

# **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

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.

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