

# Global Heavy Duty Diesel (HDD) Catalyst Market: Trends & Opportunities (2013-18)

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## Abstracts

### Scope of the Report

The report titled “Global Heavy-Duty Diesel Catalyst Market: Trends and Opportunities (2013-2018)” provides an in-depth analysis of global diesel catalyst market with focus on regional markets including North America, Asia and Europe. It also accesses the underlying trends and challenges in the market and outlines the factors that are and will be driving the growth of the industry in the forecasted period (2013-18). Further, it also analyzes the competitive scenario of global heavy duty diesel catalyst market. The profiles of three major players, Johnson Matthey, BASF and Umicore are being included in the report.

### Geographical Coverage

North America

Europe

Asia

### Company Coverage

Johnson Matthey

BASF

## Umicore

### Executive Summary

Heavy duty diesel (HDD) catalysts turn toxic exhaust emissions from diesel fuelled vehicles into non-toxic substances by using precious metals, such as platinum and palladium. Depending on the type of vehicle, the amount and composition of platinum group metals used can differ. Catalytic converters used in diesel vehicles generally need more platinum than typical petrol-engine cars. It is also more difficult to substitute platinum with other catalytic metals such as palladium and rhodium because they do not work as effectively at the lower burn temperatures at which diesel engines operate. As a result, diesel catalysts require much more sophisticated technology; hence the value of catalyst for diesel engines is higher than that for gasoline/petrol engines.

Sales of HDD catalysts is set to grow substantially in emerging markets like China and India where rising automobile sales and stricter emission standards are creating new demand. HDD catalyst market will be driven by the introduction of the Euro VI standard in Europe and Phase IV in China which are expected to come into force in 2014. Sales of HDD catalysts significantly increased in 2012 supported by rise in demand from both on-road and off-road diesel vehicles worldwide. North America, Europe and Japan have established standards that apply to non-road vehicles, locomotive and marine engines. The US and Europe have the most progressive standards in HDD with the strictest requirements regarding nitrogen dioxide emissions as well as levels of particulate matter in the exhaust.

The global HDD catalyst market is oligopolistic in nature with three major players namely Johnson Matthey, Umicore and BASF controlling majority share in 2013. Companies are continuously focusing on upgrading its technology and production lines in developing markets.

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