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Global Automotive Exhaust Heat Recovery (EHR) System Market Growth 2026-2032

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Abstracts

The global Automotive Exhaust Heat Recovery (EHR) System market size is predicted to grow from US$ 158 million in 2025 to US$ 464 million in 2032; it is expected to grow at a CAGR of 16.9% from 2026 to 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,

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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 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

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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 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.

LP Information, Inc. (LPI) ' newest research report, the ?Automotive Exhaust Heat Recovery (EHR) System Industry Forecast? looks at past sales and reviews total world Automotive Exhaust Heat Recovery (EHR) System sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive Exhaust Heat Recovery (EHR) System sales for 2026 through 2032. With Automotive Exhaust Heat Recovery (EHR) System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive Exhaust Heat Recovery (EHR) System industry.

This Insight Report provides a comprehensive analysis of the global Automotive Exhaust Heat Recovery (EHR) System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive Exhaust Heat Recovery (EHR) System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Automotive Exhaust Heat Recovery (EHR) System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Exhaust Heat Recovery (EHR) System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive Exhaust Heat Recovery (EHR) System.

This report presents a comprehensive overview, market shares, and growth

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opportunities of Automotive Exhaust Heat Recovery (EHR) System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Exhaust Gas Heat Recovery (EGHR)

Rankine Cycle Systems

Thermoelectric Generator

Electric Turbo Compounding (ETC)

Segmentation by System Structure:

Passive

Active

Segmentation by Vehicle Models:

Gasoline Vehicles

Hybrid Vehicles

Segmentation by Application:

Passenger Cars

Commercial Vehicles

This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

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Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

DANA

Faurecia

SANGO

Borgwarner

T.RAD

Futaba Industrial

BOSAL

Vernet

BENTELER

Meilianqiao Technology Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive Exhaust Heat Recovery (EHR) System market?

What factors are driving Automotive Exhaust Heat Recovery (EHR) System

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market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How doAutomotive Exhaust Heat Recovery (EHR) System market opportunities vary by end market size?

How does Automotive Exhaust Heat Recovery (EHR) System break out by Type, by Application?

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