

Automotive Upholstery Market by Application (Carpets, Dashboards, Roof Liners, Seat Covers, Sun Visors & Trunk Liners), Upholstery Materials, Fabric Type (Non-woven & Woven), Integrated Technology, Vehicle Type, and Region - Global Forecast to 2025

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Abstracts

“Growing vehicle production and increasing demand for customized automotive interiors are expected to fuel the demand for the automotive upholstery market”

The automotive upholstery market is estimated to be USD 4.65 billion in 2017 and is projected to grow at a CAGR of 6.59% during the forecast period, to reach a market size of USD 7.74 billion by 2025. Automotive upholstery market is directly driven by the global vehicle production. The market size is anticipated to grow with the vehicle production growth, especially in automotive hubs such as China and the US. The demand for cross overs and SUVs is on the high in North America. Passenger cars, cross overs, and SUVs utilize maximum volume of automotive upholstery. The growing trend of owning large vehicles in the US is driving the demand for automotive upholstery. Consumers are increasingly demanding luxurious upholstery in vehicles. Luxury variants of pick up vans and MUVs in North America are offered with leather upholstery as an optional fit. This car segment is primarily led by the demand for technologically advanced cars in developed countries such as the US, Germany, the UK, and emerging markets such as China and Brazil that have an increasing number of affluent buyers. The automotive upholstery market is dependent on raw materials such as polypropylene and polyurethane. Fluctuation in the prices of these raw materials can hamper the growth of the automotive upholstery market.

“Light duty vehicles are the fastest growing segment of the automotive upholstery market”

Light duty vehicles that include, hatchbacks, sedans, SUV, pick up vans, and MUVs are estimated to account for the largest share of the automotive upholstery market. In comparison to heavy duty vehicles (trucks and buses), that utilize automotive upholstery only in the driver's cabin space, the light duty vehicles utilize automotive upholstery across the vehicle length and breadth. The market growth in the light duty segment can be attributed to the growing demand for passenger cars across the world and the consumer's shifting interest from owning sedans to owning cross overs and SUVs. These vehicles offer more capacity, seat more passengers, better fuel economy and attractive interior and exterior design. Automakers are catering to this shift in consumer trends by launching cross over variants. China, India, and the US remain key SUV markets, hence key markets for automotive upholstery in interior applications.

"Woven fabric is the fastest growing segment of the automotive upholstery market, by fabric type"

The penetration of non-woven fabrics in automotive upholstery application is on the rise. However, automotive upholstery remains a largely woven fabric type industry. Woven fabrics are used in dashboards, seat covers, and sun visors. The main upholstery application in automobiles is seat covers. Seat covers upholstery materials are majorly flat woven fabrics and pile woven fabrics. The different types of fibers which are mainly used in seating include nylon, polyester, polypropylene, and wool. These woven fabrics have high performance characteristics, can withstand higher exposure to daylight and ultra violet radiation. They are abrasive and have reduced flammability. Major automotive fabric producers such as Toyota Boshoku Corporation (Japan), Adient PLC (Ireland), and Lear Corporation (US) manufacture woven fabrics for automotive upholstery.

"Asia Oceania: Fastest growing region of the automotive upholstery market"

Asia Oceania is the fastest growing automotive upholstery market. The region includes countries such as China and India that have emerged as key automotive production hubs. China also houses various automotive upholstery raw materials suppliers and dominates the global pricing of these raw materials. The demand for automotive upholstery in this region is driven by the growing vehicle production in this region.

BREAKDOWN OF PRIMARIES

The study contains insights provided by various industry experts, ranging from

Automotive Upholstery Market by Application (Carpets, Dashboards, Roof Liners, Seat Covers, Sun Visors & Trunk...

equipment suppliers to Tier-1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier-1–32%, Tier-2–45%, and OEM–23%

By Designation: C level–35%, D level–25%, Others–40%

By Region: North America–35%, Europe–40%, Asia Oceania–20%, RoW–5%

The report provides detailed profiles of the following companies:

Lear Corporation (US)

Toyota Boshoku Corporation (Japan)

Faurecia S.A. (France)

Grammer AG (Germany)

Adient PLC (Ireland)

Grupo Antolin Irausa, S.A. (Spain)

Seiren Co., Ltd. (Brazil)

Sage Automotive Interiors (US)

ACME Mills Company (US)

Martur Automotive Seating Systems (Turkey)

Haartz Corporation (US)

Borgers SE & CO. KGAA (Germany)

Research Coverage

The automotive upholstery market has been segmented by application (carpets, dashboards, roof liners, seat covers, sun visors, and trunk liners), upholstery materials (automotive textiles, leather, plastics, smart fabrics, synthetic leather, and thermoplastic polymers), fabric type (non-woven and woven), integrated technology (conventional, smart seats, and ventilated), vehicle type (light duty vehicles and heavy duty vehicles) and region (Asia-Oceania, Europe, North America, and Rest of the World). The market has been projected in terms of volume (tons) and value (USD thousand).

Reasons to Buy the Report:

This report contains various levels of analysis, including industry analysis, factor analysis and company profiles and competitive leadership analysis, which together comprise and discuss the basic views on the emerging and high-growth segments of the automotive upholstery market, competitive landscape, high-growth regions and countries, government initiatives, and market dynamics such as drivers, restraints, opportunities, and challenges.

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

The report provides insights with reference to the following points:

Market Development: The report provides comprehensive information about lucrative emerging markets. The report analyzes the automotive upholstery market for all vehicle types across regions.

Product Development/Innovation: The report offers detailed insights about R&D activities, upcoming technologies, and product launches in the automotive upholstery market across all regions.

Market Diversification: The report provides detailed information about untapped markets, investments, new products, and recent developments in the automotive upholstery market.

Competitive Assessment: The report offers an in-depth assessment of strategies, products, and manufacturing capabilities of leading players in the

automotive upholstery market.

Contents

1 INTRODUCTION

- 1.1 OBJECTIVES OF THE STUDY
- 1.2 MARKET DEFINITION
 - 1.2.1 MARKETS COVERED
 - 1.2.2 YEARS CONSIDERED IN THE STUDY
- 1.3 CURRENCY
- 1.4 UNITS CONSIDERED
- 1.5 LIMITATIONS
- 1.6 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
- 2.2 SECONDARY DATA
 - 2.2.1 KEY SECONDARY SOURCES
 - 2.2.2 KEY DATA FROM SECONDARY SOURCES
- 2.3 PRIMARY DATA
 - 2.3.1 SAMPLING TECHNIQUES & DATA COLLECTION METHODS
 - 2.3.2 PRIMARY PARTICIPANTS
- 2.4 FACTOR ANALYSIS
 - 2.4.1 INTRODUCTION
 - 2.4.2 DEMAND SIDE ANALYSIS
 - 2.4.2.1 Increased demand for luxury vehicles and environmentally-friendly vehicles
 - 2.4.3 SUPPLY SIDE ANALYSIS
 - 2.4.3.1 Significant focus by OEMs on convenience and comfort systems in vehicles
- 2.5 MARKET SIZE ESTIMATION
- 2.6 DATA TRIANGULATION
- 2.7 ASSUMPTIONS

3 EXECUTIVE SUMMARY

- 3.1 AUTOMOTIVE UPHOLSTERY MARKET, BY REGION, 2017 VS. 2025
- 3.2 AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2017 VS. 2025
- 3.3 AUTOMOTIVE UPHOLSTERY MARKET, BY UPHOLSTERY MATERIAL, 2017 VS. 2025
- 3.4 AUTOMOTIVE UPHOLSTERY MARKET, BY FABRIC TYPE, 2017 VS. 2025

3.5 AUTOMOTIVE UPHOLSTERY MARKET, BY INTEGRATED TECHNOLOGY, 2017 VS. 2025

3.6 AUTOMOTIVE UPHOLSTERY MARKET, BY VEHICLE TYPE, 2017 VS. 2025

4 PREMIUM INSIGHTS

4.1 AUTOMOTIVE UPHOLSTERY MARKET OVERVIEW

4.2 AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2017 VS. 2025

4.3 AUTOMOTIVE UPHOLSTERY MARKET, BY REGION, 2017 VS. 2025

4.4 AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE

4.5 AUTOMOTIVE UPHOLSTERY MARKET, BY FABRIC TYPE, 2017 VS. 2025

4.6 AUTOMOTIVE UPHOLSTERY MARKET, BY INTEGRATED TECHNOLOGY, 2017 VS. 2025

4.7 AUTOMOTIVE UPHOLSTERY MARKET, BY VEHICLE TYPE, 2017 VS. 2025

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Growing demand for advanced technologies and customized automotive interiors

5.2.1.2 Increasing demand for lightweight automotive materials

5.2.1.3 Availability of diverse non-fabric substitutes

5.2.2 RESTRAINTS

5.2.2.1 Volatility in raw material prices

5.2.3 OPPORTUNITIES

5.2.3.1 Increasing use of non-woven fabrics

5.2.3.2 Development of autonomous vehicles to present new opportunities for automotive interior design

5.2.4 CHALLENGES

5.2.4.1 Stringent government mandates to reduce HAP emissions

5.2.4.2 TVOC emissions from vehicle interiors

5.3 MACROINDICATOR ANALYSIS

5.3.1 INTRODUCTION

5.3.1.1 Premium vehicle sales as percentage of total sales

5.3.1.2 GDP (USD Billion)

5.3.1.3 GNI per capita, Atlas Method (USD)

5.3.1.4 GDP per capita, PPP (USD)

5.3.2 MACROINDICATORS INFLUENCING THE AUTOMOTIVE UPHOLSTERY MARKET IN THE THREE COUNTRIES

5.3.2.1 CHINA

5.3.2.2 JAPAN

5.3.2.3 US

6 AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION & REGION

6.1 INTRODUCTION

6.2 ASIA OCEANIA

6.2.1 CHINA

6.2.2 INDIA

6.2.3 JAPAN

6.2.4 SOUTH KOREA

6.2.5 REST OF ASIA OCEANIA

6.3 EUROPE

6.3.1 FRANCE

6.3.2 GERMANY

6.3.3 SPAIN

6.3.4 UK

6.3.5 REST OF EUROPE

6.4 NORTH AMERICA

6.4.1 US

6.4.2 CANADA

6.4.3 MEXICO

6.5 REST OF THE WORLD

6.5.1 BRAZIL

6.5.2 RUSSIA

6.5.3 OTHER ROW COUNTRIES

7 AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION & MATERIAL TYPE

7.1 INTRODUCTION

7.2 ASIA OCEANIA

7.3 EUROPE

7.4 NORTH AMERICA

7.5 REST OF THE WORLD

8 AUTOMOTIVE UPHOLSTERY MARKET, BY FABRIC TYPE

8.1 INTRODUCTION

8.2 NON-WOVEN FABRIC

8.3 WOVEN FABRIC

9 AUTOMOTIVE UPHOLSTERY MARKET, BY INTEGRATED TECHNOLOGY

9.1 INTRODUCTION

9.2 CONVENTIONAL SEATS

9.3 SMART SEATS

9.4 VENTILATED SEATS

10 AUTOMOTIVE UPHOLSTERY MARKET, BY VEHICLE TYPE

10.1 INTRODUCTION

10.2 LIGHT-DUTY VEHICLES

10.3 HEAVY-DUTY VEHICLES

11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION

11.2 MARKET RANKING ANALYSIS

11.3 COMPETITIVE SITUATION & TRENDS

11.3.1 EXPANSIONS

11.3.2 JOINT VENTURES/PARTNERSHIPS/COLLABORATIONS/SUPPLY CONTRACTS

11.3.3 NEW PRODUCT DEVELOPMENTS

11.3.4 MERGERS & ACQUISITIONS

12 COMPANY PROFILES

(Business overview, Products offered, Developments, SWOT analysis & MnM View)*

12.1 LEAR CORPORATION

12.2 TOYOTA BOSHOKU CORPORATION

12.3 FAURECIA S.A.

12.4 GRAMMER AG

12.5 ADIENT PLC

12.6 GRUPO ANTOLIN IRAUSA, S.A.

12.7 SEIREN CO., LTD

12.8 SAGE AUTOMOTIVE INTERIORS

12.9 ACME MILLS COMPANY

12.10 MARTUR AUTOMOTIVE SEATING SYSTEMS

12.11 HAARTZ CORPORATION

12.12 BORGERS SE & CO. KGAA

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

13 APPENDIX

13.1 INSIGHTS OF INDUSTRY EXPERTS

13.2 DISCUSSION GUIDE

13.3 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

13.4 INTRODUCING RT: REAL TIME MARKET INTELLIGENCE

13.5 AVAILABLE CUSTOMIZATIONS

13.6 RELATED REPORTS

13.7 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

Table 1 CURRENCY DOLLAR EXCHANGE RATES (W.R.T. USD)

Table 2 AUTOMOTIVE UPHOLSTERY MARKET, BY REGION, 2015–2025 (TONS)

Table 3 AUTOMOTIVE UPHOLSTERY MARKET, BY REGION, 2015–2025
(THOUSAND USD)

Table 4 AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025
(TONS)

Table 5 AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025
(THOUSAND USD)

Table 6 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (TONS)

Table 7 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (THOUSAND USD)

Table 8 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY,
2015–2025 (TONS)

Table 9 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY,
2015–2025 (THOUSAND USD)

Table 10 CHINA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (TONS)

Table 11 CHINA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (THOUSAND USD)

Table 12 INDIA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (TONS)

Table 13 INDIA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (THOUSAND USD)

Table 14 JAPAN: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (TONS)

Table 15 JAPAN: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION,
2015–2025 (THOUSAND USD)

Table 16 SOUTH KOREA: AUTOMOTIVE UPHOLSTERY MARKET, BY
APPLICATION, 2015–2025 (TONS)

Table 17 SOUTH KOREA: AUTOMOTIVE UPHOLSTERY MARKET, BY
APPLICATION, 2015–2025 (THOUSAND USD)

Table 18 REST OF ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY
APPLICATION, 2015–2025 (TONS)

Table 19 REST OF ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY

APPLICATION, 2015–2025 (THOUSAND USD)

Table 20 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 21 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 22 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY, 2015–2025 (TONS)

Table 23 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY, 2015–2025 (THOUSAND USD)

Table 24 FRANCE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 25 FRANCE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 26 GERMANY: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 27 GERMANY: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 28 SPAIN: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 29 SPAIN: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 30 UK: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 31 UK: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 32 REST OF EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 33 REST OF EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 34 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 35 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 36 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY, 2015–2025 (TONS)

Table 37 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY, 2015–2025 (THOUSAND USD)

Table 38 US: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 39 US: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 40 CANADA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 41 CANADA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 42 MEXICO: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 43 MEXICO: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 44 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 45 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 46 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY, 2015–2025 (TONS)

Table 47 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY, 2015–2025 (THOUSAND USD)

Table 48 BRAZIL: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 49 BRAZIL: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 50 RUSSIA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 51 RUSSIA: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 52 OTHER ROW COUNTRIES: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (TONS)

Table 53 OTHER ROW COUNTRIES: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2015–2025 (THOUSAND USD)

Table 54 AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 55 AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 56 AUTOMOTIVE UPHOLSTERY MARKET, BY REGION, 2015–2025 (TONS)

Table 57 AUTOMOTIVE UPHOLSTERY MARKET, BY REGION, 2015–2025 (THOUSAND USD)

Table 58 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 59 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 60 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 61 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 62 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 63 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 64 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 65 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 66 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 67 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 68 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 69 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 70 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 71 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 72 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 73 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 74 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 75 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 76 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 77 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 78 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY

MATERIAL TYPE, 2015–2025 (TONS)

Table 79 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 80 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 81 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 82 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 83 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 84 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 85 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 86 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 87 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 88 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 89 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 90 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 91 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 92 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 93 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 94 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 95 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 96 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 97 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 98 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 99 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 100 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 101 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 102 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 103 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR CARPETS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 104 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 105 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR DASHBOARDS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 106 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 107 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR ROOF LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 108 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 109 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR SEAT COVERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 110 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 111 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR SUN VISORS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 112 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (TONS)

Table 113 ROW: AUTOMOTIVE UPHOLSTERY MARKET FOR TRUNK LINERS, BY MATERIAL TYPE, 2015–2025 (THOUSAND USD)

Table 114 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY FABRIC TYPE, 2015–2025 (TONS)

Table 115 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY FABRIC TYPE, 2015–2025 (THOUSAND USD)

Table 116 NON-WOVEN AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY REGION 2015–2025 (TONS)

Table 117 NON-WOVEN AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY REGION

2015–2025 (THOUSAND USD)

Table 118 WOVEN AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY REGION

2015–2025 (TONS)

Table 119 WOVEN AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY REGION

2015–2025 (THOUSAND USD)

Table 120 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY INTEGRATED TECHNOLOGY, 2015–2025 (TONS)

Table 121 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY INTEGRATED TECHNOLOGY, 2015–2025 (THOUSAND USD)

Table 122 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY REGION, 2015–2025 (TONS)

Table 123 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY REGION, 2015–2025 (THOUSAND USD)

Table 124 AUTOMOTIVE UPHOLSTERY MARKET SIZE FOR CONVENTIONAL SEATS, BY REGION, 2015–2025 (TONS)

Table 125 AUTOMOTIVE UPHOLSTERY MARKET SIZE FOR CONVENTIONAL SEATS, BY REGION, 2015–2025 (THOUSAND USD)

Table 126 AUTOMOTIVE UPHOLSTERY MARKET SIZE FOR SMART SEATS, BY REGION, 2015–2025 (TONS)

Table 127 AUTOMOTIVE UPHOLSTERY MARKET SIZE FOR SMART SEATS, BY REGION, 2015–2025 (THOUSAND USD)

Table 128 AUTOMOTIVE UPHOLSTERY MARKET SIZE FOR VENTILATED SEATS, BY REGION, 2015–2025 (TONS)

Table 129 AUTOMOTIVE UPHOLSTERY MARKET SIZE FOR VENTILATED SEATS, BY REGION, 2015–2025 (THOUSAND USD)

Table 130 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY VEHICLE TYPE, 2015–2025 (TONS)

Table 131 AUTOMOTIVE UPHOLSTERY MARKET SIZE, BY VEHICLE TYPE, 2015–2025 (THOUSAND USD)

Table 132 LIGHT-DUTY VEHICLE UPHOLSTERY MARKET SIZE, BY REGION, 2015–2025 (TONS)

Table 133 LIGHT-DUTY VEHICLE UPHOLSTERY MARKET SIZE, BY REGION, 2015–2025 (THOUSAND USD)

Table 134 HEAVY-DUTY VEHICLE UPHOLSTERY MARKET SIZE, BY REGION, 2015–2025 (TONS)

Table 135 HEAVY-DUTY VEHICLE UPHOLSTERY MARKET SIZE, BY REGION, 2015–2025 (THOUSAND USD)

Table 136 EXPANSIONS, 2014–2017

Table 137 JOINT VENTURES/PARTNERSHIPS/COLLABORATIONS/SUPPLY

CONTRACTS, 2014–2017

Table 138 NEW PRODUCT DEVELOPMENTS, 2014–2017

Table 139 MERGERS & ACQUISITIONS, 2014–2017

List Of Figures

LIST OF FIGURES

Figure 1 AUTOMOTIVE UPHOLSTERY MARKET: RESEARCH DESIGN

Figure 2 RESEARCH METHODOLOGY MODEL

Figure 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, & REGION

Figure 4 GLOBAL PREMIUM VEHICLE SALES GROWTH (2012-2016)

Figure 5 AUTOMOTIVE UPHOLSTERY MARKET FOR AUTOMOTIVE: BOTTOM-UP APPROACH

Figure 6 AUTOMOTIVE UPHOLSTERY MARKET FOR AUTOMOTIVE: TOP-DOWN APPROACH

Figure 7 DATA TRIANGULATION

Figure 8 ASIA OCEANIA ACCOUNTED FOR THE LARGEST SHARE IN THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017 (THOUSAND USD)

Figure 9 SEAT COVERS SEGMENT ACCOUNTED FOR THE LARGEST SHARE IN THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017 (THOUSAND USD)

Figure 10 PU/PVC COMBINATION SEGMENT ACCOUNTED FOR THE LARGEST SHARE IN THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017

Figure 11 WOVEN FABRIC SEGMENT ACCOUNTED FOR THE LARGEST SHARE OF THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017 (THOUSAND USD)

Figure 12 CONVENTIONAL SEATS SEGMENT ACCOUNTED FOR LARGEST SHARE THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017 (THOUSAND USD)

Figure 13 LIGHT DUTY VEHICLES SEGMENT ACCOUNTED FOR LARGEST SHARE THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017 (THOUSAND USD)

Figure 14 RISING VEHICLE DEMAND AND PRODUCTION TO DRIVE THE AUTOMOTIVE UPHOLSTERY MARKET

Figure 15 SEAT COVERS SEGMENT ACCOUNTED FOR THE LARGEST SHARE OF THE AUTOMOTIVE UPHOLSTERY MARKET IN 2017 (THOUSAND USD)

Figure 16 ASIA OCEANIA MARKET FOR AUTOMOTIVE UPHOLSTERY TO GROW AT THE HIGHEST CAGR DURING THE FORECAST PERIOD (THOUSAND USD)

Figure 17 SYNTHETIC LEATHER SEGMENT ACCOUNTED FOR THE LARGEST SHARE IN 2017

Figure 18 WOVEN FABRIC TYPE IS EXPECTED TO HAVE THE LARGEST MARKET SIZE DURING THE FORECAST PERIOD (THOUSAND USD)

Figure 19 VENTILATED SEATS IS EXPECTED TO HAVE THE HIGHEST CAGR DURING THE FORECAST PERIOD (THOUSAND USD)

Figure 20 LIGHT DUTY VEHICLES SEGMENT ACCOUNTED FOR THE LARGEST

MARKET SIZE (THOUSAND USD)

Figure 21 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

Figure 22 ANNUAL NUMBER OF AIR TOXICS EMITTING FACILITIES WITH EPA EVALUATION AND CONCLUDED ENFORCEMENT ACTIONS (US)

Figure 23 INCREASING PER CAPITA GDP AND INCOME TO POSITIVELY INFLUENCE THE DEMAND FOR AUTOMOBILES

Figure 24 IMPROVING GDP AND FOCUS ON INNOVATION IN THE AUTOMOTIVE INDUSTRY HAVE MADE JAPAN A STRONG MARKET FOR EXPORTING VEHICLES

Figure 25 RISING GNI PER CAPITA AND INCREASED CONSUMER SPENDING ARE EXPECTED TO SUPPORT THE DEMAND FOR PREMIUM VEHICLES

Figure 26 GEOGRAPHIC GROWTH OPPORTUNITIES: AUTOMOTIVE UPHOLSTERY MARKET, BY COUNTRY (TONS)

Figure 27 ASIA OCEANIA: AUTOMOTIVE UPHOLSTERY MARKET SNAPSHOT

Figure 28 EUROPE: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2017 VS. 2025 (TONS)

Figure 29 NORTH AMERICA: AUTOMOTIVE UPHOLSTERY MARKET SNAPSHOT

Figure 30 ROW: AUTOMOTIVE UPHOLSTERY MARKET, BY APPLICATION, 2017 VS. 2025 (TONS)

Figure 31 AUTOMOTIVE UPHOLSTERY MARKET, BY MATERIAL TYPE, 2020 VS. 2025 (TONS)

Figure 32 AUTOMOTIVE UPHOLSTERY MARKET, BY FABRIC TYPE, 2017 VS 2025 (TONS)

Figure 33 AUTOMOTIVE UPHOLSTERY MARKET, BY INTEGRATED TECHNOLOGY, 2017 VS. 2025 (TONS)

Figure 34 AUTOMOTIVE UPHOLSTERY MARKET, BY VEHICLE TYPE, 2017 VS 2025

Figure 35 KEY DEVELOPMENTS BY LEADING PLAYERS IN THE AUTOMOTIVE UPHOLSTERY MARKET, 2014–2017

Figure 36 AUTOMOTIVE UPHOLSTERY MARKET RANKING, 2016

Figure 37 LEAR CORPORATION: COMPANY SNAPSHOT

Figure 38 LEAR CORPORATION: SWOT ANALYSIS

Figure 39 TOYOTA BOSHOKU CORPORATION: COMPANY SNAPSHOT

Figure 40 TOYOTA BOSHOKU CORPORATION: SWOT ANALYSIS

Figure 41 FAURECIA S.A.: COMPANY SNAPSHOT

Figure 42 FAURECIA S.A.: SWOT ANALYSIS

Figure 43 GRAMMER AG: COMPANY SNAPSHOT

Figure 44 GRAMMER AG: SWOT ANALYSIS

Figure 45 ADIENT PLC: COMPANY SNAPSHOT

Figure 46 ADIENT PLC: SWOT ANALYSIS

Figure 47 GRUPO ANTOLIN IRAUSA, S.A.: COMPANY SNAPSHOT

Figure 48 SEIREN CO., LTD: COMPANY SNAPSHOT

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