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# Automotive NVH Materials Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Vehicle Type (Passenger Cars, Commercial Vehicles), By Material Type (Rubber, Plastic & Foam, Fibers), By Application Type (Absorption, Damping, Insulation), By Region & Competition, 2021-2031F

https://marketpublishers.com/r/A6A075FDA65EEN.html
Date: January 2026
Pages: 182
Price: US$ 4,500.00 (Single User License)
ID: A6A075FDA65EEN

## Abstracts

The Global Automotive NVH Materials Market is projected to expand from USD 12.81 Billion in 2025 to USD 18.47 Billion by 2031, registering a CAGR of 6.29%. These materials, comprising specialized polymers, molded foams, and fibrous composites, are engineered to absorb sound and dampen mechanical vibrations within vehicle structures. Primary growth drivers include rising consumer demand for enhanced cabin comfort and the rapid electrification of the automotive sector, which requires distinct acoustic treatments to counter road and wind noise in the absence of internal combustion engines. This demand is underpinned by substantial manufacturing volumes; according to the International Organization of Motor Vehicle Manufacturers, global vehicle production hit 92.5 million units in 2024, providing a strong foundation for NVH component integration.

Despite positive growth metrics, the industry encounters significant hurdles related to the price volatility of raw materials, specifically petroleum-based derivatives utilized in synthetic foams and rubbers. Unpredictable shifts in these input costs can severely disrupt production budgets and squeeze profit margins, presenting a considerable economic obstacle that threatens to hinder the broader expansion of the market.

### Market Driver

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The escalating demand for electric and hybrid vehicle acoustics serves as a primary engine for the NVH materials sector's evolution. In contrast to internal combustion engine vehicles where mechanical noise masks external sounds, electric powertrains run silently, rendering road friction and wind noise far more noticeable to passengers. This acoustic transparency compels manufacturers to utilize advanced sound-dampening polymers and encapsulation technologies tailored to the specific frequency profiles of electrified platforms. Highlighting the scale of this necessity, the International Energy Agency reported in its 'Global EV Outlook 2024' in April 2024 that global electric car sales neared 14 million in 2023, emphasizing the massive requirement for specialized acoustic solutions to maintain acceptable noise levels.

Concurrently, the strategic emphasis on vehicle lightweighting to enhance fuel economy is transforming material composition across the industry. Manufacturers are actively replacing traditional heavy barrier mats with lightweight fibrous composites and aero-acoustic foams to satisfy strict emission standards and extend electric vehicle range without sacrificing structural integrity. This shift is vital in major hubs where high production volumes demand material efficiency. According to the China Association of Automobile Manufacturers, in January 2024, automobile production in China reached 30.16 million units in 2023, creating significant pressure to adopt weight-saving components, while the National Automobile Dealers Association reported new light-vehicle sales of 15.46 million units in the United States for the same year, reflecting a global need for these optimized solutions.

**Market Challenge**

The instability of raw material prices, particularly for petroleum-based derivatives, acts as a critical economic restraint on the Global Automotive NVH Materials Market. Producers of acoustic treatments, such as synthetic rubber and molded polyurethane foams, depend heavily on upstream petrochemical feedstocks, linking their production costs directly to the fluctuating global crude oil market. When input costs rise unexpectedly, NVH component suppliers?often bound by fixed-price contracts with automotive OEMs?face difficulties absorbing these financial shocks, forcing them to operate with reduced profit margins that severely limit capital for capacity expansion or research and development.

This unpredictability fosters a tentative business climate that directly hampers the market's growth trajectory. The consequences of these adverse conditions are visible in recent industry performance metrics. According to the American Chemistry Council, in

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December 2024, production volumes for specialty chemicals?a category including many high-performance automotive formulations?were projected to decrease by 3.2% for the year due to continued market softness. Such a contraction in the output of vital chemical inputs highlights the challenges suppliers encounter in sustaining steady growth, ultimately delaying the broader adoption of advanced NVH solutions despite strong demand from the vehicle manufacturing sector.

**Market Trends**

The adoption of bio-based and recyclable polymer composites is becoming a pivotal market trend, fueled by a strategic move toward circular economy principles rather than mere weight reduction. Manufacturers are increasingly developing acoustic treatments using materials such as fibrous PET felts and bio-foams, which deliver high sound absorption coefficients while ensuring end-of-life recyclability to comply with rigorous Scope 3 emission goals. This shift is reorganizing supply chains as OEMs validate sustainable inputs that decrease the carbon footprint of vehicle interiors without compromising acoustic performance; for instance, Autoneum reported in March 2025 that it reduced its overall CO2 emissions by 1.9% in 2024, a result largely attributed to increased sourcing of sustainable materials and resource-efficient production.

Simultaneously, the advancement of multifunctional acoustic-thermal battery pack insulation is gaining speed to meet the complex safety and comfort needs of electric vehicles. Unlike internal combustion engines, EV powertrains require specialized encapsulation that mitigates thermal runaway risks while also dampening structural vibrations and isolating high-frequency electrical noise. This requirement has driven the commercialization of advanced aerogels and compression foams that perform dual protective functions within the battery architecture. Reflecting this adoption, Aspen Aerogels reported in February 2025 that revenue for its Thermal Barrier segment reached $306.8 million in 2024, a 179% year-over-year increase driven by the demand for these cell-to-cell insulation technologies.

**Key Market Players**

BASF SE

3M Company

BRC Rubber & Plastics Inc.

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The Dow Chemical Company

ElringKlinger AG

Huntsman International LLC

Sumitomo Riko Company Limited

W. KOPP GmbH & Co. KG

KKT Holding GmbH

Covestro AG

**Report Scope**

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

Automotive NVH Materials Market, By Vehicle Type

Passenger Cars

Commercial Vehicles

Automotive NVH Materials Market, By Material Type

Rubber

Plastic & Foam

Fibers

Automotive NVH Materials Market, By Application Type

Absorption

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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 NVH Materials Market.

**Available Customizations:**

Global Automotive NVH Materials Market report with the given market data, TechSci 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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