

Automotive Catalytic Converter Market Analysis By Product (Two-Way Oxidation, Three-Way Oxidation-Reduction, Diesel Oxidation Catalyst), By Material (Platinum, Palladium, Rhodium) And Segment Forecasts To 2024

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Abstracts

The global automotive catalytic converter market size is expected to reach USD 272.95 billion by 2024 according to a new report by Grand View Research, Inc.

In 2015, the global automotive industry experienced a relatively strong growth and profitability, with annual sales reaching pre-recession levels, especially in the U.S., China, India, Japan, and South Korea. This is anticipated to favorably impact the global automotive catalytic converter market over the forecast period. Stringent emission norms by governments and regulatory authorities worldwide have further strengthened industry growth.

Catalytic converters are constituted of precious metals such as platinum, palladium, or rhodium. These metals are used as catalysts and are enclosed in a muffler-like package, which is attached at the exhaust end. Researchers are increasingly working towards the development of advanced catalytic converters that extensively reduce the toxicity of the exhaust emissions as well as improve vehicle fuel efficiency.

However, high R&D costs pertaining to the development of innovative and efficient converters is expected impede industry growth over the next eight years. Moreover, increasing adoption of hybrid and electric vehicles is expected to challenge market growth.

Further key findings from the report suggest:

Three-way oxidation-reduction catalytic converters have a value addition over their two-way catalyst counterparts as they perform three simultaneous chemical conversions. They carry out the oxidation of carbon monoxide & un-burnt hydrocarbons to water & carbon dioxide, along with the conversion of oxides of nitrogen to nitrogen & oxygen. Three-way type converters accounted for over 35% of the industry share and are expected to maintain their dominance over the forecast period.

Diesel oxidation catalyst converters are exclusively used in diesel engine vehicles and are expected to witness a steady demand over the forecast period. They are equipped with diesel particulate filters in order to eliminate particulates from the exhaust emissions. Manufacturers and associations have stepped up their R&D activities to develop new, innovative products such as the four-way catalytic converter.

Platinum tends to be a good oxidation catalyst as a result of which it was extensively used in such automobile components in the past. However, on account of the high cost associated with platinum, it is increasingly being replaced by palladium and rhodium. Rhodium exhibits greater efficiency towards the removal of toxic exhaust emissions and is thereby expected to witness a surge in demand over the next eight years. Rhodium accounted for over 40% of the industry demand and is presumed to continue its dominance over the forecast period.

Stringent emission standards such as the Bharat Stage V & VI in India that are based on the European Standards EuroV and EuroVI have made installation of catalytic converters obligatory for automobile assemblers. This is done to inhibit the issue of harmful exhaust emissions. Europe dominated the global automotive catalytic converter industry contributing to over 30% of the global revenue in 2015. The presence of several prominent automotive manufacturers in Europe is expected to generate a steady demand in the region over the forecast period.

Key industry participants include BASF Catalysts, Faurecia, Magneti Marelli, SMPE and Tenneco. Vendors are gradually adopting innovative distribution strategies such as e-commerce retailers and offer online catalogs apart from directly supplying to automobile assemblers.

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