

# **Automotive Lightweighting Market by Material (Metals, Composites, Plastics, Elastomers), Application & Component (Frame, Engine, Exhaust, Transmission, Closure, Interior), Vehicle (ICE, Electric, Micro-mobility & UAVs) and Region - Global Forecast to 2027**

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## **Abstracts**

The automotive lightweighting market is projected to grow from USD 73.9 billion in 2022 to USD 101.5 billion by 2027, at a CAGR of 6.5% for the projected period. The key growth factor driving the automotive lightweighting market is the lowered emission limits in new emission regulations, increased fuel efficiency limits, and increased vehicle weight. In developing countries like India, the governing body has implemented Bharat VI norms since 2020, Europe has Euro VI, and China has VI standards. With such emission regulations, which have highly reduced emission limits, OEMs are using lightweight materials to reduce the extra weight added to the after-treatment devices. Replacing cast iron and traditional steel components with high-strength steel (HSS), magnesium (Mg) alloys, aluminum (Al) alloys, carbon fiber, and polymer composites can directly reduce the curb weight of the vehicle body, which reduces the vehicle's fuel consumption. For instance, in 2019, the Hyundai Motors World Rally Teams incorporated a wide usage of lightweight CFRP in its rally spec i-20 model and its RM15 concept that featured an aluminum spaceframe and CFRP body panels, which resulted in an overall weight reduction of 195 Kg. And in 2020, Chevrolet Corvette Stingray incorporated an engine bracket – made from high-performance aluminum alloy material (HuCrAlloy) - that weighs less than 1.5 pounds and underwent a 40% mass reduction. Thus, it is evident that incorporating lightweight materials to achieve the norms and regulations set by the governing bodies will drive the lightweight market globally.

“HEV segment is speculated to drive the electric vehicle lightweighting market.”

Limited charging infrastructure in developing countries leads to increased demand for hybrid vehicles over electric ones. PHEVs/HEVs are mostly premium category vehicles. Hence, applications in interiors such as dashboards, seats, and upholstery are likely to have a higher demand for lightweight materials to improve aesthetics. HEVs are projected to dominate the electric & hybrid vehicles lightweight market. Furthermore, the increasing HEV sales, which have almost doubled from 3,057,000 units in 2018 to 6,964,000 units in 2021, make them a promising market for automotive lightweight. HEVs have powertrain, body structures, chassis, motors, batteries, and suspension systems. These systems/components can be easily replaced with lightweight solutions to achieve desired curbed weight by increasing the vehicle's fuel efficiency. For example, Toyota Prius Hybrid in 2012 had a curb weight of 1.63 tons.

In contrast, the new 2022 Prius weighs 1.51 tons, with the implementation of lightweight materials in the car in the powertrain and body structure. It is expected that the Asia Pacific region will lead the HEV lightweight market in terms of volume and value. This is mainly because of the OEMs from this region, who invest heavily in developing batteries and advanced components for HEVs. For instance, Toyota (Japan), on 18th October 2021, invested USD 1.29 billion in manufacturing batteries that will be used in gas-electric hybrid and electric vehicles. Hyundai (South Korea), in January 2020, announced the launching of 6 plug-in hybrid cars and two fuel-cell electric cars by 2025. Such initiatives from the domestic OEMs are expected to increase the scope of lightweight in HEVs.

“Europe is anticipated to be the second largest automotive lightweighting market by 2027.”

According to MarketsandMarkets analysis, Europe is projected to be the second-largest market for automotive lightweight materials by 2027. The passenger car production in Europe was 22,609,000 units in 2018 and 17,517,000 units in 2021. The demand for the forecast years (2022-2027) is estimated to be steady, with a CAGR of 1.28%. Furthermore, the region hosts many of the leading premium car passenger car manufacturers, including Mercedes (Germany), BMW (Germany), Volvo (Sweden), JLR (UK), and others. This is also one of the key reasons for the demand for luxury and premium cars, particularly with an SUV being the most popular segment. Some of the other key reasons for this trend are that the consumers in this region are willing to spend extra money for the safety, comfort, and driver assistance features.

However, these additional features increase the overall weight of the vehicle, which

affects the fuel economy, performance, and emission characteristics of the vehicle. For these reasons, the OEMs incorporate lightweight materials such as the Aluminum, Magnesium and other composites, making the growth of automotive lightweight more promising. Furthermore, many OEMs such as Stellantis, Covestro AG, and Thyssenkrupp are concentrated in Europe and investing heavily in R&D to create new and advanced lightweight materials that comply with stringent emission and fuel consumption regulations. Europe has Euro 6 norms that are being followed by other members in the EU, which demand strict reduction of pollutants like NOx and CO<sub>2</sub> to improve the vehicle's fuel economy. The region has also mandated that the average emission of all models sold by an OEM needs to drop from 75 grams of CO<sub>2</sub> per kilometer by 2025 and beyond. Such emission reduction targets are leading to the lightweight of vehicles in Europe.

In-depth interviews were conducted with CXOs, VPs, directors from business development, marketing, product development/innovation teams, independent consultants, and executives from various key organizations operating in this market.

By Company Type: Tier 1 companies - 70%, Tier 2 - 20%, Other- 10%

By Designation: Manager Level – 60%, C Level - 25%, and Others - 15%

By Region: Asia Pacific – 35%, North America - 30%, Europe - 20%, and Rest of the World – 15%

The automotive lightweighting market is led by globally established players such as BASF SE (Germany), Covestro AG (Germany), LyondellBasell Industries Holdings B.V.(Netherlands), Toray Industries (Japan), and ArcelorMittal (Germany).

#### Research Coverage:

The study segments the automotive lightweighting market and forecasts the market size based on Material Type (Metal, Aluminum, Magnesium & Titanium, Composite, Plastic, and Elastomers), By Application (Body in Weight, Chassis & Suspension, Powertrain, Closures, Interior and Others), By Components (Frames, Wheels, Bumpers & Fenders, Engines & Exhaust, Transmission, Doors, Hood & Trunks Lid, Seats, Instrumental Panel and Fuel Tanks), By Vehicle Type (Passenger cars, LCV, Trucks, and Buses), BY Electric and Hybrid Vehicles (BEV, PHEV, FCEV, Trucks, and BUS ), Electric Vehicles Lightweighting Market, By Material type (Metal, Aluminum, Magnesium & Titanium,

Composite, Plastic, and Elastomers), Micro-mobility Lightweighting Market, By Material Type (Aluminum, Composite, Plastics, and others) and Region (Asia Pacific, Europe, North America, And Rest of The World).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

#### Key Benefits of Buying the Report:

The report will help the key market players operating in the automotive lightweighting market with information on the closest approximations of the revenue numbers for the overall automotive lightweighting market and the sub-segments. This report would also help stakeholders understand the fastest-growing and largest market for automotive lightweight at regional and global levels for various sub-segments covered in the study. The report helps stakeholders to understand the competitive landscape, market share analysis and key growth opportunities and gain more insights to position their businesses better 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.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

#### 1.3 INCLUSIONS AND EXCLUSIONS

#### 1.4 MARKET SCOPE

#### FIGURE 1 AUTOMOTIVE LIGHTWEIGHTING MARKET: MARKET SEGMENTATION

##### 1.4.1 YEARS CONSIDERED

#### 1.5 CURRENCY CONSIDERED

#### 1.6 PACKAGE SIZE

#### 1.7 SUMMARY OF CHANGES

#### 1.8 LIMITATIONS

#### 1.9 STAKEHOLDERS

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 2 AUTOMOTIVE LIGHTWEIGHTING MARKET: RESEARCH DESIGN

#### FIGURE 3 RESEARCH METHODOLOGY MODEL

##### 2.1.1 SECONDARY DATA

###### 2.1.1.1 Key secondary sources for vehicle sales/production

###### 2.1.1.2 List of key secondary sources to estimate market sizing

###### 2.1.1.3 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

#### FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

###### 2.1.2.1 List of primary participants

#### 2.2 MARKET SIZE ESTIMATION

#### FIGURE 5 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING

##### 2.2.1 BOTTOM-UP APPROACH

#### FIGURE 6 AUTOMOTIVE LIGHTWEIGHTING MARKET: BOTTOM-UP APPROACH

##### 2.2.2 TOP-DOWN APPROACH

#### FIGURE 7 AUTOMOTIVE LIGHTWEIGHTING MARKET: TOP-DOWN APPROACH

#### FIGURE 8 AUTOMOTIVE LIGHTWEIGHTING MARKET: RESEARCH DESIGN AND METHODOLOGY

#### 2.3 DATA TRIANGULATION

#### FIGURE 9 DATA TRIANGULATION

## 2.4 FACTOR ANALYSIS

### 2.4.1 REGIONAL ECONOMY IMPACT ANALYSIS

## 2.5 RESEARCH ASSUMPTIONS

## 2.6 RESEARCH LIMITATIONS

## 3 EXECUTIVE SUMMARY

### 3.1 RECESSION IMPACT ON AUTOMOTIVE LIGHTWEIGHTING MARKET

FIGURE 10 PRE- AND POST-RECESSION SCENARIO: AUTOMOTIVE LIGHTWEIGHTING MARKET, 2018–2027 (USD BILLION)

FIGURE 11 AUTOMOTIVE LIGHTWEIGHTING MARKET: MARKET OUTLOOK

FIGURE 12 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022 VS. 2027 (USD BILLION)

## 4 PREMIUM INSIGHTS

### 4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE LIGHTWEIGHTING MARKET

FIGURE 13 RISING TREND OF VEHICLE ELECTRIFICATION OFFERS ATTRACTIVE OPPORTUNITIES

### 4.2 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION

FIGURE 14 ASIA PACIFIC TO DOMINATE MARKET DURING FORECAST PERIOD

### 4.3 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

FIGURE 15 METALS TO HOLD LARGEST GLOBAL SHARE DURING FORECAST PERIOD

### 4.4 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY APPLICATION

FIGURE 16 BODY IN WHITE APPLICATION TO HAVE LARGEST SHARE IN AUTOMOTIVE LIGHTWEIGHTING MARKET

### 4.5 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT

FIGURE 17 FRAMES SUBSEGMENT TO HOLD LARGEST SHARE DURING FORECAST PERIOD

### 4.6 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE

FIGURE 18 PASSENGER CARS TO BE DOMINANT SUBSEGMENT DURING FORECAST PERIOD

### 4.7 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

FIGURE 19 METALS PROJECTED TO BE LARGEST MARKET GROWTH DURING FORECAST PERIOD

### 4.8 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY VEHICLE TYPE

FIGURE 20 BEV SEGMENT PROJECTED TO HAVE HIGHEST MARKET SHARE

## DURING FORECAST PERIOD

### 4.9 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

FIGURE 21 ALUMINUM TO HAVE LARGEST SHARE IN MICROMOBILITY LIGHTWEIGHTING MARKET

### 4.10 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

FIGURE 22 COMPOSITES PROJECTED TO BE LARGEST SUBSEGMENT IN UAV LIGHTWEIGHTING MARKET

### 4.11 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION

FIGURE 23 ASIA PACIFIC TO BE DOMINANT REGION IN AUTOMOTIVE LIGHTWEIGHTING MARKET

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

FIGURE 24 AUTOMOTIVE LIGHTWEIGHTING MARKET DYNAMICS

#### 5.2.1 DRIVERS

5.2.1.1 Advanced manufacturing methods and technologies

5.2.1.2 Demand for fuel-efficient and low-emission vehicles

FIGURE 25 ON-ROAD VEHICLE EMISSION REGULATION OUTLOOK FOR HEAVY-DUTY VEHICLES, 2014–2030

TABLE 1 MASS REDUCTION WITH LIGHTWEIGHT MATERIALS

#### 5.2.2 RESTRAINTS

5.2.2.1 Difficulty in joining dissimilar materials

TABLE 2 ALUMINUM VS. STEEL MATERIAL MECHANICAL PROPERTIES

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Development of advanced and affordable electric and autonomous vehicles

FIGURE 26 GLOBAL ELECTRIC VEHICLES SALES, 2021–2030 (THOUSAND UNITS)

5.2.3.2 Performance package offerings in premium and sports cars

#### 5.2.4 CHALLENGES

5.2.4.1 Maintenance difficulties and replacement costs

5.2.4.2 Supply chain difficulties and high cost of lightweight materials

### 5.3 TRADE ANALYSIS

#### 5.3.1 IMPORT DATA, BY REGION

5.3.1.1 Iron or Steel

TABLE 3 US: IRON OR STEEL IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 4 GERMANY: IRON OR STEEL IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 5 FRANCE: IRON OR STEEL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.3.1.2 Aluminum



TABLE 6 GERMANY: ALUMINUM IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 7 FRANCE: ALUMINUM IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 8 US: ALUMINUM IMPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.1.3 Magnesium

TABLE 9 US: MAGNESIUM IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 10 CANADA: MAGNESIUM IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 11 GERMANY: MAGNESIUM IMPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.1.4 Elastomer

TABLE 12 CHINA: ELASTOMER IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 13 GERMANY: ELASTOMER IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 14 BELGIUM: ELASTOMER IMPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.1.5 Plastics

TABLE 15 US: PLASTICS IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 16 GERMANY: PLASTICS IMPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 17 MEXICO: PLASTICS IMPORTS SHARE, BY COUNTRY (VALUE %)

### 5.3.2 EXPORT DATA, BY REGION

#### 5.3.2.1 Iron or Steel

TABLE 18 CHINA: IRON OR STEEL EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 19 GERMANY: IRON OR STEEL EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 20 ITALY: IRON OR STEEL EXPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.2.2 Aluminum

TABLE 21 CHINA: ALUMINUM EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 22 GERMANY: ALUMINUM EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 23 ITALY: ALUMINUM EXPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.2.3 Magnesium

TABLE 24 CHINA: MAGNESIUM EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 25 AUSTRIA: MAGNESIUM EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 26 US: MAGNESIUM EXPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.2.4 Elastomer

TABLE 27 JAPAN: ELASTOMER EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 28 CHINA: ELASTOMER EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 29 US: ELASTOMER EXPORTS SHARE, BY COUNTRY (VALUE %)

#### 5.3.2.5 Plastics

TABLE 30 CHINA: PLASTICS EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 31 GERMANY: PLASTICS EXPORTS SHARE, BY COUNTRY (VALUE %)

TABLE 32 US: PLASTICS EXPORTS SHARE, BY COUNTRY (VALUE %)

## 5.4 IMPACT OF RECESSION ON ECONOMY

### 5.4.1 INTRODUCTION



#### 5.4.2 REGIONAL MACROECONOMIC OVERVIEW

#### 5.4.3 ANALYSIS OF KEY ECONOMIC INDICATORS

TABLE 33 KEY ECONOMIC INDICATORS FOR SELECT COUNTRIES, 2021–2022

#### 5.4.4 ECONOMIC STAGFLATION (SLOWDOWN) VS. ECONOMIC RECESSION

##### 5.4.4.1 Europe

TABLE 34 EUROPE: KEY ECONOMIC INDICATORS, 2021–2023

TABLE 35 EUROPE: KEY INFLATION INDICATORS, 2021–2023

##### 5.4.4.2 Asia Pacific

TABLE 36 ASIA PACIFIC: KEY ECONOMIC INDICATORS, 2021–2023

TABLE 37 ASIA PACIFIC: KEY INFLATION INDICATORS, 2021–2023

##### 5.4.4.3 Americas

TABLE 38 AMERICAS: KEY ECONOMIC INDICATORS, 2021–2023

TABLE 39 AMERICAS: KEY INFLATION INDICATORS, 2021–2023

#### 5.4.5 ECONOMIC OUTLOOK/PROJECTIONS

TABLE 40 GDP GROWTH PROJECTIONS FOR KEY COUNTRIES, 2024–2027 (% GROWTH)

### 5.5 IMPACT OF RECESSION ON AUTOMOTIVE SECTOR

#### 5.5.1 ANALYSIS OF AUTOMOTIVE VEHICLE SALES

##### 5.5.1.1 Europe

FIGURE 27 EUROPE: PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE SALES, BY COUNTRY, 2021–2022 (UNITS)

##### 5.5.1.2 Asia Pacific

FIGURE 28 ASIA PACIFIC: PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE SALES, BY COUNTRY, 2021–2022 (UNITS)

##### 5.5.1.3 Americas

FIGURE 29 AMERICAS: PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE SALES, BY COUNTRY, 2021–2022 (UNITS)

#### 5.5.2 AUTOMOTIVE SALES OUTLOOK

FIGURE 30 EUROPE: PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE PRODUCTION FORECAST, 2022 VS. 2027 ('000 UNITS)

FIGURE 31 ASIA PACIFIC: PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE PRODUCTION FORECAST, 2022 VS. 2027 ('000 UNITS)

FIGURE 32 NORTH AMERICA: PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE PRODUCTION FORECAST, 2022 VS. 2027 ('000 UNITS)

### 5.6 TRENDS/DISRUPTION IMPACTING CUSTOMERS' BUSINESSES

FIGURE 33 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES – AUTOMOTIVE LIGHTWEIGHTING MARKET

### 5.7 PATENT ANALYSIS

### 5.8 SUPPLY CHAIN ANALYSIS

FIGURE 34 SUPPLY CHAIN ANALYSIS: AUTOMOTIVE LIGHTWEIGHTING MARKET  
5.9 AVERAGE SELLING PRICING (ASP) ANALYSIS FOR AUTOMOTIVE  
LIGHTWEIGHTING MARKET, BY MATERIAL AND REGION, 2019–2021

5.9.1 NORTH AMERICA

TABLE 41 NORTH AMERICA: AUTOMOTIVE LIGHTWEIGHTING MARKET-  
AVERAGE SELLING PRICE (ASP), BY MATERIAL, 2019–2021 (USD/TON)

5.9.2 EUROPE

TABLE 42 EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET- AVERAGE  
SELLING PRICE (ASP), BY MATERIAL, 2019–2021 (USD/TON)

5.9.3 ASIA PACIFIC

TABLE 43 ASIA PACIFIC: AUTOMOTIVE LIGHTWEIGHTING MARKET- AVERAGE  
SELLING PRICE (ASP), BY MATERIAL, 2019–2021 (USD/TON)

5.9.4 REST OF THE WORLD

TABLE 44 REST OF THE WORLD: AUTOMOTIVE LIGHTWEIGHTING MARKET-  
AVERAGE SELLING PRICE (ASP), BY MATERIAL, 2019–2021 (USD/TON)

5.10 CASE STUDIES

5.10.1 USE CASE 1: BUGATTI BOLIDE- LIGHTWEIGHT HYPERCAR CAN REACH  
TOP SPEED OF ABOVE 500 KMPH

5.10.2 USE CASE 2: MCLAREN'S NEW SUPERCAR ARTURA HYBRID USED  
LIGHTWEIGHTING TO IMPROVE ITS PERFORMANCE

5.10.3 USE CASE 3: FORD LEVERAGED AUTOMOTIVE LIGHTWEIGHTING TO  
DEVELOP FUEL-EFFICIENT SEDAN

5.10.4 USE CASE 4: PORSCHE USED LIGHTWEIGHT MATERIALS TO ENHANCE  
PERFORMANCE AND INCREASE STRUCTURAL STRENGTH

5.10.5 USE CASE 5: HYUNDAI AND KIA USED LIGHTWEIGHT MATERIALS TO  
ENHANCE PERFORMANCE AND REDUCE WEIGHT

5.11 TECHNOLOGY ANALYSIS

5.11.1 OVERVIEW

5.11.1.1 Light-duty vehicles impact lightweight material industry

TABLE 45 WEIGHT REDUCTION GOALS FOR LIGHT-DUTY VEHICLES

TABLE 46 FUTURE WEIGHT REDUCTION TARGETS, BY COMPONENT, 2025 VS.  
2050

TABLE 47 TECHNOLOGICAL ROUTES FOR APPLICATION OF LIGHTWEIGHT  
MATERIALS: US

5.12 AUTOMOTIVE LIGHTWEIGHTING MARKET ECOSYSTEM

FIGURE 35 AUTOMOTIVE LIGHTWEIGHTING MARKET: ECOSYSTEM

TABLE 48 ROLE OF COMPANIES IN AUTOMOTIVE LIGHTWEIGHTING MARKET  
ECOSYSTEM

5.13 PORTER'S FIVE FORCES ANALYSIS

**TABLE 49 PORTER'S FIVE FORCES ANALYSIS****FIGURE 36 PORTER'S FIVE FORCES FOR AUTOMOTIVE LIGHTWEIGHTING MARKET****5.13.1 THREAT OF SUBSTITUTES****5.13.2 THREAT OF NEW ENTRANTS****5.13.3 BARGAINING POWER OF BUYERS****5.13.4 BARGAINING POWER OF SUPPLIERS****5.13.5 INTENSITY OF COMPETITIVE RIVALRY****5.14 REGULATORY FRAMEWORK****5.14.1 EMISSION REGULATIONS****5.14.1.1 On-road vehicles****TABLE 50 EURO-5 VS. EURO-6 VEHICLE EMISSION STANDARDS ON NEW EUROPEAN DRIVING CYCLE****TABLE 51 ON-ROAD VEHICLE EMISSION REGULATION OUTLOOK FOR PASSENGER CARS, 2016–2021****5.14.1.2 Non-road mobile machinery (NRMM) emission regulation outlook****FIGURE 37 NRMM EMISSION REGULATION OUTLOOK, 2019–2025****5.15 FUEL ECONOMY NORMS****5.15.1 US****TABLE 52 US: CAFE STANDARDS FOR EACH MODEL YEAR IN MILES PER GALLON, 2019–2025****5.15.2 EUROPE****5.15.3 CHINA****5.15.4 INDIA****5.16 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 53 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 54 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 55 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.17 KEY CONFERENCES AND EVENTS IN 2023–2024****5.17.1 BUYING CRITERIA****FIGURE 38 KEY BUYING CRITERIA FOR AUTOMOTIVE LIGHTWEIGHTING APPLICATIONS****TABLE 56 KEY BUYING CRITERIA FOR TOP TWO AUTOMOTIVE LIGHTWEIGHTING APPLICATIONS****5.17.2 KEY STAKEHOLDERS IN BUYING PROCESS**

## TABLE 57 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR AUTOMOTIVE LIGHTWEIGHTING MARKET APPLICATIONS (%)

### 6 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL

This chapter is further segmentized into region level – North America, Asia Pacific, Europe and Rest of the World.

#### 6.1 INTRODUCTION

##### 6.1.1 RESEARCH METHODOLOGY

##### 6.1.2 ASSUMPTIONS/LIMITATIONS

##### 6.1.3 INDUSTRY INSIGHTS

FIGURE 39 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022  
VS. 2027 (USD BILLION)

TABLE 58 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE,  
2018–2021 (TMT)

TABLE 59 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE,  
2022–2027 (TMT)

TABLE 60 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE,  
2018–2021 (USD BILLION)

TABLE 61 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE,  
2022–2027 (USD BILLION)

#### 6.2 METALS

TABLE 62 METALS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY TYPE,  
2018–2021 (TMT)

TABLE 63 METALS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY TYPE,  
2022–2027 (TMT)

TABLE 64 METALS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY TYPE,  
2018–2021 (USD BILLION)

TABLE 65 METALS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY TYPE,  
2022–2027 (USD BILLION)

##### 6.2.1 HIGH STRENGTH STEEL (HSS)

###### 6.2.1.1 Lightweight and resistant to contract tension

TABLE 66 HSS MARKET, BY REGION, 2018–2021 (TMT)

TABLE 67 HSS MARKET, BY REGION, 2022–2027 (TMT)

TABLE 68 HSS MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 69 HSS MARKET, BY REGION, 2022–2027 (USD BILLION)

##### 6.2.2 ALUMINUM

###### 6.2.2.1 Led by EV sales owing to lightweighting properties

TABLE 70 ALUMINUM MARKET, BY REGION, 2018–2021 (TMT)

TABLE 71 ALUMINUM MARKET, BY REGION, 2022–2027 (TMT)

TABLE 72 ALUMINUM MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 73 ALUMINUM MARKET, BY REGION, 2022–2027 (USD BILLION)

#### 6.2.3 MAGNESIUM AND TITANIUM

6.2.3.1 Magnesium considered alternative to carbon fiber material

TABLE 74 MAGNESIUM AND TITANIUM MARKET, BY REGION, 2018–2021 (TMT)

TABLE 75 MAGNESIUM AND TITANIUM MARKET, BY REGION, 2022–2027 (TMT)

TABLE 76 MAGNESIUM AND TITANIUM MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 77 MAGNESIUM AND TITANIUM MARKET, BY REGION, 2022–2027 (USD BILLION)

#### 6.3 COMPOSITES

TABLE 78 COMPOSITES MARKET, BY TYPE, 2018–2021 (TMT)

TABLE 79 COMPOSITES MARKET, BY TYPE, 2022–2027 (TMT)

TABLE 80 COMPOSITES MARKET, BY TYPE, 2018–2021 (USD BILLION)

TABLE 81 COMPOSITES MARKET, BY TYPE, 2022–2027 (USD BILLION)

##### 6.3.1 CARBON FIBER REINFORCED POLYMERS (CFRP)

6.3.1.1 Save 0.3–0.6 liters of fuel on every 100 km of drive

TABLE 82 CFRP MARKET, BY REGION, 2018–2021 (TMT)

TABLE 83 CFRP MARKET, BY REGION, 2022–2027 (TMT)

TABLE 84 CFRP MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 85 CFRP MARKET, BY REGION, 2022–2027 (USD BILLION)

##### 6.3.2 GLASS FIBER REINFORCED POLYMER (GFRP)

6.3.2.1 Good strength to weight ratio

TABLE 86 GFRP MARKET, BY REGION, 2018–2021 (TMT)

TABLE 87 GFRP MARKET, BY REGION, 2022–2027 (TMT)

TABLE 88 GFRP MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 89 GFRP MARKET, BY REGION, 2022–2027 (USD BILLION)

##### 6.3.3 NATURAL FIBER REINFORCED POLYMER (NFRP)

6.3.3.1 Makes parts lighter and sustainable

TABLE 90 NFRP MARKET, BY REGION, 2018–2021 (TMT)

TABLE 91 NFRP MARKET, BY REGION, 2022–2027 (TMT)

TABLE 92 NFRP MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 93 NFRP MARKET, BY REGION, 2022–2027 (USD BILLION)

##### 6.3.4 OTHER COMPOSITES

6.3.4.1 Europe to have highest market share

TABLE 94 OTHER COMPOSITES MARKET, BY REGION, 2018–2021 (TMT)

TABLE 95 OTHER COMPOSITES MARKET, BY REGION, 2022–2027 (TMT)

TABLE 96 OTHER COMPOSITES MARKET, BY REGION, 2018–2021 (USD BILLION)

**TABLE 97 OTHER COMPOSITES MARKET, BY REGION, 2022–2027 (USD BILLION)****6.4 PLASTICS**

TABLE 98 PLASTICS MARKET, BY REGION, 2018–2021 (TMT)

TABLE 99 PLASTICS MARKET, BY REGION, 2022–2027 (TMT)

TABLE 100 PLASTICS MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 101 PLASTICS MARKET, BY REGION, 2022–2027 (USD BILLION)

TABLE 102 PLASTICS MARKET, BY TYPE, 2018–2021 (TMT)

TABLE 103 PLASTICS MARKET, BY TYPE, 2022–2027 (TMT)

TABLE 104 PLASTICS MARKET, BY TYPE, 2018–2021 (USD BILLION)

TABLE 105 PLASTICS MARKET, BY TYPE, 2022–2027 (USD BILLION)

**6.5 ELASTOMERS**

TABLE 106 ELASTOMERS MARKET, BY REGION, 2018–2021 (TMT)

TABLE 107 ELASTOMERS MARKET, BY REGION, 2022–2027 (TMT)

TABLE 108 ELASTOMERS MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 109 ELASTOMERS MARKET, BY REGION, 2022–2027 (USD BILLION)

**7 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY APPLICATION**

This chapter is further segmentized into region level – North America, Asia Pacific, Europe, and Rest of the World.

**7.1 INTRODUCTION**

7.1.1 RESEARCH METHODOLOGY

7.1.2 ASSUMPTIONS/LIMITATIONS

7.1.3 INDUSTRY INSIGHTS

**FIGURE 40 AUTOMOTIVE LIGHTWEIGHTING MATERIAL MARKET, BY APPLICATION, 2022 VS. 2027 (USD BILLION)**

TABLE 110 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY APPLICATION, 2018–2021 (TMT)

TABLE 111 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY APPLICATION, 2022–2027 (TMT)

TABLE 112 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY APPLICATION, 2018–2021 (USD BILLION)

TABLE 113 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY APPLICATION, 2022–2027 (USD BILLION)

**7.2 BODY IN WHITE****7.2.1 CONTRIBUTES 30% OF CURB WEIGHT WITH LARGE SCOPE FOR WEIGHT REDUCTION**

TABLE 114 BODY IN WHITE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)



TABLE 115 BODY IN WHITE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 116 BODY IN WHITE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 117 BODY IN WHITE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 7.3 CHASSIS AND SUSPENSIONS

#### 7.3.1 USE OF ALUMINUM TO REDUCE WEIGHT

TABLE 118 CHASSIS AND SUSPENSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 119 CHASSIS AND SUSPENSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 120 CHASSIS AND SUSPENSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 121 CHASSIS AND SUSPENSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 7.4 POWERTRAINS

#### 7.4.1 ALUMINUM HOUSING TO REPLACE CONVENTIONAL STEEL

TABLE 122 POWERTRAINS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 123 POWERTRAINS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 124 POWERTRAINS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 125 POWERTRAINS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 7.5 CLOSURES

7.5.1 ALUMINUM AND MAGNESIUM USED TO REDUCE OVERALL VEHICLE WEIGHT

TABLE 126 CLOSURES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 127 CLOSURES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 128 CLOSURES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 129 CLOSURES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 7.6 INTERIORS

#### 7.6.1 INFOTAINMENT SYSTEMS TO REPLACE CONVENTIONAL FEATURES AND

## PUSH BUTTONS

TABLE 130 INTERIORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 131 INTERIORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 132 INTERIORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 133 INTERIORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 7.7 OTHERS

### 7.7.1 EUROPE TO BE FASTEST-GROWING MARKET

TABLE 134 OTHERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 135 OTHERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 136 OTHERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 137 OTHERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 8 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT

This chapter is further segmentized into region level – North America, Asia Pacific, Europe, and Rest of the World.

### 8.1 INTRODUCTION

#### 8.1.1 RESEARCH METHODOLOGY

#### 8.1.2 INDUSTRY INSIGHTS

FIGURE 41 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT, 2022 VS. 2027 (USD BILLION)

TABLE 138 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT, 2018–2021 (TMT)

TABLE 139 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT, 2022–2027 (TMT)

TABLE 140 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT, 2018–2021 (USD BILLION)

TABLE 141 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COMPONENT, 2022–2027 (USD BILLION)

### 8.2 FRAMES

#### 8.2.1 MADE USING HSS, ALUMINUM, AND COMPOSITES

TABLE 142 FRAMES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 143 FRAMES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 144 FRAMES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 145 FRAMES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 8.3 WHEELS

#### 8.3.1 INCORPORATION OF LIGHTWEIGHT WHEELS IN SPORTS AND HYPERCARS

TABLE 146 WHEELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 147 WHEELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 148 WHEELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 149 WHEELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 8.4 BUMPERS AND FENDERS

#### 8.4.1 DESIGNED TO REDUCE DAMAGES

TABLE 150 BUMPERS AND FENDERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 151 BUMPERS AND FENDERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 152 BUMPERS AND FENDERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 153 BUMPERS AND FENDERS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

### 8.5 ENGINES AND EXHAUSTS

#### 8.5.1 TREND SHIFT TOWARD ALL-ALUMINUM ENGINES

TABLE 154 ENGINES AND EXHAUSTS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 155 ENGINES AND EXHAUSTS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 156 ENGINES AND EXHAUSTS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 157 ENGINES AND EXHAUSTS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 8.6 TRANSMISSIONS

8.6.1 LIGHTWEIGHTING IN TRANSMISSION IN EUROPE TO GROW MORE  
TABLE 158 TRANSMISSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 159 TRANSMISSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 160 TRANSMISSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 161 TRANSMISSIONS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 8.7 DOORS

### 8.7.1 ASIA PACIFIC TO DOMINATE MARKET

TABLE 162 DOORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 163 DOORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 164 DOORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 165 DOORS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 8.8 HOODS AND TRUNKS

### 8.8.1 INCREASING DEMAND DUE TO FUEL-EFFICIENT VEHICLES

TABLE 166 HOODS AND TRUNKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 167 HOODS AND TRUNKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 168 HOODS AND TRUNKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 169 HOODS AND TRUNKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 8.9 SEATS

8.9.1 GROWING NEED FOR BETTER COMFORT AND ERGONOMICALLY DESIGNED SEATS

TABLE 170 SEATS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 171 SEATS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 172 SEATS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 173 SEATS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

#### 8.10 INSTRUMENT PANELS

##### 8.10.1 DEMAND DRIVEN BY ADOPTION OF ELECTRIC VEHICLES

TABLE 174 INSTRUMENT PANELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 175 INSTRUMENT PANELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 176 INSTRUMENT PANELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 177 INSTRUMENT PANELS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

#### 8.11 FUEL TANKS

##### 8.11.1 USE OF PLASTIC TO AID WEIGHT REDUCTION

TABLE 178 FUEL TANKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 179 FUEL TANKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 180 FUEL TANKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 181 FUEL TANKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## 9 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE

This chapter is further segmentized into region level – North America, Asia Pacific, Europe, and Rest of the World.

### 9.1 INTRODUCTION

#### 9.1.1 RESEARCH METHODOLOGY

#### 9.1.2 ASSUMPTIONS/LIMITATIONS

#### 9.1.3 INDUSTRY INSIGHTS

FIGURE 42 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD BILLION)

TABLE 182 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (TMT)

TABLE 183 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (TMT)

TABLE 184 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (USD BILLION)

TABLE 185 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE,  
2022–2027 (USD BILLION)

## 9.2 PASSENGER CARS

9.2.1 DEMAND FOR LIGHTWEIGHT MATERIALS TO BE HIGHEST IN EVS AND IC  
ENGINES PASSENGER CARS

TABLE 186 PASSENGER CARS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY  
REGION, 2018–2021 (TMT)

TABLE 187 PASSENGER CARS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY  
REGION, 2022–2027 (TMT)

TABLE 188 PASSENGER CARS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY  
REGION, 2018–2021 (USD BILLION)

TABLE 189 PASSENGER CARS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY  
REGION, 2022–2027 (USD BILLION)

## 9.3 LIGHT COMMERCIAL VEHICLES (LCVS)

9.3.1 NORTH AMERICA TO BE FASTEST-GROWING MARKET FOR LIGHTWEIGHT  
MATERIAL IN LCV SEGMENT

TABLE 190 LCVS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2018–2021 (TMT)

TABLE 191 LCVS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2022–2027 (TMT)

TABLE 192 LCVS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2018–2021 (USD BILLION)

TABLE 193 LCVS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2022–2027 (USD BILLION)

## 9.4 TRUCKS

9.4.1 LIMITED USAGE OF LIGHTWEIGHT MATERIALS DUE TO HIGH COST

TABLE 194 TRUCKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2018–2021 (TMT)

TABLE 195 TRUCKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2022–2027 (TMT)

TABLE 196 TRUCKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2018–2021 (USD BILLION)

TABLE 197 TRUCKS: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2022–2027 (USD BILLION)

## 9.5 BUSES

9.5.1 USAGE OF LIGHTWEIGHT MATERIALS IN BUSES MORE THAN TRUCKS  
AND LCVS

TABLE 198 BUSES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION,  
2018–2021 (TMT)



TABLE 199 BUSES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 200 BUSES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD BILLION)

TABLE 201 BUSES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD BILLION)

## **10 ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE**

This chapter is further segmentized into region level – North America, Asia Pacific, Europe, and Rest of the World.

### **10.1 INTRODUCTION**

#### **10.1.1 RESEARCH METHODOLOGY**

#### **10.1.2 ASSUMPTIONS/LIMITATIONS**

#### **10.1.3 INDUSTRY INSIGHTS**

FIGURE 43 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 202 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (TMT)

TABLE 203 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (TMT)

TABLE 204 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 205 ELECTRIC AND HYBRID LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

### **10.2 BATTERY ELECTRIC VEHICLES**

#### **10.2.1 LIGHTWEIGHTING TO IMPROVE FUEL EFFICIENCY OF BEVS**

TABLE 206 BEV LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 207 BEV LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 208 BEV LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 209 BEV LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD MILLION)

### **10.3 HYBRID ELECTRIC VEHICLES**

10.3.1 LIMITED AVAILABILITY OF CHARGING INFRASTRUCTURE MAKES HEVS PREFERRED OPTION OVER BEVS

TABLE 210 HEV LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 211 HEV LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 212 HEV LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 213 HEV LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD MILLION)

#### 10.4 PLUG-IN HYBRID ELECTRIC VEHICLES

##### 10.4.1 ASIA PACIFIC TO BE FASTEST-GROWING MARKET

TABLE 214 PHEV LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 215 PHEV LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 216 PHEV LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 217 PHEV LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD MILLION)

#### 10.5 ELECTRIC TRUCKS

##### 10.5.1 NORTH AMERICA TO BE LARGEST MARKET

TABLE 218 ELECTRIC TRUCKS LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 219 ELECTRIC TRUCKS LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 220 ELECTRIC TRUCKS LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 221 ELECTRIC TRUCKS LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD MILLION)

#### 10.6 ELECTRIC BUSES

10.6.1 USED BY COUNTRIES SUCH AS CHINA AND INDIA AS MODE OF TRANSPORT

TABLE 222 ELECTRIC BUSES LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (TMT)

TABLE 223 ELECTRIC BUSES LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (TMT)

TABLE 224 ELECTRIC BUSES LIGHTWEIGHTING MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 225 ELECTRIC BUSES LIGHTWEIGHTING MARKET, BY REGION, 2022–2027 (USD MILLION)

## 11 ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

This chapter is further segmentized into vehicle types – BEVs, PHEVs, HEVs, Buses and Trucks

## 11.1 INTRODUCTION

### 11.1.1 RESEARCH METHODOLOGY

### 11.1.2 INDUSTRY INSIGHTS

FIGURE 44 ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 226 ELECTRIC VEHICLE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 227 ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 228 ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD MILLION)

TABLE 229 ELECTRIC VEHICLE LIGHTWEIGHTING, BY MATERIAL TYPE, 2022–2027 (USD MILLION)

## 11.2 METALS

11.2.1 INCORPORATED IN BODY STRUCTURES, POWERTRAINS, AND SUSPENSIONS

TABLE 230 METALS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (TMT)

TABLE 231 METALS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (TMT)

TABLE 232 METALS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 233 METALS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

## 11.3 COMPOSITES

### 11.3.1 ADVANCED AND COSTLIER MATERIAL

TABLE 234 COMPOSITES: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (TMT)

TABLE 235 COMPOSITES: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (TMT)

TABLE 236 COMPOSITES: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 237 COMPOSITES: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

## 11.4 PLASTICS

### 11.4.1 BEV TO BE LARGEST LIGHTWEIGHTING MARKET FOR PLASTICS

TABLE 238 PLASTICS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING MARKET, BY VEHICLE TYPE, 2018–2021 (TMT)

TABLE 239 PLASTICS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2022–2027 (TMT)

TABLE 240 PLASTICS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 241 PLASTICS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

## 11.5 ELASTOMERS

11.5.1 USED IN ANTI-VIBRATION RUBBER MOUNTS IN ELECTRIC TRUCKS

TABLE 242 ELASTOMERS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2018–2021 (TMT)

TABLE 243 ELASTOMERS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2022–2027 (TMT)

TABLE 244 ELASTOMERS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 245 ELASTOMERS: ELECTRIC AND HYBRID VEHICLE LIGHTWEIGHTING

MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

## 12 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

This chapter is further segmentized into region level – North America, Asia Pacific, and Europe.

### 12.1 INTRODUCTION

12.1.1 RESEARCH METHODOLOGY

12.1.2 ASSUMPTIONS/LIMITATIONS

FIGURE 45 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL, 2022 VS. 2027 (USD MILLION)

TABLE 246 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL, 2018–2021 (TMT)

TABLE 247 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL, 2022–2027 (TMT)

TABLE 248 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL, 2018–2021 (USD MILLION)

TABLE 249 MICROMOBILITY LIGHTWEIGHTING MARKET, BY MATERIAL, 2022–2027 (USD MILLION)

### 12.2 HIGH STRENGTH STEEL

12.2.1 VARIABLE THICKNESS REDUCES VEHICLE WEIGHT

TABLE 250 HSS MATERIAL MARKET, BY REGION, 2018–2021 (TMT)

TABLE 251 HSS MATERIAL MARKET, BY REGION, 2022–2027 (TMT)

TABLE 252 HSS MATERIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 253 HSS MATERIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

## 12.3 ALUMINUM

### 12.3.1 LIGHTWEIGHT AND LOW DENSITY

TABLE 254 ALUMINUM MATERIAL MARKET, BY REGION, 2018–2021 (TMT)

TABLE 255 ALUMINUM MATERIAL MARKET, BY REGION, 2022–2027 (TMT)

TABLE 256 ALUMINUM MATERIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 257 ALUMINUM MATERIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

## 12.4 PLASTICS

12.4.1 USED TO WELD DISSIMILAR METALS TO FORM FIRM JOINTS AND RETAIN STRENGTH

TABLE 258 PLASTICS MATERIAL MARKET, BY REGION, 2018–2021 (TMT)

TABLE 259 PLASTICS MATERIAL MARKET, BY REGION, 2022–2027 (TMT)

TABLE 260 PLASTICS MATERIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 261 PLASTICS MATERIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

## 12.5 ELASTOMERS

### 12.5.1 LED BY EUROPEAN MARKET

TABLE 262 ELASTOMERS MATERIAL MARKET, BY REGION, 2018–2021 (TMT)

TABLE 263 ELASTOMERS MATERIAL MARKET, BY REGION, 2022–2027 (TMT)

TABLE 264 ELASTOMERS MATERIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 265 ELASTOMERS MATERIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

## 12.6 OTHER MATERIALS

TABLE 266 OTHER MATERIALS MARKET, BY REGION, 2018–2021 (TMT)

TABLE 267 OTHER MATERIALS MARKET, BY REGION, 2022–2027 (TMT)

TABLE 268 OTHER MATERIALS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 269 OTHER MATERIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

## 13 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE

### 13.1 INTRODUCTION

#### 13.1.1 RESEARCH METHODOLOGY

#### 13.1.2 ASSUMPTIONS/LIMITATIONS

FIGURE 46 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 270 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (MT)

TABLE 271 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (MT)

TABLE 272 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021

(USD MILLION)

TABLE 273 UAV LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027

(USD MILLION)

#### 13.2 ALUMINUM

13.2.1 MOSTLY PREFERRED OVER CARBON FIBER TO DESIGN FRAMES OF UAVS

#### 13.3 COMPOSITES

13.3.1 CARBON FIBER REINFORCED POLYMERS (CFRP)

13.3.1.1 WEIGHS 5 TIMES LESS THAN CONVENTIONAL STEEL DRONES

13.3.2 GLASS FIBER REINFORCED POLYMERS (CFRP)

13.3.2.1 WEIGHS 30% LESS THAN ALUMINUM-BASED DRONES

#### 13.4 PLASTICS

13.4.1 USED IN DEVELOPING ENCLOSURES OF COMPONENTS USED IN UAVS

#### 13.5 ELASTOMERS

13.5.1 USED TO ABSORB IMPACT STRESS AND NVH FROM COMPONENTS

#### 13.6 OTHERS

13.6.1 EXCELLENT HEAT RESISTANCE IN HARSH AND TOUGH CONDITIONS

### 14 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION

This chapter is further segmentized into material types – Metals, Composites, Plastics, and Elastomers.

#### 14.1 INTRODUCTION

14.1.1 RESEARCH METHODOLOGY

14.1.2 ASSUMPTIONS/LIMITATIONS

14.1.3 INDUSTRY INSIGHTS

FIGURE 47 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022 VS. 2027  
(USD BILLION)

TABLE 274 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021  
(TMT)

TABLE 275 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027  
(TMT)

TABLE 276 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2018–2021  
(USD BILLION)

TABLE 277 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY REGION, 2022–2027  
(USD BILLION)

#### 14.2 ASIA PACIFIC

14.2.1 ASIA PACIFIC: RECESSION IMPACT

FIGURE 48 ASIA PACIFIC: AUTOMOTIVE LIGHTWEIGHTING MARKET SNAPSHOT



TABLE 278 ASIA PACIFIC: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021 (TMT)

TABLE 279 ASIA PACIFIC: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (TMT)

TABLE 280 ASIA PACIFIC: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021 (USD BILLION)

TABLE 281 ASIA PACIFIC: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (USD BILLION)

#### 14.2.2 CHINA

##### 14.2.2.1 Abundant availability of lightweight materials

TABLE 282 CHINA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 283 CHINA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 284 CHINA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 285 CHINA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.2.3 JAPAN

##### 14.2.3.1 Increased demand for luxury cars and stringent emission regulations

TABLE 286 JAPAN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 287 JAPAN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 288 JAPAN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 289 JAPAN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.2.4 INDIA

##### 14.2.4.1 Growth in vehicle sales and increased demand for comfort features

TABLE 290 INDIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 291 INDIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 292 INDIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 293 INDIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.2.5 SOUTH KOREA

14.2.5.1 Demand for luxury cars with increased features, technologies, and lightweighting

TABLE 294 SOUTH KOREA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 295 SOUTH KOREA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 296 SOUTH KOREA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 297 SOUTH KOREA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

### 14.3 EUROPE

#### 14.3.1 EUROPE: RECESSION IMPACT

FIGURE 49 EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET SNAPSHOT

TABLE 298 EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021 (TMT)

TABLE 299 EUROPE LIGHTWEIGHT MATERIAL MARKET, BY COUNTRY, 2022–2027 (TMT)

TABLE 300 EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021 (USD BILLION)

TABLE 301 EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (USD BILLION)

#### 14.3.2 GERMANY

14.3.2.1 Presence of R&D centers to develop advanced lightweight vehicles

TABLE 302 GERMANY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 303 GERMANY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 304 GERMANY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 305 GERMANY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.3 FRANCE

14.3.3.1 Increasing awareness of environmental pollution hazards

TABLE 306 FRANCE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 307 FRANCE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 308 FRANCE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 309 FRANCE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.4 RUSSIA

14.3.4.1 Lightweight metals to comply with Euro V regulations

TABLE 310 RUSSIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 311 RUSSIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 312 RUSSIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 313 RUSSIA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.5 UK

14.3.5.1 Increasing incorporation of lightweight composites in premium vehicles

TABLE 314 UK: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 315 UK: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 316 UK: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 317 UK: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.6 SPAIN

14.3.6.1 Adoption of fuel-efficient and emission-reduction technologies

TABLE 318 SPAIN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 319 SPAIN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 320 SPAIN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 321 SPAIN: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.7 ITALY

14.3.7.1 Need for EVs with longer battery range

TABLE 322 ITALY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 323 ITALY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 324 ITALY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL

TYPE, 2018–2021 (USD BILLION)

TABLE 325 ITALY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.8 TURKEY

14.3.8.1 Increasing incorporation of lightweight metals in powertrains

TABLE 326 TURKEY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 327 TURKEY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 328 TURKEY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 329 TURKEY: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.3.9 REST OF EUROPE

14.3.9.1 Usage of aluminum and HSS to be higher

TABLE 330 REST OF EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 331 REST OF EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 332 REST OF EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 333 REST OF EUROPE: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.4 NORTH AMERICA

FIGURE 50 NORTH AMERICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022 VS. 2027 (USD BILLION)

##### 14.4.1 NORTH AMERICA: RECESSION IMPACT

TABLE 334 NORTH AMERICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021 (TMT)

TABLE 335 NORTH AMERICA: LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (TMT)

TABLE 336 NORTH AMERICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021 (USD BILLION)

TABLE 337 NORTH AMERICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (USD BILLION)

##### 14.4.2 US

14.4.2.1 Increasing fuel prices to lead to demand for efficient lightweight vehicles

TABLE 338 US: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 339 US: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 340 US: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 341 US: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.4.3 CANADA

##### 14.4.3.1 Growing initiatives to reduce fuel consumption in vehicles

TABLE 342 CANADA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 343 CANADA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 344 CANADA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 345 CANADA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.4.4 MEXICO

##### 14.4.4.1 Rising fuel prices and stringent emission norms

TABLE 346 MEXICO: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 347 MEXICO: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 348 MEXICO: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 349 MEXICO: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.5 REST OF THE WORLD (ROW)

FIGURE 51 REST OF THE WORLD: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022 VS. 2027 (USD BILLION)

TABLE 350 REST OF THE WORLD: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021(TMT)

TABLE 351 REST OF THE WORLD: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (TMT)

TABLE 352 REST OF THE WORLD: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2018–2021(USD BILLION)

TABLE 353 REST OF THE WORLD: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY COUNTRY, 2022–2027 (USD BILLION)

#### 14.5.1 BRAZIL

##### 14.5.1.1 Incorporation of lightweight metals in body structures of mid-range

passenger cars

TABLE 354 BRAZIL: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 355 BRAZIL: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 356 BRAZIL: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 357 BRAZIL: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.5.2 SOUTH AFRICA

14.5.2.1 Growing need for lightweight vehicles to reduce greenhouse gas emissions

TABLE 358 SOUTH AFRICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 359 SOUTH AFRICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 360 SOUTH AFRICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 361 SOUTH AFRICA: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

#### 14.5.3 OTHER COUNTRIES

14.5.3.1 Push toward cleaner transportation with lightweight vehicles

TABLE 362 OTHER COUNTRIES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (TMT)

TABLE 363 OTHER COUNTRIES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (TMT)

TABLE 364 OTHER COUNTRIES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2018–2021 (USD BILLION)

TABLE 365 OTHER COUNTRIES: AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE, 2022–2027 (USD BILLION)

## 15 COMPETITIVE LANDSCAPE

### 15.1 OVERVIEW

#### 15.2 AUTOMOTIVE LIGHTWEIGHTING MARKET SHARE ANALYSIS, 2021

FIGURE 52 AUTOMOTIVE LIGHTWEIGHTING MARKET SHARE ANALYSIS, 2021

#### 15.3 REVENUE ANALYSIS OF TOP LISTED/PUBLIC PLAYERS, 2021

#### 15.4 COMPANY EVALUATION QUADRANT

##### 15.4.1 STARS

##### 15.4.2 EMERGING LEADERS



#### 15.4.3 PERVASIVE PLAYERS

#### 15.4.4 PARTICIPANTS

FIGURE 53 COMPETITIVE EVALUATION MATRIX (LIGHTWEIGHTING MATERIAL SUPPLIERS), 2021

FIGURE 54 COMPETITIVE EVALUATION MATRIX (LIGHTWEIGHTING COMPONENT SUPPLIERS), 2021

TABLE 366 COMPANIES ADOPTED NEW PRODUCT DEVELOPMENTS AND EXPANSIONS AS KEY GROWTH STRATEGIES, 2019–2022

#### 15.5 COMPETITIVE SCENARIO

##### 15.5.1 NEW PRODUCT LAUNCHES

TABLE 367 PRODUCT LAUNCHES, 2019–2022

##### 15.5.2 DEALS

TABLE 368 DEALS, 2019–2022

##### 15.5.3 OTHER DEVELOPMENTS, 2019–2022

TABLE 369 OTHER DEVELOPMENTS, 2019–2022

#### 15.6 RIGHT TO WIN

TABLE 370 COMPANIES ADOPTED NEW PRODUCT DEVELOPMENTS, PARTNERSHIPS, AND SUPPLY CONTRACTS AS KEY GROWTH STRATEGIES FROM 2019–2022

#### 15.7 COMPETITIVE BENCHMARKING

TABLE 371 AUTOMOTIVE LIGHTWEIGHTING MARKET: DETAILED LIST OF KEY STARTUPS/SMES

TABLE 372 AUTOMOTIVE LIGHTWEIGHTING MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS

## 16 COMPANY PROFILES

(Business overview, Products offered, Recent developments & MnM View)\*

#### 16.1 KEY PLAYERS

##### 16.1.1 BASF SE

TABLE 373 BASF SE: BUSINESS OVERVIEW

FIGURE 55 BASF SE: COMPANY SNAPSHOT

TABLE 374 BASF SE: PRODUCTS OFFERED

TABLE 375 BASF SE: NEW PRODUCT DEVELOPMENTS

TABLE 376 BASF SE: DEALS

TABLE 377 BASF SE: OTHER DEVELOPMENT

##### 16.1.2 COVESTRO AG

TABLE 378 COVESTRO AG: BUSINESS OVERVIEW

FIGURE 56 COVESTRO AG: COMPANY SNAPSHOT

TABLE 379 COVESTRO AG: PRODUCTS OFFERED

TABLE 380 COVESTRO AG: NEW PRODUCT DEVELOPMENTS

TABLE 381 COVESTRO AG: DEALS

TABLE 382 COVESTRO AG: OTHER DEVELOPMENTS

#### 16.1.3 LYONDELLBASELL INDUSTRIES HOLDINGS BV

TABLE 383 LYONDELLBASELL INDUSTRIES HOLDINGS BV: BUSINESS OVERVIEW

FIGURE 57 LYONDELLBASELL INDUSTRIES HOLDINGS BV: COMPANY SNAPSHOT

TABLE 384 LYONDELLBASELL INDUSTRIES HOLDINGS BV: NEW PRODUCT DEVELOPMENTS

TABLE 385 LYONDELLBASELL INDUSTRIES HOLDINGS BV: DEALS

TABLE 386 LYONDELLBASELL INDUSTRIES HOLDINGS BV: OTHER DEVELOPMENTS

#### 16.1.4 TORAY INDUSTRIES, INC.

TABLE 387 TORAY INDUSTRIES, INC.: BUSINESS OVERVIEW

FIGURE 58 TORAY INDUSTRIES, INC.: COMPANY SNAPSHOT

TABLE 388 TORAY INDUSTRIES, INC.: PRODUCTS OFFERED

TABLE 389 TORAY INDUSTRIES, INC.: NEW PRODUCT DEVELOPMENTS

TABLE 390 TORAY INDUSTRIES, INC.: DEALS

TABLE 391 TORAY INDUSTRIES, INC.: OTHER DEVELOPMENTS

#### 16.1.5 ARCELORMITTAL

TABLE 392 ARCELORMITTAL: BUSINESS OVERVIEW

FIGURE 59 ARCELORMITTAL: COMPANY SNAPSHOT

TABLE 393 ARCELORMITTAL: PRODUCTS OFFERED

TABLE 394 ARCELORMITTAL: NEW PRODUCT DEVELOPMENTS

TABLE 395 ARCELORMITTAL: DEALS

TABLE 396 ARCELORMITTAL: OTHER DEVELOPMENTS

#### 16.1.6 THYSSENKRUPP AG

TABLE 397 THYSSENKRUPP AG: BUSINESS OVERVIEW

FIGURE 60 THYSSENKRUPP AG: COMPANY SNAPSHOT

TABLE 398 THYSSENKRUPP AG: PRODUCTS OFFERED

TABLE 399 THYSSENKRUPP AG: DEALS

TABLE 400 THYSSENKRUPP AG: OTHER DEVELOPMENTS

#### 16.1.7 NOVELIS, INC.

TABLE 401 NOVELIS, INC.: BUSINESS OVERVIEW

FIGURE 61 NOVELIS, INC.: COMPANY SNAPSHOT

TABLE 402 NOVELIS, INC.: PRODUCTS OFFERED

TABLE 403 NOVELIS, INC.: DEALS

**TABLE 404 NOVELIS, INC.: OTHER DEVELOPMENTS****16.1.8 ALCOA CORPORATION****TABLE 405 ALCOA CORPORATION: BUSINESS OVERVIEW****FIGURE 62 ALCOA CORPORATION: COMPANY SNAPSHOT****TABLE 406 ALCOA CORPORATION: PRODUCTS OFFERED****TABLE 407 ALCOA CORPORATION: DEALS****16.1.9 OWENS CORNING****TABLE 408 OWENS CORNING: BUSINESS OVERVIEW****FIGURE 63 OWENS CORNING: COMPANY SNAPSHOT****TABLE 409 OWENS CORNING: PRODUCTS OFFERED****16.1.10 STRATASYS LTD.****TABLE 410 STRATASYS LTD.: BUSINESS OVERVIEW****FIGURE 64 STRATASYS LTD.: COMPANY SNAPSHOT****TABLE 411 STRATASYS LTD.: PRODUCTS OFFERED****TABLE 412 STRATASYS LTD.: NEW PRODUCT DEVELOPMENTS****TABLE 413 STRATASYS LTD.: DEALS****TABLE 414 STRATASYS LTD.: OTHER DEVELOPMENTS**

\*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

**16.2 ADDITIONAL PLAYERS****16.2.1 TATA STEEL****TABLE 415 TATA STEEL: COMPANY OVERVIEW****16.2.2 POSCO****TABLE 416 POSCO: COMPANY OVERVIEW****16.2.3 MITSUBISHI CHEMICAL CORPORATION****TABLE 417 MITSUBISHI CHEMICAL CORPORATION: COMPANY OVERVIEW****16.2.4 TEIJIN****TABLE 418 TEIJIN: COMPANY OVERVIEW****16.2.5 SGL CARBON****TABLE 419 SGL CARBON: COMPANY OVERVIEW****16.2.6 LANXESS****TABLE 420 LANXESS: COMPANY OVERVIEW****16.2.7 BOREALIS AG****TABLE 421 BOREALIS AG: COMPANY OVERVIEW****16.2.8 SOLVAY****TABLE 422 SOLVAY: COMPANY OVERVIEW****16.2.9 DOWDUPONT****TABLE 423 DOWDUPONT: COMPANY OVERVIEW****16.2.10 AK STEEL HOLDING CORPORATION**

**TABLE 424 AK STEEL HOLDING CORPORATION: COMPANY OVERVIEW****16.2.11 US MAGNESIUM LLC****TABLE 425 US MAGNESIUM LLC: COMPANY OVERVIEW****16.2.12 ALERIS CORPORATION****TABLE 426 ALERIS CORPORATION: COMPANY OVERVIEW****16.2.13 HEXCEL****TABLE 427 HEXCEL: COMPANY OVERVIEW****16.2.14 CELANESE****TABLE 428 CELANESE: COMPANY OVERVIEW****16.2.15 WHB BRASIL****TABLE 429 WHB BRASIL: COMPANY OVERVIEW****17 RECOMMENDATIONS BY MARKETSANDMARKETS****17.1 ASIA PACIFIC EXPECTED TO DOMINATE GLOBAL AUTOMOTIVE  
LIGHTWEIGHTING MARKET****17.2 COMPOSITE MATERIAL TO BE KEY FOCUS IN AUTOMOTIVE  
LIGHTWEIGHTING MARKET****17.3 CONCLUSION****18 APPENDIX****18.1 INSIGHTS OF INDUSTRY EXPERTS****18.2 DISCUSSION GUIDE****18.3 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL****18.4 CUSTOMIZATION OPTIONS****18.4.1 AUTOMOTIVE LIGHTWEIGHTING MARKET, BY MATERIAL TYPE  
(COUNTRY LEVEL)****18.4.1.1 Metals****18.4.1.1.1 HSS****18.4.1.1.2 Aluminum****18.4.1.1.3 Magnesium and Titanium****18.4.1.2 Composites****18.4.1.2.1 CFRP****18.4.1.2.2 GFRP****18.4.1.2.3 NFRP****18.4.1.2.4 Other Composites****18.4.1.3 Plastics****18.4.1.3.1 PC**

18.4.1.3.2 ABS

18.4.1.3.3 PA

18.4.1.3.4 PP

18.4.1.3.5 PU

18.4.1.3.6 Others

18.4.1.4 Elastomers

18.4.1.4.1 EPDM

18.4.1.4.2 NR

18.4.1.4.3 SBR

18.4.1.4.4 Others

18.4.2 MICROMOBILITY LIGHTWEIGHTING MARKET, BY VEHICLE TYPE

18.4.2.1 E-Bikes Lightweighting Market, By Material

18.4.2.1.1 HSS

18.4.2.1.2 Aluminum

18.4.2.1.3 Plastics

18.4.2.1.4 Elastomers

18.4.2.1.5 Others

18.4.2.2 E-Moped Lightweighting Market, By Material

18.4.2.2.1 HSS

18.4.2.2.2 Aluminum

18.4.2.2.3 Plastics

18.4.2.2.4 Elastomers

18.4.2.2.5 Others

18.5 RELATED REPORTS

18.6 AUTHOR DETAILS

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