

Catalytic Converter Market by Type (FWCC, TWCC, SCR, DOC, and LNT), Material (Platinum, Palladium, and Rhodium), Vehicle Type (Passenger Cars, LCV, Bus & Truck, Construction, and Agriculture & Mining), Aftermarket and Region - Global Forecast to 2025

<https://marketpublishers.com/r/C87994B36E0EN.html>

Date: March 2019

Pages: 212

Price: US\$ 5,650.00 (Single User License)

ID: C87994B36E0EN

Abstracts

“The increasing vehicle production and stringency in emission norms will drive the catalytic converter market.”

The catalytic converter market is projected to grow from USD 42.4 billion in 2018 to USD 73.1 billion by 2025, at a CAGR of 8.10%. The major driving factors for the catalytic converter market are stringent emission norms, fuel efficiency regulations, and increasing adoption rate of SCRs in diesel engines around the globe. The demand for catalytic converters is driven by the increasing vehicle production, stringency in emission norms, and technological partnership between OEMs and Tier I players. However, increasing sales of BEVs and the high cost of precious materials are acting as restrains for the catalytic converter market.

“Agricultural tractor is estimated to be the largest and fastest growing market for the off-highway vehicle segment.”

Agriculture tractors hold the maximum share in the overall off-highway vehicle segment. The demand for agricultural tractors is driven by increasing mechanization rate, rising global population, shortage of skilled farm labor, increasing labor cost, and the growing need for operational efficiency and profitability. With the rising demand for tractors, the demand for several aftertreatment devices will also grow simultaneously. DOC and DPF devices are fitted in most of the agricultural tractors to comply with off-highway vehicle emission norms. The deployment of these devices is more prominent in Europe and

North America, and will eventually boost up in the Asian countries also. Alternatively, deployment of SCRs is dependent on the engine capacity. For instance, 200 kW tractors are equipped with DOC, DPF, and SCR. Thus, the growing demand for agricultural tractors and the governments' push toward lower emissions would drive the catalytic converter market in the coming years.

"Asia Oceania is estimated to be the largest catalytic converter market during the forecast period."

The catalytic converter market in Asia Oceania is expected to be the largest during the forecast period. The major driving factors are huge vehicle production and upcoming emission norms in developing countries such as China and India. China and India are currently following China IV and BS IV respectively, and are planning to launch China VI and BS VI directly which will fuel the growth of catalytic converter. However, the adoption rate of aftertreatment devices is comparatively low against the European countries, the US, and Canada.

In-depth interviews were conducted with CEOs, marketing directors, innovation and technology directors, and executives from various key organizations operating in the catalytic converter market place.

By Company Type: Tier I - 45%, Tier II - 35%, and OEMs - 20%

By Designation: C level - 40%, D level - 35%, Other - 25%

By Region: North America - 48%, Europe - 30%, Asia Oceania — 22%

Note: Tier 1 (Exhaust system and catalytic converter manufacturer), Tier 2 (Material suppliers), others (OEM, Industry expert).

The catalytic converter market is dominated by the global players and comprises several regional players. Some of the key players in the catalytic converter market are Faurecia (France), Tenneco (US), Continental (Germany), Eberspächer (Germany), Johnson Maththey (UK), Umicore (Belgium), Futaba (Japan), BAEF (Germany), CDTI Materials (US), and Benteler International (Austria). The study includes an in-depth competitive analysis of these key players in the catalytic converter market, with their company profiles, SWOT analysis of the top 5 companies, recent developments, and key market strategies.

Research Coverage

The catalytic converter market has been segmented on the basis of type of catalytic converter [three-way catalytic converter (TWCC), four-way catalytic converter (FWCC), diesel oxidation catalyst (DOC), selective catalytic reduction (SCR), and lean NOx trap (LNT)], vehicle type (passenger car, LCV, truck, and bus), material (palladium, platinum, rhodium, and others), off-highway vehicle (agricultural tractors, mining equipment, and construction equipment), aftermarket (passenger car, LCV, HCV), and region [Asia Oceania (China, Japan, India, South Korea, Thailand, and Rest of Asia Oceania), Europe (UK, Germany, France, Spain, Russia, Turkey, and Rest of Europe), North America (US, Canada, and Mexico), and Rest of the world (Brazil, Iran, and Rest of RoW)].

Key Benefits of Buying the Report:

This report provides insights with reference to the following points:

OE Market Size, by Catalytic Converter Type: The report offers in-depth market sizing and forecast up to 2025, by catalytic converter type, such as TWCC, FWCC, DOC, SCR, and LNT. The market sizing for catalytic converter type is covered at the country and regional levels considered under this study.

OE Market Size, by Material: The report offers in-depth market sizing and forecast up to 2025, by material, such as palladium, platinum, rhodium, others. The market sizing for components is covered at vehicle types and regional levels considered in the study.

OE Market Size, by Off-highway Vehicle: The report offers in-depth market sizing and forecast up to 2025, by off-highway vehicle, such as agricultural tractors, construction equipment, and mining equipment. The market sizing for off-highway vehicle is covered for regions considered in the study.

Aftermarket Size, by Vehicle Type: The report offers in-depth aftermarket sizing and forecast up to 2025, by vehicle type, at a regional level.

The report provides “Market Share” of the leading players in the catalytic converter market.

Market Development: The report provides comprehensive information about lucrative emerging markets for catalytic converter across regions.

Product Development/Innovation: The report gives detailed insights into R&D activities, upcoming technologies, and new product launches in the catalytic converter market.

Market Diversification: The report offers detailed information about untapped markets, investments, new products, and recent developments in the catalytic converter market.

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