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ICE & BEV Seatbelt Material Market: Current Analysis and Forecast (2025-2033)

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Abstracts

The ICE & BEV Seatbelt Material market is set to show a growth rate of 6.42% during the forecast period (2025-2033F). The ICE & BEV Seatbelt Material Market is a specialized fabric and webbing type that is engineered to be safe, durable, and comfortable to be used both in Internal Combustion Engine (ICE) and in the Battery Electric Vehicle (BEV) market. The materials used to make seatbelts are designed to provide high tensile performance, abrasion resistance, and resistance to flame, as well as passenger safety during crash and impact events. The products available in the market are a diverse range of products, such as polyester webbing, nylon seatbelt fabrics, aramid reinforced products, and bio-based materials that are environmentally friendly to enable them to meet the safety requirements of the automotive industry. Also, market demand is being driven by the increased attention to compliance with safety, crashworthiness, and higher-order restraint systems of passenger and commercial vehicles. In addition, the current trend in adopting modern, efficient, and environmentally sustainable safety solutions is being influenced by the growing interplay between lightweight, sustainable, and recyclable seatbelt materials on both ICE and BEV platforms.

Based on the material type, the global ICE & BEV Seatbelt Material Market is segmented into nylon, polyester, and polypropylene. Among these, the polyester segment dominated the market and is expected to dominate in the forecast period. This is attributed to its high tensile strength, high abrasion resistance, low stretch under load, and also good UV and heat resistance, making it the most popular material in the manufacture of seatbelts. Polyester webbing is extremely popular with automotive OEMs in both ICE and BEV applications as it provides a balance of durability, safety, and cost-effectiveness. Its consistency in providing safety to passengers in situations involving crashes and adherence

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to high standards of international safety have made polyester the preferred choice when it comes to the production of seatbelts. The nylon segment, though relatively smaller, is likely to enjoy gradual adoption, owing to its large impact resistance, flexibility, and soft feel, which offers greater comfort to the passengers.

Based on the component type, the global ICE & BEV Seatbelt Material Market is categorized into anchor point, buckle assembly, retractor assembly, and webbing. The retractor assembly segment dominated the market, as it forms the core feature of a seatbelt system, which influences automatic adjustment, tension control, and ensures a security level in locking during sudden deceleration or collisions. A more sophisticated feature that is being added to retractor assemblies is emergency locking retractors (ELR), pre-tensioners, and load limiters, which have substantially increased the safety and comfort of passengers. The increasing use of electronic sensors and smart-safety technologies, particularly in BEVs where high-level occupant protection is a major differentiator, is creating demand for innovative and intelligent retractor systems. This high usage in both ICE and BEV vehicles makes retractor assemblies the most popular type of component in the marketplace.

Based on the vehicle type, the global ICE & BEV Seatbelt Material Market is divided into commercial vehicles and passenger cars. Among these, the passenger car segment dominated the market and is expected to behave in the same fashion in the forecast period, since passenger cars constitute most of the automotive production and sales worldwide. Increased demand for personal mobility, urbanization, and growing consumer awareness of the safety of cars have resulted in increased use of advanced seatbelt fabric in this segment. The governments worldwide are being compelled to implement stringent government safety provisions such as NCAP ratings, Euro NCAP, and NHTSA. Such demands are pushing car manufacturers towards the high-performance seatbelt material, which is more crash protective, comfortable, and durable. Furthermore, battery electric vehicles (BEVs) are expanding at an exponential rate in the market, particularly in the passenger car sector, which is motivating the use of lightweight, sustainable, and recyclable materials in seatbelts that meet the global emission reduction targets.

Based on the distribution channel, the global ICE & BEV Seatbelt Material Market is segmented into Original Equipment Manufacturers (OEM) and Aftermarket. Among these, the Original Equipment Manufacturers (OEM) segment dominated the market and is expected to continue its dominance in the forecast period, as most seatbelt materials are sold directly to automakers as they manufacture their vehicles. To achieve high safety standards set by the global association and the reliability of their vehicles, OEMs focus on high-performance, certified, and regulation-compliant seatbelt materials. The increasing electrification of vehicle fleets, a rapid rise in passenger car manufacturing, and growing safety compliance of both ICE and BEV platforms present a significant demand for OEMs. Secondly, the adoption of light, recyclable, and smart webbing concepts to the next generation vehicles is further consolidating the OEM procurement channels, particularly with the automakers putting greater emphasis on high-tech safety features as a defining factor in their models. Although the aftermarket segment is relatively small in share, it is considered to be a critical part of vehicle safety maintenance and upkeep in the lifecycle of a vehicle. The necessity to replace through wear and tear, accidents, and regulatory compliance inspections drives demand within this segment.

For a better understanding of the demand of ICE & BEV Seatbelt Material, the market is analyzed based on its worldwide adoption in countries such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, U.K., France, Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, South-Korea and the Rest of Asia-Pacific), and Rest of World. Among these, the Asia Pacific region is the largest in the world in the automotive seatbelt material, with the high volume of vehicle production, fast urbanization, and growing disposable income that have greatly boosted the number of vehicles per household in the various countries, such as China, India, and Japan. China had the highest market share in the world in the year 2024, and the nation was projected to produce nearly 33.8 percent of the global vehicle production. It is a market leader in the internal combustion engine (ICE) and electric vehicle (EV) sectors. The high demand for compact SUVs in the Asia Pacific markets is led by OEMs like Hyundai, Tata Motors, Toyota, Maruti Suzuki, Mahindra and Mahindra, MG Motors, and other local manufacturers, with many of the new models including captain seats in the middle rows, each fitted with individual seatbelt retractors to protect the occupants better. Whereas economy models, especially ICE, offer front captain seat retractors or rear bench seat retractors, the increasing popularity of premium vehicles in the Asia Pacific market has led to the introduction of retractors in the rear and even third-row seats to ensure a high level of safety requirements.

Some major players running in the market include Autoliv, Joyson Safety Systems, Belt-tech, Bxseatbelts, Coats Group plc, Country Brook Design, Daicel Corporation, Berger GmbH & Co. Holding KG, GOOD SUCCESS CORP., and GWR Safety Systems.

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