

# **Automotive Composites Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Application Type (Structural Assembly, Powertrain Component, Interior, Exterior), By Material Type (Thermoset Polymer, Thermoplastic Polymer, Carbon Fiber, and Glass Fiber), By Regional, Competition**

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## **Abstracts**

Global Automotive Composites Market has valued at USD 25 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.3%. The Global Automotive Composites Market is a dynamic and rapidly evolving sector within the automotive industry, driven by a host of factors that are reshaping vehicle design and manufacturing processes. Composites, which are materials made from a combination of two or more distinct constituents, typically a polymer matrix reinforced with fibers such as carbon, glass, or aramid, have gained increasing importance in the automotive sector due to their unique properties and advantages. One of the primary drivers of the automotive composites market is the pressing need for weight reduction in vehicles. As global emissions regulations become more stringent and environmental concerns grow, automakers are compelled to seek innovative solutions to enhance fuel efficiency and reduce greenhouse gas emissions. Composites offer a lightweight alternative to traditional materials like steel and aluminum, effectively reducing a vehicle's overall weight while maintaining structural integrity. This weight reduction leads to improved fuel economy and reduced carbon emissions, aligning with the industry's sustainability goals. Another significant trend in the automotive composites market is the surge in demand for electric vehicles (EVs). EVs rely on lightweight materials to maximize their driving range and battery efficiency. Composites are well-suited for EV applications as they help offset the weight of heavy battery systems,

contributing to longer battery life and extended driving ranges. As the global shift toward electric mobility continues, the demand for composites in EV manufacturing is expected to grow substantially. Furthermore, stringent safety and emissions regulations worldwide are influencing the adoption of composites in automotive manufacturing. These regulations necessitate the use of materials that enhance crashworthiness while reducing vehicle emissions. Composites offer an attractive solution as they can be tailored to provide high strength-to-weight ratios and excellent energy absorption characteristics, improving both safety and emissions compliance. In addition to their weight-saving benefits, automotive composites also enable designers to create innovative and aerodynamic vehicle shapes, enhancing aesthetic appeal and aerodynamic efficiency. Composites offer greater design flexibility compared to traditional materials, allowing automakers to craft sleek, modern vehicle profiles that reduce drag and enhance overall performance. Moreover, the market is witnessing a continuous influx of research and development efforts aimed at improving composite materials and manufacturing processes. This includes advancements in resin technology, fiber reinforcement, and automated manufacturing techniques. These innovations result in composites that are not only lighter and stronger but also more cost-effective and feasible for mass production. In conclusion, the Global Automotive Composites Market is on an upward trajectory, driven by the imperative to reduce vehicle weight for improved fuel efficiency, the rising demand for electric vehicles, stringent safety and emissions regulations, and ongoing advancements in composite materials and manufacturing techniques. As automakers continue to prioritize sustainability, performance, and innovation, automotive composites are poised to play a pivotal role in shaping the future of the automotive industry.

## Key Market Drivers

### Lightweight Vehicles

A significant driver for the Global Automotive Composites Market is the rising demand for lightweight vehicles. Lightweight composites, such as carbon fiber reinforced polymers (CFRPs) and glass fiber reinforced polymers (GFRPs), help reduce the overall weight of the vehicle, resulting in improved fuel efficiency and reduced carbon emissions. By utilizing advanced manufacturing techniques, automakers can create complex composite structures that offer high strength-to-weight ratios, ensuring enhanced safety without sacrificing performance. Moreover, the use of automotive composites also provides design flexibility, allowing for innovative vehicle designs that capture the attention of consumers. As stringent environmental regulations continue to be implemented worldwide, automakers are compelled to adopt lightweight composites

to meet the increasing demand for fuel-efficient and eco-friendly vehicles, driving the growth of the Global Automotive Composites Market.

### Technological Advances

Recent technological advancements in manufacturing processes have revolutionized the production of composite materials, enabling cost-effective mass production. As a result, automotive composites have become increasingly affordable and accessible, extending beyond luxury cars to a broader range of vehicles. This accessibility has significantly contributed to the growth of the market, opening up new possibilities and driving innovation in the automotive industry.

### Increased Performance

Composite materials, with their unique combination of strength and lightweight properties, have revolutionized the automotive industry. By offering superior strength-to-weight ratios when compared to traditional materials, such as steel or aluminum, they have not only enhanced vehicle performance but also opened up new design possibilities. These advanced materials have gained significant traction in high-performance vehicles, where every ounce of weight reduction counts. As a result, there has been a growing demand for composite materials, as automakers seek to optimize performance, fuel efficiency, and overall driving experience.

### Changing Consumer Preferences

In today's world, as consumers become more conscious of sustainability and fuel efficiency, their preferences when purchasing vehicles are changing. This shift in consumer behavior has led to a growing demand for vehicles made with composite materials. These materials, known for their lightweight nature and durability, not only contribute to fuel efficiency but also offer enhanced performance and reduced environmental impact. By choosing vehicles made with composite materials, consumers are making a positive impact on both their driving experience and the planet.

### Regulatory Frameworks

The automotive industry, a sector of great significance, is confronted with stringent regulations concerning carbon emissions. These regulations not only impose a commitment on automakers but also stimulate them to embrace innovative technologies and materials, such as advanced composites, in order to effectively meet these

standards. This pursuit of compliance not only contributes to a greener future but also serves as a catalyst for the overall growth of the market.

### Electric Vehicles (EV) Growth

The rise in popularity of electric vehicles has also been a significant driver of innovation in the automotive industry. With increasing concerns about climate change and the need for sustainable transportation solutions, the demand for EVs has skyrocketed. In response, manufacturers have been actively exploring ways to improve the performance and efficiency of electric vehicles.

One key aspect that has emerged is the use of lightweight materials like composites in EV construction. These materials offer several advantages, including reduced weight, increased strength, and improved energy efficiency. By incorporating composites, EV manufacturers can enhance the range of their vehicles, which is a critical factor for consumers considering electric vehicles.

The adoption of lightweight materials in EV design has opened up new possibilities for improving the overall performance and functionality of electric vehicles. As the technology continues to evolve, we can expect to see further advancements in this area, leading to even more efficient and capable electric vehicles in the future.

### Emerging Markets

Emerging markets, particularly in Asia, have experienced an extraordinary surge in automotive demand in recent years. This exponential growth can be attributed to a combination of factors, including a burgeoning middle class and an upward trajectory in disposable incomes. As a result, the demand for vehicles, especially those constructed with innovative composite materials, has reached unprecedented levels. This trend not only reflects the increasing aspirations and purchasing power of consumers in these markets, but also signifies a shift towards more sustainable and technologically advanced transportation solutions.

### Future Trends

Looking towards the future, the development of self-driving cars and connected vehicles is expected to revolutionize the automotive industry. As these advanced technologies become more prevalent, the demand for automotive composites is projected to skyrocket. These composites, known for their high-strength and lightweight properties,

will play a crucial role in improving fuel efficiency and overall vehicle performance. The integration of such materials in self-driving cars and connected vehicles will not only enhance safety but also contribute to the reduction of environmental impact. Consequently, market trends are anticipated to be significantly influenced by this growing demand for advanced automotive composites.

## Key Market Challenges

### Cost Constraints

One of the primary challenges facing the automotive composites market is the cost of materials and manufacturing processes. Composite materials, such as carbon fiber reinforced composites, are often more expensive than traditional materials like steel and aluminum. The cost of raw materials, production, and specialized manufacturing equipment can significantly drive up the overall cost of composite components.

High material costs can limit the adoption of composites in mass-market vehicles, as automakers are constantly striving to balance cost-effectiveness with performance. The cost challenge also affects the overall affordability of vehicles, potentially reducing their competitiveness in the market.

To address this challenge, manufacturers are actively researching and developing cost-effective composite materials and production techniques. Innovations in material recycling, automation, and supply chain management are helping to reduce overall production costs.

### Production Scalability

Mass production scalability remains a notable challenge in the automotive composites market. Traditional manufacturing processes for composites, such as manual layup and autoclave curing, are time-consuming and labor-intensive. Scaling up these processes to meet the high production volumes required by the automotive industry can be logistically complex.

Limited production scalability can hinder the widespread adoption of composites, especially in high-volume vehicle segments. It can lead to production bottlenecks, increased lead times, and challenges in meeting consumer demand.

Companies are investing in advanced manufacturing technologies, including automated

layup and out-of-autoclave curing processes, to improve production scalability. These technologies streamline manufacturing, reduce labor requirements, and enhance efficiency.

### Recycling and End-of-Life Management

The recyclability and end-of-life management of composite materials pose significant challenges. Unlike metals, composites can be challenging to recycle due to their heterogeneous composition. Separating and recycling the individual components of composites, such as resin and fibers, requires specialized processes.

The lack of efficient recycling options can result in environmental concerns and disposal challenges. As sustainability becomes a central theme in the automotive industry, addressing the end-of-life management of composite materials is essential.

Research and development efforts are focused on improving the recyclability of composite materials. Innovations in recycling techniques and the development of more easily separable composite structures are being explored to minimize environmental impact.

### Material Consistency and Quality Assurance

Ensuring material consistency and quality assurance in composite manufacturing is a critical challenge. Composite properties can vary due to factors such as resin mixing, curing processes, and environmental conditions. Maintaining consistent quality across large production volumes is essential for safety and performance.

Inconsistent material properties can lead to structural weaknesses, reduced performance, and safety concerns in composite components. It can also result in production rejects and increased costs associated with quality control and testing.

Manufacturers are investing in advanced quality control and testing processes to monitor and maintain material consistency. Automation and real-time monitoring during manufacturing help ensure that composite components meet stringent quality standards.

### Regulatory Compliance and Certification

Meeting regulatory compliance and certification requirements is a complex challenge in

the automotive composites market. Regulations vary by region and application, and ensuring that composite materials and components adhere to safety and emissions standards can be intricate and time-consuming.

Non-compliance with regulatory standards can lead to costly delays in product development, recalls, and damage to brand reputation. Achieving compliance can require extensive testing, documentation, and validation processes.

Companies are proactively engaging with regulatory authorities to stay informed about evolving standards and requirements. Collaboration with certification bodies and early involvement in the regulatory process are essential for addressing this challenge effectively.

#### Limited Material Standardization

The lack of standardized composite materials is a challenge in the automotive industry. Unlike traditional materials with established standards, composites offer a wide range of customization options. While this flexibility is an advantage, it can also lead to challenges in material selection, testing, and certification.

Limited material standardization can complicate the design and manufacturing processes. It requires extensive testing and validation to ensure that customized composite materials meet safety and performance requirements.

Efforts are underway to develop industry-wide material standards and specifications for composites. Standardization initiatives can simplify material selection, testing, and certification processes, making it easier for automakers to integrate composites into their vehicles.

#### Durability and Long-Term Performance

Ensuring the long-term durability and performance of composite materials in automotive applications is a complex challenge. Composites may be susceptible to issues such as moisture absorption, delamination, and degradation over time, especially when exposed to harsh environmental conditions.

Durability concerns can affect the reliability and longevity of composite components, impacting vehicle safety and maintenance costs. Automakers must carefully consider the long-term performance of composites when incorporating them into vehicle designs.

Research and development efforts focus on enhancing the durability of composite materials through improved resin formulations, protective coatings, and advanced manufacturing techniques. Comprehensive testing and accelerated aging studies help evaluate long-term performance.

### Consumer Perception and Acceptance

Consumer perception and acceptance of composite materials in vehicles can be a challenge. While composites offer numerous advantages, some consumers may have concerns about the durability, reparability, and safety of composite components.

Consumer hesitation can impact purchasing decisions, potentially slowing the adoption of vehicles with composite components. Building consumer trust and addressing misconceptions are essential for market acceptance.

Education and awareness campaigns can help consumers better understand the benefits and safety of composites in vehicles. Providing transparent information about the use of composites and their advantages is crucial for fostering acceptance.

### Key Market Trends

#### Increasing Use of Carbon Fiber Composites

Carbon fiber composites are gaining prominence in the automotive industry due to their exceptional strength-to-weight ratio. Automakers are increasingly using carbon fiber-reinforced composites in critical components, such as chassis, body panels, and interior structures. Carbon fiber composites offer a significant weight reduction potential, contributing to improved fuel efficiency and performance.

The use of carbon fiber composites in high-performance and luxury vehicles is becoming more common, enhancing their performance and agility. This trend is also trickling down to mainstream vehicles as advancements in carbon fiber production and cost reduction initiatives make these materials more accessible.

Ongoing research and development efforts are focused on optimizing carbon fiber composites for automotive applications. Innovations in carbon fiber production techniques, resin formulations, and manufacturing processes are helping reduce costs and improve scalability.



## Hybrid and Multi-Material Solutions

Automakers are increasingly adopting hybrid and multi-material solutions in vehicle design. Rather than relying solely on a single composite material, they are combining composites with metals, plastics, and other materials to create lightweight and structurally efficient vehicle architectures. This approach allows for tailored material selection based on specific application requirements.

Hybrid and multi-material solutions provide automakers with the flexibility to optimize vehicle designs for performance, safety, and cost-effectiveness. By strategically incorporating composites in areas that benefit most from weight reduction, automakers can achieve a balance between structural integrity and efficiency.

Advanced material modeling and simulation tools are assisting automakers in determining the optimal material combinations for different vehicle components. These tools help evaluate the performance and durability of hybrid material solutions.

## Integration of Composites in Electric Vehicles (EVs)

Electric vehicles (EVs) are rapidly becoming a dominant force in the automotive industry, and composites play a crucial role in their development. Lightweight composites are essential for offsetting the weight of EV batteries, extending the vehicle's driving range, and maximizing energy efficiency. Automakers are integrating composites into EV components, including battery enclosures and structural elements.

The integration of composites in EVs contributes to improved battery efficiency and overall vehicle performance. Lighter EVs can achieve longer driving ranges on a single charge, making them more appealing to consumers. This trend aligns with the industry's goal of reducing emissions and promoting sustainable transportation.

Research efforts are focused on developing composites that are specifically tailored to the requirements of EV applications. Composite materials with excellent thermal conductivity and flame resistance are in development to enhance battery safety in EVs.

## Advancements in Resin Technology

Resin technology is a critical aspect of composite material development. Advancements in resin formulations are enabling the creation of composites with improved properties,

such as enhanced impact resistance, thermal stability, and fire retardancy. These advancements are crucial for expanding the range of applications for composites in the automotive industry.

Advanced resin technology allows automakers to select composite materials that meet stringent safety and performance standards. This trend is particularly relevant in critical applications where composite materials must withstand extreme conditions, such as crash energy absorption.

Collaboration between material suppliers, resin manufacturers, and automakers is driving the development of tailored resin formulations for specific automotive applications. Research continues to focus on enhancing the properties of composite resins.

### Automated Composite Manufacturing

Automation is playing a pivotal role in composite manufacturing. Automated processes, such as automated fiber placement (AFP) and automated tape laying (ATL), are streamlining composite component production. These technologies improve production efficiency, reduce labor costs, and ensure consistency in composite layup.

Automated manufacturing techniques are making composites more accessible for high-volume production. They are particularly beneficial for complex-shaped components, such as aircraft fuselages and automotive body panels. This trend contributes to the wider adoption of composites in the automotive sector.

Continuous investments in automated manufacturing equipment and processes are key to mitigating production challenges. Automakers and suppliers are adopting robotics and advanced machinery to optimize composite manufacturing.

### Sustainability and Recyclability

Sustainability is a driving force in the automotive composites market. Automakers are actively seeking sustainable solutions, including recyclable composites and bio-based materials. The emphasis is on reducing the environmental impact of composite production and end-of-life disposal.

Sustainable composites align with the industry's sustainability goals and appeal to environmentally conscious consumers. By adopting recyclable and bio-based

composites, automakers can reduce the carbon footprint associated with vehicle manufacturing.

Research into recyclable composites and bio-based resins is ongoing. Collaborations between automakers and material suppliers are focused on developing sustainable composite materials that meet performance and environmental criteria.

### Digitalization and Simulation Tools

Digitalization and advanced simulation tools are transforming the design and manufacturing of composite components. Virtual prototyping and simulation enable engineers to assess the performance of composite materials under various conditions, optimizing designs and reducing development lead times.

Digitalization streamlines the design and testing phases of composite development, resulting in faster time-to-market and cost savings. Simulation tools also aid in material selection and structural analysis, ensuring that composites meet safety and performance requirements.

Continued investments in digitalization and simulation technologies are essential to harness the full potential of composites. Automakers are integrating these tools into their product development processes to accelerate innovation.

### Supply Chain Resilience

Supply chain resilience has become a critical consideration in the automotive composites market. The COVID-19 pandemic exposed vulnerabilities in global supply chains, prompting automakers to seek more resilient sourcing strategies for composite materials.

Ensuring a resilient supply chain is essential to prevent disruptions in composite material availability. Diversifying suppliers, securing strategic stockpiles, and exploring local sourcing options are strategies adopted to mitigate supply chain risks.

Automakers are reevaluating their supply chain strategies and collaborating with suppliers to enhance resilience. Digital tools and analytics are employed to monitor and optimize supply chain operations.

### Segmental Insights

## Vehicle Type Insights

The global Automotive Composites market is segmented based on vehicle type into passenger cars, light commercial vehicles, and heavy commercial vehicles. Passenger cars account for the largest market share due to their high production volume and increasing need for fuel efficiency. The use of composites in passenger cars helps to reduce vehicle weight, thereby improving fuel efficiency and reducing emissions. Light commercial vehicles and heavy commercial vehicles also provide significant growth opportunities, considering the increasing demand for lightweight and fuel-efficient vehicles in the logistics and transportation industry.

## Product Type Insights

The global automotive composites market is segmented into several product types, each with unique properties that cater to various applications within the automotive industry. These product types include carbon fiber composites, glass fiber composites, and others. Carbon fiber composites, known for their high strength-to-weight ratio, are particularly favored in high-performance vehicles and electric cars. On the other hand, glass fiber composites offer cost-effectiveness and flexibility in molding, making them a popular choice for mass-produced vehicles. The other types of composites have specific niche applications, contributing to the diversity and richness of this market.

## Regional Insights

The global automotive composites market varies considerably by region, reflecting divergent economic, technological, and environmental factors. In North America, stringent emission standards and a growing consumer preference for fuel-efficient, lightweight vehicles are driving the growth of the automotive composites market. In contrast, Europe's market is shaped by a robust automotive industry, a heightened emphasis on environmental sustainability, and a strong focus on advanced manufacturing techniques. The Asia-Pacific region, particularly China and India, presents a dynamic market landscape, propelled by rapid industrialization, expanding automobile production, and increasing disposable incomes.

## Key Market Players

### Hexcel Corporation

Mitsubishi Chemical Carbon Fiber and Composites, Inc.

mouldCAM Pty Ltd.

SGL Carbon

Toho Tenex (Teijin Ltd)

Toray Industries Inc

Nippon Sheet Glass Company, Limited

Sigmatex

Nippon Carbon Co., Ltd.

Solvay

Report Scope:

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

Automotive Composites Market, By Application Type:

Structural Assembly

Powertrain Component

Interior

Exterior

Automotive Composites Market, By Material Type:

Thermoset Polymer

Thermoplastic Polymer

Carbon Fiber

Glass Fiber

Automotive Composites Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

## Competitive Landscape

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

## Available Customizations:

Global Automotive Composites 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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