

South & Central America 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 South and Central America is projected to grow significantly, reaching an estimated US\$ 3,257.38 million by 2031, up from US\$ 2,583.34 million in 2024. This growth represents a compound annual growth rate (CAGR) of 3.6% from 2025 to 2031.

Executive Summary and Market Analysis

The automotive industry in South and Central America is primarily driven by the strong presence of major automotive manufacturers in countries like Brazil, Argentina, and Chile. According to a report by Fastener World Inc., vehicle sales in the region saw a year-on-year increase of 2.8%, with total sales ranging from 3.8 million to 4.1 million units in 2023. Brazil leads the market, accounting for over half of the sales, while Argentina and Chile contribute approximately 300,000 to 400,000 units each. The automotive sector in this region heavily relies on import and export revenues, creating substantial opportunities for the leather market, particularly for automotive seat applications. The growth in passenger car sales is a key factor driving demand for leather in this sector.

Major automotive manufacturers are expanding their operations in South and Central America to capitalize on the burgeoning automotive market. For instance, Audi AG invested US\$ 19.2 million in 2022 to resume production at its plant in Parana, Brazil, with a capacity of 4,000 vehicles annually. Additionally, Kavak, a used car platform, invested US\$ 500 million in Brazil to enhance its auto reconditioning capabilities, which is expected to boost the demand for leather in automotive seats as the used car market grows. The end users of leather for automotive seats include automotive companies and original equipment manufacturers (OEMs), indicating that the growth of the automotive industry will create further opportunities for leather suppliers in the coming years.

Market Segmentation

The South and Central America leather for automotive seats market can be segmented based on type and vehicle type.

1. Type: The market is divided into genuine leather and artificial leather. In 2024, the genuine leather segment held a larger market share. The artificial leather segment is further categorized into polyurethane, polyvinyl chloride, and other materials.

2. Vehicle Type: The market is also segmented into passenger cars, light commercial vehicles, heavy commercial vehicles, and others. The passenger cars segment dominated the market in 2024.

Market Outlook

A notable trend in the automotive leather market is the rising demand for vegan leather, as consumers and industries increasingly seek sustainable and cruelty-free alternatives to traditional leather. Vegan leather, made from plant-based materials such as pineapple leaves, mushrooms, and apple peels, is gaining traction in automotive applications. This type of leather not only provides a cruelty-free option but also aims to minimize the environmental impact associated with animal agriculture. The growing number of vegan consumers, with reports indicating that 25.8 million people tried veganism as of January 2025, is driving the production and adoption of vegan products across various sectors, including automotive.

Automakers are responding to this trend by developing vegan leather seats from sustainable materials that are breathable and durable. Vegan leather seats are resistant

to stains and scratches, offering long-lasting use. Brands like Tesla, BMW AG, Audi AG, and Mercedes-Benz are already incorporating vegan leather into their vehicle interiors. For example, in February 2024, BMW AG launched an all-electric BMW 5 Series featuring a fully vegan interior, including seats made from materials like cactus, cork, and mushrooms. This shift towards vegan leather is expected to further stimulate growth in the leather for automotive seats market.

Country Insights

The South and Central America leather for automotive seats market is primarily composed of Brazil, Argentina, and the Rest of South and Central America, with Brazil holding the largest market share in 2024. As the largest automotive producer in the region, Brazil has seen a surge in passenger vehicle sales, driven by economic growth, favorable credit policies, and government incentives. According to the OICA Correspondents Survey, passenger car production in Brazil increased to 1,895,020 units in Year-to-Date (YTD) 2024, up from 1,782,079 units in YTD 2023. Similarly, light commercial vehicle production rose to 485,576 units in YTD 2024, compared to 421,626 units in the previous year. This growth in vehicle production is expected to drive demand for leather seat applications, as manufacturers focus on premium interiors to enhance comfort and appeal.

Brazil's automotive industry is not only the largest in South and Central America but also a significant exporter of light and commercial vehicles. The increasing vehicle ownership and expanding automotive production in Brazil are anticipated to bolster the demand for leather in automotive seats, supporting the market's growth during the forecast period.

Company Profiles

Key players in the South and Central America 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. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products to consumers.

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