

Report Information

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Automotive Heat Shield Market Research Report – Forecast to 2032

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Description:

Automotive Heat shield Market overview

The Automotive Heat Shield Market industry is projected to grow from USD 15825.1 Million in 2021 to USD 18759.1 Million by 2032, exhibiting a compound annual growth rate (CAGR) 3.8% during the forecast period (2023 - 2032). Heat shields are used to protect the parts of a device from heat generated from its core. Heat shields are highly used in many electrical devices, the automotive sector, and other things. The rising demand and production of electric vehicles, fuel-efficient vehicles, and commercial vehicles are expected to fuel the Automotive Heatshield market growth. Heatshield plays a crucial role in controlling the excess heat generated by the vehicle, protecting the sensitive part of the vehicle, and boosting the engine's performance by keeping the under-bonnet temperature in check.

Over the years, Heatshield has seen huge demand for commercial vehicles and passenger cars. Excess heat generation in the vehicle and lack of heat management can reduce the performance of the vehicle. Too much heat from the engine can lower the output and lead to spark plug failures. That is why it becomes very important to have an effective heat-management solution to maintain temperature and fuel efficiency. The battery-operated vehicles use lithium-ion batteries that generate high heat. The lack of a heat control mechanism can cause a negative impact on the battery life and vehicle.

The growing demand for electric vehicles worldwide is expected to boost the Automotive Heatshield market size. Modern-day cars need better performance and efficiency, which is why many automotive companies use Heatshield, and it will boost the market trends. Apart from that, better economic conditions, a growing population, and easy credit contribute to the increasing number of vehicles. All vehicles with more than 1.6 liters of engine capacity contain Heatshield, and the market size is growing rapidly. In the last ten years, the global luxury car market grew 78%, further driving the market growth.

Covid-19 analysis

Due to the outbreak of coronavirus disease, the world economy has been severely affected. The covid-19 pandemic has largely impacted the world economy—the businesses suffering badly due to the pandemic. Further, with the imposition of lockdown and social distancing guidelines, the government and the businesses have suffered huge losses. The automotive sector has been highly affected by this, and the demand for expensive products has declined. People are going through a financial crisis, and they don't want to spend their money on buying cars or any expensive things. The demand for the automotive sector has decreased, and it hurt the Heatshield market. Apart from that, the travel restrictions and restrictions on import & export badly affected the Automotive Heatshield market growth. The key players are trying their best to propel the market's demand, and the market may see positive results after the post-Covid situation.

Competitive landscape

The major key players in the Automotive Heatshield market are

- Lydall Inc. (U.S.)
- Progress-WerkOberkirch AG (Germany)
- UGN Inc. (U.S.)
- Morgan Advanced Materials (U.K.),
- Dana Holding Corporation (U.S.)

- Federal-Mogul Holding Corporation (U.S.),
- Autoneum Holdings AG (Switzerland),
- Zircotec (U.K.)
- ThermoTec Automotive (U.S.)
- Elringklinger AG (Germany)

Recent developments

In March 2021, Zircotec launched ZircoFlex SHIELD, which offers better thermal performance with 46% lower volume and 40% lower weight.

Market dynamics

Drivers in the Heatshield market

According to the data by World Health Organization, the world population reached 7.6 billion in March 2017, and it is growing rapidly. Due to the increasing population, the demand for the automotive sector and luxury cars is increasing, driving the automotive heat shield industry. The Heatshield is used in vehicles to protect them from excess heat generation. Apart from that, the increasing adoption of electric vehicles will further propel the demand of the Heatshield market. The high adoption of electric vehicles is due to the government initiative and for raising environmental concerns. Many automotive manufacturers are focusing the producing electric vehicles rather than improving conventional engines. This shift will propel the Heatshield market trends.

Opportunities in the Heatshield market

The demand for passenger cars is rapidly increasing, and it is expected to generate 1.5 billion in revenue by the end of 2016 due to the increasing demand. The increased use of pickup vehicles and lightweight vehicles will need Heatshield for better heat management. And it will generate more opportunities for the Heatshield market. Apart from that, people's increasing lifestyle and per capita income in developed regions will bring more opportunities for the Heatshield market.

Restraints in the Heatshield market

One of the biggest restraints in the Automotive Heatshield market is the high price of Heatshield. It is recommended to change the Heatshield in every 100,000 to 150,000 kilometers. And many people don't change it because of the high price and lack of awareness about vehicle safety.

Challenges in the Heatshield market

Heat shields are made from Aluminum, produced from the extraction from bauxite. But due to the implementation of various regulations regarding mining has been a big challenge for the market. Apart from that, many people aren't aware of the importance of Heatshield. As a result, they don't replace the shield when it gets old, and lack of awareness is another challenge for the Heatshield market.

Cumulative growth analysis

The Automotive Heatshield market was valued at 14 billion in 2020, and it is expected to reach 17 billion by registering a healthy CAGR of 5%. The demand for the market has increased rapidly over the years. It will grow more due to the economic development, increasing population, increasing per capita income, and choosing electric vehicles. All these factors will drive the market size in the forecast period.

Market segmentation

The Automotive Heatshield market is segmented based on vehicle type, material type, application, and sales channel.

- **By vehicle type**

Based on vehicle type, the market is divided into passenger cars, HCV, and LCV. Passenger cars hold the highest market share, which is expected to dominate this segment in the forecast period. The passenger cars segment is expected to generate 1.5 billion in revenue by 2026, owing to the adoption and demand from the aftermarket sector.

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By material type

The Automotive Heatshield global market is divided into Aluminum, aluminized steel, and stainless steel based on material type. Aluminized steel segments hold the highest share in the market, and it is expected to grow at a CAGR rate of 3.5% in the forecast period. Due to great material properties like low coefficient, thermal expansion, and high temperature will dominate the market. This material combines steel and aluminum properties that will create a great advantage for the Heatshield market. The aluminum segment will also grow at a rapid rate due to the adoption of lightweight vehicles.

- ## By application

By application, the market is segmented into the engine, underbody Heatshield, tank Heatshield, starter motor, turbocharger, exhaust manifold, the catalytic converter. Engine application is projected to hold the highest market share with a 4% CAGR. The wide application of Heatshield is to protect the vehicle from the heat generated from the engine.

- ## By sales channel

Based on sales channels, the market is divided into OEM and aftermarket. OEM had a 75% market share in 2019. The high production of the automotive market to meet the rising demand is responsible for the segment growth. There may be 1.2 billion cars on the road by 2020 as per Green Mobility Report by the World Bank.

Regional analysis

The major regions in the Automotive Heatshield market are North America, Asia-Pacific, Europe, and the rest of the world. Asia-Pacific dominated the Heatshield market. Rapid industrialization, apart from the availability of human resources and resources, raw materials, a good transportation network, and government initiatives, will boost the market in this region. Some of the major countries are China, India, and Japan. The luxury cars demand has increased rapidly in the countries like India, China, and Japan. As a result, it has created even more demand for the Heatshield market. North America will also see huge growth in the market due to the rapid demand for electric vehicles in this region and the strong economy. Europe will also register a healthy CAGR in the forecast period.

Report overview

This global Automotive Heatshield market report is based on the qualitative and quantitative analysis of the Heatshield market. It highlights the market overviews, covid-19 analysis, market dynamics, and market analysis. This global market report also highlights the regional analysis, competitive landscape, and recent market development.

Segmental table

Market, by Vehicle Type

- Passenger Cars
- HCV
- LCV

Market, by Material Type

- Aluminum
- Stainless Steel
- Aluminized Steel

Market, by Application

- Turbo Charger

- Tank Heatshield
- Catalytic Converter
- Exhaust Manifold
- Underbody Heat shield
- Engine
- Starter Motor
- Others

Market, by Sales Channel

- OEM
- Aftermarket

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