

# **Automotive Aftermarket Glass Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Tempered Glass, Laminated Glass), By Vehicle Type (Passenger Vehicles, Light Commercial Vehicles, Heavy Commercial vehicles), By Application Type (Windscreen, Backlite, Sunroof, Sidelight), By Region and Competition 2018-2028**

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## **Abstracts**

Global Automotive aftermarket glass market was valued at USD 4.4 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.60% through 2028. Automotive glass shields the occupants from outside hazards while also safeguarding the vehicle's structure. It is designed with cutting-edge, newly developed features like improved visibility, noise reduction, and resistance to temperature changes from the outside. The goal of vehicle aerodynamics research is to increase operating speed, and this has produced a number of cutting-edge designs. It contributes to increasing the demand for the product. The overall value and operational optimization of automobile glass features have improved due to ongoing innovations. The automotive industry's technological advancements contribute to achieving optimal fuel efficiency and passenger safety. This has forced the manufacturers to engage in extensive research and development, which is expected to support the growth of the automotive aftermarket glass market.

### **Market Drivers**

Rising Vehicle Ownership and Aging Fleets

One of the primary drivers fueling the growth of the Global Automotive Aftermarket Glass Market is the global rise in vehicle ownership. As economies grow and middle-class populations expand, there is a corresponding increase in the demand for personal transportation. This surge in vehicle ownership leads to a larger installed base of vehicles on the roads, subsequently driving the demand for replacement glass components. As vehicles age, wear and tear on glass components become inevitable. Windshields, side windows, and rear windows are susceptible to damage from road debris, weather conditions, and accidents. The aging global vehicle fleet, combined with the natural wear of glass components, creates a steady and sustained demand for aftermarket glass products. Moreover, as consumers seek to extend the lifespan of their vehicles, the aftermarket becomes a crucial source for affordable and high-quality replacement glass. This trend is particularly evident in regions with a high concentration of older vehicles, presenting lucrative opportunities for aftermarket glass manufacturers and suppliers.

### Technological Advancements in Automotive Glass

The evolution of automotive glass technology is a significant driver shaping the Global Automotive Aftermarket Glass Market. Technological advancements are not limited to the enhancement of glass durability but also extend to the integration of innovative features. Smart glass solutions, heads-up displays (HUDs), and advanced driver assistance systems (ADAS) sensors are becoming commonplace in modern vehicles. The integration of smart glass technologies, which can change transparency or display information, is driving the demand for technologically advanced replacement glass in the aftermarket. Consumers are increasingly seeking glass solutions that offer not only structural integrity but also additional functionalities that contribute to a more sophisticated driving experience. ADAS, including sensors embedded in windshields and other glass components, requires specialized replacement solutions that are compatible with these advanced technologies. This presents an opportunity for aftermarket glass manufacturers to develop and supply components that cater to the growing market for technologically enhanced vehicles. As the automotive industry continues its trajectory toward increased connectivity and autonomy, the aftermarket glass sector must align with these technological trends to meet the evolving needs of vehicle owners.

### Safety Concerns and Regulatory Compliance

Safety is paramount in the automotive industry, and concerns regarding the structural

integrity of glass components have intensified in recent years. Regulatory bodies worldwide impose stringent safety standards to ensure that automotive glass meets specific criteria for impact resistance, visibility, and overall safety. Meeting these standards is a critical driver for aftermarket glass manufacturers and suppliers. The automotive aftermarket glass sector plays a vital role in addressing safety concerns by providing replacement components that adhere to or exceed regulatory requirements. For example, laminated glass, which consists of layers of glass with a layer of polyvinyl butyral (PVB) in between, enhances safety by preventing shards from scattering upon impact. Consumer awareness and emphasis on safety features in vehicles are driving the demand for high-quality replacement glass that contributes to overall vehicle safety. As vehicles equipped with advanced safety features become more commonplace, the aftermarket must respond by offering products that maintain or enhance safety standards. The commitment to safety also extends to compliance with environmental regulations, with a focus on producing glass components using eco-friendly materials and manufacturing processes. This dual emphasis on safety and sustainability aligns with broader societal expectations and regulatory initiatives.

### Increasing Incidence of Accidents and Collisions

The escalating incidence of road accidents and collisions globally is a significant driver for the Global Automotive Aftermarket Glass Market. Accidents, whether minor fender-benders or more severe collisions, often result in damage to vehicle glass components. Windshields, in particular, are susceptible to cracks and chips caused by debris or impacts. The aftermath of accidents creates a substantial demand for replacement glass in the aftermarket. Vehicle owners seek quick and effective solutions to restore the structural integrity and aesthetics of their vehicles. This demand is further amplified by insurance companies, which often recommend or require the use of aftermarket glass solutions for cost-effectiveness. The prevalence of road accidents is influenced by various factors, including increased traffic congestion, distracted driving, and varying road conditions. As urbanization continues and traffic volumes rise, the frequency of accidents is likely to increase, contributing to sustained demand for replacement glass in the aftermarket. The aftermarket glass sector can leverage this driver by offering a diverse range of replacement solutions that cater to different vehicle models and types of damage. Additionally, providing efficient and accessible services for glass replacement after accidents can enhance the market's responsiveness to the needs of vehicle owners.

### Increasing Awareness of Vehicle Aesthetics and Customization

Aesthetic considerations and the desire for vehicle customization are emerging as influential drivers in the Global Automotive Aftermarket Glass Market. Modern consumers view their vehicles not only as modes of transportation but also as expressions of personal style. This shift in consumer attitudes has led to a growing demand for glass components that contribute to the aesthetics and customization of vehicles. Sunroofs, panoramic roofs, and tinted glass are examples of glass components that enhance the visual appeal of vehicles. Consumers seek aftermarket solutions that go beyond mere functionality, providing options to personalize and differentiate their vehicles from others on the road. The aftermarket can capitalize on this trend by offering a diverse range of glass components that cater to different aesthetic preferences. Tinted glass, for instance, not only adds a touch of style but also provides privacy and heat reduction, making it a sought-after customization option. Furthermore, the customization trend extends to branding and logo customization on glass surfaces. Vehicle owners, particularly enthusiasts and those passionate about their vehicles, are inclined to opt for aftermarket glass components that allow for personalization, contributing to the overall aesthetics of their vehicles.

## Key Market Challenges

### Technological Advancements and Compatibility Issues

One of the primary challenges facing the Global Automotive Aftermarket Glass Market is the rapid pace of technological advancements in modern vehicles. Automotive manufacturers are integrating an increasing array of advanced technologies into their designs, including Advanced Driver Assistance Systems (ADAS), heads-up displays, and smart glass. While these technologies enhance safety and driving experience, they also present compatibility challenges for aftermarket glass replacement. As vehicles become more sophisticated, the replacement of damaged or aging glass components involves considerations beyond the structural and aesthetic aspects. Ensuring that aftermarket glass solutions are compatible with the embedded sensors, cameras, and technologies poses a significant challenge. ADAS features, for example, often rely on precise placement and calibration of sensors, requiring specialized knowledge and equipment for accurate installation. The industry must address these technological challenges by investing in research and development to develop aftermarket glass solutions that seamlessly integrate with advanced vehicle technologies. Collaboration between glass manufacturers, technology providers, and automotive aftermarket stakeholders is crucial to navigating this challenge and delivering solutions that meet the evolving needs of vehicle owners.

## Stringent Regulatory Compliance and Safety Standards

The Global Automotive Aftermarket Glass Market operates within a complex regulatory landscape, characterized by stringent safety standards and compliance requirements. Governments and regulatory bodies worldwide impose strict guidelines to ensure the safety and performance of automotive glass components. Meeting these standards is a critical challenge for manufacturers and suppliers in the aftermarket, particularly as vehicles become subject to increasingly rigorous safety and emission regulations. Adherence to safety standards involves rigorous testing and certification processes for aftermarket glass products. This not only adds to the production costs but also requires significant investment in research and development to develop glass solutions that meet or exceed regulatory requirements. Additionally, regional variations in safety standards pose challenges for manufacturers aiming to create globally compatible products. The challenge of navigating regulatory compliance underscores the need for continuous monitoring of evolving standards, proactive engagement with regulatory bodies, and investment in testing and certification processes. Industry stakeholders must establish robust quality control measures to ensure that aftermarket glass components meet the highest safety standards, instilling confidence in consumers and regulatory authorities.

## Increasing Complexity of Vehicle Designs

The automotive industry is witnessing a trend towards increasingly complex vehicle designs, characterized by sleek aesthetics, panoramic roofs, and integrated technologies. While these design innovations contribute to the overall appeal of vehicles, they also pose challenges for aftermarket glass replacement. Complex shapes, integrated sensors, and advanced materials create unique requirements for replacement glass components. Panoramic sunroofs, for example, have become a popular feature in modern vehicles, but their intricate designs make replacement a more complex and specialized task. Moreover, integrated heating elements, acoustic laminations, and other advanced features in modern glass components add to the complexity of aftermarket replacements. To address this challenge, stakeholders in the Global Automotive Aftermarket Glass Market must invest in research and development to engineer replacement solutions that match the complexity of modern vehicle designs. Collaboration between automakers and aftermarket glass manufacturers is essential to gain insights into evolving vehicle designs and develop compatible replacement components that maintain safety and performance standards.

## Brand Recognition and Consumer Trust



Building brand recognition and consumer trust is an ongoing challenge for participants in the Global Automotive Aftermarket Glass Market. Consumers often associate brand reputation with product quality and reliability. Establishing and maintaining a positive brand image is crucial for manufacturers and suppliers in the aftermarket, where competition is fierce, and consumer choices are influenced by factors beyond cost. Original Equipment Manufacturer (OEM) glass components often carry a perception of higher quality, and consumers may be hesitant to opt for aftermarket alternatives due to concerns about fit, finish, and performance. Overcoming this challenge requires aftermarket stakeholders to proactively communicate the quality, safety, and reliability of their products, establishing trust among consumers and repair professionals. Marketing strategies that highlight the technical specifications, testing procedures, and adherence to safety standards can contribute to building brand credibility. Additionally, offering warranties and guarantees on aftermarket glass products instills confidence in consumers, assuring them that these components are designed to meet or exceed industry standards.

### Global Economic Uncertainty and Supply Chain Disruptions

The Global Automotive Aftermarket Glass Market is not immune to the broader economic landscape and supply chain challenges. Economic uncertainties, geopolitical tensions, and global events, such as the COVID-19 pandemic, can disrupt the supply chain, leading to shortages, increased costs, and logistical complexities for aftermarket stakeholders. Fluctuations in raw material prices, currency exchange rates, and trade policies can impact the cost of production and, subsequently, the pricing of aftermarket glass components. Additionally, disruptions in the supply chain can lead to delays in product availability, affecting the ability of manufacturers and suppliers to meet market demands in a timely manner. Navigating economic uncertainties and supply chain disruptions requires a proactive approach to risk management and strategic planning. Diversification of suppliers, investment in inventory management systems, and agility in responding to changing market conditions are essential for mitigating the impact of external factors on the Global Automotive Aftermarket Glass Market.

### Key Market Trends

#### Rise of Advanced Driver Assistance Systems (ADAS) and Smart Glass

One of the most notable trends in the Global Automotive Aftermarket Glass Market is the increasing integration of Advanced Driver Assistance Systems (ADAS) and smart glass technologies. As vehicles become more connected and autonomous features

become standard, there is a growing demand for advanced glass solutions that can accommodate these technological advancements. Smart glass, including technologies like Heads-Up Displays (HUDs), augmented reality windshields, and electrochromic glass, is gaining traction in the aftermarket. These technologies enhance the driving experience by providing real-time information, improving visibility, and increasing overall safety. For example, augmented reality windshields can display navigation information and alerts directly in the driver's line of sight, reducing the need to look away from the road. The aftermarket is responding to this trend by offering replacement glass solutions that are compatible with ADAS sensors and can integrate seamlessly with smart glass technologies. This shift reflects the industry's commitment to keeping pace with the evolving automotive landscape and providing consumers with cutting-edge solutions that enhance both safety and driving experience.

### Growing Emphasis on Sustainability and Lightweighting

Sustainability has become a driving force in the automotive industry, and the aftermarket glass segment is no exception. Manufacturers and consumers alike are placing a growing emphasis on eco-friendly materials, recycling processes, and lightweighting initiatives. The quest for sustainability is reshaping the materials used in automotive glass, with a focus on reducing the environmental impact of production and disposal. Lightweighting, in particular, is a key trend influencing the choice of materials for automotive glass. Lightweight glass solutions contribute to improved fuel efficiency and reduced emissions, aligning with global efforts to address climate change and enhance environmental sustainability. Advanced materials, such as polycarbonate and other lightweight composites, are gaining popularity as replacements for traditional glass, especially in applications like sunroofs and side windows. As a response to this trend, the automotive aftermarket glass market is witnessing a shift towards offering sustainable and lightweight alternatives. Recycled glass, laminated glass structures that reduce weight, and energy-efficient manufacturing processes are becoming integral components of aftermarket glass solutions, meeting the demands of environmentally conscious consumers and regulatory pressures for cleaner, greener automotive products.

### Digitalization and E-commerce in Aftermarket Glass Sales

The advent of digitalization has significantly impacted the distribution and sales channels within the Global Automotive Aftermarket Glass Market. E-commerce platforms and digital marketplaces are gaining prominence as preferred channels for consumers seeking replacement glass solutions. The convenience of online purchasing,

extensive product information, and the ability to compare prices and reviews contribute to the growing popularity of digital platforms. Digitalization also facilitates efficient inventory management and order fulfillment processes for suppliers and retailers in the aftermarket glass sector. Online platforms provide a streamlined experience for consumers to search for specific glass components, compare options, and make informed decisions. Additionally, the integration of virtual tools, such as augmented reality applications, allows consumers to visualize how specific glass products will appear on their vehicles before making a purchase. The trend towards digitalization and e-commerce in the aftermarket glass market underscores the industry's adaptation to changing consumer behaviors and preferences. Manufacturers and distributors are investing in online platforms, ensuring a user-friendly experience and leveraging digital marketing strategies to reach a broader audience.

### Increasing Focus on ADAS Calibration Services

With the widespread adoption of Advanced Driver Assistance Systems (ADAS) in modern vehicles, there is a growing need for specialized calibration services in the aftermarket. ADAS features, such as lane departure warning systems, adaptive cruise control, and automatic emergency braking, rely on sensors and cameras that are often integrated into or mounted near the vehicle's glass components. When windshield replacement or repair occurs, it is crucial to recalibrate these ADAS sensors to ensure their accuracy and functionality. As a result, the automotive aftermarket glass market is experiencing a surge in demand for ADAS calibration services. These services require specialized equipment, trained technicians, and adherence to stringent calibration procedures to guarantee the proper functioning of ADAS features. The trend towards ADAS calibration services represents a shift in the aftermarket landscape, with an increasing focus on providing comprehensive solutions that go beyond glass replacement. Service providers are investing in training programs and equipment to meet the demand for ADAS calibration, aligning with the industry's commitment to safety and ensuring that vehicles with advanced technologies maintain their functionality after glass-related interventions.

### Segmental Insights

#### Type Analysis

Due in large part to its unique qualities and lower price than laminated glass, the tempered glass category generated the highest revenue share. Due to its high strength and durability during the manufacturing process, tempered glass is becoming more



frequently used in automobiles, mostly for side and backlight applications. The segment with the fastest predicted compound annual growth rate (CAGR) for the projection period is laminated glass. Laminated glass for windshield replacement is expected to be in high demand in the replacement market due to rising consumer awareness of safety concerns. Glass is used in windshields more often because of its structure, which prevents it from shattering or coming apart. Automobile aftermarket glass demand is growing, which is motivating producers to increase their output and make investments in new technology.

## Regional Insights

Due in large part to shifting consumer habits and increased disposable income, Asia Pacific led the market and generated the most revenue. Furthermore, the Asia Pacific region has lower glass manufacturing costs due to factors like high domestic demand, inexpensive labor, raw material availability, and an abundance of available land. Because China and India have highly efficient aftermarket glass production facilities, the Asia Pacific region is experiencing the fastest rate of growth. The largest supplier of aftermarket parts is China tempered glass and laminated glass are among the most widely available replacement parts in the glass market because of the highest factory facilities.

## Key Market Players

AGC Inc.

Fuyao Glass Industry Group Co., Ltd.

Nippon Sheet Glass Co., Ltd.

Saint-Gobain

Xinyi Glass Holdings Limited

Vitro

Central Glass Co., Ltd.

Corning Incorporated

Guardian Industries

TAIWAN GLASS IND. CORP

### Report Scope:

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

Automotive aftermarket glass Market, By Type:

Tempered Glass

Laminated Glass

Automotive aftermarket glass Market, By Vehicle Type:

Passenger Vehicles

Light Commercial Vehicles

Heavy Commercial vehicles

Automotive aftermarket glass Market, By Application Type:

Windscreen

Backlite

Sunroof

Sidelight

Automotive aftermarket glass Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive aftermarket glass Market.

## Available Customizations:

Global Automotive aftermarket glass market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

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

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