

Global AdBlue Market Research Report 2024(Status and Outlook)

<https://marketpublishers.com/r/G5C5514E6BF0EN.html>

Date: November 2024

Pages: 151

Price: US\$ 3,200.00 (Single User License)

ID: G5C5514E6BF0EN

Abstracts

Report Overview

AdBlue is a fluid which is automatically sprayed into a car's exhaust system to reduce the nitrous oxide emissions of diesel engines. AdBlue is made of a mixture of urea and deionised water. The widespread usage of AdBlue in modern diesel cars coincided with stricter Euro 6 emissions standards that have been in effect since 2016. AdBlue makes it much easier to lower the emissions of diesel cars so they comply with these regulations.

With the development of the market, high-quality AdBlue products will gradually become the mainstream of consumption. Enterprises tend to buy more reliable AdBlue. The quality of AdBlue directly affects the work efficiency of the transportation industry. High-quality AdBlue can reduce potential maintenance costs and time costs.

Key trends in market development also include a shift in supply channels to filling station models. In the future, with the continuous increase of customer demand and the diversification of sales, matching with gas stations or independent urea filling stations will become the development trend of the industry, the supply channels will be further improved, and the convenience for users to purchase vehicle urea will be greatly improved. will also further reduce

At the same time, with the further strengthening of supervision in various countries and regions, the enhancement of national environmental protection awareness and the upgrading of consumption awareness, a large and stable AdBlue customer market will be formed.

The global AdBlue market size is projected to reach US\$ 9865.75 Million by 2028, from US\$ 4730.23 million in 2021, at a CAGR of 12.48% during 2022-2028. The government policy of stricter emission standards and stricter emission monitoring will be a key enabler for the growth of the AdBlue market. Beginning in November 2022, Europe is working hard to promote stricter vehicle exhaust emission standards. Compared with 'Euro 6', the 'Euro 7' standard is more stringent, reducing the nitrogen oxide emissions of small cars and vans by 35%, and the nitrogen oxide emissions of buses and trucks by 56%. In China, China VI b emission standards, which are stricter than Euro VI emission standards, will be officially implemented on July 1, 2023.

Because the sales of heavy and medium vehicles have increased due to the evolving transportation needs to support the movement of goods and population growth, which largely contributes to air pollution. Road transport is the largest source of urban air pollution. Nitrogen oxides are produced by car engines along with tiny particles that, when combined with other pollutants in the atmosphere, can harm sensitive lung tissue in animals and humans. AdBlue can significantly reduce emissions of environmentally harmful nitrogen oxides (NOx), thereby helping to meet strict emission limits set by various standards. With the implementation of stricter exhaust emission standard policy, higher requirements are put forward for the exhaust emission of motor vehicles and other related machinery, and the market space of chemical products such as urea for vehicles required in the exhaust gas treatment system will be further opened.

In addition, in order to achieve environmental protection goals faster, governments of various countries are using stricter emission monitoring in addition to issuing stricter exhaust emission standards.

Another trend worthy of attention is the decline in urea prices. As the most important raw material of AdBlue, urea has a very important price. In 2022, the price of urea will rise sharply due to multiple factors. However, as both natural gas and coal prices fell, the cost of urea fell. Going forward, the transaction price of urea is estimated to decline slowly within 12 months.

At the same time, the increase in the penetration rate of hybrid or pure electric vehicles will hinder the development of the AdBlue market. The world is going through a climate emergency, with global warming and green issues becoming top of mind. Therefore, fleets need to present a greener image. Businesses once invested in diesel company cars have turned to hybrid and electric alternatives, while rental companies are offering customers a mix of hybrid or petrol models. This will have a huge impact on diesel car sales. Diesel exhaust fluid demand is directly related to diesel vehicle sales, thus,

declining diesel vehicle sales are expected to restrain the growth of the AdBlue market over the forecast period.

According to the type, AdBlue can be divided into Pack (Below 20L), Pack (20L~200L) and Pack (200L~1000L). Among them, the Pack (Below 20L) type dominates the AdBlue market and has already accounted for 80.15% of the market share in 2021. This goes hand in hand with the type's ease of sale and transport, as well as ease of refilling. During the forecast period, the dominant position of Pack (Below 20L) will continue to be maintained.

From the perspective of application scenarios, AdBlue can be divided into Medium and Heavy Trucks, Light Trucks, Bus, Passenger Car, Others. The main reason for the use of diesel engines in medium and heavy trucks is that the trucks are larger and cannot be driven by small displacement gasoline engines. The diesel engine has strong power, low fuel consumption, and can also reduce the cost of maintaining a car. It is most suitable for large vehicles such as trucks. This makes medium and heavy trucks the most important revenue generator in the AdBlue market. In 2021, the medium and heavy trucks segment accounted for 80.79% of the market share. During the forecast period of 2022-2028, we estimate that the market size of light trucks type will expand at a CAGR of up to 24.10%. Light trucks are expected to have great market development potential in the future.

On basis of geography, the AdBlue market is segmented into North America, Europe, Asia-Pacific, South America, Middle East and Africa, etc. Asia-Pacific and Europe are the two largest markets for AdBlue, with a market share of 39.32 % and 38.55%. Europe has a high deployment rate of passenger cars, heavy trucks and light trucks. Moreover, the increasing use of off-road mobile machinery in Asia and Europe in sectors such as manufacturing, agriculture, mining, and forestry is positive for the market. At the same time, stringent emission standards such as Euro VI and the increasing use of SCR technology in commercial vehicles are driving the expansion of the industry. The market size in Asia Pacific will expand at the highest CAGR of 16.27% during the forecast period. The local prosperous logistics, fast-growing industry and construction industry have contributed greatly to this.

According to our calculations, in 2021, the indicators CR5 and HHI related to AdBlue market concentration will be 59.48% and 13.88% respectively. This shows a relatively low market concentration. Due to the low barriers to entry, the entire AdBlue market is still in fierce competition. It is expected that in 2022, the market concentration will decrease. Key players in the current market include Yara, BASF, CF Industries,

GreenChem, Mitsui Chemicals, Kelas, Borealis L.A.T, Sinopec Group, Nissan Chemical, CNPC, Sichuan Meifeng, ENI S.p.A., Total, Cummins, Shell, BP, Novax, SKW Piesteritz , Liaoning Rundi.

This report provides a deep insight into the global AdBlue market covering all its essential aspects. This ranges from a macro overview of the market to micro details of the market size, competitive landscape, development trend, niche market, key market drivers and challenges, SWOT analysis, value chain analysis, etc.

The analysis helps the reader to shape the competition within the industries and strategies for the competitive environment to enhance the potential profit. Furthermore, it provides a simple framework for evaluating and accessing the position of the business organization. The report structure also focuses on the competitive landscape of the Global AdBlue Market, this report introduces in detail the market share, market performance, product situation, operation situation, etc. of the main players, which helps the readers in the industry to identify the main competitors and deeply understand the competition pattern of the market.

In a word, this report is a must-read for industry players, investors, researchers, consultants, business strategists, and all those who have any kind of stake or are planning to foray into the AdBlue market in any manner.

Global AdBlue Market: Market Segmentation Analysis

The research report includes specific segments by region (country), manufacturers, Type, and Application. Market segmentation creates subsets of a market based on product type, end-user or application, Geographic, and other factors. By understanding the market segments, the decision-maker can leverage this targeting in the product, sales, and marketing strategies. Market segments can power your product development cycles by informing how you create product offerings for different segments.

Key Company

Yara

BASF

CF Industries

GreenChem

Mitsui Chemicals

Kelas

Borealis L.A.T

Sinopec Group

Nissan Chemical

CNPC

Sichuan Meifeng

ENI S.p.A.

Total

Cummins

Shell

BP

Novax

SKW Piesteritz

Liaoning Rundi

Market Segmentation (by Type)

Pack (Below20L)

Pack (20L~200L)

Pack (200L~1000L)

Market Segmentation (by Application)

Medium and Heavy Trucks

Light Trucks

Bus

Passenger Car

Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the AdBlue Market

Overview of the regional outlook of the AdBlue Market:

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value (USD Billion) data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the AdBlue Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the

industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 10 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 11 provides a quantitative analysis of the market size and development potential of each market segment (product type and application) in the next five years.

Chapter 12 is the main points and conclusions of the report.

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