



The Toyota Camry, one of the vehicles that feature in WardsAuto's 2018 list of 'Ten Best Interiors'.

ALL IMAGES FROM THE RESPECTIVE OEMS

Leather is key to 'Ten Best Interiors'

WardsAuto's 2018 list of the best vehicle interiors includes cars, jeeps and cross-over vehicles from North American, Asian and European brands, but what they have in common is their use of leather as a preferred material.

Optimism is in healthy supply at specialist automotive media organisation WardsAuto. Director of information content, John Sousanis, a speaker at the 2018 Lectra Automotive Leather Conference in Bordeaux, says the prospects for this segment of the leather industry to keep growing are good.

Even if growth has slowed slightly in recent years, the car industry's figures are good from a historical perspective, he insists. In 2015, across the globe, there were 90 million light vehicles built in total. The corresponding figure for 2017 was 95.5 million and WardsAuto's projections are for the industry to produce 100 million light vehicles for the first time in 2019, reaching 106 million by 2023. "Between 2015 and 2023, the industry will have added 16 million vehicles annually," Mr Sousanis points out. "That's like adding one 'US' to the global market in that time."

There will be growth in Europe as well, with the 2023 volume of vehicles purchased there likely to be 10% higher than 2015's, while South America will grow by 37% over the same period (which will still leave it short of the levels the

market there reached before "the huge dip" of 2014. The market in China, however, is on course to reach 33 million vehicles by 2025 if not sooner. Perhaps optimism like Mr Sousanis's should be more widespread, but he accepts that some in the automotive industry are reluctant to share it. "There is angst among some people in the industry," he says, "perhaps because lots of things are changing all at once, such as car ownership, engines, autonomy and so on."

CUVs to drive leather growth

Focusing on the US, he explains that leather's market penetration in cars there increased from 29% of the total in 2001 to 48% in 2017. "Almost half of vehicles being sold in the US at the moment have leather seats," he says. And according to his company's data, the reason for this increase is not only because of a rise in the numbers of luxury vehicles. Luxury cars' share of the market has gone up, but only from 10% of all sales a few years ago to 13% in 2017.

Instead, Mr Sousanis makes it clear that the key to leather's ongoing success is the increasing popularity of

crossover utility vehicles (CUVs). Sales of these vehicles are growing strongly, he explains, and 53% of them have leather seats. He says: "Growth in the CUV segment will drag growth in automotive leather upwards, more than the rest of the industry. There are a lot of reasons to be optimistic about the outlook in automotive for the leather industry for at least the next decade. And by then autonomous vehicles, which will come, but only slowly at first, maybe giving leather good options."

Cars with sofas

Original equipment manufacturers, however, are going to need automotive tanners to be flexible suppliers he warns. The need to be able to move quickly and serve more and more niche segments of the market is only going to intensify. This is one of the excuses car brands sometimes offer when they decide to use synthetic materials instead of leather in the interiors of their vehicles, but the WardsAuto director of information content is in no doubt that leather will continue to dominate, certainly in high-end interiors. He says: "It's probably true that the next generation is not as interested in leather, but that demographic is less interested in cars in general. When you become a vehicle owner, you see that durability, look and comfort are important. Because of that, it makes sense to use leather in the interior of a vehicle."

Autonomous vehicles present real potential for a sea-change in vehicle interiors, in John Sousanis's opinion. He continues: "By 2030 we calculate that there will be 10 million autonomous vehicles on the road, so around 10% of the market. Many of these early vehicles may be fleet-owned and fairly spartan, so there will be less impact on the interior in the short term. But as a longer play, autonomy will have a big effect on car interiors. Take the steering-wheel out and you don't have to look forward any more. There is potential for sofas and beds inside the car, depending on what happens regarding legislation."

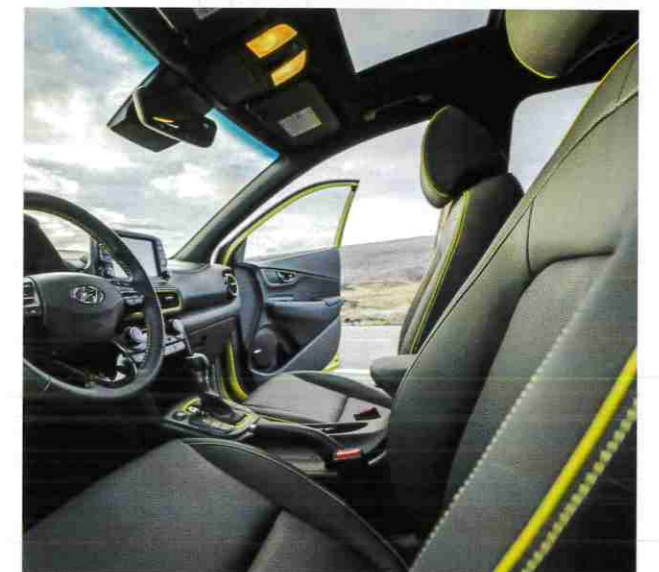
Ten of the best

To return to 2018 and the latest edition of the analyst company's awards, all of the winners in its 'Ten Best Interiors' category are extensive users of leather in their vehicles' upholstery and Mr Sousanis says he was impressed by automotive manufacturers' inventive use of colour, stitching and other design details, making this year's 'Ten Best Interiors' collection especially interesting. "We saw very sophisticated use of colour and many striking ways of using leather on seats," he explains. "Suppliers have to be vibrant and imaginative and they will have to combine their leather with other materials, but as long as they can keep doing that, leather will have a bright future in automotive."

WardsAuto's ten prize-winners emerged from 40 finalists, with the main criteria being that all 40 had to have all-new, or at least "significantly improved" interiors compared to earlier models of the same vehicle. Within that, there were two main areas of focus: the way the design of the interior and the materials the designers chose helped create comfort in the vehicle, and the way the interior allows 'interaction with infotainment'. "Innovations in these two areas are moving down market," John Sousanis says, "in the sense that what was 'luxury-only' a few years ago is now available in relatively cheap vehicles." It's not the price that matters to WardsAuto.



The **Chevrolet Equinox Premier 2.0T**, priced at \$36,375, is on the list of 'Ten Best Interiors' for 2018. It is a mid-size CUV, stylish and with "outstanding infotainment", according to the judges (the car has an in-vehicle 'report card' that offers parents an assessment of how well teenagers with recently gained licences have driven). "It doesn't have a typical 'family-mover' design in the interior," Mr Sousanis comments. "A two-tone leather scheme helps that. Plus, the back seats, which have bolsters and individual seats, seem almost as important as the front seats, which gives a hint of how car interiors might go with autonomy when the driver will no longer be more important than anyone else in the car in terms of comfort."



Next is the **Hyundai Kona**, priced at \$29,775. This is a small CUV with "brilliant flashes of colour" in the interior. "They've used really good materials," says John Sousanis, "and tasteful pop colours, such as lime neon, in the stitching and piping. These things were not being done in this segment five years ago."



Also on the list there is the **Infiniti QX50** (price \$58,195), a small, luxury CUV with a 'concept-car' feel to it, according to WardsAuto, because it has features that you might normally expect to see only at an auto show. These features include a spacious cockpit, diamond patterns on the seats, three or four different colours of stitching in the door panels and "generous" amounts of leather on the arm rest.



Representing the 'lower luxury' end of the market on the 'Ten Best Interiors' rostrum we have the **Kia Stinger**, priced at \$48,350. The judges liked the extensive use of colour, especially red, in the upholstery in this car, good execution on stitching and other details, and the quality of the leather.



Lexus is represented on the list by the **LS500**, which has a price-tag of \$89,780. "This is 'upper luxury'," John Sousanis observes, "so Lexus is trying to make it distinctive. For example, it has a hand-cut crystal trim for the light in the door panel and hand-stitched pleated leather. Lexus is usually known for black interiors, but this time there are two- and three-tone colours and lots of attention has gone into the rear seats."

Perhaps the most important vehicle in the list from a leather interior or design point of view, in John Sousanis's opinion, is the **Toyota Camry**, priced at \$39,253 (see opening image of this article). "This car does not usually compete in the interior," he explains. "It's a mass-produced Toyota, not a Lexus, and its job, usually, is to work well and be reliable. But there is this bold use of colour and a large number of separate panels. It has beautiful stitching between the panels to make a jigsaw effect and that's purely for aesthetics, so much so that you find yourself wondering if it's really a Camry. If this helps move the Camry forward, there will be a Honda Accord that looks like this in no time. The interior was never a player in this segment, and now it is. It's very exciting."



The **Lincoln Navigator**, \$96,570, is there, too, described by John Sousanis as "a study in how much leather it's possible to get into a single car". Again, there is heavy emphasis on designing the back seats well and attractive detail such as two-toned leather on the steering-wheel, the console, the doors and the seats. Infotainment is a feature here, too, with a large, intuitive touchscreen catching the judges' attention.



The **Range Rover Velar First Edition**, priced at \$91,830, also represents Europe. "There is so much happening on the door in this vehicle," John Sousanis says, "and the dash is like something from Kubrick's '2001: A Space Odyssey'. The seats are complicated, but Range Rover clearly thought this vehicle was worth the trouble.



European vehicles made the list too. The **Porsche Panamera Turbo S E-Hybrid**, which has a price of \$201,540, offers plenty of added value in its interior. The massaging seats are part of that, showing that seats have become a real area of competition for original equipment manufacturers. Porsche's answer to questions about what sort seat a car costing \$200,000 should have involves massage. Less ostentatious, but still attractive as far as the judges were concerned, are the "exceptional stitching" and high-quality, pleasant to touch caramel-coloured leather on the seats.



Among the interesting inclusions is the **Ram 1500 Laramie Limited**, which costs \$65,945, a large pick-up. Mr Sousanis points out that, even though half of the vehicle is a truck-bed, Ram still left itself with "a huge interior to cover". He says there is something of a country-and-western, cowboy feel to the stitching, but that it is not over-the-top. 🌟

WardsAuto publishes its list of 'Ten Best Interiors' every year. Until 2011, the competition was known as 'Interior of the Year'. There is no ranking in the top ten; all ten vehicles listed in this article are 2018 winners.