

Automotive Interior Market by Component (HUD, Door Panel, Dome Module, Seat, Headliner, Center Console, Center Stack & Others), Material Type, Level of Autonomy, Electric Vehicle, Passenger Car Class, ICE Vehicle Type and Region - Global Forecast to 2032

Market Report | 2025-05-06 | 472 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global automotive interior market size is projected to grow from USD 176.44 billion in 2025 to USD 205.77 billion by 2032, at a CAGR of 2.2%.

The automotive interior market is expected to experience growth driven by various factors. The automotive industry is currently under constant pressure to adapt to new changes due to technological advancements and end-user preferences. Vehicle interiors are key areas that have witnessed a rapid change due to various factors, such as consumer demand for safety and comfort, preference for fuel efficiency, and increasing competition within the industry. OEMs are prioritizing the integration of advanced features and premium design elements, while simultaneously leveraging lightweight, cost-effective, and durable materials to improve overall vehicle performance and sustainability. Recent developments include the adoption of head-up displays, advanced gesture and voice controls, heated steering wheels, haptic feedback, smart seating systems, ambient lighting, illuminated headliners, and integrated air purification systems. As consumers increasingly seek personalized and tech-enabled driving experiences, industry players are investing in the development of innovative, high-performance interior solutions to strengthen their market position.

?

Metal segment to have highest CAGR during forecast period

The metal segment in the automotive interior market is anticipated to register the highest CAGR during the forecast period. This growth is driven by increasing demand for strength, durability, and structural integrity in key interior components such as seat frames, instrument panels, pedals, and steering systems. As vehicles become more advanced and safety regulations tighten, the

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

role of robust metal elements in supporting in-cabin features becomes even more critical.

Metal materials, especially high-strength steel and aluminum alloys, are progressively utilized to optimize weight without compromising safety or performance. Automakers are prioritizing lightweight metal solutions to meet fuel efficiency targets and improve overall vehicle dynamics. In electric and hybrid vehicles, metal interiors also support better thermal management and battery integration, further boosting their significance in next-generation vehicle design.

The premium vehicle segment is also contributing to this trend, with the use of brushed metal trims and accents becoming more common in high-end interiors to elevate visual appeal and luxury perception. As consumer expectations evolve and manufacturers push for advancement in both functionality and aesthetics, the metal segment is well-positioned to capitalize on emerging openings across all vehicle categories.

Passenger cars segment to witness significant growth during forecast period

The passenger cars segment is anticipated to register strong growth in the automotive interior market during the forecast period. This trend is largely driven by rising consumer expectations for enhanced in-vehicle comfort, advanced features, and aesthetic appeal. As urbanization accelerates and disposable income levels rise-particularly in emerging markets-passenger vehicle sales are gaining momentum. This has resulted in increasing demand for upgraded interior components such as infotainment systems, smart seating, ambient lighting, and climate control technologies.

OEMs are heavily investing in the customization and technological advancement of passenger car interiors to distinguish their offerings and enhance the user experience. Features such as AI-enabled voice assistance, digital instrument clusters, and ambient lighting, which were previously used only in premium cars, are presently being integrated into compact and mid-range passenger cars. Moreover, the shift toward electric and hybrid vehicles is driving the development of new interior layouts and space-optimization strategies. Original equipment manufacturers (OEMs) such as Nissan (Japan), Honda Motor Co., Ltd. (Japan), Audi AG (Germany), BMW (Germany), and Mercedes-Benz (Germany) are actively introducing Level 2 and Level 3 semi-autonomous vehicles, which necessitate advanced interior features to improve driver comfort and safety. These advancements are reshaping consumer expectations and driving demand for innovative interior solutions.

In 2025, Renault Group announced plans to acquire Nissan's 51% stake in their Indian joint venture, Renault Nissan Automotive India Private Ltd (RNAIPL), subsequently taking full ownership of the manufacturing facility in Chennai. This strategic move aligns with Renault's commitment to extend its presence in the Indian market and underscores the importance of India as a hub for automotive innovation and production. The acquisition is anticipated to facilitate the development and production of new models, including those equipped with progressed independent highlights.

These developments highlight the automotive industry's shift towards integrating cutting-edge technologies within vehicle interiors to meet evolving consumer demands. As OEMs continue to invest in autonomous vehicle technologies and expand their operations in key markets like India, the automotive interior market is anticipated to experience robust growth during the forecast period.

Asia Pacific to hold the largest market share during the forecast period

Asia Pacific continues to emerge as a high-potential region for the global automotive industry, led primarily by the rapid expansion of the Chinese market. Alongside China, countries such as India, Japan, and South Korea play significant roles in shaping the regional automotive landscape. While Japan and South Korea are mature markets with strong OEM footprints, India is steadily evolving into a key manufacturing and innovation hub. According to OICA, China and India together produce over 30 million vehicles annually, reinforcing the region's strategic importance despite global market slowdowns.

Furthermore, the region is the largest market for small passenger cars, making it a viable market for automotive interior component suppliers. With the rise of autonomous vehicle trends, automotive interior components will become increasingly

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

important in the selection of car models; as a result, manufacturers are delivering high-tech interiors such as advanced entertainment systems, connected applications, and premium interior materials.

The market growth in Asia Pacific can be attributed to the high vehicle production and increased use of advanced electronics in Japan, South Korea, and China. The governments of these countries have recognized the growth potential of the automotive sector and have consequently undertaken various initiatives to encourage major OEMs to enter their domestic markets. Several global automobile manufacturers, such as Volkswagen (Germany), Mercedes Benz (Germany), and General Motors (US), have shifted their production plants to emerging economies in the region.

?

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

-□By Company Type: OEMs - 24%, Tier I - 44%, Tier II - 32%

-□By Designation: CXOs - 24%, Directors - 37%, and Others - 39%

-□By Region: North America - 24%, Europe - 32%, Asia Pacific- 36%, and RoW- 8%

The automotive interior market is dominated by global players such as FORVIA Faurecia (France), Adient plc. (Ireland), Robert Bosch GmbH (Germany), Lear Corporation (US), and Antolin (Spain). These companies adopted product launches, deals, and other strategies to gain traction in the automotive interior market.

Research Coverage:

The market study covers the Automotive Interior Market by Component (Center Stack, Head-Up Display, Instrument Cluster, Rear Seat Entertainment, Dome Module, Headliner, Seat, Interior Lighting, Door Panel, Center Console, Adhesives & Tapes, Upholstery), Material Type (Leather, Fabric, Vinyl, Wood, Glass Fiber Composite, Carbon Fiber Composite, Metal), Level of Autonomy (Semi-Autonomous, Autonomous, Non-autonomous), Electric Vehicle (BEV, FCEV, HEV, PHEV), Passenger Car Class (Economic Cars, Mid Segment Cars, Luxury Segment Cars), ICE Vehicle Type (Passenger Cars, Light Commercial Vehicles, Heavy Commercial Vehicles), and Region (Asia Pacific, Europe, North America, RoW). It also covers the competitive landscape and company profiles of the major players in the automotive interior market ecosystem.

The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall automotive interior market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

-□Analysis of Key Drivers (Growing consumer preference for high-end features, convenience, and advanced safety, lightweight & sustainable material innovations, enhanced functionalities in lighting, and increasing demand for modular & multi-functional interior designs), Restraints (High development cost and volatility in raw material prices, significant power consumption in automotive interior electronics, increasing competition from local companies offering counterfeit/retrofit solutions), Opportunities (Rising trend of semi-autonomous and autonomous vehicles, growing trend of interior customization in premium vehicles, new entertainment and smart mirror applications, recycling and refurbishment of automotive interior materials), and Challenges (Cybersecurity risks in connected interiors, presence of unorganized aftermarket) influencing the growth of the automotive interior market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the automotive interior market.

-□Market Development: Comprehensive information about lucrative markets ? the report analyzes the automotive interior market across varied regions.

-□Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive interior market.

-□Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FORVIA Faurecia (France), Adient plc. (Ireland), Robert Bosch GmbH (Germany), Lear Corporation (US), and Antolin (Spain), among others in the automotive interior market.

Table of Contents:

- 1 INTRODUCTION 33
 - 1.1 STUDY OBJECTIVES 33
 - 1.2 MARKET DEFINITION 34
 - 1.2.1 INCLUSIONS AND EXCLUSIONS 38
 - 1.3 MARKET SCOPE 39
 - 1.3.1 YEARS CONSIDERED 40
 - 1.4 CURRENCY CONSIDERED 40
 - 1.5 STAKEHOLDERS 41
 - 1.6 SUMMARY OF CHANGES 42
- 2 RESEARCH METHODOLOGY 43
 - 2.1 RESEARCH DATA 43
 - 2.1.1 SECONDARY DATA 44
 - 2.1.1.1 List of key secondary sources 45
 - 2.1.1.2 Key data from secondary sources 46
 - 2.1.2 PRIMARY DATA 47
 - 2.1.2.1 Key data from primary sources 48
 - 2.1.2.2 List of participating companies for primary research 49
 - 2.1.2.3 Major objectives of primary research 49
 - 2.1.2.4 List of primary participants 50
 - 2.2 MARKET SIZE ESTIMATION 51
 - 2.2.1 BOTTOM-UP APPROACH 53
 - 2.2.2 TOP-DOWN APPROACH 54
 - 2.3 DATA TRIANGULATION 56
 - 2.4 FACTOR ANALYSIS 57
 - 2.5 RESEARCH ASSUMPTIONS 59
 - 2.6 RESEARCH LIMITATIONS 60
- 3 EXECUTIVE SUMMARY 61
- 4 PREMIUM INSIGHTS 66
 - 4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE INTERIOR MARKET 66
 - 4.2 AUTOMOTIVE INTERIOR MARKET, BY REGION 67
 - 4.3 AUTOMOTIVE INTERIOR MARKET, BY COMPONENT TYPE 67
 - 4.4 AUTOMOTIVE INTERIOR MARKET, BY MATERIAL TYPE 68
 - 4.5 AUTOMOTIVE INTERIOR MARKET, BY LEVEL OF AUTONOMY 68
 - 4.6 AUTOMOTIVE INTERIOR MARKET, BY PASSENGER CAR CLASS 69
 - ?
 - 4.7 AUTOMOTIVE INTERIOR MARKET, BY ELECTRIC VEHICLE TYPE 69
 - 4.8 AUTOMOTIVE INTERIOR MARKET, BY ICE VEHICLE TYPE 70
- 5 MARKET OVERVIEW 71
 - 5.1 INTRODUCTION 71
 - 5.2 IMPACT OF AI/GEN AI ON AUTOMOTIVE INTERIOR MARKET 72
 - 5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 72
 - 5.4 MARKET DYNAMICS 73
 - 5.4.1 DRIVERS 74

5.4.1.1	Growing consumer preference for high-end features, convenience, and advanced safety	74
5.4.1.2	Lightweight & sustainable material innovations	74
5.4.1.3	Enhanced functionalities in interior lighting	76
5.4.1.4	Increasing demand for modular & multi-functional interior designs	77
5.4.2	RESTRAINTS	78
5.4.2.1	High development cost and volatility in raw material prices	78
5.4.2.2	Increasing competition from local companies offering counterfeit/retrofit solutions	79
5.4.2.3	Significant power consumption in automotive interior electronics	79
5.4.3	OPPORTUNITIES	80
5.4.3.1	Rising trend of semi-autonomous and autonomous vehicles	80
5.4.3.2	Growing trend of interior customization in premium vehicles	87
5.4.3.3	New entertainment and smart mirror applications	89
5.4.3.4	Recycling of automotive interior materials	89
5.4.4	CHALLENGES	91
5.4.4.1	Cybersecurity risks in connected interiors	91
5.4.4.2	Presence of unorganized aftermarket	91
5.5	PRICING ANALYSIS	93
5.5.1	AVERAGE SELLING PRICE TRENDS OF COMPONENTS, BY VEHICLE TYPE, 2024	93
5.5.2	AVERAGE SELLING PRICE TRENDS OF COMPONENTS, BY REGION, 2024	93
5.6	ECOSYSTEM ANALYSIS	94
5.7	SUPPLY CHAIN ANALYSIS	97
5.8	CASE STUDY ANALYSIS	98
5.8.1	CONCEPT AND SERIAL DEVELOPMENT OF HIGH-END AUTOMOTIVE DOOR PANELS	98
5.8.2	INCORPORATION OF HIDDEN LIGHTING WITHIN TRIM PIECES AND GLOVEBOX	98
5.8.3	DINETTE SEATING FOR WINNEBAGO MPV MODELS	99
5.8.4	ACCENTURE LEVERAGED AI TO DESIGN CAR SEATS WITH INTELLIGENCE-DRIVEN FEATURES	99
5.8.5	DESIGNING REAR INTERIOR COMPARTMENT TRI WITH AESTHETICS AND REDUCED NVH IN CABINS	100
5.8.6	DESIGN AND DEVELOPMENT OF MODULAR CAR INTERIOR SYSTEM TO REDUCE CYCLE TIME	100
?		
5.9	PATENT ANALYSIS	101
5.10	TECHNOLOGY ANALYSIS	107
5.10.1	KEY TECHNOLOGIES	107
5.10.1.1	Wireless lighting using integrated sensors and controllers with luminaires	107
5.10.1.2	Active motion seating	107
5.10.1.3	AR HUDs	107
5.10.1.4	Curved and flexible displays	108
5.10.1.5	Multi-display systems	108
5.10.1.6	Transparent and headliner displays	108
5.10.1.7	High-resolution and high-dynamic-range (HDR) displays	109
5.10.1.8	3D printing materials for vehicle interior parts	109
5.10.1.9	Adaptive lighting	109
5.10.2	ADJACENT TECHNOLOGIES	110
5.10.2.1	Networked lighting controllers	110
5.10.2.2	Lighting control system network with AI	110
5.10.2.3	Connected lighting	110
5.10.3	COMPLEMENTARY TECHNOLOGIES	110
5.10.3.1	Human-centric lighting	110

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.10.3.2	Integrated wellness features	111
5.10.3.3	Multi-material smart surfaces in car interiors	111
5.11	REGULATORY LANDSCAPE	112
5.11.1	REGULATORY BODIES, GOVERNMENT AGENCIES AND OTHER ORGANISATION	112
5.12	INVESTMENT SCENARIO	118
5.13	TRADE ANALYSIS	119
5.13.1	IMPORT SCENARIO OF AUTOMOTIVE SEAT	119
5.13.2	EXPORT SCENARIO OF AUTOMOTIVE SEAT	122
5.14	KEY CONFERENCES AND EVENTS IN 2025-2026	126
5.15	KEY STAKEHOLDERS AND BUYING CRITERIA	127
5.15.1	KEY STAKEHOLDERS IN BUYING PROCESS	127
5.15.2	BUYING CRITERIA	128
5.16	SUPPLIER ANALYSIS	129
5.16.1	SEAT	129
5.16.2	HEAD-UP DISPLAY (HUD)	131
5.16.3	INSTRUMENT CLUSTER	133
5.16.4	DOME MODULE	134
5.16.5	HEADLINER	136
5.16.6	INTERIOR LIGHTING	138
5.16.7	DOOR PANEL	140
5.16.8	CENTER CONSOLE	141
5.16.9	UPHOLSTERY	143
5.16.10	OTHERS	144
6	AUTOMOTIVE INTERIOR MARKET, BY COMPONENT TYPE	146
6.1	INTRODUCTION	147
6.2	CENTER STACK	151
6.2.1	INCREASING DEMAND FOR CONNECTIVITY AND INFOTAINMENT TO DRIVE MARKET	151
6.3	HEAD-UP DISPLAY (HUD)	153
6.3.1	DEMAND FOR COMFORT AND SAFETY FUNCTIONS TO DRIVE MARKET	153
6.4	INSTRUMENT CLUSTER	155
6.4.1	RISING DEMAND FOR DIGITAL INSTRUMENT CLUSTERS TO DRIVE MARKET	155
6.5	REAR SEAT ENTERTAINMENT	157
6.5.1	GROWTH IN SALES OF LUXURY VEHICLES TO DRIVE MARKET	157
6.6	DOME MODULE	159
6.6.1	GROWING POPULARITY OF CONNECTED CARS TO DRIVE MARKET	159
6.7	HEADLINER	161
6.7.1	INCREASING DEMAND FOR SAFETY FEATURES TO DRIVE MARKET	161
6.8	SEAT	163
6.8.1	INCREASING DEMAND FOR PREMIUM PASSENGER CARS TO DRIVE MARKET	163
6.8.1.1	Standard seat	167
6.8.1.2	Powered seat	167
6.8.1.3	Heated and powered seat	168
6.8.1.4	Heated seat	169
6.8.1.5	Powered, heated, and memory seat	169
6.8.1.6	Powered, heated, and ventilated seat	170
6.8.1.7	Powered, heated, ventilated, and memory seat	170
6.8.1.8	Powered, heated, ventilated, memory, and massage seat	170

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.9	INTERIOR LIGHTING	170
6.9.1	RIISING DEMAND FOR AMBIENT LIGHTING TO DRIVE MARKET	170
6.9.2	AUTOMOTIVE INTERIOR LIGHTING APPLICATIONS	172
6.9.2.1	Dashboard lights	172
6.9.2.2	Glovebox lights	172
6.9.2.3	Reading lights	172
6.9.2.4	Dome lights	173
6.9.2.5	Rear-view mirror interior lights	173
6.9.2.6	Engine compartment lights	173
6.9.2.7	Passenger area lights	173
6.9.2.8	Driver area lights	173
6.9.2.9	Footwell lights	173
6.10	DOOR PANEL	173
6.10.1	RIISING AUTOMOBILE PRODUCTION TO DRIVE MARKET	173
6.11	CENTER CONSOLE	175
6.11.1	GROWING DEMAND FOR ADVANCED INFOTAINMENT, CONNECTIVITY, AND ERGONOMIC DESIGN TO DRIVE MARKET	175
6.12	OTHERS	177
6.13	ADHESIVES & TAPES	178
6.14	UPHOLSTERY	178
6.15	KEY INDUSTRY INSIGHTS	179
7	AUTOMOTIVE INTERIOR MARKET, BY ELECTRIC VEHICLE TYPE	180
7.1	INTRODUCTION	181
7.2	BATTERY ELECTRIC VEHICLE (BEV)	184
7.2.1	RIISING INTEGRATION OF ADVANCED TECHNOLOGIES AND SAFETY NORMS TO DRIVE MARKET	184
7.3	FUEL CELL ELECTRIC VEHICLE (FCEV)	187
7.3.1	RAPID ADVANCEMENT IN INTERIOR COMPONENTS TO DRIVE MARKET	187
7.4	HYBRID ELECTRIC VEHICLE (HEV)	190
7.4.1	FOCUS ON COMFORT AND LUXURY TO DRIVE MARKET	190
7.5	PLUG-IN HYBRID ELECTRIC VEHICLE (PHEV)	193
7.5.1	FOCUS ON SUSTAINABILITY AND DIGITALIZATION TO DRIVE PHEV INTERIOR INNOVATIONS	193
7.6	KEY INDUSTRY INSIGHTS	196
8	AUTOMOTIVE INTERIOR MARKET, BY ICE VEHICLE TYPE	197
8.1	INTRODUCTION	198
8.2	PASSENGER CAR (PC)	200
8.2.1	RIISING DEMAND FOR MID-SEGMENT AND LUXURY CARS TO DRIVE MARKET	200
8.3	LIGHT COMMERCIAL VEHICLE (LCV)	202
8.3.1	GROWTH IN POINT-TO-POINT TRANSPORTATION OWING TO INCREASING E-COMMERCE ACTIVITIES TO DRIVE MARKET	202
8.4	HEAVY COMMERCIAL VEHICLE (HCV)	203
8.4.1	HIGH DEMAND FOR FREIGHT TRANSPORTATION BY ROAD TO DRIVE MARKET	203
8.5	KEY INDUSTRY INSIGHTS	205
9	AUTOMOTIVE INTERIOR MARKET, BY LEVEL OF AUTONOMY	206
9.1	INTRODUCTION	207
9.2	NON-AUTONOMOUS CAR	212
9.2.1	RIISING DEMAND FOR COMFORT DRIVING TO DRIVE MARKET	212
9.3	SEMI-AUTONOMOUS CAR	214
9.3.1	INCREASING DEMAND FOR SAFETY FEATURES TO DRIVE MARKET	214

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.4	AUTONOMOUS CAR	215
9.4.1	ADVANCEMENTS IN ROBO-TAXIS AND AUTOMATED RIDE-HAILING SERVICES TO DRIVE MARKET	215
9.5	KEY INDUSTRY INSIGHTS	217
	?	
10	AUTOMOTIVE INTERIOR MARKET, BY MATERIAL TYPE	218
10.1	INTRODUCTION	219
10.2	LEATHER	221
10.2.1	HIGH DEMAND FOR LEATHER SEATS AND FINISHES IN ASIA PACIFIC TO DRIVE MARKET	221
10.3	FABRIC	222
10.3.1	RIISING PRODUCTION OF ECONOMIC CARS TO DRIVE MARKET	222
10.4	VINYL	223
10.4.1	DURABILITY, AFFORDABILITY, AND VERSATILITY OF VINYL TO DRIVE MARKET	223
10.5	WOOD	224
10.5.1	RIISING DEMAND FOR LUXURY VEHICLES TO DRIVE MARKET	224
10.6	GLASS FIBER COMPOSITE	225
10.6.1	WIDE USE IN INSTRUMENT AND DOOR PANELS TO DRIVE MARKET	225
10.7	CARBON FIBER COMPOSITE	225
10.7.1	INCREASING DEMAND FOR LIGHTWEIGHT AND FUEL-EFFICIENT VEHICLES TO DRIVE MARKET	225
10.8	METAL	226
10.8.1	INCREASING USE OF CHROME FINISH IN VEHICLE INTERIORS TO DRIVE MARKET	226
10.9	KEY INDUSTRY INSIGHTS	228
11	AUTOMOTIVE INTERIOR MARKET, BY PASSENGER CAR CLASS	229
11.1	INTRODUCTION	230
11.2	ECONOMIC CAR	233
11.2.1	INCREASING DEMAND FOR CONNECTIVITY AND INFOTAINMENT TO DRIVE MARKET	233
11.3	MID-SEGMENT CAR	236
11.3.1	ADVANCEMENT IN AUTOMOTIVE TECHNOLOGY TO DRIVE MARKET	236
11.4	LUXURY CAR	239
11.4.1	INCREASING DEMAND FOR ADVANCED FEATURES TO DRIVE MARKET	239
11.5	KEY INDUSTRY INSIGHTS	241
12	AUTOMOTIVE INTERIOR MARKET, BY REGION	242
12.1	INTRODUCTION	243
12.2	ASIA PACIFIC	245
12.2.1	MACROECONOMIC OUTLOOK	246
12.2.2	CHINA	251
12.2.2.1	Introduction of new technologies to drive market	251
12.2.3	JAPAN	254
12.2.3.1	Rising demand for comfort features in passenger cars to drive market	254
12.2.4	SOUTH KOREA	256
12.2.4.1	Rising demand for luxurious interiors to drive market	256
12.2.5	INDIA	259
12.2.5.1	Increase in demand for compact SUVs to drive market	259
12.2.6	THAILAND	262
12.2.6.1	Rise in digitalization and connectivity in vehicles to drive market	262
12.2.7	REST OF ASIA PACIFIC	264
12.3	EUROPE	267
12.3.1	MICROECONOMIC OUTLOOK	267

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.3.2	GERMANY	272
12.3.2.1	Increase in demand for autonomous vehicles to drive market	272
12.3.3	FRANCE	275
12.3.3.1	Rise in demand for SUVs to drive market	275
12.3.4	UK	278
12.3.4.1	Increase in demand for comfort and convenience in vehicles to drive market	278
12.3.5	SPAIN	281
12.3.5.1	Increase in adoption of semi-autonomous vehicles to drive market	281
12.3.6	ITALY	283
12.3.6.1	Government policies to support higher vehicle production to drive market	283
12.3.7	RUSSIA	286
12.3.7.1	Development of automotive component manufacturing facilities and investments to drive market	286
12.3.8	TURKEY	289
12.3.8.1	Growing popularity of personalization of vehicles to drive market	289
12.3.9	REST OF EUROPE	292
12.4	NORTH AMERICA	294
12.4.1	MACROECONOMIC OUTLOOK	297
12.4.2	US	300
12.4.2.1	Increasing demand for modular features in SUVs to drive market	300
12.4.3	CANADA	303
12.4.3.1	Collaborations between OEMs and domestic automotive interior suppliers to drive market	303
12.4.4	MEXICO	305
12.4.4.1	OEM expansion and cost-efficient manufacturing to drive market	305
12.5	REST OF THE WORLD (ROW)	308
12.5.1	MACROECONOMIC OUTLOOK	310
12.5.2	BRAZIL	313
12.5.2.1	Rising focus on comfort and convenience to drive market	313
12.5.3	IRAN	315
12.5.3.1	Technology transfer from foreign partners to drive market	315
12.5.4	SOUTH AFRICA	318
12.5.4.1	Interior upgrades in entry-level cars to drive market	318
	?	
13	COMPETITIVE LANDSCAPE	321
13.1	INTRODUCTION	321
13.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, 2021-2025	321
13.3	MARKET SHARE ANALYSIS, 2024	325
13.3.1	AUTOMOTIVE INTERIOR MANUFACTURER, MARKET SHARE ANALYSIS, 2024	326
13.3.2	AUTOMOTIVE SEAT MANUFACTURER, MARKET SHARE ANALYSIS, 2024	327
13.4	REVENUE ANALYSIS, 2020-2024	328
13.5	COMPANY VALUATION AND FINANCIAL METRICS	329
13.6	BRAND/PRODUCT COMPARISON	330
13.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	331
13.7.1	STARS	331
13.7.2	EMERGING LEADERS	331
13.7.3	PERVASIVE PLAYERS	331
13.7.4	PARTICIPANTS	331
13.7.5	COMPANY FOOTPRINT	333

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.7.5.1	Company footprint	333
13.7.5.2	EV type footprint	334
13.7.5.3	Component type footprint	335
13.7.5.4	Vehicle type footprint	336
13.7.5.5	Material type footprint	337
13.7.5.6	Region footprint	338
13.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	339
13.8.1	PROGRESSIVE COMPANIES	339
13.8.2	RESPONSIVE COMPANIES	339
13.8.3	DYNAMIC COMPANIES	339
13.8.4	STARTING BLOCKS	339
13.8.5	COMPETITIVE BENCHMARKING	341
13.8.5.1	List of startups/SMEs	341
13.8.5.2	Competitive benchmarking of startups/SMEs	341
13.9	COMPETITIVE SCENARIO	342
13.9.1	PRODUCT LAUNCHES	342
13.9.2	DEALS	349
13.9.3	EXPANSIONS	364
13.9.4	OTHERS	370
14	COMPANY PROFILES	372
14.1	KEY PLAYERS	372
14.1.1	ADIANT PLC.	372
14.1.1.1	Business overview	372
14.1.1.2	Products/Solutions/Services offered	374
14.1.1.3	Recent developments	374
14.1.1.3.1	Product launches	374
14.1.1.3.2	Deals	375
14.1.1.3.3	Expansions	376
14.1.1.3.4	Others	376
14.1.1.4	MnM view	376
14.1.1.4.1	Right to win	376
14.1.1.4.2	Strategic choices	377
14.1.1.4.3	Weaknesses and competitive threats	377
14.1.2	FORVIA FAURECIA	378
14.1.2.1	Business overview	378
14.1.2.2	Products/Solutions/Services offered	380
14.1.2.3	Recent developments	381
14.1.2.3.1	Product launches	381
14.1.2.3.2	Deals	382
14.1.2.3.3	Expansions	383
14.1.2.3.4	Others	384
14.1.2.4	MnM view	384
14.1.2.4.1	Right to win	384
14.1.2.4.2	Strategic choices	384
14.1.2.4.3	Weaknesses and competitive threats	384
14.1.3	YANFENG	385
14.1.3.1	Business overview	385

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.1.3.2	Products/Solutions/Services offered	386
14.1.3.3	Recent developments	387
14.1.3.3.1	Product launches	387
14.1.3.3.2	Deals	389
14.1.3.3.3	Expansions	389
14.1.3.4	MnM view	390
14.1.3.4.1	Right to win	390
14.1.3.4.2	Strategic choices	390
14.1.3.4.3	Weaknesses and competitive threats	390
14.1.4	LEAR CORPORATION	391
14.1.4.1	Business overview	391
14.1.4.2	Products/Solutions/Services offered	392
14.1.4.3	Recent developments	393
14.1.4.3.1	Product launches	393
14.1.4.3.2	Deals	394
14.1.4.3.3	Expansions	395
14.1.4.3.4	Others	396
14.1.4.4	MnM view	397
14.1.4.4.1	Key strengths	397
14.1.4.4.2	Strategic choices	397
14.1.4.4.3	Weaknesses and competitive threats	397
14.1.5	CONTINENTAL AG	398
14.1.5.1	Business overview	398
14.1.5.2	Products/Solutions/Services offered	399
14.1.5.3	Recent developments	400
14.1.5.3.1	Product launches	400
14.1.5.3.2	Deals	401
14.1.5.3.3	Expansions	401
14.1.5.4	MnM view	402
14.1.5.4.1	Key strengths	402
14.1.5.4.2	Strategic choices	402
14.1.5.4.3	Weaknesses and competitive threats	402
14.1.6	ANTOLIN	403
14.1.6.1	Business overview	403
14.1.6.2	Products/Solutions/Services offered	404
14.1.6.3	Recent developments	406
14.1.6.3.1	Product launches	406
14.1.6.3.2	Deals	407
14.1.6.3.3	Expansions	408
14.1.7	SAMVARDHANA MOTHERSON GROUP (SMP DEUTSCHLAND GMBH)	409
14.1.7.1	Business overview	409
14.1.7.2	Products/Solutions/Services offered	411
14.1.7.3	Recent developments	412
14.1.7.3.1	Deals	412
14.1.7.3.2	Expansions	415
14.1.7.3.3	Others	415
14.1.8	TOYOTA BOSHOKU CORPORATION	416

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.1.8.1	Business overview	416
14.1.8.2	Products/Solutions/Services offered	417
14.1.8.3	Recent developments	418
14.1.8.3.1	Product launches	418
14.1.8.3.2	Deals	419
14.1.8.3.3	Expansions	420
14.1.8.3.4	Others	420
14.1.9	ROBERT BOSCH GMBH	421
14.1.9.1	Business overview	421
14.1.9.2	Products/Solutions/Services offered	422
14.1.9.3	Recent developments	423
14.1.9.3.1	Product launches	423
14.1.9.3.2	Deals	424
14.1.9.3.3	Expansions	425
?		
14.1.10	HYUNDAI MOBIS	426
14.1.10.1	Business overview	426
14.1.10.2	Products/Solutions/Services offered	427
14.1.10.3	Recent developments	428
14.1.10.3.1	Product launches	428
14.1.10.3.2	Deals	428
14.1.10.3.3	Expansions	429
14.1.10.3.4	Others	429
14.1.11	DENSO CORPORATION	430
14.1.11.1	Business overview	430
14.1.11.2	Products/Solutions/Services offered	431
14.1.11.3	Recent developments	432
14.1.11.3.1	Deals	432
14.1.11.3.2	Expansions	434
14.1.12	ZF FRIEDRICHSHAFEN AG	435
14.1.12.1	Business overview	435
14.1.12.2	Products/Solutions/Services offered	436
14.1.12.3	Recent developments	437
14.1.12.3.1	Product launches	437
14.1.12.3.2	Deals	437
14.1.12.3.3	Expansions	438
14.1.13	PANASONIC HOLDINGS CORPORATION	439
14.1.13.1	Business overview	439
14.1.13.2	Products/Solutions/Services offered	440
14.1.13.3	Recent developments	442
14.1.13.3.1	Product launches	442
14.1.13.3.2	Deals	442
14.1.14	VALEO	444
14.1.14.1	Business overview	444
14.1.14.2	Products/Solutions/Services offered	445
14.1.14.3	Recent developments	446
14.1.14.3.1	Product launches	446

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.1.14.3.2	Deals	447
14.1.14.3.3	Others	448
14.1.15	DRAXLMAIER GROUP	449
14.1.15.1	Business overview	449
14.1.15.2	Products/Solutions/Services offered	449
14.1.15.3	Recent developments	450
14.1.15.3.1	Product launches	450
14.1.15.3.2	Deals	450
14.1.15.3.3	Expansions	451
?		
14.2	OTHER KEY PLAYERS	452
14.2.1	NIPPON SEIKI CO., LTD.	452
14.2.2	YAZAKI CORPORATION	453
14.2.3	RENESAS ELECTRONICS CORPORATION	454
14.2.4	JAPAN DISPLAY, INC.	454
14.2.5	MAGNA INTERNATIONAL INC.	455
14.2.6	HARMAN INTERNATIONAL	456
14.2.7	SAINT-GOBAIN	457
14.2.8	PIONEER CORPORATION	458
14.2.9	VISTEON CORPORATION	459
14.2.10	FUJITSU LIMITED	460
15	RECOMMENDATIONS	461
15.1	ASIA PACIFIC TO BE KEY AUTOMOTIVE INTERIOR MARKET	461
15.2	INTEGRATION OF NEW TECHNOLOGIES AS KEY FOCUS AREA	461
15.3	CONCLUSION	462
16	APPENDIX	463
16.1	KEY INSIGHTS OF INDUSTRY EXPERTS	463
16.2	DISCUSSION GUIDE	463
16.3	KNOWLEDGESTORE: MARKETSandMARKETS? SUBSCRIPTION PORTAL	468
16.4	CUSTOMIZATION OPTIONS	470
16.5	RELATED REPORTS	470
16.6	AUTHOR DETAILS	471

Automotive Interior Market by Component (HUD, Door Panel, Dome Module, Seat, Headliner, Center Console, Center Stack & Others), Material Type, Level of Autonomy, Electric Vehicle, Passenger Car Class, ICE Vehicle Type and Region - Global Forecast to 2032

Market Report | 2025-05-06 | 472 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-20
		Signature	<div></div>