

Automotive Heat Shield Market Forecasts to 2032 – Global Analysis By Product Type (Rigid Heat Shields, Single Shell Heat Shields, Flexible Heat Shields, Double Shell Heat Shields, and Other Product Types), Material, Vehicle Type, Function, Sales Channel, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Automotive Heat Shield Market is accounted for \$14.08 billion in 2025 and is expected to reach \$22.47 billion by 2032 growing at a CAGR of 6.9% during the forecast period. An automotive heat shield is a thermal protection device used in vehicles to control and limit heat exposure from high-temperature sources including exhaust systems, engines, and turbochargers. Manufactured from heat-resistant materials such as metal alloys, ceramics, or advanced composites, it works by reflecting or dispersing thermal energy. This protection helps safeguard surrounding components, electrical systems, and vehicle structures from overheating. Automotive heat shields play a crucial role in improving safety, maintaining optimal operating conditions, extending component lifespan, and ensuring reliable vehicle performance and comfort.

Market Dynamics:

Driver:

Rising adoption of turbochargers

Turbocharged engines operate at significantly higher temperatures, increasing the need for effective thermal management solutions. Heat shields play a critical role in protecting

nearby components such as wiring, hoses, and body panels from excessive heat. Stricter emission regulations are encouraging automakers to adopt downsized, turbocharged engines, indirectly boosting heat shield demand. The trend toward higher engine efficiency and performance further elevates thermal loads within engine compartments. As vehicle production rises in emerging economies, the installation of turbochargers is becoming more widespread. Consequently, the requirement for durable and high-performance automotive heat shields continues to expand.

Restraint:

Durability issues with non-metallic materials

The increasing use of non-metallic and composite materials in automotive heat shields presents durability-related challenges. While these materials offer weight reduction benefits, they can be vulnerable to long-term exposure to extreme heat and vibration. Degradation over time may reduce shielding effectiveness and compromise component safety. Automakers often remain cautious about adopting non-metallic heat shields in high-temperature zones. Variability in material performance across different driving conditions further complicates large-scale adoption. Replacement and warranty concerns also add to the overall cost burden for manufacturers.

Opportunity:

Lightweighting through advanced composites

Automakers are increasingly focused on reducing vehicle weight to improve fuel efficiency and lower emissions. Advanced composites provide effective thermal insulation while contributing to overall mass reduction. Continuous innovation in material science is improving the heat resistance and durability of lightweight solutions. These materials support the design of compact engine compartments with higher thermal loads. Electric and hybrid vehicles also benefit from lightweight heat shields to protect battery and power electronics. As a result, advanced composite heat shields are emerging as a key growth avenue for the market.

Threat:

Intense price competition

The presence of numerous regional and global manufacturers limits pricing flexibility.

OEMs frequently prioritize cost optimization, pushing suppliers to reduce margins. Standardization of heat shield designs further intensifies competitive rivalry. Smaller players struggle to balance innovation investments with aggressive pricing demands. Fluctuations in raw material costs add to financial pressures across the supply chain. These factors collectively pose a threat to profitability and long-term sustainability for market participants.

Covid-19 Impact:

The COVID-19 pandemic disrupted the automotive heat shield market by causing temporary shutdowns of vehicle manufacturing plants. Supply chain interruptions led to shortages of raw materials and delayed component deliveries. Reduced vehicle production directly impacted demand for heat shields during the peak pandemic period. However, gradual recovery in automotive manufacturing supported market stabilization. The crisis prompted manufacturers to reassess supply chain resilience and sourcing strategies. Automation and localization initiatives gained traction to reduce dependency on global suppliers. In the post-pandemic phase, renewed vehicle demand is supporting steady recovery of the heat shield market.

The rigid heat shields segment is expected to be the largest during the forecast period

The rigid heat shields segment is expected to account for the largest market share during the forecast period. Rigid heat shields offer superior thermal resistance and structural stability under high-temperature conditions. They are widely used in exhaust systems, turbochargers, and engine compartments. Metal-based rigid shields provide long service life and reliable protection for critical components. Their compatibility with conventional manufacturing processes supports large-scale adoption by OEMs. Increasing vehicle production volumes further strengthen demand for rigid heat shields.

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

Over the forecast period, the aftermarket segment is predicted to witness the highest growth rate. Aging vehicle fleets are increasing the need for replacement of worn or damaged heat shields. Consumers are becoming more aware of engine protection and thermal safety requirements. Growth in vehicle usage and longer ownership cycles support aftermarket demand. Independent service centers are expanding their offerings of heat management components. Availability of cost-effective replacement heat shields further boosts sales through aftermarket channels.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to rapid growth in vehicle production across China, India, and Southeast Asia is a key contributing factor. Expanding middle-class populations are driving demand for passenger vehicles. The presence of major automotive OEMs and component manufacturers strengthens regional supply chains. Government policies supporting domestic manufacturing further enhance market growth. Increasing adoption of turbocharged engines in the region boosts heat shield requirements.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to rising demand for high-performance and fuel-efficient vehicles. Strong adoption of turbocharged and hybrid powertrains increases thermal management needs. Continuous technological advancements support the development of advanced heat shield materials. Stringent emission norms are encouraging the use of efficient engine designs with higher heat output. A well-established aftermarket ecosystem further supports market expansion.

Key players in the market

Some of the key players in Automotive Heat Shield Market include Dana Incorporated, UGN, Inc., Autoneum Holding AG, Talbros Automotive Components Ltd., ElringKlinger AG, Progress-Werk Oberkirch AG, Tenneco Inc., DuPont de Nemours, Inc., Alkegen, Eberspacher Group, FORVIA, Carcoustics International GmbH, Morgan Advanced Materials, Nichias Corporation, and Sumitomo Riko Company Limited.

Key Developments:

In December 2025, DRiV, a global leader in the automotive aftermarket, announced the addition of 118 CARB-compliant Walker® CalCat® catalytic converters, extending coverage to more than 9 million vehicles in operation. The expansion adds coverage across a range of vehicle applications commonly found in CARB-regulated markets.

In June 2025, Dana Incorporated announced that it has reached a definitive agreement to sell its Off-Highway business to Allison Transmission Holdings, Inc. for \$2.7 billion. This represents 7x the expected 2025 adjusted EBITDA of the Off-Highway business.

The transaction, which is subject to customary regulatory approvals and closing conditions, is projected to close late in the fourth quarter of 2025.

Product Types Covered:

Rigid Heat Shields

Single Shell Heat Shields

Flexible Heat Shields

Double Shell Heat Shields

Other Product Types

Materials Covered:

Metallic

Non-Metallic

Probes and Analyzers

Vehicle Types Covered:

Passenger Cars

Light Commercial Vehicles (LCV)

Heavy Commercial Vehicles (HCV)

Electric & Hybrid Vehicles

Functions Covered:

Acoustic

Non-Acoustic

Sales Channels Covered:

Original Equipment Manufacturer (OEM)

Aftermarket

Applications Covered:

Exhaust System

Engine Compartment

Turbocharger

Under Bonnet / Firewall

Under Chassis

Battery & Power Electronics

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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

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