

Australia Automotive Acoustic Engineering Services Market By Process (Designing, Development, Testing), By Software (Calibration, Vibration, Others), By Application (Interior, Body and Structure, Powertrain, Drivetrain), By Vehicle Type (Passenger Cars, Commercial Vehicles), By Region, By Competition, Opportunities & Forecast, 2020-2030F

Market Report | 2025-08-25 | 85 pages | TechSci Research

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Report description:

Market Overview:

Australia Automotive Acoustic Engineering Services Market was valued at USD 162.68 Million in 2024 and is expected to reach USD 264.67 Million by 2030 with a CAGR of 8.45% during the forecast period. The Australia Automotive Acoustic Engineering Services market is experiencing notable momentum due to the growing emphasis on enhancing in-cabin comfort and reducing vehicular noise, vibration, and harshness (NVH). As automotive manufacturers aim to improve driving experience and brand perception, acoustic engineering services have become integral to vehicle development cycles. For instance, as per Australia Automotive Aftermarket Association, The Australian aftermarket for replacement auto parts and accessories is valued at approximately US\$9.2 billion, with U.S. auto parts exports to Australia totaling US\$1.85 billion in 2021, making the U.S. the second-largest supplier after China. The integration of advanced simulation technologies, including computer-aided engineering (CAE) tools, has made it feasible to test and optimize acoustic performance during early design stages. This not only minimizes prototyping costs but also accelerates time-to-market for new models. The rise in consumer expectations for quieter cabins, especially in luxury and high-performance vehicles, is further fueling demand for comprehensive acoustic solutions, including material analysis, component-level testing, and full-vehicle acoustic modeling. For instance, in 2022, vehicle demand outpaced supply, a total of 1,081,429 vehicles were delivered in Australia, with Toyota leading the market at a 21.4% share and the Toyota Hi-Lux topping sales at 64,391 units. SUVs and light commercial vehicles dominated the market, making up 76.8% of total sales and representing eight of the top ten best-selling models. Battery electric vehicles gained traction, accounting for 3.1% of overall

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vehicle sales.

Market Drivers

Integration of Active Noise Cancellation (ANC) Technologies

The automotive sector is increasingly turning to active noise cancellation (ANC) systems to enhance passenger comfort. These systems utilize sensors and digital signal processors to emit counter-frequencies that neutralize unwanted noise inside the cabin. This technology has proven especially useful in reducing road, wind, and engine noise, delivering a refined driving experience. With the growing consumer preference for quieter and more premium in-cabin experiences, automakers are actively incorporating ANC systems as a value-added feature. This integration of ANC is not limited to luxury vehicles but is gradually penetrating mid-range segments as well. Automakers are also working closely with acoustic engineering service providers to develop customized ANC solutions tailored to various vehicle architectures. The expansion of electric and hybrid vehicles, known for minimal powertrain noise, has further accentuated the need to manage other ambient sounds through ANC. The market for acoustic engineering services is being bolstered by these evolving OEM demands for ANC design, validation, and optimization. ANC integration fosters competitive differentiation in vehicles, making it a critical driver.

Key Market Challenges

Complexity of Multimaterial Acoustic Modeling

The increasing use of composite and multimaterial structures in vehicles creates intricate sound transmission and damping profiles. Acoustic behavior varies significantly between metals, polymers, foams, and composites, requiring precise modeling to predict how each material contributes to noise paths and vibration characteristics. Traditional acoustic modeling tools struggle to fully capture the dynamic interactions in these complex assemblies. Service providers must employ high-resolution material databases and advanced simulation techniques to achieve accurate results. Accurately calibrating these simulations with physical tests remains a challenge, especially in high-frequency ranges. As vehicles incorporate more multifunctional components, the complexity of isolating acoustic sources and developing targeted solutions grows. Acoustic engineers need to consider interfaces between different materials, such as bonding seams, gaskets, and reinforcements, all of which influence sound behavior. Integrating these variables into simulation environments without compromising speed or efficiency remains a pressing concern.

Key Market Trends

Rise of Sound Design for Electric Vehicle Cabins

The growing shift toward electrified powertrains is fundamentally altering the acoustic landscape inside vehicles. Electric drivetrains eliminate traditional engine noise, revealing other ambient sounds that were previously masked. This creates new challenges and opportunities for acoustic engineers. Instead of mitigating engine and exhaust sounds, the focus shifts to enhancing or recreating vehicle feedback through sound design. Artificial propulsion sounds are now being engineered to alert pedestrians and enhance driver experience. Engineers work closely with digital sound designers to craft audio feedback that aligns with the brand identity and driving dynamics. This includes low-frequency hums, acceleration cues, and synthesized gearshift sounds. Acoustic services now involve advanced sound synthesis, calibration of directional speakers, and testing of actuator-based audio output. As the electric vehicle market expands, sound design will play a pivotal role in driver engagement and road safety.

Engineers are also addressing new sources of cabin noise, such as tire rolling, HVAC hum, and regenerative braking. This has pushed service providers to develop low-frequency insulation and targeted damping solutions. The silence of electric vehicles increases consumer sensitivity to even minor sounds, driving innovation in materials and layout optimization. The involvement of user-experience designers in acoustic engineering teams is becoming more prevalent. Sound personalization is emerging, with drivers able to select preferred sound profiles through infotainment systems.

Key Market Players

- [] Siemens Digital Industries Software (Siemens AG)
- [] Robert Bosch GmbH
- [] Continental Engineering Services GmbH (Continental AG)
- [] Bertrandt AG
- [] Schaeffler Engineering GmbH
- [] Autoneum Holding Ltd

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-□IAC Acoustics (Catalyst Acoustics Group)

-□AVL List GmbH

-□EDAG Engineering Group AG

-□FEV Group GmbH

Report Scope:

In this report, the Australia Automotive Acoustic Engineering Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ Australia Automotive Acoustic Engineering Services Market, By Process:

- o Designing
- o Development
- o Testing

□ Australia Automotive Acoustic Engineering Services Market, By Software:

- o Calibration
- o Vibration
- o Others

□ Australia Automotive Acoustic Engineering Services Market, By Application:

- o Interior
- o Body and Structure
- o Powertrain
- o Drivetrain

□ Australia Automotive Acoustic Engineering Services Market, By Vehicle Type:

- o Passenger Cars
- o Commercial Vehicles

□ Australia Automotive Acoustic Engineering Services Market, By Region:

- o Victoria & Tasmania
- o Queensland
- o Western Australia
- o Northern Territory & Southern Australia
- o Australia Capital Territory & New South Wales

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Australia Automotive Acoustic Engineering Services Market.

Available Customizations:

Australia Automotive Acoustic Engineering Services Market report with the given market data, TechSci Research offers customizations according to the company's specific needs. The following customization options are available for the report:

Company Information

-□Detailed analysis and profiling of additional market players (up to five).

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