

# **Synthetic Leather Surface Materials for Transportation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material Type (Polyurethane (PU), Polyvinyl Chloride (PVC), Polyester, Others), By Application (Upholstery, Headliner, Dashboard, Floor, Others), By Region and Competition, 2019-2029F**

<https://marketpublishers.com/r/S39D3C26A516EN.html>

Date: May 2024

Pages: 185

Price: US\$ 4,900.00 (Single User License)

ID: S39D3C26A516EN

## **Abstracts**

Global Synthetic Leather Surface Materials for Transportation Market was valued at USD 9.25 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.35% through 2029.

Synthetic leather, also referred to as artificial leather or faux leather, is a versatile material crafted to emulate the appearance and texture of genuine leather. Its utility spans across various sectors, serving as a substitute for leather in upholstery, footwear, clothing, and furniture fabrics. Particularly in transportation, synthetic leather is extensively employed, adorning seats, door trims, headrests, steering wheel covers, and other vehicle components.

The popularity of synthetic leather can be attributed to its exceptional durability, rendering it well-suited for high-traffic areas and demanding applications. Additionally, its low maintenance requirements compared to natural leather make it advantageous, especially in bustling environments where time-efficiency is paramount.

Two primary materials, Polyurethane (PU) and Polyvinyl Chloride (PVC), dominate the production of synthetic leather. These materials offer a plethora of benefits, including resistance to water, UV rays, and scratches, making synthetic leather an optimal choice

for transportation applications prone to exposure and wear.

Despite promising growth prospects, the synthetic leather market confronts challenges, notably environmental concerns linked with PVC-based products. These apprehensions underscore the necessity for sustainable production methods to ensure the market's long-term environmental viability. Ongoing research and development endeavors are anticipated to introduce innovative and eco-friendly approaches, further propelling the expansion of the synthetic leather market. Synthetic leather presents numerous advantages and widespread applications across diverse industries. However, addressing environmental issues and embracing sustainable practices will be imperative for fostering the enduring growth and prosperity of the synthetic leather market as it progresses.

## Key Market Drivers

### Growth in Automotive Industry

Synthetic leather, known as artificial or faux leather, is a versatile material meticulously crafted to mirror the aesthetics and tactile qualities of natural leather. Composed of a blend of fibers, coatings, and binders, synthetic leather offers a durable and cost-effective alternative to genuine leather. In the automotive sector, its applications are diverse, ranging from seats to door trims, headrests, and steering wheel covers, providing ample customization possibilities.

One of synthetic leather's paramount advantages lies in its superior durability and resilience against wear and tear, particularly advantageous in automotive interiors subjected to constant use and varied weather conditions. Compared to traditional leather, synthetic variants demand less upkeep, exhibiting greater resistance to cracking, fading, and staining, thus ensuring prolonged longevity and heightened cost-effectiveness.

Amidst the automotive industry's escalating commitment to sustainable practices, synthetic leather, especially those derived from Polyurethane (PU), emerges as an environmentally conscious substitute for natural leather. PU-based synthetic leather not only diminishes reliance on animal-derived materials but also curtails the environmental footprint associated with conventional leather production processes. Moreover, the burgeoning demand for vehicles, propelled by rapid urbanization and rising disposable incomes, particularly in regions like the Asia Pacific, augments the market for synthetic leather surface materials.

In response to evolving industry demands, extensive research and development endeavors are underway to advance sustainable production methodologies and enhance the quality and performance of synthetic leather. This ongoing innovation not only propels market expansion but also fosters the emergence of eco-friendly synthetic leather variants aligned with the automotive Industry's sustainability objectives.

The confluence of escalating vehicle demand and the inherent benefits of synthetic leather, including durability, ease of maintenance, and eco-friendliness, positions it as a promising material within the automotive sector. As the industry continues to prioritize sustainability and innovation, synthetic leather stands are poised to play a pivotal role in shaping the future of automotive interiors, offering both functional excellence and environmental responsibility.

### Surge in Technological Advancements

In the realm of synthetic leather production, technological progress stands as a cornerstone, catalyzing a transformative shift within the industry. These advancements not only seek to refine manufacturing processes, elevate product quality, and mitigate environmental impact but also endeavor to redefine the capabilities of synthetic leather itself.

Polyurethane (PU) and Polyvinyl Chloride (PVC), the predominant materials in synthetic leather production, have undergone notable enhancements over time. A significant stride in this realm is the advent of waterborne PU, heralding a departure from solvent-based methods while curbing environmental harm. This eco-conscious approach resonates favorably with manufacturers and consumers alike, aligning with the burgeoning demand for sustainable alternatives.

Concurrently, technological breakthroughs have ushered in synthetic leather products that closely emulate the aesthetics, texture, and resilience of natural leather. Leveraging innovative methodologies and meticulous craftsmanship, synthetic leather now mirrors the luxurious allure and nuanced tones once synonymous with genuine leather. This leap forward broadens the appeal of synthetic leather, captivating consumers and industries, notably the automotive sector.

Within automotive realms, synthetic leather has emerged as the preferred surface material, propelled by technological advancements. These strides have yielded synthetic leather variants boasting superior attributes such as UV resistance, scratch

resilience, and simplified maintenance. Such qualities render synthetic leather an optimal choice for diverse applications spanning seats, door trims, headrests, and steering wheel covers. The automotive industry's steadfast pursuit of sustainability further underscores the demand for eco-conscious materials, prompting synthetic leather to adapt its production methodologies toward greater environmental compatibility and sustainability.

The trajectory of synthetic leather production is marked by continuous evolution, propelled by technological innovations that transcend the confines of conventional materials. With a steadfast commitment to innovation and sustainability, synthetic leather stands poised to redefine industry standards, offering a versatile, environmentally friendly, and aesthetically pleasing alternative to its natural counterpart. As technological advancements persist, the future of synthetic leather holds promise as a cornerstone of sustainable and sophisticated material solutions across diverse sectors.

## Key Market Challenges

### Disruptions in Supply Chain

Supply chains serve as vital arteries in the synthesis and dissemination of synthetic leather surface materials within the transportation sector. They facilitate the seamless procurement of raw materials and their conversion into top-tier synthetic leather products, primarily destined for various industries, notably automotive. Yet, the intricate nature of these supply chains renders them susceptible to disruptions with wide-ranging repercussions. Geopolitical unrest, natural calamities, and pandemics represent just a few of the myriad factors capable of disrupting the availability and pricing of raw materials, thus compromising the entire manufacturing process.

Disruptions in supply chains precipitate dire consequences, including production delays, escalated expenses, and, in extreme cases, cessation of manufacturing. The ongoing COVID-19 pandemic exemplifies such disruption, profoundly affecting global supply chains due to widespread lockdowns, labor shortages, and logistical impediments.

Within the synthetic leather market, such disruptions may manifest as shortages of critical raw materials like Polyurethane (PU) and Polyvinyl Chloride (PVC), resulting in diminished production capacities and inflated costs for manufacturers. However, the ramifications extend beyond manufacturing entities, impacting consumers and industries reliant on these materials, particularly the automotive sector. Supply chain

disruptions can impede sustainability endeavors within the industry. While many companies are actively investing in sustainable production methodologies, disruptions may impede or exacerbate the economic burden of implementing these initiatives.

Recognizing the intricate dynamics of supply chains and preemptively addressing potential disruptions are imperative to safeguarding the stability, efficiency, and sustainability of the synthetic leather industry amidst evolving global challenges.

## Key Market Trends

### Growing Shift towards Electric and Autonomous Vehicles

The global rise of electric vehicles (EVs) and autonomous vehicles (AVs) heralds a paradigm shift in transportation, offering a plethora of benefits compared to traditional vehicles. EVs, renowned for their reduced fuel consumption and environmental impact, spearhead the transition towards sustainable mobility. Bolstered by advancements in battery technology, EVs now boast extended driving ranges, rendering them practical for both daily commutes and long-distance journeys. Meanwhile, AVs promise enhanced safety and convenience through the integration of advanced sensors and artificial intelligence algorithms, enabling autonomous navigation and informed driving decisions. The convergence of EVs and AVs emerges as a transformative force in the automotive landscape, heralding a future characterized by cleaner, safer, and more efficient transportation systems.

The ascendancy of EVs and AVs not only reshapes the transportation sector but also influences interior design paradigms and requisites. As these vehicles prioritize comfort, luxury, and sustainability, there is a burgeoning demand for high-quality, eco-friendly materials like synthetic leather in interior upholstery. Synthetic leather presents myriad advantages over traditional leather, including heightened durability, simplified maintenance, and cost-effectiveness. Moreover, it offers a cruelty-free alternative, aligning with the ethical sensibilities of discerning consumers. Furthermore, synthetic leather allows for extensive customization in terms of color, texture, and patterns, empowering manufacturers to craft bespoke vehicle interiors that reflect brand identity and cater to individual preferences.

With continuous innovations in material engineering and design, the prospects for creating innovative and sustainable interior spaces within EVs and AVs are boundless. The versatility and adaptability of synthetic leather enable the realization of interior concepts that seamlessly merge luxury, functionality, and eco-consciousness.

Moreover, the integration of smart materials and technologies further enhances the user experience within these vehicles, offering features such as temperature regulation, adaptive seating, and interactive interfaces.

The adoption of synthetic leather in EVs and AVs signifies a broader shift towards eco-friendly and socially responsible manufacturing practices in the automotive industry. By embracing sustainable materials and design principles, automakers not only reduce their environmental footprint but also cater to evolving consumer preferences for ethically sourced and environmentally conscious products. Furthermore, the widespread adoption of synthetic leather in vehicle interiors contributes to the preservation of natural resources and biodiversity by reducing reliance on animal-derived materials.

In essence, the intersection of EVs, AVs, and synthetic leather epitomizes a forward-thinking approach to transportation design, wherein innovation, sustainability, and consumer-centricity converge to redefine the future of mobility. As the automotive industry continues to evolve, the integration of eco-friendly materials and cutting-edge technologies will play a pivotal role in shaping the next generation of vehicles, driving progress towards a cleaner, safer, and more sustainable transportation ecosystem.

## Segmental Insights

### Material Type Insights

Based on the category of material type, the polyurethane (PU) segment emerged as the dominant segment in the global market for synthetic leather surface materials for transportation in 2023. Polyurethane (PU) stands as a versatile material lauded for its durability, water resistance, flexibility, and cost-effectiveness. Beyond these attributes, its recyclability and eco-friendly nature further elevate its appeal, rendering it a favored option across various transportation applications. Whether adorning car seats, dashboards, headliners, or door panels, PU delivers unparalleled cushioning, sound insulation, and resilience against fading and cracking. Its enduring quality and ability to withstand the rigors of time make it an optimal choice for manufacturers and consumers alike. With a myriad of benefits at its disposal, PU maintains its status as a staple material in the automotive industry and extends its utility into diverse sectors. As industries continue to prioritize sustainability and performance, the versatility and reliability of PU ensure its enduring relevance and widespread adoption in countless applications, underscoring its indispensable role in modern manufacturing practices.

### Application Insights

Based on the application, the upholstery segment is poised for rapid expansion in the foreseeable future, with synthetic leather emerging as a preferred choice for various reasons. The exceptional durability renders it ideal for upholstery materials subjected to heavy use and wear, ensuring longevity and resilience. Moreover, synthetic leather boasts effortless maintenance, requiring minimal upkeep to preserve its pristine appearance. Resistant to stains and discoloration, it maintains its aesthetic appeal over prolonged periods.

Also, the versatility of synthetic leather in design is a key driver of its widespread adoption. Manufacturers can craft synthetic leather in an extensive array of colors, patterns, and textures, offering limitless design possibilities. This adaptability empowers manufacturers to curate bespoke interiors tailored to the unique preferences and styles of consumers, infusing each vehicle with individuality. The surge in demand for synthetic leather in upholstery is fueled by burgeoning consumer preferences for luxury and comfort in vehicle interiors. Synthetic leather exudes a sense of opulence and sophistication, enriching the driving experience. Its smooth texture and plushness elevate passenger comfort, transforming long journeys into pleasurable experiences. Moreover, synthetic leather imbues interiors with an aura of refinement and elegance, enhancing the overall ambiance of the vehicle.

In essence, the multifaceted appeal of synthetic leather, encompassing durability, design versatility, and luxurious comfort, positions it as a sought-after material in the upholstery segment. As consumer expectations for opulent and personalized interiors continue to rise, synthetic leather remains poised to meet these demands, offering a blend of functionality, aesthetics, and indulgence in vehicle upholstery applications.

## Regional Insights

Asia Pacific emerged as the dominant region in the Global Synthetic Leather Surface Materials for Transportation Market in 2023, holding the largest market share in terms of value. In the Asia Pacific region, there is a notable concentration of automobile manufacturers, leading to a significant demand for synthetic leather. This demand is primarily driven by two key factors. Firstly, the rising middle-class population in China is increasingly seeking more luxurious and comfortable vehicles, which often come equipped with synthetic leather interiors. Additionally, the implementation of stricter environmental regulations in these regions has further encouraged the adoption of synthetic leather over traditional leather. This is primarily due to the lower environmental impact associated with synthetic leather, making it a more sustainable choice. As a

result, the demand for synthetic leather in the automotive industry continues to grow steadily in the Asia Pacific region.

### Key Market Players

Ultrafabrics LLC

Alfatex Italia Srl

Covestro AG

Yarwood Leather Ltd.

BASF SE

ANANAS ANAM LTD.

Kuraray Co. Ltd.

Toyota Motor Corporation

Toray Industries, Inc.

Teijin Limited

### Report Scope:

In this report, the Global Synthetic Leather Surface Materials for Transportation Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Synthetic Leather Surface Materials for Transportation Market, By Material Type:

o Polyurethane (PU)

o Polyvinyl Chloride (PVC)



- o Polyester

- o Others

#### Synthetic Leather Surface Materials for Transportation Market, By Application:

- o Upholstery

- o Headliner

- o Dashboard

- o Floor

- o Others

#### Synthetic Leather Surface Materials for Transportation Market, By Region:

- o North America

- ? United States

- ? Canada

- ? Mexico

- o Europe

- ? France

- ? United Kingdom

- ? Italy

- ? Germany

? Spain

o Asia Pacific

? China

? India

? Japan

? Australia

? South Korea

o South America

? Brazil

? Argentina

? Colombia

o Middle East & Africa

? South Africa

? Saudi Arabia

? UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Synthetic Leather Surface Materials for Transportation Market.

Available Customizations:

Global Synthetic Leather Surface Materials for Transportation 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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