

Automotive Exhaust Systems Market by After-Treatment Device (DPF, DOC, LNT, & SCR), Components (Exhaust Manifold, Downpipe, Catalytic Converter, Muffler & Tailpipe), Fuel Type (Gasoline & Diesel) and by Region - Trends & Forecast to 2020

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Abstracts

Automotive exhaust systems perform main three functions: channel exhaust gases out of the engine, reduce the noise generated by high-velocity exhaust gases, and clean up emissions that are harmful to the environment. The automotive exhaust systems comprise five components: engine manifold, engine down pipe, catalytic convertor, muffler, and tail pipe.

The global automotive exhaust systems market is growing at a healthy rate. This growth is mainly driven by changing emission norms in different regions across the globe. Latest emission regulations have reduced the volume of allowed emissions from the exhaust systems of the automobiles, and hence exhaust system manufacturers have been investing heavily in the R&D for technologically advanced exhausts that comply with new guidelines.

This report covers major global players in this industry including Eberspacher GmbH (Germany), Tenneco Inc (U.S.), Faurecia SA (France), Sango Industrial Co Ltd (Japan), and Futaba Industrial Co Ltd (Japan). In 2014, these companies jointly accounted for the highest amount of revenue in the exhaust systems market. These manufacturers offer exhaust systems to OEMs that comply with the new and latest emission norms prescribed by the governments. The new emission norms have made after-treatment devices a necessary component, as these help OEMs keep a check on the emission levels produced by the vehicles, and reduce the emission of harmful green house gases. The different after-treatment devices used are diesel particulate filter (DPF),

diesel oxidation catalyst (DOC), lean NO_x trap (LNT), selective catalytic reduction (SCR), and gasoline particulate filter (GPF). All these devices reduce carbon emissions from a vehicle and help in bettering the environment.

The report also discusses the qualitative aspects of the market such as the market dynamics, Porter's Five Forces analysis, and PEST analysis, which provide an overview of the forces shaping the industry in major regions such as North America, Asia-Oceania, and Europe. The report covers the automotive exhaust systems market globally from 2015 to 2020 in terms of volume and value, segmented by region (Asia-Oceania, North America, Europe, and ROW), by vehicle type (passenger cars, light commercial vehicles, and heavy commercial vehicles), by fuel type (gasoline and diesel), by component (exhaust manifold, engine downpipe, catalytic converter, muffler, resonator, and tail pipe), and after-treatment devices used (DPF, DOC, LNT, TWC, SCR, and GPF).

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About

In the present industry and regulatory scenario, a vehicle's exhaust system plays a pivotal role as its engine or transmission. The widespread awareness among governments and consumers regarding vehicle emission levels has created a need for highly advanced exhaust systems which while limiting the emission levels from a vehicle provide optimum performance. The chapter below provides a description of the forces that are shaping up the market for these exhaust systems. Each market is subjected to various forces that help or restrain it from growing, and also there are certain aspects of the market that can help any particular OEM gain a larger share of the pie.

The automotive industry's focus has seen a shift from manufacturing performance or comfort-oriented vehicles to producing vehicles that have the least possible effect over the environment. While earlier vehicles had to pass security and efficiency tests to get certifications, modern vehicles are subjected to stringent emission norms that they must comply with to get their certifications. Governments across the globe have been pushing the permissible emission levels lower to curb pollution and to reduce their carbon footprint. The graph below provides an overview of the evolution of European emission norms over the past few decades. As evident from the graph, the permissible emission levels have seen a drastic drop and are at a level where further reductions will make it very hard for the manufacturers to comply using only engine technologies. Therefore, the demand for advanced exhaust systems is expected to rise in the coming years.

The global vehicle production is expected to rise at a brisk pace over the coming years. The major contributors to this growth are the developing economies of the world such as Brazil, India, China, and Mexico. The rising economies and improving standard of living in this country has been pushing the demand for vehicles. Most major OEMs have already set up their manufacturing plants in these countries to cater to this growing demand. The availability of relatively cheaper labor in these countries is another factor that is pushing the companies to use these countries as export hubs to other parts of the world. The rising production will bring with it increasing demand for exhaust systems which are to be put into these vehicles. The graph below provides an estimate of the vehicle production over the period of 2012 to 2019.

Most of the countries around the globe follow different emission norms implemented by their respective governments such as Euro standards or EPA norms. Euro emission

norms is one of the most commonly followed emission norms across the globe. Under these emission norms, all vehicles have to pass the emission test requirements before being actually sold to the end consumers. Euro VI, which is to be implemented in the coming years, is going to have even stricter emission tests for the vehicles due to the growing environmental concern all over the world. Therefore, the company which can foresee this as an opportunity and work towards creating exhaust systems to comply with these norms at an earlier stage will be able to capitalize having an early-bird advantage.

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