

Automotive Advanced High-Strength Steel Market Forecasts To 2034 – Global Analysis By Steel Grade (Dual-Phase (DP) Steel, Transformation-Induced Plasticity (TRIP) Steel, Complex-Phase (CP) Steel, Martensitic (MS) Steel, Ferritic-Bainitic (FB) Steel, Press-Hardened Steel (PHS), Twinning-Induced Plasticity (TWIP) Steel and Third-Generation AHSS), Vehicle Type, Tensile Strength, Product Form, Propulsion Type, Technology, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Automotive Advanced High-Strength Steel Market is accounted for \$29.9 billion in 2026 and is expected to reach \$63.7 billion by 2034 growing at a CAGR of 9.9% during the forecast period. The Automotive Advanced High-Strength Steel Market focuses on engineered steel grades that deliver superior strength, toughness, crash performance, and lightweighting benefits for modern vehicles. AHSS is widely incorporated into body-in-white structures, chassis systems, closures, impact-protection components, and electric-vehicle battery enclosures. Vehicle manufacturers increasingly utilize these materials to enhance occupant safety while lowering vehicle weight, improving fuel economy, and extending EV driving range. Major material categories include dual-phase, martensitic, TRIP, complex-phase, and press-hardened steels. Improvements in forming, joining, and manufacturing technologies are broadening their automotive applications. Rising vehicle production, stricter safety standards, lightweighting initiatives, and accelerating vehicle electrification are anticipated to drive market growth.

Market Dynamics:

Driver:

Increasing Vehicle Safety Requirements

Stricter automotive safety standards are creating stronger demand for Advanced High-Strength Steel. Regulatory bodies and vehicle safety organizations increasingly require manufacturers to achieve higher levels of crash protection and occupant safety. AHSS is well suited to these requirements because its high strength and energy-absorption capabilities improve the performance of critical structural components during collisions. Manufacturers can use advanced grades in pillars, reinforcement beams, cross members, roof structures, and crash-management systems to strengthen vehicle architecture without adding excessive weight. As safety performance becomes an increasingly important vehicle-design priority, automakers are expanding the use of AHSS. This growing focus on crashworthiness is therefore contributing significantly to market development.

Restraint:

High Production and Processing Costs

Automotive Advanced High-Strength Steel can carry elevated manufacturing expenses because its production often requires sophisticated alloying, controlled thermal treatment, advanced processing, and stringent quality management. Maintaining precise strength, ductility, and consistency can increase energy requirements and manufacturing complexity. Automotive processors may also need specialized stamping equipment, forming technologies, welding systems, and tooling to handle AHSS effectively. Such requirements can raise capital and operational expenditures for vehicle manufacturers and component producers. The financial burden may discourage smaller suppliers and cost-conscious automotive companies from rapidly adopting these materials. Consequently, elevated production, equipment, and processing expenses can remain an important constraint on the widespread utilization of AHSS in automotive manufacturing.

Opportunity:

Development of Sustainable and Low-Carbon Automotive Steel

Increasing sustainability requirements across the automotive industry are creating new opportunities for AHSS manufacturers to supply lower-emission steel solutions. Automakers are seeking materials that simultaneously support lightweight vehicle construction and reduce environmental impacts throughout production. Advanced high-

strength steel can contribute to material efficiency because stronger grades may allow thinner components, while steel's recyclability supports circularity initiatives. Producers can strengthen their market positions by incorporating greater recycled content, renewable energy, and lower-carbon production technologies into automotive steel manufacturing. As vehicle manufacturers introduce stricter sustainability expectations for suppliers, demand for environmentally improved automotive steel is likely to encourage new partnerships, material innovations, and commercial opportunities between steelmakers and automotive manufacturers.

Threat:

Supply Chain Disruptions and Geopolitical Risks

Geopolitical instability and interruptions across international supply networks can create significant risks for the Automotive Advanced High-Strength Steel industry. AHSS production relies on coordinated availability of raw materials, energy, logistics, equipment, and specialized processing capabilities. Tariffs, sanctions, trade barriers, conflicts, transportation disruptions, and changing trade policies can increase costs or restrict access to essential inputs. Automotive manufacturers may also encounter delays when specialized steel grades cannot be delivered on schedule or when approved suppliers experience operational disruptions. These uncertainties can encourage customers to diversify sourcing or consider alternative materials. Persistent supply-chain instability could consequently increase procurement complexity, cause pricing fluctuations, and hinder dependable AHSS supply.

Covid-19 Impact:

The COVID-19 outbreak caused a substantial short-term slowdown in the Automotive Advanced High-Strength Steel Market as lockdowns interrupted automotive manufacturing, steelmaking, transportation, and purchasing activity. Temporary shutdowns at vehicle plants reduced production volumes and consequently lowered requirements for automotive steel and AHSS. Steel manufacturers responded by cutting production and operating capacity because of weakened downstream demand. Supply-chain interruptions, labor shortages, transportation restrictions, and uncertain market conditions created additional challenges for steel suppliers and automotive component manufacturers. As restrictions eased, automotive production gradually resumed, improving steel consumption and helping the market recover. The subsequent rebound demonstrated the strong dependence of AHSS demand on automotive production levels.

The Dual-Phase (DP) Steel segment is expected to be the largest during the forecast period

The Dual-Phase (DP) Steel segment is expected to account for the largest market share

during the forecast period, owing to its balanced mechanical characteristics and broad suitability for automotive applications. DP steel combines high strength with good ductility and forming performance, enabling manufacturers to achieve lightweight yet durable vehicle structures. Its ability to absorb crash energy makes it valuable for structural reinforcements, rails, pillars, cross-members, bumpers, and related components. Furthermore, compatibility with established automotive stamping and joining infrastructure facilitates large-scale implementation. The grade's established manufacturing base, relatively economical processing, widespread availability, and adaptability across vehicle platforms continue to strengthen its position as a leading AHSS material.

The Press Hardening segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Press Hardening segment is predicted to witness the highest growth rate, driven by the automotive industry's increasing focus on reducing vehicle weight while improving structural safety and crash performance. The technology allows complex components to achieve exceptionally high strength through controlled forming and hardening, making it suitable for critical body structures. Applications include pillars, door reinforcements, roof structures, cross-members, and crash-protection components. Rising electric-vehicle adoption further encourages its use because lightweight structures can support efficiency and battery protection requirements. Moreover, ongoing development of advanced press-hardened steels, improved forming methods, digital simulation, and optimized production processes is expected to expand the technology's adoption across next-generation automotive manufacturing.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, driven by the region's extensive automotive production capabilities, increasing electric vehicle manufacturing, and strong steelmaking infrastructure. China, Japan, South Korea, and India represent important automotive manufacturing centers, generating significant requirements for AHSS in structural assemblies, safety components, chassis systems, and battery protection structures. Growing emphasis on vehicle lightweighting, crash protection, fuel efficiency, and emissions reduction is further supporting AHSS utilization. Moreover, continuous investments in automotive-grade steel production, advanced material technologies, and manufacturing facilities are strengthening the regional supply base and encouraging broader adoption of high-strength steel in passenger and commercial vehicles.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rising vehicle manufacturing, rapid electric vehicle adoption, and

expanding automotive steel production capabilities. Countries such as China, Japan, South Korea, and India are strengthening demand for AHSS through increasing vehicle output and investments in lightweight structural technologies. The growing integration of high-strength steel into battery enclosures, crash structures, body components, and other safety-critical applications is supporting market expansion. Furthermore, improvements in advanced steel grades, local production capacity, and automotive manufacturing technologies are enhancing regional adoption. Increasing emphasis on vehicle safety, weight reduction, efficiency, and electrification is expected to sustain strong AHSS market growth across Asia-Pacific.

Key players in the market

Some of the key players in Automotive Advanced High-Strength Steel Market include ArcelorMittal S.A., China Baowu Steel Group Corporation Limited, POSCO, Nippon Steel Corporation, JFE Steel Corporation, thyssenkrupp Steel, SSAB AB, Tata Steel Limited, Cleveland-Cliffs Inc., United States Steel Corporation, Kobe Steel, Ltd., Hyundai Steel Company, Nucor Corporation, JSW Steel Limited, voestalpine AG, HBIS Group Co., Ltd., Shougang Group and Ansteel Group Corporation Limited.

Key Developments:

In July 2026, Hyundai Steel held a Customers Day in connection with the WRC Greece Rally and met with major European customers to strengthen strategic relationships. The company discussed EU trade measures, including TRQ and CBAM, while promoting its automotive steel capabilities and lower-carbon steel solutions.

In June 2026, ArcelorMittal collaborated with Jaguar Land Rover (JLR) and Gestamp on JLR's Cornerstone circular vehicle project, supplying XCarb® recycled and renewably produced steel for structural components including the side-impact beam and tunnel topper.

In May 2026, FE Steel announced that its automotive sheet-steel spot-welding technology had been adopted for automotive components through cooperation with a domestic Japanese automaker.

Steel Grades Covered:

Dual-Phase (DP) Steel

Transformation-Induced Plasticity (TRIP) Steel

Complex-Phase (CP) Steel

Martensitic (MS) Steel

Ferritic-Bainitic (FB) Steel

Press-Hardened Steel (PHS)

Twinning-Induced Plasticity (TWIP) Steel

Third-Generation AHSS

Vehicle Types Covered:

Passenger Vehicles

Light Commercial Vehicles

Heavy Commercial Vehicles

Tensile Strengths Covered:

600–800 MPa

800–1,000 MPa

1,000–1,200 MPa

1,200–1,500 MPa

Above 1,500 MPa

Product Forms Covered:

Sheets

Coils

Plates

Bars

Propulsion Types Covered:

Internal Combustion Engine (ICE) Vehicles

Hybrid Electric Vehicles (HEVs)

Plug-in Hybrid Electric Vehicles (PHEVs)

Battery Electric Vehicles (BEVs)

Fuel Cell Electric Vehicles (FCEVs)

Technologies Covered:

Cold Forming

Press Hardening

Stamping

Roll Forming

Hydroforming

Tailored Blank Technology

Resistance Spot Welding

Laser Welding

Adhesive Bonding

Mechanical Joining

Computer-Aided Engineering (CAE) & Simulation

Applications Covered:

Body-in-White Structures

Closures

Chassis & Suspension

Crash Management Structures

Side-Impact Protection Structures

Seating Structures

Powertrain Components

Battery Enclosures & Protection Structures

End Users Covered:

Passenger Vehicle Manufacturers

Commercial Vehicle Manufacturers

Automotive Component Manufacturers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY STEEL GRADE

- 5.1 Dual-Phase (DP) Steel
- 5.2 Transformation-Induced Plasticity (TRIP) Steel
- 5.3 Complex-Phase (CP) Steel
- 5.4 Martensitic (MS) Steel
- 5.5 Ferritic-Bainitic (FB) Steel
- 5.6 Press-Hardened Steel (PHS)
- 5.7 Twinning-Induced Plasticity (TWIP) Steel
- 5.8 Third-Generation AHSS

6 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY VEHICLE TYPE

- 6.1 Passenger Vehicles
- 6.2 Light Commercial Vehicles
- 6.3 Heavy Commercial Vehicles

7 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY TENSILE STRENGTH

- 7.1 600–800 MPa
- 7.2 800–1,000 MPa
- 7.3 1,000–1,200 MPa
- 7.4 1,200–1,500 MPa
- 7.5 Above 1,500 MPa

8 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY PRODUCT FORM

- 8.1 Sheets
- 8.2 Coils
- 8.3 Plates
- 8.4 Bars

9 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY PROPULSION TYPE

- 9.1 Internal Combustion Engine (ICE) Vehicles
- 9.2 Hybrid Electric Vehicles (HEVs)
- 9.3 Plug-in Hybrid Electric Vehicles (PHEVs)
- 9.4 Battery Electric Vehicles (BEVs)
- 9.5 Fuel Cell Electric Vehicles (FCEVs)

10 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY TECHNOLOGY

- 10.1 Cold Forming
- 10.2 Press Hardening
- 10.3 Stamping
- 10.4 Roll Forming
- 10.5 Hydroforming
- 10.6 Tailored Blank Technology
- 10.7 Resistance Spot Welding
- 10.8 Laser Welding
- 10.9 Adhesive Bonding
- 10.10 Mechanical Joining
- 10.11 Computer-Aided Engineering (CAE) & Simulation

11 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY APPLICATION

- 11.1 Body-in-White Structures
- 11.2 Closures
- 11.3 Chassis & Suspension
- 11.4 Crash Management Structures
- 11.5 Side-Impact Protection Structures
- 11.6 Seating Structures
- 11.7 Powertrain Components
- 11.8 Battery Enclosures & Protection Structures

12 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY END USER

- 12.1 Passenger Vehicle Manufacturers
- 12.2 Commercial Vehicle Manufacturers
- 12.3 Automotive Component Manufacturers

13 GLOBAL AUTOMOTIVE ADVANCED HIGH-STRENGTH STEEL MARKET, BY GEOGRAPHY

- 13.1 North America
 - 13.1.1 United States
 - 13.1.2 Canada
 - 13.1.3 Mexico
- 13.2 Europe
 - 13.2.1 United Kingdom
 - 13.2.2 Germany
 - 13.2.3 France
 - 13.2.4 Italy
 - 13.2.5 Spain
 - 13.2.6 Netherlands
 - 13.2.7 Belgium
 - 13.2.8 Sweden
 - 13.2.9 Switzerland
 - 13.2.10 Poland
 - 13.2.11 Rest of Europe
- 13.3 Asia Pacific
 - 13.3.1 China
 - 13.3.2 Japan
 - 13.3.3 India
 - 13.3.4 South Korea
 - 13.3.5 Australia
 - 13.3.6 Indonesia
 - 13.3.7 Thailand
 - 13.3.8 Malaysia
 - 13.3.9 Singapore
 - 13.3.10 Vietnam
 - 13.3.11 Rest of Asia Pacific
- 13.4 South America
 - 13.4.1 Brazil
 - 13.4.2 Argentina

13.4.3 Colombia

13.4.4 Chile

13.4.5 Peru

13.4.6 Rest of South America

13.5 Rest of the World (RoW)

13.5.1 Middle East

13.5.1.1 Saudi Arabia

13.5.1.2 United Arab Emirates

13.5.1.3 Qatar

13.5.1.4 Israel

13.5.1.5 Rest of Middle East

13.5.2 Africa

13.5.2.1 South Africa

13.5.2.2 Egypt

13.5.2.3 Morocco

13.5.2.4 Rest of Africa

14 STRATEGIC MARKET INTELLIGENCE

14.1 Industry Value Network and Supply Chain Assessment

14.2 White-Space and Opportunity Mapping

14.3 Product Evolution and Market Life Cycle Analysis

14.4 Channel, Distributor, and Go-to-Market Assessment

15 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

15.1 Mergers and Acquisitions

15.2 Partnerships, Alliances, and Joint Ventures

15.3 New Product Launches and Certifications

15.4 Capacity Expansion and Investments

15.5 Other Strategic Initiatives

16 COMPANY PROFILES

16.1 ArcelorMittal S.A.

16.2 China Baowu Steel Group Corporation Limited

16.3 POSCO

16.4 Nippon Steel Corporation

16.5 JFE Steel Corporation

- 16.6 thyssenkrupp Steel
- 16.7 SSAB AB
- 16.8 Tata Steel Limited
- 16.9 Cleveland-Cliffs Inc.
- 16.10 United States Steel Corporation
- 16.11 Kobe Steel, Ltd.
- 16.12 Hyundai Steel Company
- 16.13 Nucor Corporation
- 16.14 JSW Steel Limited
- 16.15 voestalpine AG
- 16.16 HBIS Group Co., Ltd.
- 16.17 Shougang Group
- 16.18 Ansteel Group Corporation Limited

List Of Tables

LIST OF TABLES

Table 1 Global Automotive Advanced High-Strength Steel Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Automotive Advanced High-Strength Steel Market Outlook, By Steel Grade (2023-2034) (\$MN)

Table 3 Global Automotive Advanced High-Strength Steel Market Outlook, By Dual-Phase (DP) Steel (2023-2034) (\$MN)

Table 4 Global Automotive Advanced High-Strength Steel Market Outlook, By Transformation-Induced Plasticity (TRIP) Steel (2023-2034) (\$MN)

Table 5 Global Automotive Advanced High-Strength Steel Market Outlook, By Complex-Phase (CP) Steel (2023-2034) (\$MN)

Table 6 Global Automotive Advanced High-Strength Steel Market Outlook, By Martensitic (MS) Steel (2023-2034) (\$MN)

Table 7 Global Automotive Advanced High-Strength Steel Market Outlook, By Ferritic-Bainitic (FB) Steel (2023-2034) (\$MN)

Table 8 Global Automotive Advanced High-Strength Steel Market Outlook, By Press-Hardened Steel (PHS) (2023-2034) (\$MN)

Table 9 Global Automotive Advanced High-Strength Steel Market Outlook, By Twinning-Induced Plasticity (TWIP) Steel (2023-2034) (\$MN)

Table 10 Global Automotive Advanced High-Strength Steel Market Outlook, By Third-Generation AHSS (2023-2034) (\$MN)

Table 11 Global Automotive Advanced High-Strength Steel Market Outlook, By Vehicle Type (2023-2034) (\$MN)

Table 12 Global Automotive Advanced High-Strength Steel Market Outlook, By Passenger Vehicles (2023-2034) (\$MN)

Table 13 Global Automotive Advanced High-Strength Steel Market Outlook, By Light Commercial Vehicles (2023-2034) (\$MN)

Table 14 Global Automotive Advanced High-Strength Steel Market Outlook, By Heavy Commercial Vehicles (2023-2034) (\$MN)

Table 15 Global Automotive Advanced High-Strength Steel Market Outlook, By Tensile Strength (2023-2034) (\$MN)

Table 16 Global Automotive Advanced High-Strength Steel Market Outlook, By 600–800 MPa (2023-2034) (\$MN)

Table 17 Global Automotive Advanced High-Strength Steel Market Outlook, By 800–1,000 MPa (2023-2034) (\$MN)

Table 18 Global Automotive Advanced High-Strength Steel Market Outlook, By

1,000–1,200 MPa (2023-2034) (\$MN)

Table 19 Global Automotive Advanced High-Strength Steel Market Outlook, By

1,200–1,500 MPa (2023-2034) (\$MN)

Table 20 Global Automotive Advanced High-Strength Steel Market Outlook, By Above

1,500 MPa (2023-2034) (\$MN)

Table 21 Global Automotive Advanced High-Strength Steel Market Outlook, By Product

Form (2023-2034) (\$MN)

Table 22 Global Automotive Advanced High-Strength Steel Market Outlook, By Sheets

(2023-2034) (\$MN)

Table 23 Global Automotive Advanced High-Strength Steel Market Outlook, By Coils

(2023-2034) (\$MN)

Table 24 Global Automotive Advanced High-Strength Steel Market Outlook, By Plates

(2023-2034) (\$MN)

Table 25 Global Automotive Advanced High-Strength Steel Market Outlook, By Bars

(2023-2034) (\$MN)

Table 26 Global Automotive Advanced High-Strength Steel Market Outlook, By

Propulsion Type (2023-2034) (\$MN)

Table 27 Global Automotive Advanced High-Strength Steel Market Outlook, By Internal

Combustion Engine (ICE) Vehicles (2023-2034) (\$MN)

Table 28 Global Automotive Advanced High-Strength Steel Market Outlook, By Hybrid

Electric Vehicles (HEVs) (2023-2034) (\$MN)

Table 29 Global Automotive Advanced High-Strength Steel Market Outlook, By Plug-in

Hybrid Electric Vehicles (PHEVs) (2023-2034) (\$MN)

Table 30 Global Automotive Advanced High-Strength Steel Market Outlook, By Battery

Electric Vehicles (BEVs) (2023-2034) (\$MN)

Table 31 Global Automotive Advanced High-Strength Steel Market Outlook, By Fuel

Cell Electric Vehicles (FCEVs) (2023-2034) (\$MN)

Table 32 Global Automotive Advanced High-Strength Steel Market Outlook, By

Technology (2023-2034) (\$MN)

Table 33 Global Automotive Advanced High-Strength Steel Market Outlook, By Cold

Forming (2023-2034) (\$MN)

Table 34 Global Automotive Advanced High-Strength Steel Market Outlook, By Press

Hardening (2023-2034) (\$MN)

Table 35 Global Automotive Advanced High-Strength Steel Market Outlook, By

Stamping (2023-2034) (\$MN)

Table 36 Global Automotive Advanced High-Strength Steel Market Outlook, By Roll

Forming (2023-2034) (\$MN)

Table 37 Global Automotive Advanced High-Strength Steel Market Outlook, By

Hydroforming (2023-2034) (\$MN)

Table 38 Global Automotive Advanced High-Strength Steel Market Outlook, By Tailored Blank Technology (2023-2034) (\$MN)

Table 39 Global Automotive Advanced High-Strength Steel Market Outlook, By Resistance Spot Welding (2023-2034) (\$MN)

Table 40 Global Automotive Advanced High-Strength Steel Market Outlook, By Laser Welding (2023-2034) (\$MN)

Table 41 Global Automotive Advanced High-Strength Steel Market Outlook, By Adhesive Bonding (2023-2034) (\$MN)

Table 42 Global Automotive Advanced High-Strength Steel Market Outlook, By Mechanical Joining (2023-2034) (\$MN)

Table 43 Global Automotive Advanced High-Strength Steel Market Outlook, By Computer-Aided Engineering (CAE) & Simulation (2023-2034) (\$MN)

Table 44 Global Automotive Advanced High-Strength Steel Market Outlook, By Application (2023-2034) (\$MN)

Table 45 Global Automotive Advanced High-Strength Steel Market Outlook, By Body-in-White Structures (2023-2034) (\$MN)

Table 46 Global Automotive Advanced High-Strength Steel Market Outlook, By Closures (2023-2034) (\$MN)

Table 47 Global Automotive Advanced High-Strength Steel Market Outlook, By Chassis & Suspension (2023-2034) (\$MN)

Table 48 Global Automotive Advanced High-Strength Steel Market Outlook, By Crash Management Structures (2023-2034) (\$MN)

Table 49 Global Automotive Advanced High-Strength Steel Market Outlook, By Side-Impact Protection Structures (2023-2034) (\$MN)

Table 50 Global Automotive Advanced High-Strength Steel Market Outlook, By Seating Structures (2023-2034) (\$MN)

Table 51 Global Automotive Advanced High-Strength Steel Market Outlook, By Powertrain Components (2023-2034) (\$MN)

Table 52 Global Automotive Advanced High-Strength Steel Market Outlook, By Battery Enclosures & Protection Structures (2023-2034) (\$MN)

Table 53 Global Automotive Advanced High-Strength Steel Market Outlook, By End User (2023-2034) (\$MN)

Table 54 Global Automotive Advanced High-Strength Steel Market Outlook, By Passenger Vehicle Manufacturers (2023-2034) (\$MN)

Table 55 Global Automotive Advanced High-Strength Steel Market Outlook, By Commercial Vehicle Manufacturers (2023-2034) (\$MN)

Table 56 Global Automotive Advanced High-Strength Steel Market Outlook, By Automotive Component Manufacturers (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World

(RoW) Regions are also represented in the same manner as above.

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