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Global Automotive Exhaust Heat Recovery (EHR) System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Exhaust Heat Recovery (EHR) System market size is expected to reach $ 464 million by 2032, rising at a market growth of 15.9% CAGR during the forecast period (2026-2032).
Exhaust Heat Recovery (EHR) is an energy efficiency improvement technology that utilizes the high-temperature heat energy in engine exhaust that is not yet used. It recovers and reuses the heat energy through heat exchange, power generation, or power coupling. Its core purpose is to convert waste heat that would otherwise be directly emitted into the environment into usable electrical, mechanical, or thermal energy for onboard power generation, auxiliary drive, coolant heating, cabin or powertrain thermal management, thereby reducing fuel consumption, shortening cold start warm-up time, and reducing emissions. This system is widely used in gasoline vehicles, hybrid vehicles, and commercial vehicles, and is one of the important technical paths to improve the thermal efficiency of the vehicle and meet increasingly stringent emission regulations.
Against the backdrop of the global automotive industry's accelerated transformation towards energy conservation, emission reduction, and high efficiency, exhaust heat recovery (EHR) systems are gradually becoming a crucial technological path to improve vehicle thermal efficiency and reduce fuel consumption. During operation, internal combustion engines lose a significant amount of energy as waste heat through the exhaust system. EHR systems effectively improve energy efficiency by reusing this heat, demonstrating clear application value in traditional gasoline vehicles, hybrid vehicles, and some range-extended electric vehicles.
From a technical perspective, EHR systems, through heat exchangers, valve bodies, and control units, recover the high-temperature heat energy from engine exhaust and convert it into usable heat. This heat is primarily used for engine coolant heating, cabin

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heating systems, powertrain preheating, or auxiliary power generation. Compared to traditional methods relying on fuel or electricity for heating, EHR systems can significantly shorten engine and cabin warm-up time during cold starts, thereby reducing fuel consumption and emissions, and improving driving comfort. This characteristic makes it particularly relevant in meeting increasingly stringent emission regulations and energy consumption limits.

From a market demand perspective, the development of EHR (Exhaust Heat Recovery) systems is highly correlated with the upgrading of global emissions regulations. Major automotive markets such as Europe, China, and Japan are continuously tightening carbon emission and fuel consumption standards, prompting OEMs to constantly explore the energy-saving potential of internal combustion engine systems. Especially in cold regions and under high-frequency short-distance operating conditions, exhaust heat recovery systems have a more significant advantage in reducing cold-start fuel consumption and emissions. Furthermore, in hybrid vehicles, the intermittent operation of the engine further amplifies the difficulty of thermal management, creating new application opportunities for EHR systems.

From an industry chain perspective, automotive exhaust heat recovery systems are a typical automotive thermal management subsystem. Upstream involves high-temperature resistant materials such as stainless steel and aluminum alloys, as well as precision-machined components; midstream consists of system and module suppliers; and downstream directly supplies OEMs. Suppliers with accumulated thermal management technology, system integration capabilities, and experience in collaborative development with OEMs have a greater competitive advantage in the market. Currently, the global market is dominated by European, American, and Japanese automotive parts companies with advantages in technology and customer resources. Meanwhile, the competitiveness of China's domestic supply chain in cost control, response speed, and large-scale manufacturing is continuously improving.

From a regional market perspective, Europe, with its most stringent emission regulations, is one of the most proactive markets in adopting and implementing EHR systems. Japan, with its mature hybrid technology, has a high acceptance rate of exhaust thermal management systems. China, driven by energy conservation and emission reduction policies and the increasing penetration rate of hybrid vehicles, possesses medium- to long-term growth potential. In contrast, the North American market has been relatively cautious in its adoption of EHR systems, but structural opportunities still exist as regulations become stricter in the future.

Looking ahead, automotive exhaust heat recovery systems will place greater emphasis on system integration, intelligent control, and synergistic optimization with the vehicle's thermal management system. With the diversification of automotive powertrains, EHR systems will no longer be just a single energy-saving component, but will gradually

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become an important part of the overall vehicle thermal management architecture. Overall, given the continued existence of traditional internal combustion engines and hybrid vehicles, automotive exhaust heat recovery systems, as a key technology for improving energy efficiency and reducing emissions, will continue to demonstrate their market value and strategic significance.

This report studies the global Automotive Exhaust Heat Recovery (EHR) System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Exhaust Heat Recovery (EHR) System and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Exhaust Heat Recovery (EHR) System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Exhaust Heat Recovery (EHR) System total production and demand, 2021-2032, (K Sets)

Global Automotive Exhaust Heat Recovery (EHR) System total production value, 2021-2032, (USD Million)

Global Automotive Exhaust Heat Recovery (EHR) System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sets), (based on production site)

Global Automotive Exhaust Heat Recovery (EHR) System consumption by region & country, CAGR, 2021-2032 & (K Sets)

U.S. VS China: Automotive Exhaust Heat Recovery (EHR) System domestic production, consumption, key domestic manufacturers and share

Global Automotive Exhaust Heat Recovery (EHR) System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sets)

Global Automotive Exhaust Heat Recovery (EHR) System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

Global Automotive Exhaust Heat Recovery (EHR) System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

This report profiles key players in the global Automotive Exhaust Heat Recovery (EHR) System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include DANA, Faurecia, SANGO, Borgwarner, T.RAD, Futaba Industrial, BOSAL, Vernet, BENTELER, Meilianqiao Technology Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive Exhaust Heat Recovery (EHR) System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Sets) and average price (US$/Set) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Exhaust Heat Recovery (EHR) System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Exhaust Heat Recovery (EHR) System Market, Segmentation by Type:

Exhaust Gas Heat Recovery (EGHR)

Rankine Cycle Systems

Thermoelectric Generator

Electric Turbo Compounding (ETC)

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Global Automotive Exhaust Heat Recovery (EHR) System Market, Segmentation by System Structure:

Passive

Active

Global Automotive Exhaust Heat Recovery (EHR) System Market, Segmentation by Vehicle Models:

Gasoline Vehicles

Hybrid Vehicles

Global Automotive Exhaust Heat Recovery (EHR) System Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

DANA

Faurecia

SANGO

Borgwarner

T.RAD

Futaba Industrial

BOSAL

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Vernet

BENTELER

Meilianqiao Technology Group

Key Questions Answered:

1. How big is the global Automotive Exhaust Heat Recovery (EHR) System market?
2. What is the demand of the global Automotive Exhaust Heat Recovery (EHR) System market?
3. What is the year over year growth of the global Automotive Exhaust Heat Recovery (EHR) System market?
4. What is the production and production value of the global Automotive Exhaust Heat Recovery (EHR) System market?
5. Who are the key producers in the global Automotive Exhaust Heat Recovery (EHR) System market?
6. What are the growth factors driving the market demand?

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