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ICE & EV Seatbelt Material Market by Component (Retractor, Buckle, Anchor, and Others), Type of Component by Material (Steel/Aluminum, Polycarbonate, and Nylon), and Vehicle Type (Passenger Car, LCV, and HCV), and Region - Global Forecast to 2032

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Abstracts

The BEV seatbelt material market is estimated to be at 96.52 megatons in 2025 and reach 248.97 megatons at a CAGR of 14.5% during the forecast period. The push towards increases in vehicle safety, especially through stricter regulations and heightened consumer awareness, is a major driver of the seatbelt material market, as automakers are compelled to adopt advanced seatbelt technologies like pretensioners, load limiters (front and rear seats), and smart reminder systems to meet evolving safety standards. This trend is further amplified by the growing sales of SUVs, both compact and full-size, which not only boost overall vehicle production but also increase the number of occupants per vehicle, thereby increasing the demand for high-performance, durable seatbelt materials. As a result, the seatbelt material market is experiencing steady growth in line with the development of the passenger vehicle segment across all price points.

'Heavy commercial vehicle is the fastest-growing vehicle type segment of the seatbelt material market.'

Heavy commercial vehicles (HEVs) comprise heavy trucks and buses & coaches. Two units of seatbelts are considered in heavy trucks for driver and co-passenger, whereas one seatbelt is for the driver in the buses & coaches. The average weight of a single seatbelt assembly in heavy commercial vehicles typically ranges from 1.4 to 1.7 kg and

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varies across the retractor, buckle, anchor, and other components in different regions. According to the industrial expert, due to excess vibration in HCVs, the weight of the retractor is increased to compensate the load. The global demand for heavy trucks has risen significantly, driven by increased e-commerce & logistics demand and growing infrastructure investments by regional authorities, leading to heightened construction & mining sectors. The adoption of seatbelts is also becoming popular in HCVs owing to OEMs' focus on driver & co-passenger safety and regulatory mandates. For instance, in the US, the National Highway Traffic Safety Administration (NHTSA) has enforced the rule requiring seat belt warnings for all passengers, including city transport buses. In India, the state of Kerala mandated seatbelt usage for drivers and front-seat passengers in heavy vehicles, including state-run buses, from November 2023. Further, the growing fitment rate of telematics & fleet management would prompt the seatbelt market. In North America, the integration of advanced fleet management software with telematics and usage-based insurance (UBI) has significantly influenced driver and co-passenger seatbelt usage. Modern telematics systems can monitor and record seatbelt status in real time, transmitting this data to fleet managers and insurance providers. UBI insurers use this information to assess individual driving behaviors, including whether seatbelts are consistently worn, and adjust insurance premiums, accordingly, rewarding safer practices with lower rates and penalizing non-compliance. Hence, as the regulatory environments have become more ambitious and harmonized globally concentrated on heavy-duty vehicle segments coupled with technological advancements in telematics and OEMs and fleet operators to prioritize passenger safety, seatbelt manufacturers would invest in advanced seatbelt technologies and materials, fueling the HEV segment of the market.

'Battery electric vehicles hold the leading market share of the seatbelt material market.'

Battery electric vehicle sales are experiencing rapid growth worldwide, with global sales reaching 17.1 million in 2024, which was a 25% increase YOY, while in 2021, they were around 6.75 million. This increase in sales was driven by falling battery costs, expanding model choices, and robust government support, particularly in China, Europe, and the US. Similar to ICE passenger cars, pure battery electric cars often integrate advanced passive safety features such as pretensioners, load limiters, and enhanced airbag systems, leveraging the electronic architecture with improved occupant protection.

Considering electric vehicle sales, based on the model mapping, the sedan and hatchback in EV versions contribute 65% of the sales in China, whereas the premium variant in EVs offers captain seats in the rear row, reflecting strong consumer demand

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for the vehicles. The trend in the Americas is due to an increase in mid-sized electric SUVs and pickup trucks, further boosting the demand for seatbelt components with 2-point and 3-point seatbelts. Moreover, the demand for ADAS features is increasingly being offered as standard or optional equipment in EVs across Europe and the Americas, driven by rising consumer demand for safety, regulatory encouragement, and the broader shift toward autonomous mobility. These advanced systems, ranging from adaptive cruise control and lane-keeping assist to emergency braking and collision warnings, are tightly integrated with automotive seatbelt systems, as ADAS can trigger seatbelt pretensioners or dynamic tension adjustments in anticipation of a potential crash, maximizing occupant protection.

'The Americas is the second-largest market for seatbelt materials globally.'

The Americas market is growing rapidly, driven by stringent safety regulations, high consumer awareness, and technological innovation. Recent safety norms include the US National Highway Traffic Safety Administration's (NHTSA) finalized rule mandating enhanced seat belt reminder systems for both front and rear seats in new vehicles. The front seat requirements by September 2026 and rear seat reminders by September 2027, aimed at increasing usage rates and saving lives. In the US, mid-size and large SUVs account for approximately 55–60% of all new vehicle sales, reflecting a strong consumer shift toward larger, multi-row vehicles. This trend is significantly boosting the market for seatbelts, especially for second row and third-row seats, as automakers equip these vehicles with dedicated retractors and advanced restraint systems to ensure safety for all occupants. The rise of SUVs with three-row configurations by leading OEMs is expanding the need for durable webbing, high-strength metal components, and advanced sensors in seatbelt assemblies. As a result, the growing popularity of SUVs and premium vehicles in the Americas is driving sustained growth in the seatbelt material and technology market, with manufacturers responding to both regulatory requirements and consumer expectations for comprehensive safety across all seating positions.

The automakers in the US are making significant investments in occupant safety by introducing new technologies that are more advanced than traditional restraint systems. One notable example is Ford's invention and commercial deployment of inflatable seatbelts, which are offered depending upon the customer's demand for extra safety features in vehicles, as per the trim level. Moreover, the automakers are incorporating advanced seatbelt pretensioners and dynamic load limiters and integrating seatbelt systems with ADAS features such as automatic emergency braking and collision anticipation, further enhancing occupant protection.

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The break-up of the profile of primary participants in the seatbelt material market is as follows:
By Companies: Tier I - 30%, Tier II – 70%
By Designation: Manager level - 30%, C-Level Executives - 50%, Others- 20%,
By Region: Americas - 10%, Europe – 20%, and Asia Pacific - 70%

Global players dominate the seatbelt material market, which also comprise several regional players. The key players in the seatbelt material market are Autoliv (Sweden), Joyson Safety Systems (US), ZF Friedrichshafen AG (Germany), Tokairika, Co., Ltd. (Japan), Yanfeng (Japan), Far Europe Inc. (China), GWR Safety System (US), Holmbergs Safety System Holding AB (Sweden), Ashimori Industrial Co. Ltd. (Japan), and Samsong Industries, Ltd, (South Korea).

Research Coverage:

By Components (Retractor, Buckle, Anchor, and Others), Seatbelt Retractor Market (ICE), By material (Steel/Aluminum, Polycarbonate, and Nylon), Seatbelt Buckle Market (ICE), By Material (Steel/Aluminum, Polycarbonate, and Nylon), Seatbelt Anchor Market (ICE), By Material (Steel/Aluminum and Polycarbonate), Seatbelt Material Market (ICE), By Vehicle Type (Passenger Car, Light Commercial Vehicle, Heavy Commercial Vehicle), Seatbelt Retractor Market (BEV), By Material (Steel/Aluminum, Polycarbonate, and Nylon), Seatbelt Buckle Market (BEV), By Material (Steel/Aluminum, Polycarbonate, and Nylon), Seatbelt Material Market (BEV), By Anchor (Steel/Aluminum and Polycarbonate), By Region (Asia Pacific, Europe, and the Americas)

The report's scope covers detailed information regarding the major factors influencing the growth of the seatbelt material market. A thorough analysis of the key industry players has provided insights into their business overview, products, key strategies, contracts, partnerships, agreements, product launches, mergers and acquisitions, recession impact, and recent seatbelt material market developments.

Key Benefits of Buying the Report:

The report will help market leaders and new entrants with information on the closest approximations of the revenue numbers for the overall seatbelt material market and the sub-segments. It will also help stakeholders understand the competitive landscape, gain insights into positioning their businesses better, and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and

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provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following points:

Analysis of critical drivers (increase in stringency in safety standards and growing crash tests), restraints (increase in the development of active safety system), opportunities (lighter and sustainable materials and small textiles), and challenges (chemical compatibility, durability requirement, and production and manufacturing) influencing the growth of the seatbelt material market

Product Development/Innovation: Detailed insights into upcoming technologies and new products launched in the seatbelt material market

Market Development: Comprehensive market information – the report analyzes the authentication and brand protection market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the seatbelt material market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the seatbelt material market, such as Autoliv (Sweden), Joyson Safety Systems (US), ZF Friedrichshafen AG (Germany), Tokairika, Co., Ltd. (Japan), and Yanfeng (Japan)

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