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Automotive Plastic Materials Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Vehicle Type (ICE, BEV, PHEV and HEV), By Type (PP, PE, ABS, PU, PVC, PA, PC, PVB & Other Engineering Plastics), By Application (Interior, Exterior, Under the Hood and Lighting & Electric Wiring), By Region & Competition, 2021-2031F

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Abstracts

The Global Automotive Plastic Materials Market is projected to expand from USD 46.57 Billion in 2025 to USD 67.65 Billion by 2031, achieving a Compound Annual Growth Rate (CAGR) of 6.42%. This market includes a wide array of high-performance polymers, such as polypropylene, polyurethanes, and polycarbonates, which are engineered to substitute traditional metal parts in vehicle production. These materials are essential to the industry's lightweighting initiatives, which aim to improve fuel economy and safety standards while lowering overall vehicle mass. The sector is chiefly supported by strict government environmental regulations requiring reduced fleet emissions, as well as the increasing production of electric vehicles that demand lighter chassis components to optimize battery range and performance.

According to data from the European Automobile Manufacturers? Association, global car manufacturing reached 75.5 million units in 2024, highlighting the substantial industrial volume fueling the demand for polymer-based applications. However, the market faces a significant obstacle in the form of persistent crude oil price volatility. Since crude oil influences the cost of raw resin production, its fluctuating value creates financial instability for material suppliers and automotive original equipment manufacturers, potentially impeding market growth.

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Market Driver

The rapid global transition toward electric and hybrid vehicle manufacturing serves as a major market catalyst, fundamentally changing material needs within the automotive sector. To compensate for the significant weight of battery packs, manufacturers are increasingly adopting advanced thermoplastics and composites, which help extend driving range and enhance overall energy efficiency. This shift demands high-performance materials for components like battery housings, connectors, and thermal management systems, which must provide electrical insulation and heat resistance. The International Energy Agency's 'Global EV Outlook 2024', published in April 2024, projected that global electric car sales would hit approximately 17 million units in 2024, a strong trajectory that directly increases the consumption of specialized automotive polymers.

Concurrently, strict emission regulations and fuel efficiency standards are forcing original equipment manufacturers to pursue aggressive lightweighting strategies through metal replacement. Regulatory bodies worldwide are imposing rigorous limits on tailpipe emissions, making the substitution of heavy steel and aluminum parts with engineering plastics a technical necessity to avoid non-compliance penalties. For instance, the U.S. Environmental Protection Agency's March 2024 rule targets a near 50 percent reduction in fleet average greenhouse gas emissions by 2032 compared to 2026 standards. This regulatory pressure is driving material adoption in major hubs; as reported by the China Association of Automobile Manufacturers, new energy vehicle production reached 8.3 million units between January and September 2024, demonstrating the massive scale at which lightweight polymer solutions are currently required.

Market Challenge

The persistent volatility in crude oil prices acts as a critical barrier to the growth of the Global Automotive Plastic Materials Market. Since crude oil is the primary feedstock for producing essential polymers like polypropylene and polycarbonates, erratic shifts in global oil valuation result in unpredictable raw material costs. This instability disrupts the supply chain by making it difficult for resin manufacturers to establish stable long-term pricing, which in turn complicates budget forecasting for automotive Original Equipment Manufacturers (OEMs). When polymer prices spike unexpectedly, the economic advantage of substituting traditional metal parts with plastics diminishes, causing manufacturers to hesitate in adopting aggressive lightweighting strategies.

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As reported by the Organization of the Petroleum Exporting Countries, the Reference Basket crude oil price averaged $73.07 per barrel in December 2024 following a period of market fluctuation. Such instability in feedstock prices directly squeezes profit margins across the industry, limiting the capital available for material innovation. Consequently, this financial unpredictability risks delaying the mass production of lightweight chassis components that are required for the next generation of electric vehicles.

Market Trends

The industry is increasingly shifting focus from simple lightweighting to comprehensive material circularity through the adoption of bio-based and post-consumer recycled (PCR) polymer composites. Manufacturers are integrating renewable feedstocks and mechanically recycled plastics into vehicle interiors and structural components to significantly lower the lifecycle carbon footprint of their fleets. This transition is actively supported by chemical suppliers who are expanding production capacities to meet the rigorous sustainability goals of automotive original equipment manufacturers. In its '2024 Sustainability Report' released in April 2025, LyondellBasell noted a 65 percent increase in its volumes of recycled and renewable-based polymers, reaching over 200,000 metric tons in 2024, highlighting the growing industrial uptake of these sustainable solutions.

Simultaneously, the growth of additive manufacturing for production-grade plastic parts is transforming the supply chain by facilitating the direct fabrication of complex, end-use components without the need for expensive tooling. This technology enables the creation of lightweight, topologically optimized structures and allows for on-demand spare part production, thereby reducing inventory and logistics costs. The sector is moving beyond rapid prototyping toward the mass production of items such as clips, brackets, and customized interior trims. According to Stratasys' 'Fourth Quarter and Full Year 2024 Financial Results' from March 2025, manufacturing applications accounted for 36 percent of the company's total revenue in 2024, up from 34 percent the previous year, signaling a strategic pivot toward serial production.

Key Market Players

BASF SE

Dow Inc.

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Saudi Basic Industries Corporation

Covestro AG

LyondellBasell Industries N.V.

LG Chem Ltd.

Evonik Industries AG

Borealis AG

Celanese Corporation

DuPont de Nemours, Inc.

Report Scope

In this report, the Global Automotive Plastic Materials Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Plastic Materials Market, By Vehicle Type

ICE

BEV

PHEV and HEV

Automotive Plastic Materials Market, By Type

PP

PE

ABS

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PU

PVC

PA

PC

PVB & Other Engineering Plastics

Automotive Plastic Materials Market, By Application

Interior

Exterior

Under the Hood and Lighting & Electric Wiring

Automotive Plastic Materials Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

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- Asia Pacific
  - China
  - India
  - Japan
  - Australia
  - South Korea
- South America
  - Brazil
  - Argentina
  - Colombia
- Middle East & Africa
  - South Africa
  - Saudi Arabia
  - UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Plastic Materials Market.

Available Customizations:

Global Automotive Plastic Materials Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following

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customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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