

Automotive Plastics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Automotive Plastics Market Analysis

The Automotive Plastics Market size is estimated at USD 33.52 billion in 2025, and is expected to reach USD 49.64 billion by 2030, at a CAGR of 8.17% during the forecast period (2025-2030). The steady uptick reflects automakers' pivot toward lighter materials to reconcile strict emission rules with performance targets. Accelerated adoption of advanced polymer solutions, especially in electric-vehicle (EV) platforms, is pushing the automotive plastics market well ahead of its historical pace. Asia-Pacific commands almost half of global demand and is compounding at the fastest regional rate, while polypropylene (PP) continues to set the benchmark for cost-to-performance across major vehicle systems.

Global Automotive Plastics Market Trends and Insights

Increasing demand for lightweight materials in electric vehicles

Range anxiety and battery-pack cost keep lightweighting at the center of EV engineering. PP compounds now appear in larger volumes per EV than in comparable internal-combustion cars, largely because lower mass converts directly into added driving range without resizing the battery. Beyond instrument panels and trims, high-dielectric PP and advanced polyamide grades are entering structural housings and high-voltage busbars. Dedicated EV platforms free designers from legacy metal hard-points, allowing more plastic integration into body structures and thermal-management channels.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Carbon-emission penalties accelerating polypropylene bumper adoption

Fleet-average emissions standards in Europe and North America impose significant financial penalties for excess CO₂. Automakers therefore target "quick wins" such as switching from metal-reinforced to fully PP bumpers, achieving meaningful mass savings at lower system cost. Industry life-cycle assessments consistently show PP bumpers delivering a smaller carbon footprint than steel or aluminum alternatives once use-phase fuel savings are incorporated.

OEM qualification delays for Bio-PA due to odor & flammability

Bio-sourced polyamides promise lower cradle-to-gate emissions, yet residual odor and inconsistent ignition behavior complicate cabin and under-hood approvals. Academic work on cellulosic-fiber-reinforced Bio-PA confirms wide variability in mechanical properties stemming from fiber dispersion challenges. Industry groups have petitioned regulators to allow longer validation cycles so material suppliers can fine-tune formulations.

Other drivers and restraints analyzed in the detailed report include:

Shift to Modular Front-End Carriers (MECs) via injection-molded hybrids / Growing demand for flexible and cost-efficient design materials / High materials and processing cost /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Polypropylene held a commanding 34.18% automotive plastics market share in 2024 on the back of balanced cost, processability and property retention. Interior fascia, door trims and center consoles dominate PP usage, but glass-fiber-reinforced grades now extend into semi-structural seat carriers and tailgates.

Polyamides are climbing an 8.87% CAGR trajectory through 2030 as high-temperature electrified powertrains demand better thermal and dielectric insulation. PA66 and partially aromatic PA6/6T blends displace metal brackets in battery-cold-plate assemblies, inverter housings and turbo-air ducts. Bio-based PA grades, while not yet mainstream, attract OEMs seeking Scope-3 carbon reductions once odor and flame-spread hurdles are cleared.

Interior accounted for 32.97% of the automotive plastics market size in 2024, buoyed by demand for soft-touch dashboards, ambient-lit door panels, and integrating display clusters into single multi-shot molded units. Haptic coatings and laser-etch graphics depend on specialty PP, ABS, and PC/PMMA blends, reinforcing plastics' role in experiential design.

Under-bonnet components, though smaller in absolute volume, are growing at 8.98% per year. Electrified architectures pack more electronics and require intricate cooling channels; thus, heat-stabilized PA, PPS, and PBT replace die-cast aluminum for e-motor cooling jackets and high-voltage busbar covers.

The Automotive Plastics Market Report Segments the Industry by Material (Polypropylene (PP), Polyurethane (PU), Polyvinyl Chloride (PVC), and More), Application (Exterior, Interior, and More), Vehicle Type (Conventional/Traditional Vehicles, and Electric Vehicles), Source (Virgin Plastic, Recycled Plastic, and More), and Geography (Asia-Pacific, North America, Europe, South America, and Middle East and Africa).

Geography Analysis

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Asia-Pacific dominated the automotive plastics market with a 48.25% stake in 2024 and mirrors the highest regional CAGR at 9.82% to 2030. China's large-scale EV rollout, supported by battery-maker alliances and state incentives, is spurring polymer capacity expansions across PP, PA and PBT value chains. India records double-digit growth in passenger-car output, triggering investments in local compounding hubs to curb import reliance. South Korea and Japan refine ultra-high-molecular-weight grades for impact-resistant exterior panels, further embedding a virtuous innovation-capacity loop.

North America presents a mature yet inventive landscape. Compliance with tightening Corporate Average Fuel Economy standards pushes OEMs toward multi-material architectures that maximize plastics in liftgates, battery packs and advanced driver-assistance sensor housings. The United States also hosts pioneering work in closed-loop recycling partnerships between resin suppliers and tier-one molders, supporting local circular-economy targets.

Europe maintains sizeable demand anchored by premium vehicle segments and aggressive regulatory frameworks. The proposed 25% recycled-content threshold in passenger cars catalyzes R&D around compatibilizer additives and de-odorizing systems that elevate post-consumer resin performance. Germany leads technology deployments in fiber-reinforced PA cross-members, while France and the United Kingdom channel public funding toward biopolymer pilot lines. The region nevertheless faces margin pressures from energy-cost volatility, making material efficiency a strategic imperative.

List of Companies Covered in this Report:

Arkema / Asahi Kasei Advance Corporation / BASF SE / Borealis AG / Braskem / Celanese Corporation / Covestro AG / Daicel Corporation / Dow / dsm-firmenich / DuPont / Evonik Industries AG / Exxon Mobil Corporation / INEOS / LANXESS / LG Chem / LyondellBasell Industries Holdings B.V. / Mitsui Chemicals Inc. / SABIC / TEIJIN LIMITED /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increasing Demand for Lightweight Materials in Electric Vehicles

4.2.2 Carbon Emission Penalties Accelerating Polypropylene Bumper Adoption

4.2.3 Shift to Modular Front-End Carriers (MECs) via Injection-Molded Hybrids

4.2.4 Growing Demand for Flexible and Cost Efficient Design Materials in Automotive

4.2.5 Consistent Expansion of the Global Automotive Sector

4.3 Market Restraints

4.3.1 OEM Qualification Delays for Bio-PA due to Odor and Flammability

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.3.2 High Materials and Processing Cost

4.3.3 Increasing Competition from Alternative Materials in Automotive

4.4 Value Chain Analysis

4.5 Porter's Five Forces

4.5.1 Bargaining Power of Suppliers

4.5.2 Bargaining Power of Buyers

4.5.3 Threat of New Entrants

4.5.4 Threat of Substitutes

4.5.5 Degree of Competition

5 Market Size and Growth Forecasts (Value)

5.1 By Material

5.1.1 Polypropylene (PP)

5.1.2 Polyurethane (PU)

5.1.3 Polyvinyl Chloride (PVC)

5.1.4 Polyethylene (PE)

5.1.5 Acrylonitrile Butadiene Styrene (ABS)

5.1.6 Polyamides (PA)

5.1.7 Polycarbonate (PC)

5.1.8 Other Materials

5.2 By Application

5.2.1 Exterior

5.2.2 Interior

5.2.3 Under Bonnet

5.2.4 Other Applications

5.3 Vehicle Type

5.3.1 Conventional/Traditional Vehicles

5.3.2 Electric Vehicles

5.4 Source

5.4.1 Virgin Plastic

5.4.2 Recycled Plastic

5.4.3 Bio-based Plastic

5.5 By Geography

5.5.1 Asia-Pacific

5.5.1.1 China

5.5.1.2 Japan

5.5.1.3 India

5.5.1.4 South Korea

5.5.1.5 Rest of Asia-Pacific

5.5.2 North America

5.5.2.1 United States

5.5.2.2 Canada

5.5.2.3 Mexico

5.5.3 Europe

5.5.3.1 Germany

5.5.3.2 United Kingdom

5.5.3.3 France

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

5.5.3.4 Italy
5.5.3.5 Rest of Europe
5.5.4 South America
5.5.4.1 Brazil
5.5.4.2 Argentina
5.5.4.3 Rest of South America
5.5.5 Middle East and Africa
5.5.5.1 Saudi Arabia
5.5.5.2 South Africa
5.5.5.3 Rest of Middle East Africa

6 Competitive Landscape
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share(%)/Ranking Analysis
6.4 Company Profiles {(includes Global-level Overview, Market-level Overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)}
6.4.1 Arkema
6.4.2 Asahi Kasei Advance Corporation
6.4.3 BASF SE
6.4.4 Borealis AG
6.4.5 Braskem
6.4.6 Celanese Corporation
6.4.7 Covestro AG
6.4.8 Daicel Corporation
6.4.9 Dow
6.4.10 dsm-firmenich
6.4.11 DuPont
6.4.12 Evonik Industries AG
6.4.13 Exxon Mobil Corporation
6.4.14 INEOS
6.4.15 LANXESS
6.4.16 LG Chem
6.4.17 LyondellBasell Industries Holdings B.V.
6.4.18 Mitsui Chemicals Inc.
6.4.19 SABIC
6.4.20 TEIJIN LIMITED

7 Market Opportunities and Future Outlook
7.1 White-Space and Unmet-Need Assessment
7.2 Technological Developments in Electric Vehicles

Automotive Plastics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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 License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		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"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-18"/>

Signature

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com