

Automotive Shielding Market by Shielding (Heat, EMI), Heat Application (Engine, Turbocharger, Battery Management, Fuel Tank), EMI Application (ACC, ECU, LDW, BSD, AEB, FCW, DMS), Material Type, Vehicle (PC, LCV, HCV), and Region - Global Forecast to 2025

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Abstracts

“The increasing focus on compliance with the automotive EMC standards is driving the growth of the automotive shielding market.”

The global automotive shielding market size is projected to grow from USD 20.2 billion in 2020 to USD 24.7 million by 2025, at a CAGR of 4.1%. The market is driven by automotive EMC standards and rigorous test procedures employed by the OEMs to avoid failures of electronics-based critical safety systems. Automotive EMC standards are regulated by authorities such as International Standards Organization (ISO), SAE International, International Electrotechnical Commission (IEC), and others. These authorities have set EMC standards to limit the radiation levels from vehicle electronics. Thus, automotive OEMs and tier 1 component manufacturers are investing heavily to assess the EMC levels while designing vehicles and other electronic components. For instance, Mercedes-Benz inaugurated its EMC test facility called Mercedes Benz Technology Centre (MTC) in Sindelfingen, Germany, in 2019 with an investment of USD 56 million.

The OEM plans to consider multiple EMC tests before the approval of any vehicle. Rigorous test procedures and stringent test standards would encourage superior EMC materials in the coming years. In addition, EMC (electromagnetic compatibility) has become a key prerequisite for major automotive technologies such as connectivity, shared mobility, autonomous driving, and electric drivetrain. Vehicles are now equipped with microprocessors, cameras, ultrasonic sensors, and radars. These electronics are

often confined in small spaces.

Systems such as infotainment, GPS module, transmitters, and cameras are sources of electromagnetic interference. As convenience and advanced safety features rely on the real-time exchange of data, severe electromagnetic interference can lead to loss of function of a critical system. In addition, electric and hybrid vehicles use high voltage electricals such as batteries, DC-DC converters, inverters, electric motors, and other subsystems that emit electromagnetic fields. Asia Pacific is estimated to lead the automotive shielding market due to its huge vehicle production volume, followed by Europe and North America.

“Demand for EMI shielding in advanced electronics in connectivity and driving assistance functions is likely to drive the growth of the automotive shielding market during the forecast period.”

With advancements in technology, the number of electronic components in a vehicle has increased, which in turn has driven the market for automotive shielding. Electronics and embedded systems control various mechanical and electrical functions in a vehicle and thus play a vital role in automotive technology. The increased number of electronic components can be attributed to the growing demand for comfort and safety features in a vehicle, which accentuates the need for complex electronic circuitry.

Heat shields are installed between the engine compartment and the vehicle cabin to prevent the heat generated by the engine and exhaust system from affecting these electronic systems. Apart from heat shields, EMI shields also help to secure a smooth connection between the electronic components. EMI shielding reduces electromagnetic interference among the electronic components. Thus, the growing number of electronic components in a vehicle is expected to drive the automotive shielding market.

In addition, automotive OEMs and Tier 1 partners have invested considerable resources in developing next-generation connected vehicles. IoT devices, ultrasonic sensors, and high-definition cameras are now common in premium sedans and SUVs. For instance, in January 2020, Audi introduced its Traffic Light Information service in Rhine, Germany, the second city in Europe after Ingolstadt. The system primarily comprises of two major features - Green Light Optimized Speed Advisory (GLOSA) and Time-to-Green. An Audi vehicle would send its real-time traffic data to approximately 150 traffic signals, and the system will suggest speed advisory and countdown for green lights. According to the company, the system would improve convenience for drivers, increase traffic safety, and encourage an economical style of driving. Such systems would

require superior EMI shielding for sensors and on-board computers to avoid any interference with other electronics.

“Europe is estimated to play a major role in the automotive shielding market during the forecast period.”

Europe is estimated to be the second-largest market in the automotive shielding market. The growth of the automotive shielding industry in this region can be attributed to technological advancements such as the use of high-mobility logistics trucks for their enhanced capabilities. Europe has stringent emission regulations to tackle rising emission levels. Government mandates for increasing fuel efficiency of vehicles and the use of advanced safety features have led to the growth of the automotive shielding market. The region is home to leading manufacturers such as Renault, PSA Group, Volkswagen, BMW, Volvo, and Daimler.

According to the European Automobile Manufacturers Association (ACEA), Europe accounted for 23.2% of the global vehicle production in 2018. The European automotive market registered growth for the past six years despite the recent global automotive slowdown. It has witnessed an increasing demand for passenger cars 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.

By Company Type: OEMs - 19%, Tier 1 – 53%, and Tier 2 - 28%,

By Designation: CXOs - 22%, Directors - 37%, and Others* - 41%

By Region: North America - 35%, Europe - 32%, Asia Pacific - 27%, LATAM - 4%, and Rest of the World- 2%

*Others include sales, marketing, and product managers.

The automotive shielding market comprises major manufacturers and service providers such as Tenneco Inc (US), Laird (UK), Henkel (Germany), Dana Incorporated (US), and Morgan Advanced Materials (UK), 3M (US), Parker Hannifin (Chomerics) (US), and KGS KITAGAWA INDUSTRIES CO (Japan).

Research Coverage:

Automotive Shielding Market by Shielding (Heat, EMI), Heat Application (Engine, Turbocharger, Battery Manageme...

The study covers the automotive shielding market across various segments. It aims at estimating the market size and future growth potential of this market across different segments such as heat application, EMI application, shielding type, material type, vehicle type, and region. The study also includes an in-depth competitive analysis of key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

Key Benefits of Buying the Report:

The report will help leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall automotive shielding market. 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 pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 MARKET DEFINITION
 - 1.2.1 INCLUSIONS & EXCLUSIONS
- 1.3 MARKET SCOPE
 - 1.3.1 YEARS CONSIDERED FOR THE STUDY
- 1.4 LIMITATIONS
- 1.5 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
- 2.2 SECONDARY DATA
 - 2.2.1 KEY DATA FROM SECONDARY SOURCES
- 2.3 PRIMARY DATA
 - 2.3.1 SAMPLING TECHNIQUES & DATA COLLECTION METHODS
 - 2.3.2 PRIMARY PARTICIPANTS
- 2.4 MARKET SIZE ESTIMATION
 - 2.4.1 AUTOMOTIVE SHIELDING MARKET: BOTTOM-UP APPROACH
 - 2.4.2 AUTOMOTIVE SHIELDING MARKET: TOP-DOWN APPROACH
- 2.5 MARKET BREAKDOWN AND DATA TRIANGULATION
- 2.6 ASSUMPTIONS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

- 4.1 AUTOMOTIVE SHIELDING MARKET TO GROW AT A SIGNIFICANT RATE DURING THE FORECAST PERIOD (2020–2025)
- 4.2 ASIA PACIFIC IS ESTIMATED TO LEAD THE GLOBAL AUTOMOTIVE SHIELDING MARKET IN 2020
- 4.3 GLOBAL AUTOMOTIVE SHIELDING MARKET, BY SHIELDING AND VEHICLE TYPE
- 4.4 AUTOMOTIVE SHIELDING MARKET, BY HEAT APPLICATION
- 4.5 AUTOMOTIVE SHIELDING MARKET, BY EMI APPLICATION
- 4.6 AUTOMOTIVE SHIELDING MARKET, BY MATERIAL TYPE

4.7 AUTOMOTIVE SHIELDING MARKET, BY SHIELDING TYPE

4.8 AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 OPERATIONAL DATA

5.2.1 COMPARISON OF EMI SHIELDING OPTIONS

5.3 MARKET DYNAMICS

5.3.1 DRIVERS

5.3.1.1 Automotive EMC test standards

5.3.1.2 Demand for EMI protection in advanced electronics

5.3.2 RESTRAINTS

5.3.2.1 Development of products to minimize EMI

5.3.3 OPPORTUNITIES

5.3.3.1 Emergence of autonomous vehicles

5.3.3.2 Development of battery systems and electric powertrains

5.3.3.3 Deployment of V2V, V2X, and connectivity services

5.3.4 CHALLENGES

5.3.4.1 Design complexity and risk of failure of EMI shielding systems

5.3.5 IMPACT OF MARKET DYNAMICS

5.4 REVENUE SHIFT DRIVING MARKET GROWTH

5.5 REVENUE MISSED: OPPORTUNITIES FOR SHIELDING MANUFACTURERS

5.6 AUTOMOTIVE SHIELDING MARKET, SCENARIOS (2018–2025)

5.6.1 AUTOMOTIVE SHIELDING MARKET, MOST LIKELY SCENARIO

5.6.2 OPTIMISTIC SCENARIO

5.6.3 PESSIMISTIC SCENARIO

6 COVID – 19 IMPACTS

6.1 OEM ANNOUNCEMENTS

6.2 TIER 1 MANUFACTURERS ANNOUNCEMENTS

6.3 IMPACT ON GLOBAL AUTOMOTIVE INDUSTRY

6.4 IMPACT ON GLOBAL AUTOMOTIVE SHIELDING MARKET

7 INDUSTRY TRENDS

7.1 INTRODUCTION

7.2 TECHNOLOGICAL OVERVIEW

- 7.2.1 EMI PROTECTION DESIGN TECHNIQUES: IC LEVEL
- 7.2.2 EMI PROTECTION DESIGN TECHNIQUES: BOARD LEVEL SHIELDING (BLS)
- 7.2.3 EMI PROTECTION DESIGN TECHNIQUES: MODULE LEVEL
- 7.2.4 EMI PROTECTION DESIGN TECHNIQUES: INTERCONNECT LEVEL
- 7.3 VALUE CHAIN ANALYSIS FOR AUTOMOTIVE EMI SHIELDING SYSTEMS
- 7.4 PORTERS FIVE FORCES

8 AUTOMOTIVE SHIELDING MARKET, BY HEAT APPLICATION

- 8.1 INTRODUCTION
- 8.2 RESEARCH METHODOLOGY
- 8.3 ASSUMPTIONS
- 8.4 ENGINE COMPARTMENT
 - 8.4.1 COMMERCIAL VEHICLES REQUIRE MORE ENGINE COMPARTMENT HEAT SHIELD
- 8.5 EXHAUST SYSTEM
 - 8.5.1 INCREASING FUEL EFFICIENCY STANDARDS WOULD HAVE A POSITIVE IMPACT
 - 8.5.1.1 Exhaust pipes
 - 8.5.1.2 Exhaust manifold
 - 8.5.1.3 Catalytic convertor
- 8.6 TURBOCHARGER
 - 8.6.1 ENGINE DOWNSIZING WOULD BE A MAJOR GROWTH DRIVER
 - 8.6.1.1 Intake manifold
 - 8.6.1.2 Air intake
- 8.7 UNDER BONNET
 - 8.7.1 FOCUS ON NVH LEVEL IS EXPECTED TO DRIVE THE MARKET
 - 8.7.1.1 Electronic box/ECU
 - 8.7.1.2 Battery
 - 8.7.1.3 Firewall
- 8.8 UNDER CHASSIS
 - 8.8.1 ENGINE ENCAPSULATION TO BOOST THE DEMAND FOR UNDER CHASSIS HEAT SHIELD
 - 8.8.1.1 Transmission lines/cables
 - 8.8.1.2 Transmission tunnel
 - 8.8.1.3 Gearbox
- 8.9 FUEL TANK
 - 8.9.1 ADOPTION OF PLASTIC FUEL TANKS WOULD BOOST DEMAND FOR SUPERIOR HEAT SHIELD

8.10 BATTERY MANAGEMENT

8.10.1 DEVELOPMENT OF HIGH VOLTAGE POWERTRAIN WITH ADVANCED BATTERY MANAGEMENT SYSTEMS WOULD DRIVE THE MARKET

8.11 MARKET LEADERS

9 AUTOMOTIVE SHIELDING MARKET, BY EMI APPLICATION

9.1 INTRODUCTION

9.2 RESEARCH METHODOLOGY

9.3 ASSUMPTIONS

9.4 ADAPTIVE CRUISE CONTROL (ACC)

9.4.1 DEMAND FOR DRIVING COMFORT WILL BOOST THE DEMAND

9.5 ELECTRIC MOTOR

9.5.1 INCREASING USE OF MOTORS FOR CONVENIENCE FEATURES WOULD DRIVE THE MARKET

9.6 ENGINE CONTROL MODULE (ECM)

9.6.1 ADOPTION OF HIGH PERFORMANCE ENGINES WOULD BOOST DEMAND FOR ADVANCED ECM

9.7 FORWARD COLLISION WARNING (FCW)

9.7.1 DEMAND FOR ACTIVE SAFETY SYSTEMS WILL FUEL THE DEMAND FOR EMI SHIELDING

9.8 INFOTAINMENT

9.8.1 DEMAND FOR SMARTPHONE INTEGRATION AND REAR SEAT ENTERTAINMENT WOULD HAVE A POSITIVE IMPACT

9.9 INTELLIGENT PARK ASSIST (IPA)

9.9.1 AUTOMATED PARKING SYSTEMS WOULD FUEL THE DEMAND FOR EMI SHIELDING

9.10 LANE DEPARTURE WARNING (LDW)

9.10.1 SAFETY MANDATES WOULD INFLUENCE THE DEMAND FOR EMI SHIELDS FOR LDW

9.11 BLIND SPOT DETECTION (BSD)

9.11.1 GOVERNMENT REGULATIONS PERTAINING TO VEHICLE SAFETY WOULD BE INSTRUMENTAL

9.12 NIGHT VISION SYSTEM (NVS)

9.12.1 CAR ASSESSMENT PROGRAMS SUCH AS NCAP WOULD SURGE THE DEMAND FOR NVS SYSTEMS

9.13 DRIVER MONITORING SYSTEM (DMS)

9.13.1 EMPHASIS ON ACTIVE SAFETY SYSTEMS WOULD ESCALATE THE

DEMAND FOR EMI SHIELDING FOR DMS

9.14 AUTOMATIC EMERGENCY BRAKING (AEB)

9.14.1 MANDATES FOR AEB IN MAJOR COUNTRIES TO DRIVE THE MARKET

9.15 MARKET LEADERS

10 AUTOMOTIVE SHIELDING MARKET, BY MATERIAL TYPE

10.1 INTRODUCTION

10.2 OPERATIONAL DATA

10.2.1 RESEARCH METHODOLOGY

10.3 ASSUMPTIONS

10.4 METALLIC

10.4.1 ADVANCEMENTS IN AUTOMOTIVE DESIGN WILL FUEL THE DEMAND FOR FLEXIBLE METALLIC SHIELDS

10.5 NON-METALLIC

10.5.1 ADVANCED CONTROL MODULES ENHANCE THE DEMAND FOR NON-METALLIC EMI SHIELDING

10.6 MARKET LEADERS

11 AUTOMOTIVE SHIELDING MARKET, BY SHIELDING TYPE

11.1 INTRODUCTION

11.2 RESEARCH METHODOLOGY

11.3 ASSUMPTIONS

11.4 EMI SHIELDING

11.4.1 INCREASING USE OF ELECTRONICS WOULD BOOST THE DEMAND FOR EMI SHIELD

11.5 HEAT SHIELDING

11.5.1 THERMAL PROTECTION FOR HIGH PERFORMANCE ENGINES WOULD FUEL

THE MARKET

11.6 MARKET LEADERS

12 AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE

12.1 INTRODUCTION

12.2 OPERATIONAL DATA

12.2.1 RESEARCH METHODOLOGY

12.3 ASSUMPTIONS

12.4 PASSENGER CAR

12.4.1 RISING DEMAND FOR PASSENGER CARS IN EMERGING ECONOMIES WOULD TRIGGER MARKET GROWTH

12.5 LIGHT COMMERCIAL VEHICLE (LCV)

12.5.1 RISING DEMAND FOR LCV IN TRANSPORT OF CARGO WOULD DRIVE THE MARKET

12.6 HEAVY COMMERCIAL VEHICLE (HCV)

12.6.1 HIGHER HEAT DISSIPATION DEMAND FOR HCV WOULD DRIVE THE MARKET

12.7 MARKET LEADERS

13 AUTOMOTIVE SHIELDING MARKET, BY REGION

13.1 INTRODUCTION

13.2 ASIA PACIFIC

13.2.1 CHINA

13.2.1.1 Developments by domestic OEMs would drive the market in China

13.2.2 INDIA

13.2.2.1 Upcoming BS VI norms would have positive impact on the market

13.2.3 JAPAN

13.2.3.1 Innovations to enhance driving comfort are expected to drive the market

13.2.4 SOUTH KOREA

13.2.4.1 AEB and LDW regulations imposed by the South Korean government to drive demand

13.2.5 THAILAND

13.2.5.1 Government initiatives to localize production attract major OEMs and component manufacturers in the country

13.2.6 REST OF ASIA PACIFIC

13.2.6.1 Taiwan and Indonesia have become production hubs for major OEMs

13.3 EUROPE

13.3.1 GERMANY

13.3.1.1 Growing demand for vehicle performance will propel the demand

13.3.2 FRANCE

13.3.2.1 Incorporation of high performance engines by French OEMs will drive the market

13.3.3 ITALY

13.3.3.1 Government initiatives to increase production and export will impact the market positively

13.3.4 RUSSIA

13.3.4.1 Innovations in commercial vehicles will fuel the Russian market

13.3.5 UK

13.3.5.1 Focus on premium passenger car segment to fuel demand

13.3.6 TURKEY

13.3.6.1 Developments by component manufacturers will drive the market

13.3.7 SPAIN

13.3.7.1 Increasing vehicle production will boost demand

13.3.8 REST OF EUROPE

13.3.8.1 Advancements in electric drive systems will drive demand

13.4 NORTH AMERICA

13.4.1 US

13.4.1.1 Developments in autonomous driving will drive the market

13.4.2 CANADA

13.4.2.1 Focus on fuel efficiency standards will boost the demand

13.4.3 MEXICO

13.4.3.1 Light trucks production will drive demand

13.5 LATAM

13.5.1 BRAZIL

13.5.1.1 Increasing passenger car production will drive the Brazilian market

13.5.2 ARGENTINA

13.5.2.1 Stringent NVH norms for commercial vehicles will drive the Argentinian market

13.5.3 REST OF LATAM

13.5.3.1 Presence of leading automotive players will drive the Rest of LATAM market

13.6 REST OF THE WORLD (ROW)

13.6.1 IRAN

13.6.1.1 Focus on automotive R&D and design would fuel the demand in Iran

13.6.2 SOUTH AFRICA

13.6.2.1 Increasing production of commercial vehicles will drive the South African market

13.6.3 REST OF ROW

13.6.3.1 New investments and presence of major automotive players to drive the market

14 RECOMMENDATIONS BY MARKETSANDMARKETS

14.1 ASIA PACIFIC WILL HOLD MAJOR MARKET FOR AUTOMOTIVE SHIELDING

14.2 THERMAL MANAGEMENT FOR BATTERY SYSTEMS AND FUEL TANKS CAN

BE A KEY FOCUS FOR MANUFACTURERS

14.3 EMI PROTECTION FOR ADVANCED CONTROL MODULES WILL CREATE
REVENUE OPPORTUNITY FOR EMI SHIELDING MANUFACTURERS

14.4 CONCLUSION

15 COMPETITIVE LANDSCAPE

15.1 OVERVIEW

15.2 MARKET RANKING ANALYSIS

15.3 COMPETITIVE LEADERSHIP MAPPING

15.3.1 VISIONARY LEADERS

15.3.2 INNOVATORS

15.3.3 DYNAMIC DIFFERENTIATORS

15.3.4 EMERGING COMPANIES

15.4 STRENGTH OF PRODUCT PORTFOLIO: HEAT SHIELD MANUFACTURERS

15.5 BUSINESS STRATEGY EXCELLENCE: HEAT SHIELD MANUFACTURERS

15.6 STRENGTH OF PRODUCT PORTFOLIO: EMI SHIELD MANUFACTURERS

15.7 BUSINESS STRATEGY EXCELLENCE: EMI SHIELD MANUFACTURERS

15.8 WINNERS VS. TAIL-ENDERS

15.9 COMPETITIVE SCENARIO

15.9.1 NEW PRODUCT DEVELOPMENTS

15.9.2 COLLABORATIONS

15.9.3 MERGERS/ACQUISITIONS

15.9.4 EXPANSIONS

16 COMPANY PROFILES

(Business overview, Products and services offered, Recent developments, SWOT analysis & MnM View)*

16.1 TENNECO INC

16.2 LAIRD PLC

16.3 HENKEL

16.4 MORGAN ADVANCED MATERIALS

16.5 DANA INCORPORATED

16.6 AUTONEUM

16.7 ELRINGKLINGER AG

16.8 KITAGAWA INDUSTRIES CO., LTD

16.9 3M

16.10 PARKER HANNIFIN CORP (CHOMERICS)

16.11 TECH-ETCH, INC.

16.12 MARIAN INC.

16.13 RTP COMPANY

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

16.14 OTHER KEY PLAYERS

16.14.1 ASIA PACIFIC

16.14.1.1 NICHIAS Corporation

16.14.1.2 Talbros

16.14.1.3 Kokusan Parts Industry Co., Ltd

16.14.1.4 Datsons Engineering Works Pvt. Ltd.

16.14.2 EUROPE

16.14.2.1 R?chling

16.14.2.2 HAPPICH Group

16.14.2.3 Zircotec

16.14.2.4 CARCOUSTICS

16.14.3 NORTH AMERICA

16.14.3.1 Lydall Inc.

16.14.3.2 Orion Industries

16.14.3.3 UGN Inc

16.14.3.4 Thermo-Tec Automotive Inc.

17 APPENDIX

17.1 DISCUSSION GUIDE

17.2 KNOWLEDGE STORE: MARKETSandMARKETS SUBSCRIPTION PORTAL

17.3 AVAILABLE CUSTOMIZATIONS

17.4 RELATED REPORTS

17.5 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 INCLUSIONS & EXCLUSIONS FOR AUTOMOTIVE SHIELDING MARKET

TABLE 2 COMPARISON OF EMI SHIELDING OPTIONS

TABLE 3 EMC STANDARDS FOR AUTOMOBILE

TABLE 4 AUTOMOTIVE SHIELDING MARKET: IMPACT OF MARKET DYNAMICS

TABLE 5 AUTOMOTIVE SHIELDING MARKET (MOST LIKELY), BY REGION,
2018–2025 (USD MILLION)

TABLE 6 AUTOMOTIVE SHIELDING MARKET (OPTIMISTIC), BY REGION,
2021–2025 (USD MILLION)

TABLE 7 AUTOMOTIVE SHIELDING MARKET (PESSIMISTIC), BY REGION,
2021–2025 (USD MILLION)

TABLE 8 OEM ANNOUNCEMENTS

TABLE 9 TIER 1 MANUFACTURERS ANNOUNCEMENTS

TABLE 10 AUTOMOTIVE SHIELDING MARKET, BY HEAT APPLICATION, 2018–2025
(USD MILLION)

TABLE 11 MAJOR ASSUMPTIONS, BY HEAT APPLICATION

TABLE 12 ENGINE COMPARTMENT: AUTOMOTIVE SHIELDING MARKET, BY
REGION, 2018–2025 (USD MILLION)

TABLE 13 EXHAUST SYSTEM: AUTOMOTIVE SHIELDING MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 14 TURBOCHARGER: AUTOMOTIVE SHIELDING MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 15 UNDER BONNET: AUTOMOTIVE SHIELDING MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 16 UNDER CHASSIS: AUTOMOTIVE SHIELDING MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 17 FUEL TANK: AUTOMOTIVE SHIELDING MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 18 BATTERY MANAGEMENT: AUTOMOTIVE SHIELDING MARKET, BY
REGION, 2018–2025 (USD THOUSAND)

TABLE 19 RECENT DEVELOPMENTS, BY HEAT APPLICATION

TABLE 20 AUTOMOTIVE SHIELDING MARKET, BY EMI APPLICATION, 2018–2025
(USD MILLION)

TABLE 21 MAJOR ASSUMPTIONS, BY EMI APPLICATION

TABLE 22 ACC: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD
THOUSAND)

TABLE 23 ELECTRIC MOTOR: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 24 ECM: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 25 FCW: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 26 INFOTAINMENT: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 27 IPA: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 28 LDW: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 29 BSD: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 30 NVS: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 31 DMS: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 32 AEB: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD THOUSAND)

TABLE 33 RECENT DEVELOPMENTS, BY EMI APPLICATION

TABLE 34 AUTOMOTIVE SHIELDING MARKET, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

TABLE 35 COMPARISON OF AUTOMOTIVE LIGHTWEIGHT MATERIAL VS. CONVENTIONAL MATERIAL PRICING

TABLE 36 ASSUMPTIONS: BY MATERIAL TYPE

TABLE 37 METALLIC: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 38 NON-METALLIC: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 39 RECENT DEVELOPMENTS, BY MATERIAL TYPE

TABLE 40 AUTOMOTIVE SHIELDING MARKET, BY SHIELDING TYPE, 2018–2025 (USD MILLION)

TABLE 41 MAJOR ASSUMPTIONS: BY SHIELDING TYPE

TABLE 42 EMI SHIELDING: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 43 HEAT SHIELDING: AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD MILLION)

TABLE 44 RECENT DEVELOPMENT, BY SHIELDING TYPE

TABLE 45 AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE, 2018–2025
(USD MILLION)

TABLE 46 GLOBAL VEHICLE PRODUCTION, 2017 VS. 2018

TABLE 47 ASSUMPTIONS: BY VEHICLE TYPE

TABLE 48 PASSENGER CAR: AUTOMOTIVE SHIELDING MARKET, BY REGION,
2018–2025 (USD MILLION)

TABLE 49 LIGHT COMMERCIAL VEHICLE: AUTOMOTIVE SHIELDING MARKET, BY
REGION, 2018–2025 (USD MILLION)

TABLE 50 HEAVY COMMERCIAL VEHICLE: AUTOMOTIVE SHIELDING MARKET,
BY REGION, 2018–2025 (USD MILLION)

TABLE 51 RECENT DEVELOPMENT, BY VEHICLE TYPE

TABLE 52 AUTOMOTIVE SHIELDING MARKET, BY REGION, 2018–2025 (USD
MILLION)

TABLE 53 ASIA PACIFIC: AUTOMOTIVE SHIELDING MARKET, BY COUNTRY,
2018–2025 (USD MILLION)

TABLE 54 CHINA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 55 CHINA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 56 INDIA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 57 INDIA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 58 JAPAN: VEHICLE PRODUCTION DATA (UNITS)

TABLE 59 JAPAN: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 60 SOUTH KOREA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 61 SOUTH KOREA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE
TYPE, 2018–2025 (USD MILLION)

TABLE 62 THAILAND: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 63 REST OF ASIA PACIFIC: AUTOMOTIVE SHIELDING MARKET, BY
VEHICLE TYPE, 2018–2025 (USD MILLION)

TABLE 64 EUROPE: AUTOMOTIVE SHIELDING MARKET, BY COUNTRY, 2018–2025
(USD MILLION)

TABLE 65 GERMANY: VEHICLE PRODUCTION DATA (UNITS)

TABLE 66 GERMANY: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 67 FRANCE: VEHICLE PRODUCTION DATA (UNITS)

TABLE 68 FRANCE: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 69 ITALY: VEHICLE PRODUCTION DATA (UNITS)

TABLE 70 ITALY: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 71 RUSSIA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 72 RUSSIA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 73 UK: VEHICLE PRODUCTION DATA (UNITS)

TABLE 74 UK: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE, 2018–2025
(USD MILLION)

TABLE 75 TURKEY: VEHICLE PRODUCTION DATA (UNITS)

TABLE 76 TURKEY: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 77 SPAIN: VEHICLE PRODUCTION DATA (UNITS)

TABLE 78 SPAIN: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 79 REST OF EUROPE: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE
TYPE, 2018–2025 (USD MILLION)

TABLE 80 NORTH AMERICA: AUTOMOTIVE SHIELDING MARKET, BY COUNTRY,
2018–2025 (USD MILLION)

TABLE 81 US: VEHICLE PRODUCTION DATA (UNITS)

TABLE 82 US: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE, 2018–2025
(USD MILLION)

TABLE 83 CANADA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 84 CANADA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 85 MEXICO: VEHICLE PRODUCTION DATA (UNITS)

TABLE 86 MEXICO: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 87 LATIN AMERICA: AUTOMOTIVE SHIELDING MARKET, BY COUNTRY,
2018–2025 (USD MILLION)

TABLE 88 BRAZIL: VEHICLE PRODUCTION DATA (UNITS)

TABLE 89 BRAZIL: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 90 ARGENTINA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 91 ARGENTINA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 92 REST OF LATAM: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE
TYPE, 2018–2025 (USD MILLION)

TABLE 93 ROW: AUTOMOTIVE SHIELDING MARKET, BY COUNTRY, 2018–2025

(USD MILLION)

TABLE 94 IRAN: VEHICLE PRODUCTION DATA (UNITS)

TABLE 95 IRAN: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 96 SOUTH AFRICA: VEHICLE PRODUCTION DATA (UNITS)

TABLE 97 SOUTH AFRICA: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE
TYPE, 2018–2025 (USD MILLION)

TABLE 98 EGYPT: VEHICLE PRODUCTION DATA (UNITS)

TABLE 99 REST OF ROW: AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE,
2018–2025 (USD MILLION)

TABLE 100 NEW PRODUCT DEVELOPMENTS, 2017–2018

TABLE 101 COLLABORATIONS, 2019

TABLE 102 MERGERS/ACQUISITIONS, 2018–2019

TABLE 103 EXPANSIONS, 2017

TABLE 104 TENNECO INC: PRODUCTS AND SERVICES OFFERED

TABLE 105 TENNECO INC: TOTAL SALES, 2014–2018 (USD BILLION)

TABLE 106 TENNECO INC: NET PROFIT, 2014–2018 (USD MILLION)

TABLE 107 LAIRD PLC: PRODUCTS AND SERVICES OFFERED

TABLE 108 LAIRD PLC: NEW PRODUCT DEVELOPMENT

TABLE 109 LAIRD PLC: TOTAL SALES, 2014–2017 (USD MILLION)

TABLE 110 HENKEL: PRODUCTS AND SERVICES OFFERED

TABLE 111 HENKEL: TOTAL SALES, 2014–2018 (USD BILLION)

TABLE 112 HENKEL: NET PROFIT, 2014–2018 (USD BILLION)

TABLE 113 MORGAN ADVANCED MATERIALS: PRODUCTS AND SERVICES
OFFERED

TABLE 114 MORGAN ADVANCED MATERIALS: TOTAL SALES, 2014–2018 (USD
BILLION)

TABLE 115 MORGAN ADVANCED MATERIALS: NET PROFIT, 2014–2018 (USD
MILLION)

TABLE 116 DANA INCORPORATED: PRODUCTS AND SERVICES OFFERED

TABLE 117 DANA INCORPORATED: COLLABORATIONS

TABLE 118 DANA INCORPORATED: ACQUISITIONS

TABLE 119 DANA INCORPORATED: TOTAL SALES, 2015–2019 (USD BILLION)

TABLE 120 DANA INCORPORATED: NET PROFIT, 2015–2019 (USD MILLION)

TABLE 121 AUTONEUM: PRODUCTS AND SERVICES OFFERED

TABLE 122 AUTONEUM: TOTAL SALES, 2014–2018 (USD BILLION)

TABLE 123 AUTONEUM: NET PROFIT, 2014–2018 (USD MILLION)

TABLE 124 ELRINGKLINGER AG: PRODUCTS AND SERVICES OFFERED

TABLE 125 ELRINGKLINGER AG: TOTAL SALES, 2014–2018 (USD BILLION)

TABLE 126 ELRINGKLINGER AG: NET PROFIT, 2014–2018 (USD MILLION)

TABLE 127 KITAGAWA INDUSTRIES CO., LTD: PRODUCTS AND SERVICES OFFERED

TABLE 128 KITAGAWA INDUSTRIES CO., LTD: TOTAL SALES, 2014–2018 (USD MILLION)

TABLE 129 KITAGAWA INDUSTRIES CO., LTD: NET PROFIT, 2014–2018 (USD MILLION)

TABLE 130 3M: PRODUCTS AND SERVICES OFFERED

TABLE 131 3M: TOTAL SALES, 2014–2019 (USD BILLION)

TABLE 132 3M: NET PROFIT, 2014–2019 (USD BILLION)

TABLE 133 PARKER HANNIFIN CORP (CHOMERICS): PRODUCTS AND SERVICES OFFERED

TABLE 134 PARKER HANNIFIN CORP (CHOMERICS): NEW PRODUCT DEVELOPMENTS

TABLE 135 PARKER HANNIFIN CORP (CHOMERICS): TOTAL SALES, 2014–2019 (USD BILLION)

TABLE 136 PARKER HANNIFIN CORP (CHOMERICS): NET PROFIT, 2014–2019 (USD MILLION)

TABLE 137 TECH-ETCH, INC.: PRODUCTS AND SERVICES OFFERED

TABLE 138 TECH-ETCH, INC.: NEW PRODUCT DEVELOPMENTS

TABLE 139 MARIAN INC.: PRODUCTS AND SERVICES OFFERED

TABLE 140 MARIAN INC: EXPANSION

TABLE 141 RTP COMPANY: PRODUCTS AND SERVICES OFFERED

TABLE 142 CURRENCY EXCHANGE RATES (PER USD)

List Of Figures

LIST OF FIGURES

FIGURE 1 AUTOMOTIVE SHIELDING MARKET: MARKET SEGMENTATION

FIGURE 2 AUTOMOTIVE SHIELDING MARKET: RESEARCH DESIGN

FIGURE 3 RESEARCH DESIGN MODEL

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

FIGURE 5 AUTOMOTIVE SHIELDING MARKET: RESEARCH DESIGN & METHODOLOGY

FIGURE 6 AUTOMOTIVE SHIELDING MARKET: RESEARCH METHODOLOGY ILLUSTRATION

OF 3M REVENUE ESTIMATION

FIGURE 7 DATA TRIANGULATION

FIGURE 8 AUTOMOTIVE SHIELDING: MARKET OUTLOOK

FIGURE 9 AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE, 2020 VS. 2025 (USD MILLION)

FIGURE 10 INCREASING DEMAND FOR ELECTRONICS IN VEHICLES IS LIKELY TO BOOST

THE GROWTH OF AUTOMOTIVE SHIELDING

FIGURE 11 AUTOMOTIVE SHIELDING MARKET SHARE, BY REGION, 2020

FIGURE 12 HEAT SHIELDING AND PASSENGER CAR ACCOUNT FOR THE LARGEST SHARES OF THE AUTOMOTIVE SHIELDING MARKET IN 2020

FIGURE 13 EXHAUST SYSTEM HEAT SHIELD IS EXPECTED TO HOLD THE LARGEST MARKET SHARE, 2020 VS. 2025 (USD MILLION)

FIGURE 14 ENGINE CONTROL MODULE IS EXPECTED TO HOLD THE LARGEST MARKET SHARE, 2020 VS. 2025 (USD MILLION)

FIGURE 15 METALLIC IS ESTIMATED TO HOLD THE LARGEST MARKET SHARE, 2020 VS. 2025 (USD MILLION)

FIGURE 16 HEAT SHIELDING IS ESTIMATED TO HOLD THE LARGEST MARKET SHARE, 2020 VS. 2025 (USD MILLION)

FIGURE 17 PASSENGER CAR IS ESTIMATED TO HOLD THE LARGEST MARKET SHARE, 2020 VS. 2025 (USD MILLION)

FIGURE 18 AUTOMOTIVE SHIELDING MARKET: MARKET DYNAMICS

FIGURE 19 ADVANCED ELECTRONICS/CONTROL MODULES IN A CAR

FIGURE 20 VISION SYSTEM OF A FULLY AUTONOMOUS VEHICLE

FIGURE 21 KEY COMPONENTS OF A BATTERY SYSTEM

FIGURE 22 ELECTRIC VEHICLE ROADMAP: VOLKSWAGEN

FIGURE 23 AUTOMOTIVE SHIELDING MARKET– FUTURE TRENDS & SCENARIO,

2021–2025 (USD MILLION)

FIGURE 24 VOLKSWAGEN GROUP PERFORMANCE IN CHINA DURING JAN-FEB 2020

FIGURE 25 PASSENGER CAR SALES AND PRODUCTION IN CHINA

FIGURE 26 COMMERCIAL VEHICLE SALES AND PRODUCTION IN CHINA

FIGURE 27 VALUE CHAIN ANALYSIS: EMI SHIELDING SYSTEMS

FIGURE 28 PORTER'S FIVE FORCES: AUTOMOTIVE SHIELDING MARKET

FIGURE 29 AUTOMOTIVE SHIELDING MARKET, BY HEAT APPLICATION, 2020 VS. 2025 (USD MILLION)

FIGURE 30 KEY PRIMARY INSIGHTS

FIGURE 31 AUTOMOTIVE SHIELDING MARKET, BY EMI APPLICATION, 2020 VS. 2025 (USD MILLION)

FIGURE 32 KEY PRIMARY INSIGHTS

FIGURE 33 AUTOMOTIVE SHIELDING MARKET, BY MATERIAL TYPE, 2020 VS. 2025 (USD MILLION)

FIGURE 34 KEY PRIMARY INSIGHTS

FIGURE 35 AUTOMOTIVE SHIELDING MARKET: BY SHIELDING TYPE, 2020 VS. 2025 (USD MILLION)

FIGURE 36 KEY PRIMARY INSIGHTS

FIGURE 37 AUTOMOTIVE SHIELDING MARKET, BY VEHICLE TYPE, 2020 VS. 2025 (USD MILLION)

FIGURE 38 KEY PRIMARY INSIGHTS

FIGURE 39 AUTOMOTIVE SHIELDING MARKET, BY REGION, 2020 VS. 2025 (USD MILLION)

FIGURE 40 ASIA PACIFIC: AUTOMOTIVE SHIELDING MARKET SNAPSHOT

FIGURE 41 EUROPE: AUTOMOTIVE SHIELDING MARKET SNAPSHOT

FIGURE 42 AUTOMOTIVE SHIELDING MARKET – MARKET RANKING ANALYSIS, 2019

FIGURE 43 AUTOMOTIVE SHIELDING MARKET (GLOBAL): COMPETITIVE LEADERSHIP MAPPING FOR HEAT SHIELD MANUFACTURERS, 2019

FIGURE 44 HEAT SHIELDING: PRODUCT PORTFOLIO ANALYSIS OF TOP PLAYERS

IN AUTOMOTIVE SHIELDING MARKET

FIGURE 45 HEAT SHIELDING: BUSINESS STRATEGY EXCELLENCE OF TOP PLAYERS

IN AUTOMOTIVE SHIELDING MARKET

FIGURE 46 AUTOMOTIVE SHIELDING MARKET (GLOBAL): COMPETITIVE LEADERSHIP MAPPING FOR EMI SHIELD MANUFACTURERS, 2019

FIGURE 47 EMI SHIELDING: PRODUCT PORTFOLIO ANALYSIS OF TOP PLAYERS

IN AUTOMOTIVE SHIELDING MARKET

FIGURE 48 EMI SHIELDING: BUSINESS STRATEGY EXCELLENCE OF TOP PLAYERS

IN AUTOMOTIVE SHIELDING MARKET

FIGURE 49 KEY DEVELOPMENTS BY LEADING PLAYERS IN THE MARKET, 2017–2019

FIGURE 50 TENNECO INC: COMPANY SNAPSHOT

FIGURE 51 TENNECO INC: SWOT ANALYSIS

FIGURE 52 LAIRD PLC: COMPANY SNAPSHOT

FIGURE 53 LAIRD PLC: SWOT ANALYSIS

FIGURE 54 HENKEL: COMPANY SNAPSHOT

FIGURE 55 HENKEL: SWOT ANALYSIS

FIGURE 56 MORGAN ADVANCED MATERIALS: COMPANY SNAPSHOT

FIGURE 57 MORGAN ADVANCED MATERIALS: SWOT ANALYSIS

FIGURE 58 DANA INCORPORATED: COMPANY SNAPSHOT

FIGURE 59 DANA INCORPORATED: SWOT ANALYSIS

FIGURE 60 AUTONEUM: COMPANY SNAPSHOT

FIGURE 61 ELRINGKLINGER AG: COMPANY SNAPSHOT

FIGURE 62 KITAGAWA INDUSTRIES CO., LTD: COMPANY SNAPSHOT

FIGURE 63 3M: COMPANY SNAPSHOT

FIGURE 64 PARKER HANNIFIN CORP (CHOMERICS): COMPANY SNAPSHOT

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