

Middle East & Africa Leather for Automotive Seats Market Size and Forecast (2021-2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type [Genuine Leather and Artificial Leather (Polyurethane, Polyvinyl Chloride, Others)] and Vehicle Type (Passenger Cars, Light Commercial Vehicles, Heavy Commercial Vehicles, Others)

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Abstracts

The leather market for automotive seats in the Middle East and Africa is projected to grow significantly, with an expected market size of approximately US\$ 2,652.32 million by 2031, up from US\$ 2,096.67 million in 2024. This growth translates to a compound annual growth rate (CAGR) of 3.7% from 2025 to 2031.

Executive Summary and Market Analysis

According to Fastener World Inc., the automotive sectors in the Middle East, particularly in countries like Saudi Arabia, the UAE, and Israel, have reported impressive sales growth exceeding 20% in their 2023 annual reports. Meanwhile, Africa, although smaller in comparison, has also seen a notable increase in production, surpassing one million units with a year-on-year growth of 15% in 2023. South Africa and Morocco emerged as the leading automobile producers in the region, with production figures of over 600,000 and 500,000 vehicles, respectively. Turkey has also shown remarkable growth, with sales increasing by over 55%, reaching nearly 1.3 million units. This surge in vehicle sales across the Middle East and Africa is anticipated to drive the demand for leather used in automotive seat applications in the coming years.

The automotive sector's expansion, driven by increased vehicle manufacturing,

technological advancements, and a growing consumer preference for luxury and comfort, is significantly boosting the leather market for automotive seats. Car manufacturers are increasingly prioritizing high-quality interiors, which in turn is escalating the demand for durable, aesthetically pleasing leather materials across all vehicle categories. For instance, Renault Group Morocco reported a production of 50,000 vehicles in 2022 from its factories in Tangier and Casablanca, marking a 15.3% increase from 2021. The Middle East and Africa market is evolving due to rising passenger vehicle production, a growing population, and increasing middle-class incomes.

Strategic Insights

Market Segmentation Analysis

The Middle East and Africa leather for automotive seats market can be segmented based on type and vehicle type. The market is divided into genuine leather and artificial leather, with the genuine leather segment holding a larger market share in 2024. The artificial leather segment is further categorized into polyurethane, polyvinyl chloride, and other materials. In terms of vehicle type, the market is segmented into passenger cars, light commercial vehicles, heavy commercial vehicles, and others, with passenger cars dominating the market share in 2024.

Market Outlook

Luxury vehicles are characterized by superior comfort and high-quality materials that enhance their interiors. Leather seats are often seen as a hallmark of premium interiors, significantly improving the vehicle's overall aesthetics and contributing to a refined ambiance. Consumers of luxury vehicles typically associate leather seats with sophistication and exclusivity, which aligns with the luxury vehicle image. This trend is driven by the increasing demand for stylish, high-quality automotive interiors.

To meet this demand, many luxury automotive manufacturers incorporate leather seats to enhance the visual appeal of their vehicles. Notable brands such as Dr. Ing. h.c. F. Porsche AG utilize 100% genuine leather for their automotive seats, while others like Audi AG, BMW AG, and Lexus offer both genuine and synthetic leather options. These brands are witnessing a surge in vehicle sales across various developed and emerging markets.

Additionally, the rising disposable income among high-net-worth individuals in emerging

markets like India is contributing to the growing demand for luxury vehicles. In response, numerous luxury automotive brands are expanding their presence in these markets to strengthen their competitive position. Consequently, the increasing number of luxury vehicles is driving the global demand for leather used in automotive seats.

Country Insights

The Middle East and Africa leather for automotive seats market includes key countries such as South Africa, Saudi Arabia, the UAE, Qatar, Morocco, and others. South Africa is expected to hold the largest market share in 2024.

Automakers favor leather for automotive seat applications due to its high-end appearance and feel, which enhances the vehicle's aesthetics and perceived value. Leather is known for its durability, wear resistance, and ease of cleaning, making it ideal for long-term use. It also provides superior comfort and temperature control, aligning well with luxury brand expectations. According to the International Organization of Motor Vehicle Manufacturers (OICA), South Africa's automobile production rose by 24% to 555,889 units in 2022. Furthermore, the National Association of Automobile Manufacturers of South Africa (NAAMSA) reported a 7.6% increase in domestic new vehicle sales in June 2022, totaling 41,019 units. The South African government has also launched the Automotive Masterplan (SAAM) 2021-2035, aiming to produce 1.4 million vehicles annually by 2035, which represents 1% of global vehicle production. Significant investments in the automotive sector, totaling around US\$ 460 million in 2021, are expected to further stimulate the growth of the leather for automotive seats market.

Company Profiles

Key players in the Middle East and Africa leather for automotive seats market include San Fang Chemical Industrial Co Ltd, Mayur Uniquoters Limited, Nan Ya Plastics Corp, FILWEL Co., Ltd., Kolon Industries Inc, BASF SE, Kuraray Co Ltd, Teijin Ltd, Toray Industries Inc, Covestro AG, Wollsdorf Leder Schmidt & Co Ges.m.b.H., Curtidos Trevi?o S.A. de C.V., Wickett-Craig, Super Tannery Ltd., and Elmo Sweden AB, among others. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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