

# **Automotive Seats Market by Type & Technology (Powered, Heated, Ventilated, Memory, Massage), Seat Trim OE & Aftermarket (Synthetic & Genuine Leather, Fabric), Frame, Component, Vehicle EV, OHV, ATV, LSV) - Global Forecast to 2030**

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## **Abstracts**

The automotive seat market is projected to grow from USD 53.7 billion in 2023 to USD 58.4 billion by 2030, at a CAGR of 1.2%. The factors driving the automotive seats market are – an increase in demand for SUVs & luxury cars, especially in developing countries, the need for foldable & adjustable seating configurations in SUVs which allow for flexible cargo and passenger space, increasing advancements such as massage seats, memory seats, built-in entertainment systems, and others. The rise in sales of EVs has also increased the adoption of lightweight materials in seat structures to raise the vehicle range.

“Bucket Seats is the largest seat type market.”

The demand for performance vehicles, including sports cars and high-performance variants, has grown globally. The increasing use of bucket seats has also increased due to the higher adoption of these seats in performance-oriented vehicles. The rising demand for full-size SUVs and the growing share of passenger cars globally drive the bucket seats market. According to the International Organization of Motor Vehicle Manufacturers (OICA), the share of passenger car production in the top regions is as below:

According to MarketsandMarkets analysis, with the increase in overall vehicle production, the market share of bucket seats accounts for >55% in value in 2023. These bucket seats provide better support and lateral confinement, essential for performance

driving. Furthermore, the sales of SUVs, which was around ~27% of total car sales in the year 2019, increased to ~38% in 2022 because the SUVs are more rugged, spacious, and have higher ground clearance suitable for all terrains. With the increase in full-size SUV sales, the demand for bucket seats has also grown in the last few years.

The purchasers of new and used cars frequently look for methods to customize their vehicles, which is only possible with bucket seats because they offer various options for colors, materials, and finishes that allow purchasers to select the ideal seats based on their requirements. The Asia Pacific region is expected to lead the bucket seats market, considering it has the largest production and sales contribution to the global car industry.

“Genuine leather is the fastest growing trim material in the automotive seats market by 2030.”

Genuine leather is used in car seat upholstery, particularly in higher end luxury models. The increasing demand for luxury vehicles drives the growth of the genuine leather segment in the automotive seat market. According to the International Organization of Motor Vehicle Manufacturers (OICA), the key country's premium car sales (SUV D and SUV E) grew steadily from 12.5 million units in 2019 to 15.1 million units in 2022. Genuine leather in automotive has a higher resale value than other fabrics. Genuine leather is primarily used in high-end luxury vehicles and is offered in the brands. A few examples of vehicles using genuine leather are Tesla Model 3, Audi A4, Mercedes Benz C class, and Volvo XC90.

“Europe is the fastest growing market in the automotive seat market.”

According to European Automobile Manufacturers' Association (ACEA) 2022, SUVs accounted for 49% of total EU passenger car sales in 2022, which has increased by 44% compared to 2019, and passenger car registrations fell by 12% in 2022, compared to 2019. This trend is expected to continue in the coming years. Owing to the stringent emission targets, a few countries will add taxes on the sales of diesel vehicles from the year 2025, promoting the sales of electric passenger cars and SUVs. For instance, the Norway government offers a grant of up to USD 2,203 for purchasing a hybrid vehicle. Also, France has started offering a tax break for hybrid and semi-hybrid vehicles by introducing a bonus-malus system for cars based on their CO2 emissions. In July 2021, the European government proposed a regulation that all the new cars and vans sold in the EU will be zero-emission by 2035, which has significantly impacted the automotive industry, as it will accelerate the shift towards EVs. This increase in EV sales will boost

the sales of automotive seats, as EVs will require different seats than traditional gasoline-powered vehicles. EVs usually have heavy batteries, which require seats to be designed differently to support more weight without compromising features. Some of the major automotive seat industry players are operating from Europe - Adient Plc, with production facilities in Germany, France, Italy, & the United Kingdom, and Faurecia, with facilities in Germany, France, Spain, & the Czech Republic.

The break-up of the profile of primary participants in the passenger car seats market:

By Company Type: Tier 1 – 80%, Tier 2 – 20 %.

By Designation: Director Level – 10%, C Level – 60%, Others - 30%.

By Region: Asia Pacific – 90%. Europe – 0%, America – 10.0%, MEA-0%.

Prominent companies include Adient Plc (US), Faurecia (France), Lear Corporation (US), Toyota Boshoku Corporation (Japan), and Magna International (Canada) are the leading manufacturers of passenger car seats in the global market.

Research Coverage:

This research report categorizes the automotive seats market by technology type (heated seats; heated and powered seats; standard seats; powered seats; powered, heated and memory seats; powered, heated, and ventilated seats; powered, heated, ventilated, and memory seats; powered, heated, ventilated, massage and memory seats), by seat type (bucket and split bench), by component (armrests, pneumatic systems, seat belts, seat frames and structures, seat headrests, seat height adjusters, seat recliners, seat tracks, and side curtain airbags), by vehicle type (passenger cars, light commercial vehicles, heavy trucks, and buses), by material (steel, aluminum, and carbon-amide-metal), by trim material (genuine leather, synthetic leather, and fabric), off-highway vehicle, by vehicle type (construction and mining equipment, and agricultural tractors), Electric vehicle seats market, by propulsion type (battery electric vehicle, fuel cell electric vehicle and plug-in hybrid electric vehicle), LSV seats market, by vehicle type (golf carts, commercial turf utility vehicles, industrial utility vehicles, and personal mobility vehicles), seat trim material, by sales channel (OEM and aftermarket), ATV seats market, by seating capacity (one-seater and two-seater), and by region (Asia Pacific, Europe, Americas, and the Middle East & Africa). The report's scope covers detailed information regarding the major factors, such as influencing factors for the

growth of the automotive seat market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, recession impact, and recent developments associated with the automotive seats market. This report covers the competitive analysis of upcoming automotive seat market startups.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall automotive seats market and their subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse.

The report provides insights on the following pointers:

Analysis of key drivers (Growing demand for premium vehicles, Rising adoption of powered seats in mid-segment cars & SUVs), restraints (High cost of advanced modular seats compared to conventional seats), opportunities (Growing focus on autonomous cars and increased preference for ride sharing, Increasing demand for lightweight seating materials in electric vehicles), and challenges (Costing and investment on lightweight material for right composition in automotive seats) influencing the growth of the automotive seats market.

**Product Development/Innovation:** Detailed insights on new products such as, Zero Gravity Captain Chairs by Faurecia in April 2023, and ReNewKnit Sueded Material launched by Adient Plc in October 2022.

**Market Development:** The growing demand for premium cars, and rising demand for powered seats in mid segment and SUVs is driving the market – the report analyses the automotive seat market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive seat market.

**Competitive Assessment:** In-depth assessment of market shares, growth

strategies, and service offerings of leading players like Adient Plc (US), Faurecia (France), Lear Corporation (US), Toyota Boshoku Corporation (Japan), and Magna International (Canada) among others in the automotive seat market.

The report also helps stakeholders understand the pulse of the automotive seats market & electric vehicle market by providing information on recent trends and technologies.

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