

Southeast Asia Automotive Upholstery Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Automotive upholstery refers to the materials and components that cover and complete a vehicle's interior, including seats, door panels, headliners, carpets, and other associated trims. It plays a significant role in comfort, aesthetics, longevity, and the in-cabin experience.

The Southeast Asian Automotive Upholstery market is expected to exhibit a growth rate of 7.08% during the forecast period (2025-2033F). The market is driven by rising passenger-vehicle production, rising disposable income, and increasing demand for greater interior comfort and aesthetics. Also, the growth of EV production is increasing the value of vehicle interiors per car, and the longer duration of vehicle ownership is sustaining aftermarket demand. Moreover, the increasing regulatory focus on safety, durability, and interior quality standards is prompting OEMs (original equipment manufacturers) to invest in higher-quality upholstery solutions.

On September 4, 2025, Antolin, a multinational leader in the design and manufacture of automotive interior components, inaugurated two new industrial plants in Thailand and Indonesia, consolidating its expansion in Southeast Asia, one of the industry's most dynamic regions. The new plant in Thailand is located in a strategic area to serve global OEMs with a local presence, reinforcing key electrification projects in markets such as Vietnam, Malaysia, and Indonesia. This facility will operate as a center of excellence for modular and intelligent interior solutions, including modular headliners, door panels, and cockpits.

Based on product type, the market is segmented into seat covers, door panels, headliners, carpets & floor mats, and others. Among these, the seat covers segment held the largest share in 2024. This is primarily because they can fit

any type of vehicle and are also frequently replaced. The OEM market is also robust because seating systems are a premium interior component, and the aftermarket drives incremental volume through customizations and wear-based replacements. Such a dual-demand structure prompts suppliers to scale production and expand their material portfolio to accelerate adoption across different price points. In November 2025, Pecca Group Bhd stepped up its transformation into an integrated seat and interior systems provider, targeting Tier-1 automotive component manufacturer status by 2026 as it deepens its presence across the automotive, aviation, and locomotive sectors. According to the upholstery manufacturer, the move expands its scope to support a broader range of requirements across all three sectors by adding full seat assembly to its core expertise in designing and supplying leather upholstery for seats and components. The new seat assembly capability is expected to be commissioned in the second half of 2026 (2H26).

Based on material type, the Southeast Asian Automotive Upholstery market is segmented into leather, fabric, vinyl, and others. Among these, the leather segment is expected to grow at a significant CAGR during the forecast period (2025-2033). Leather and leather substitutes facilitate market expansion by fueling the trend of vehicle premiumization in the Southeast Asian emerging markets. With rising consumer purchasing power, OEMs are increasingly offering leather or PU leather trims in mid-segment passenger cars, thereby increasing per-vehicle upholstery value. This transformation helps manufacturers increase margins, invest in material innovation, and expand production footprints across regions.

Based on vehicle type, the market is segmented into passenger cars and commercial vehicles. Among these, the passenger cars segment held the dominant share of the Southeast Asia Automotive Upholstery market in 2024. This is due to high production volumes and a growing domestic sales market. The rise in urbanization, income, and access to financing is driving passenger vehicle penetration, which directly correlates with demand for seats and interior trim. This provides upholstery manufacturers with stable, long-term OEM contracts and a rationale for asset localization.

Based on sales channel, the market is segmented into OEM (original equipment manufacturer), and aftermarket. Among these, the aftermarket segment is expected to grow at a significant CAGR during the forecast period (2025-2033). This is driven by rising vehicle ownership, a longer vehicle ownership cycle, and

a growing need for interior refurbishment and personalization. In low-end markets, consumers often upgrade seats, mats, and trims to enhance comfort and looks. This sustains recurring revenue streams for upholstery suppliers and reduces reliance on repetitive OEM production volumes.

For a better understanding of the market adoption of the Southeast Asian Automotive Upholstery market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow at a significant CAGR during the forecast period (2025-2033), driven by vehicle assembly and a strong push toward local manufacturing. The growth of local OEMs and EV manufacturers is increasing the demand for local sourcing of seating and interior materials. The increasing number of vehicles and rising income levels are also driving demand for aftermarket upholstery. On December 8, 2025, South Korea's Kolon Industries signed a long-term supply contract with Autoliv, the world's largest vehicle safety parts company. The agreement follows an MoU signed in April, under which Kolon Industries committed to increasing supplies of airbag materials. In accordance with the contract, Kolon Industries will build a new airbag material production facility in Vietnam, which will commence operation from 2028 with the latest production technology. The facility is estimated to have an investment capital of approximately USD 48 million.

Some major players running in the market include Pecca Group Berhad, SEIREN CO., LTD., Newton Leather Industries Sdn Bhd, OZ LEATHER JOINT STOCK COMPANY, Interhides Public Company Limited, Innova Pte Ltd, Adient plc, Thai Summit Group, TOYOTA BOSHOKU CORPORATION, and FORVIA Group.

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