

Electric Vehicle Plastics Market by Type (ABS, PU, PA, PC, PVB, PP, PVC, PMMA), Application & Component (Dashboard, Seat, Trim, Bumper, Body, Battery, Engine, Lighting, Wiring), Battery Type & Material, Vehicle Type and Region - Global Forecast to 2027

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Abstracts

The electric vehicle plastics market is expected to grow from USD 3.7 billion in 2022 and is poised to reach USD 12.6 billion in 2027, at a CAGR of 27.9% during the forecast period.

The global demand for electric vehicles has shown significant growth in recent years. According to IEA statistics, electric vehicle sales have increased from 10.3 million units in 2020 to 16.2 million units in 2021, with an increase of 57.3% from the previous year. The growth can be attributed to increasing support from local governments in incentives to usher customers into buying EVs and increase the adoption rate of electric mobility. The demand for premium electric vehicles has seen growth in developed and developing countries with high disposable income, better charging infrastructure, rising customer awareness. Developed regions such as Europe, North America, and a few Asian countries such as Japan and South Korea are the key markets for premium electric vehicles. Increasing the driving range of electric vehicles is a top priority for OEMs. Lighter vehicles require less power to travel a particular distance thus increasing the driving range per charge of a vehicle. Some of the areas that will find plastics application in EVs are specifically around the battery pack and the structure, after that power electronics such as the inverter, the DC converter, and the onboard charger. Batteries today are heavy and can increase EV weight by 35% compared to an ICE. For example, battery pack of Mercedes-Benz EQC weighs in at 635 kgs. A 10% reduction in battery weight can improve driving range by 6% to 8%. So, replacing battery casing and battery separators by low density materials such as polypropylene, which is ~33%

lighter than polycarbonate, can help in overall weight reduction. Vehicle interior and exterior applications such as door handles, bumpers, dashboards, seats contribute to a major share of weight in the vehicle. These parts if made from lightweight materials such as polyurethane and polypropylene can not only significantly reduce weight of the vehicle but also provide quality aesthetic looks due to their flexibility in design and manufacturing.

Hence, it is likely the demand for light weight high performance plastics in EV powertrain, interior, and exterior applications is likely to drive the demand for plastics in electric vehicles.

BEVs are likely to drive demand for plastics due to their growing popularity

The BEV segment is estimated to showcase the fastest-growing vehicle segment for plastics during the forecast period. BEVs have showcased a faster adoption compared to other EV types and one of the reasons can be that these are clean and comparatively low cost compared to HEVs/PHEVs. With advancements in weight-reduction technologies and improved range, the demand for battery electric vehicles is expected to increase further in the coming years. This would drive the demand for lightweight plastics such as polypropylene. Polyurethanes (PU) have excellent manufacturability and are preferred material options for automotive seating solutions. Higher demand for interior comfort drives PU demand in EVs. Polypropylene (PP) has a lower density than other plastic materials; hence it has opened new opportunities to reduce vehicle weight. PP also has good recyclability, allowing it to be reused as raw material and reducing plastic waste. Thus, increased adoption of BEV vehicles amongst other EV vehicle types is likely to drive the demand for plastic components used in these vehicles.

Interior trim application to boost plastic blended fabrics for aesthetically pleasing plastic components.

OEMs introduce advanced seating solutions as customers of luxury electric vehicles and premium electric SUVs prefer superior ride quality. These seating solutions are a new growth opportunity for OEMs to reduce vehicle weight while providing a quality interior experience. For current generation customers, interior aesthetics are one of the primary factors while purchasing a vehicle. OEMs that can deliver a wide range of interiors will likely gain market share in the future. The design flexibility of plastics can be used to improve aesthetics in vehicle interiors. Therefore, due to increased demand for safety features in the market and aesthetically pleasing interiors, the demand for advanced interior trim components will likely increase during the forecast period.

Europe is the second largest market for EV plastics owing to faster-growing EV sales

According to IEA, the split between BEV and PHEV is 55/45, with 5.5 million electric vehicles on the road as of 2021 in Europe. This results from changes in EV tax incentive schemes and shift towards electric mobility to reduce CO2 emissions and prevent climate change.

Germany is a global hub for automotive design and innovation. With companies like BASF leading the charge in innovative plastic solutions, the country's demand for higher, more aesthetically pleasing interiors has risen. The country is one of the biggest markets for premium vehicles, making it a focal point for adopting lightweight, high-performance plastic. France is at the center of luxury business in the world. It is one of the top countries with high demand for luxury vehicles and SUVs. The growing demand for luxury EVs is next as top companies shift their focus to low carbon mobility. Luxury interiors and higher-quality seating will drive the demand for better-quality plastic products. In Sweden, according to IEA, the share of electric vehicles sold in 2021 was 42% of all the vehicles sold in the country, one of the highest numbers in the European region. This is indicative of the increasing customer awareness and the rising government support in the form of new schemes toward electric mobility.

In Europe, the EV sales are primarily driven by mature charging infrastructure, customer awareness and attractive government incentives. Demand for higher quality interiors to drive the plastic market in this region.

The breakup of primary respondents

By Company: Plastic Component Manufacturers – 30%, Plastic Suppliers – 60%, Others -10%

By Designation: C level executives – 20%, Others – 80%

By Region: Europe - 20%, Asia Pacific - 50%, North America - 30%

The Electric Vehicle Plastics industry is dominated by global players and comprises several regional players, including BASF SE(Germany), Lyondellbasell Industries Holdings B.V. (Netherlands), Sabic (Saudi Arabia), Dow (US) & Dupont (US). The study includes an in-depth competitive analysis of these key players in the Electric Vehicle

Plastics market with their company profiles, MnM view of the top five companies, recent developments, and key market strategies.

Research Coverage

The primary objective of the study is to define, describe, and forecast the Electric Vehicle Plastics market, by value and volume. The study segments the Electric Vehicle Plastics market By Plastic type [acrylonitrile butadiene styrene (ABS), polyamide (PA), polycarbonate (PC), polyvinyl butyral, polyurethane (PU), polypropylene (PP), polyvinyl chloride (PVC), polymethylmethacrylate (PMMA), high density polyethylene (HDPE), low density polyethylene (LDPE), polybutylene terephthalate (PBT), and others], By Application (powertrain system/under bonnet, exterior, interior, and lighting & wiring), By Component (dashboard, seats, interior trim, car upholstery, bumper, body, exterior trim, battery, auxiliary battery, engine, engine top cover, engine encapsulation, fuel tank, lighting, electric wiring, floor insulator, fender insulator, wheel arc liner and other components), Battery Plastics Market, By Material (Polyamide, Polycarbonate, Polypropylene, Polyethylene, and Other Plastic Materials), Battery Plastics Market, By Type (Drive Battery and Auxiliary Battery), Battery Plastics Market, By Vehicle Type (BEV, PHEV and FCEV), Polypropylene Market, By Component (dashboard, seats, interior trim, car upholstery, bumper, body, exterior trim, battery, auxiliary battery, engine, engine top cover, engine encapsulation, fuel tank, lighting, electric wiring, floor insulator, fender insulator, and wheel arc liner), By Vehicle Type (BEV and PHEV/HEV), By Region (Asia Pacific, North America, and Europe). It analyzes the opportunities offered by various segments of the market to the stakeholders. It tracks and analyzes competitive developments such as market ranking analysis, expansions, joint ventures, acquisitions, and other activities carried out by key industry participants.

Key Benefits of Buying the Report:

The report will help the market leaders with the information on the closest approximations of the revenue numbers for the electric vehicle market and the sub-segments. The study will also help the key players identify the highest potential region and design its product portfolio per market requirements. Detailed research on different plastic types, plastic components and their application is expected to help manufacturers to understand the potential market for these vehicle types and which technologies are predominant in the respective vehicle types. This report includes various analyses like supply chain, average selling price analysis, patent analysis, revenue shift analysis, case study analysis, and porter's analysis. 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 market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

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