. Also, governments of several countries in the region have set safety mandates to prevent accidents that could occur due to a large amount of heat produced by vehicle engines. Additionally, the use of heat shields can increase the fuel efficiency of cars. These mandates have led to the growth of advanced electrical and electronics components in vehicles, which, in turn, has increased the demand for automotive heat shields. In addition, the growing demand for luxury vehicles will also fuel the automotive heat shield market.

“Acoustic segment is estimated to be the largest automotive heat shield market, by function”

Acoustic heat shields eliminate the noise and sound in the engine compartment, transmission tunnel, and bulkhead. In addition, these are thermos-formable and offer lower emissions. These are made of absorber materials that are general among high-expansion foam, polyester fiber, glass fiber, rockwool, cotton, and metal cover or foil. For example, Dana Incorporated’s Victor Reinz is a thermal acoustic protective shielding. It protects vehicle components from engine exhaust heat and insulates exhaust components. This increases efficiency, fuel utilization, and vehicle performance.

Acoustic heat shields for underbody are considered an integral component of the underbody system and provide high thermal performance solutions. It even contributes to an improvement of the underbody aerodynamics. It also provides effective protection against high-frequency sounds by combining them with a sound absorber. These benefits will drive the acoustic heat shield market.

“Europe is projected to be the second largest automotive heat shield market during the forecast period.”

The growth of the automotive heat shield market in Europe can be attributed to technological advancements carried out in the industry, such as high mobility logistic trucks for their enhanced capabilities. Europe has stringent emission regulations to tackle rising emission levels. According to experts, stringent emission regulations in

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Europe would be a major challenge for both passenger car and commercial vehicle manufacturers in 2020. Government mandates for increasing fuel efficiency of vehicles and use of advanced safety features have led to the growth of the automotive heat shield market. Europe is home to leading manufacturers such as Renault, Volkswagen, BMW, and Daimler AG. It has witnessed an increasing demand for LCVs equipped with advanced electrical and electronics components. The market growth is also driven by the presence of automotive heat shield manufacturers such as ElringKlinger, Lydall, Carcoustics, and Morgan Advanced Materials.

The study contains insights from various industry experts, ranging from component suppliers to tier 1 companies and OEMs.

The break-up of the primaries is as follows:

By Company Type: Tier 1: 63%, Tier 2: 13%, OEM: 24%

By Designation: C level: 27%, D level: 41%, Others: 32%

By Region: North America: 27%, Europe: 32%, Asia Pacific: 37%, RoW: 4%

Some of the key players in the automotive heat shield market are Dana Incorporated (US), Morgan Advanced Materials (UK), Autoneum (Switzerland), ElringKlinger AG (Germany), Lydall Inc. (UK), Tenneco Inc. (US), Carcoustics (Germany), and UGN Inc. (US).

Research Coverage:

The report segments the automotive heat shield market, by volume and value, on the basis of region (Asia Pacific, Europe, North America, and the Rest of the World), application type (exhaust system heat shield, turbocharger heat shield, under bonnet heat shield, engine compartment heat shield, and under chassis heat shield), material type (metallic and non-metallic), vehicle type (passenger car, light commercial vehicle, and heavy commercial vehicle), function (acoustic and non-acoustic), product type (single shell, double shell, and sandwich), electric vehicle type (BEV, HEV, PHEV, and FCEV). This report contains various levels of industry analysis and company profiles, which highlight emerging and high-growth segments of this market, competitive mapping, and market dynamics (drivers, restraints, opportunities, & challenges).

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The report contains various levels of analysis, including industry analysis, industry trends, and company profiles, which together comprise and discuss the basic views on the emerging and high-growth segments of the automotive heat shield market, high-growth regions and countries, government initiatives, and market dynamics such as drivers, restraints, opportunities, and challenges.

Reasons to Buy the Report:

The report enables new entrants and smaller firms as well as established firms to understand the market better to help them acquire a larger market share. Firms purchasing the report could use any one or a combination of the 4 strategies (market development, product development/innovation, market diversification, and competitive assessment) mentioned below to strengthen their position in the market.

The report provides insights into the following points:

Market Penetration: The report offers comprehensive information about the automotive heat shield market and the top players in the market.

Product Development/Innovation: The report provides detailed insights into upcoming technologies, R&D activities, and new product launches in the automotive heat shield market.

Market Development: The report offers comprehensive information about the automotive heat shield market. The report analyses the automotive heat shield market across regions and provides comprehensive information about lucrative emerging markets.

Market Diversification: The report provides exhaustive information about new products, untapped regional markets, recent developments, and investments in the automotive heat shield market.

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