Automotive Upholstery Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 90 pages | Mordor Intelligence

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Report description:

The Automotive Upholstery Market was valued at USD 8.5 billion and is expected to reach USD 13.6 billion by registering a CAGR of around 7% during the forecast period.

The COVID-19 pandemic hindered the growth of the automotive upholstery market as the production of new vehicles witnessed a decline due to the imposition of lockdowns and travel restrictions worldwide. Supply chain disruptions and fluctuations in the costs of raw materials further hampered the growth of the upholstery market. However, as manufacturing facilities resumed production, the market grew significantly during the forecast period.

Over the medium term, growing demand for advanced automotive technologies and automotive interiors, with a rising focus on lightweight automotive materials and the development of varied non-fabric substitutes, is expected to drive demand in automotive upholstery during the forecast period. Furthermore, contributed by the rising demand for customized interiors in vehicles. Moreover, various automobile manufacturers are focusing on developing better products to offer better product to their customers.

Key Highlights
In the same line, Mercedes has worked for a perforated seat. Mushrooms on the forest floor are produced by the mycelium of a fungus, which is a fibrous root system that helps break down organic matter to nourish plant life. A foamy marshmallowy material can be harvested in as little as two weeks by feeding mycelial cells a diet of sawdust and organic material in a vertical agriculture facility powered by renewable energy. The material is then formed into sheets and processed according to green chemistry principles. Some plasticizers provide durability, but Mylo is certified to be 50-85% bio-based.
Key Highlights

The perforated seat inserts look and feel like leather and make their automotive debut in the Mercedes EQXX.

Adriano Di Marti, a Mexican company, created Deserttex automotive upholstery by harvesting mature prickly pear leaves, which grow back naturally and do not require irrigation, chemicals, or pesticides. These leaves are crushed, sun-dried, mixed with non-toxic materials, and processed into vegan leather. It is said to be durable for ten years and, unlike Mylo, is partially biodegradable.
Key Highlights
Deserttex, which imitates the spring-back and suppleness of collagen in animal leather, is used for the majority of the EQXX's white seating, console, and steering wheel.

On the other hand, the changing prices of raw materials and the strict government rules and regulations for reducing HAP (Hazardous air pollutant) emissions are anticipated to curtail the growth of the market. Nevertheless, the development of autonomous vehicles offers new opportunities for automotive upholstery manufacturers throughout the forecast period.

Asia-Pacific region is the largest market for the automotive upholstery market and is expected to lead the market. China is anticipated to play a significant role in the automotive upholstery market, followed by Japan and India. North America is expected to grow at a faster rate, followed by Europe during the forecast period owing to the rising number of automobiles in this region.

Automotive Upholstery Market Trends

Seat Covers Segment Expected to Gain Significance during the Forecast Period

The Seat Covers application is estimated to be the largest growing segment for the automotive upholstery market by product type application during the forecast period. The growth of this application can be attributed directly to the growth of vehicle production. Seat covers utilize the maximum upholstery material in an automotive application. Each car seat utilizes up to 2 meters of upholstery material.

The upholstery material required for automotive seat covers varies depending on the vehicle model and vehicle type. Moreover, as the comfort of drivers in vehicles is gaining importance, seats have become an important factor in influencing a purchase decision for a buyer who spends a significant amount of time in road transit. So in this regard, some of the key players in the market are focused on improving their investments over the forecast period. For instance,

In November 2021, auto seat covers maker Peca Group (PGB) signed a 2-year memorandum of understanding (MoU) with Malaysia Automotive Robotics and IoT Institute (MARii) to collaborate in EV parts, components technology, and market expansion of products.
Under this MoU, MARii will be developing new opportunities for PGB to expand its capabilities to offer more competitive products to global brands, as well as enhance the operational efficiency of PGB's business process by integrating Industry 4.0 systems.

Despite this, to cater to the growing demand for comfortable seats and seat covers from customers, automotive OEMs are also providing customized seats. Currently, customers can choose from a wide variety of seat covers that are offered as a standard fit on car seats, as well as diverse options in the aftermarket. For instance,

In May 2022, Toyota Boshoku Corporation (Toyota Boshoku) announced that it would exhibit at the JSAE's Automotive Engineering Exposition 2022. Its Fatigue Estimation and Drowsiness Suppression System is a seat cover equipped with a system that estimates the driver's drowsiness and fatigue while driving and suppresses drowsiness. The "plant-derived self-healing resin material" is a plant-derived resin that repairs itself even if the material is scratched or cracked.

In addition, driver fatigue, which is observed as a major reason for vehicle accidents, can be reduced with ergonomically structured automotive seats and perforated seat covers. The increase in the uptake of advanced seat technologies such as sensor-enabled seats, which monitor a driver's biometrics, and ventilated seats likely to drive the growth of the automotive seat's upholstery market.

Asia-Pacific Region Anticipated to Lead the Automotive Upholstery Market

Asia-Pacific region is likely to dominate the Automotive upholstery market owing to the growing demand for automotive vehicles and the presence of automobile manufacturing facilities, especially in countries such as China, India, and Japan. The demand for automotive upholstery in this region is directly linked to vehicle production in China and India, which are both automotive hubs. Moreover, the demand for luxury vehicles in this region is anticipated to grow, further enhancing the demand for automotive upholstery from this region.

Apart from rising automotive sales, government initiatives and global investments boost the demand for automotive upholstery over the forecast period. So, players present in the market are actively engaged in designing several growth strategies and are also inclined towards performing research and development activities to strengthen their presence in the market. For instance,

In April 2022, Honda Cars India Ltd., India's leading premium car manufacturer, today unveiled the much-anticipated New City e: HEV, India's Supreme Electric Hybrid. The company reiterated its global vision of achieving carbon neutrality and zero collision fatalities by 2050 while releasing technical details of the new City e: HEV. The car's interior is plush, premium, and spacious, with a New Luxurious Two-Tone Ivory & Black Interior Color Theme.
Nobo Automotive Systems will exhibit a carbon fiber frame seat at the Shanghai International Automobile Industry Exhibition in April 2021. This seat's back frame is integrally formed with carbon fiber composites and uses a small number of parts, resulting in a 35% weight reduction. Zhejiang Tiancheng Controls' high-end carbon fiber seat, introduced in November 2021, uses one-piece molding, thermosetting, and injection molding processes and is approximately 30% lighter than conventional steel seats.

North America is expected to grow at a faster pace during the forecasted period due to the presence of leading automotive manufacturers with a surge in industrialization followed by the Europe region.

The growth of the market in North America is attributed to the high adoption of passenger cars in the countries such as the United States, Canada, and Mexico. Cars being one of the major needs in almost all households in the United States, production growth contributes to the upholstery market during the forecast period.

Automotive Upholstery Market Competitor Analysis

The Automotive Upholstery Market is the moderately consolidated one owing to its competitive nature and the presence of a large number of players operating in it across the globe. These players are estimated to focus on the development of new products and innovations, which will help them expand their product portfolio and attract a large number of consumers across the globe. For instance, in March 2021, Adient, a global leader in automotive seating, announced that as part of its strategic transformation in

China, it has entered into definitive agreements with joint venture partner Yanfeng Automotive Trim Systems Ltd. (YF) to end its Yanfeng Adient Seating Co., Ltd. (YFAS) joint venture in China.

Some of the key players in the market are Adient PLC, Lear Corporation, Toyota Boshoku Corporation, Faurecia SE, and Seiren Co. Ltd.

Additional Benefits:

The market estimate (ME) sheet in Excel format
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