

# **Diesel Exhaust Fluid Market by Component (SCR Catalysts, DEF Tanks, Injectors, Supply Modules, Sensors), OHV Market by Application, Aftermarket by Vehicle Type, Supply Mode (Cans, IBCs, Bulk & Pumps), End Use Market and Region - Global Forecast to 2027**

<https://marketpublishers.com/r/DA41C973F2DEN.html>

Date: May 2022

Pages: 213

Price: US\$ 4,950.00 (Single User License)

ID: DA41C973F2DEN

## **Abstracts**

The global diesel exhaust fluid aftermarket forecasted to reach USD 50.0 billion by 2027 from USD 34.4 billion in 2020, at a CAGR of 7.8%.

Governments around the globe have updated and improved their emission standards by introducing new legislation for the automotive industry to comply to. Western regions, such as the North American and European region, have introduced new regulations like the Clear Air Act of the Us which has stricter standards and wider scope for emissions. In the Asian region countries like China and India have introduced swift regulation to counter rising air pollution. The introduction of such regulations, norms and standards will drive the demand for DEF across the globe.

“The DEF pump segment is expected to be the fastest-growing segment throughout the forecast period”

The diesel exhaust fluid aftermarket for pumps is projected to grow from USD 7,373.3 million in 2022 to USD 11,979.1 million by 2027, at a CAGR of 10.2% during the forecast period. Compared to conventional cans and bottles supply mode the DEF pumps supply mode is cheaper but expensive than the Bulk supply mode due to the economic behind the economies of scale. Customers choose to go for DEF dispensing units for its convenience in DEF refilling. This has caused oil marketing companies

(OMCs) to install such dispensing units at their fuel stations to increase customer convenience. FMT Swiss Ag, a leading supplier of specialty fluid storage and dispensing solutions, in 2017, launched a range of diesel exhaust fluid (DEF) dispensing unit product for its North American market.

“Globally, the HCV segment is estimated to lead the diesel exhaust fluid OE market in 2022”

Globally, the HCVs segment is estimated to lead the diesel exhaust fluid OE market, by volume. It is anticipated to grow from 33.2 million gallons in 2022 to 36.5 million gallons by 2027, at a CAGR of 1.9% during the forecast period. Demand from developed and developing economies globally has increased for the HCV vehicle segment due to either better product offering or increased economic activities. Businesses need to comply with the regulations and norms of the country where they operate. Complying with regulations will cause an increased demand of DEF products.

“North America is projected to be the largest regional market “

The North American diesel exhaust fluid aftermarket is estimated to grow from USD 15,006.6 million in 2022 to USD 22,067.4 million by 2027, at a CAGR of 8.0% during the forecast period. The US and Canada have a large number of on-road vehicles and stringent emission norms, such as the Clean Air Act (CAA) in the US. Increasing economic activity and improving business environment in Mexico has led to high demand for diesel intensive vehicles and equipments. Compliance with emission regulations will drive the demand for DEF in the country. Canada follows similar demand and regulation pattern as the US hence it is also likely to follow similar demand trend of DEF.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and strategy directors, and executives from various key organizations operating in this market.

By Company Type: Tier 1 – 50%, Tier 2 –25%, and Other – 25%

By Designation: C Level - 50%, Di Level- 33%, and Others – 17%

By Region: Asia Pacific - 43%, Europe - 29%, North America – 25%

TotalEnergies (France), Shell PLC (The Netherlands), BASF SE (Germany), Brenntag SE (Germany), and China Petrochemical Corporation (Sinopec) (China) are the leading manufacturers of diesel exhaust fluid in the global market.

#### Research Coverage:

The study segments the diesel exhaust fluid market and forecasts the OE market size based on vehicle type (Passenger Cars, LCVs, and HCVs), component (SCR catalysts, DEF tanks, DEF injectors, DEF supply module, DEF sensor, and NOx sensor), off-highway DEF OE market size based on application (construction equipment and agricultural tractors), aftermarket size based on supply mode (cans & bottles, IBCs, bulk, and pumps), end use market (OE & Aftermarket), and region (Asia-Oceania, Europe, North America, and RoW).

The study also includes an in-depth competitive analysis of the major diesel exhaust fluid manufacturers in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

#### Key Benefits of Buying the Report:

The report will help the market leaders/new entrants in this market with the information on the closest approximations of the revenue numbers for the overall diesel exhaust fluid market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides them information on key market drivers, restraints, challenges, and opportunities.

## Contents

### 1 INTRODUCTION

#### 1.1 OBJECTIVES OF THE STUDY

#### 1.2 MARKET DEFINITION

#### 1.3 INCLUSIONS & EXCLUSIONS

#### TABLE 1 DIESEL EXHAUST FLUID MARKET: INCLUSIONS & EXCLUSIONS

#### 1.4 MARKET SCOPE

##### 1.4.1 YEARS CONSIDERED IN THE STUDY

#### 1.5 CURRENCY

#### 1.6 PACKAGE SIZE

#### 1.7 LIMITATIONS

#### 1.8 STAKEHOLDERS

#### 1.9 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 1 DIESEL EXHAUST FLUID MARKET: RESEARCH DESIGN

#### FIGURE 2 RESEARCH DESIGN MODEL

##### 2.1.1 SECONDARY DATA

##### 2.1.1.1 Key secondary sources for base data

##### 2.1.1.2 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

#### FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS

##### 2.1.3 PRIMARY PARTICIPANTS

#### 2.2 MARKET ESTIMATION METHODOLOGY

#### FIGURE 4 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING

#### 2.3 MARKET SIZE ESTIMATION

##### 2.3.1 BOTTOM-UP APPROACH

#### FIGURE 5 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE: BOTTOM-UP APPROACH

##### 2.3.2 TOP-DOWN APPROACH

#### FIGURE 6 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE: TOP-DOWN APPROACH

##### 2.3.3 RESEARCH DESIGN AND METHODOLOGY

#### FIGURE 7 RESEARCH APPROACH: DIESEL EXHAUST FLUID MARKET

#### 2.4 DATA TRIANGULATION

## FIGURE 8 DATA TRIANGULATION

### 2.5 FACTOR ANALYSIS

### 2.6 RESEARCH ASSUMPTIONS

### 2.7 RESEARCH LIMITATIONS

## 3 EXECUTIVE SUMMARY

### 3.1 PRE- & POST-COVID-19 SCENARIO

FIGURE 9 PRE- & POST-COVID-19 SCENARIO: DIESEL EXHAUST FLUID  
AFTERMARKET, 2018–2027 (USD MILLION)

TABLE 2 DIESEL EXHAUST FLUID AFTERMARKET: PRE- VS. POST-COVID-19  
SCENARIO, 2018–2027 (USD MILLION)

### 3.2 REPORT SUMMARY

FIGURE 10 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2022 VS. 2027  
(USD MILLION)

## 4 PREMIUM INSIGHTS

### 4.1 ATTRACTIVE OPPORTUNITIES IN DIESEL EXHAUST FLUID AFTERMARKET

FIGURE 11 STRINGENT EMISSION REGULATIONS LEADING TO INCREASED  
PENETRATION OF VEHICLES EQUIPPED WITH SCR

### 4.2 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE

FIGURE 12 HCVS WILL DOMINATE DIESEL EXHAUST FLUID OE MARKET BY 2027

### 4.3 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT

FIGURE 13 DEF SENSORS ARE PROJECTED TO REGISTER HIGHEST GROWTH  
FROM

## 2022 TO 2027

### 4.4 OFF-HIGHWAY DIESEL EXHAUST FLUID OE MARKET, BY APPLICATION

FIGURE 14 AGRICULTURAL TRACTORS TO WITNESS FASTEST GROWTH  
BETWEEN

## 2022 AND 2027

### 4.5 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE

FIGURE 15 BULK SUPPLY MODE WILL CONTINUE TO DOMINATE MARKET TILL  
2027

### 4.6 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET

FIGURE 16 AFTERMARKET ACCOUNTS FOR LARGER MARKET SHARE IN 2022

4.7 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION

FIGURE 17 NORTH AMERICA IS LARGEST MARKET FOR DIESEL EXHAUST FLUID

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

FIGURE 18 DIESEL EXHAUST FLUID: MARKET DYNAMICS

#### 5.2.1 DRIVERS

5.2.1.1 Stringent emission regulations are leading to increased penetration of vehicles equipped with SCR

FIGURE 19 MEDIUM AND HEAVY-DUTY TRUCK EMISSION REGULATIONS OUTLOOK, BY KEY COUNTRY, 2014-2025

TABLE 3 EURO NOX EMISSION LIMITS FOR ON-HIGHWAY VEHICLES, 2001 TO 2022

FIGURE 20 EMISSION LIMITS OF KEY POLLUTANT, WITH VS WITHOUT DEF

5.2.1.2 Increasing number of DEF pumps

FIGURE 21 EUROPE: DEF SUPPLY MODE, 2011 VS. 2016 VS. 2019

5.2.1.3 Increasing average age of vehicles and miles driven

FIGURE 22 GLOBAL VEHICLE PARC, 2018-2027 (THOUSAND UNITS)

#### 5.2.2 RESTRAINTS

5.2.2.1 Increasing sales of electric vehicles

TABLE 4 FINANCIAL INCENTIVES FOR ELECTRIC VEHICLES, BY COUNTRY

FIGURE 23 ELECTRIC VEHICLE SALES, 2018 VS. 2030 (THOUSAND UNITS)

5.2.2.2 Decrease in share of light-duty diesel vehicles

FIGURE 24 EUROPE: DIESEL SHARE IN LIGHT-DUTY VEHICLE (PASSENGER CARS & LCVS) SALES (%), 2018–2027

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Rising demand for DEF in construction equipment

FIGURE 25 SALES OF CONSTRUCTION EQUIPMENT, 2019 VS. 2027 (THOUSAND UNITS)

5.2.3.2 Tier IV/Stage IV and Stage V emission regulations for off-highway engines

FIGURE 26 COUNTRY-WISE NON-ROAD MOBILE MACHINERY REGULATIONS OVERVIEW, 2019-2030

5.2.3.3 Diesel exhaust fluid market offers growth opportunities to fuel tank manufacturers and material suppliers

#### 5.2.4 CHALLENGES

5.2.4.1 Adulteration impacting the quality of DEF

TABLE 5 UREA SPECIFICATIONS FOR AUTOMOTIVE DEF

TABLE 6 DEIONIZED WATER SPECIFICATION FOR AUTOMOTIVE DEF

5.2.4.2 Fluctuating urea prices

FIGURE 27 FLUCTUATING UREA PRICES, 2015-2020 (USD PER METRIC TON)

5.3 PORTER'S FIVE FORCES ANALYSIS

5.3.1 DIESEL EXHAUST FLUID MARKET

FIGURE 28 PORTER'S FIVE FORCES ANALYSIS: DIESEL EXHAUST FLUID MARKET

TABLE 7 PORTER'S FIVE FORCES ANALYSIS

5.3.1.1 Intensity of competitive rivalry

5.3.1.2 Threat of new entrants

5.3.1.3 Threat of substitutes

5.3.1.4 Bargaining power of suppliers

5.3.1.5 Bargaining power of buyers

5.4 PATENT ANALYSIS

TABLE 8 GRANTED/APPLICATION PATENT

5.5 DIESEL EXHAUST FLUID AFTERMARKET- SCENARIO ANALYSIS

FIGURE 29 DIESEL EXHAUST FLUID AFTERMARKET SCENARIO, 2018–2027 (USD MILLION)

5.5.1 REALISTIC SCENARIO

TABLE 9 DIESEL EXHAUST FLUID AFTERMARKET (REALISTIC SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.5.2 LOW IMPACT SCENARIO

TABLE 10 DIESEL EXHAUST FLUID AFTERMARKET (LOW IMPACT SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.5.3 HIGH IMPACT SCENARIO

TABLE 11 DIESEL EXHAUST FLUID AFTERMARKET (HIGH IMPACT SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.6 SUPPLY CHAIN ANALYSIS

FIGURE 30 DIESEL EXHAUST FLUID SUPPLY CHAIN

5.7 AVERAGE SELLING PRICE (ASP) ANALYSIS

5.7.1 ASP ANALYSIS, BY REGION, 2021 (USD PER GALLON)

TABLE 12 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2021 (USD PER GALLON)

5.7.2 ASP ANALYSIS, BY COMPONENT, 2021 (USD PER UNIT)

TABLE 13 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT, 2021 (USD PER UNIT)

5.8 REGULATORY ANALYSIS

TABLE 14 SAFETY REGULATIONS, BY COUNTRY/REGION



## 5.9 TRADE ANALYSIS

TABLE 15 IMPORT TRADE DATA, BY COUNTRY, 2021 (TONS)

TABLE 16 EXPORT TRADE DATA, BY COUNTRY, 2021 (TONS)

## 5.10 MARKET ECOSYSTEM

TABLE 17 DIESEL EXHAUST FLUID MARKET: ECOSYSTEM

# 6 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE

## 6.1 INTRODUCTION

### 6.1.1 RESEARCH METHODOLOGY

FIGURE 31 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 18 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 19 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 20 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 21 DIESEL EXHAUST FLUID OE MARKET, BY VEHICLE TYPE, 2021–2027 (USD MILLION)

## 6.2 PASSENGER CARS

TABLE 22 PASSENGER CARS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (MILLION GALLONS)

TABLE 23 PASSENGER CARS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (MILLION GALLONS)

TABLE 24 PASSENGER CARS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 25 PASSENGER CARS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD MILLION)

## 6.3 LIGHT COMMERCIAL VEHICLES

TABLE 26 LCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (MILLION GALLONS)

TABLE 27 LCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (MILLION GALLONS)

TABLE 28 LCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 29 LCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD MILLION)

## 6.4 HEAVY COMMERCIAL VEHICLES



TABLE 30 HCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (MILLION GALLONS)

TABLE 31 HCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (MILLION GALLONS)

TABLE 32 HCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 33 HCVS: DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD MILLION)

## **7 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT**

### **7.1 INTRODUCTION**

FIGURE 32 WORKING PRINCIPLE OF EXHAUST SYSTEM WITH SCR AND DEF

#### **7.1.1 RESEARCH METHODOLOGY**

FIGURE 33 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT, 2022 VS. 2027 (USD MILLION)

### **7.2 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT**

TABLE 34 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT, 2018–2020 (THOUSAND UNITS)

TABLE 35 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT, 2021–2027 (THOUSAND UNITS)

TABLE 36 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT, 2018–2020 (USD MILLION)

TABLE 37 DIESEL EXHAUST FLUID OE MARKET, BY COMPONENT, 2021–2027 (USD MILLION)

### **7.3 SCR CATALYSTS**

TABLE 38 SCR CATALYSTS OE MARKET, BY REGION, 2018–2020 (THOUSAND UNITS)

TABLE 39 SCR CATALYSTS OE MARKET, BY REGION, 2021–2027 (THOUSAND UNITS)

TABLE 40 SCR CATALYSTS OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 41 SCR CATALYSTS OE MARKET, BY REGION, 2021–2027 (USD MILLION)

### **7.4 DEF TANKS**

TABLE 42 DEF TANKS OE MARKET, BY REGION, 2018–2020 (THOUSAND UNITS)

TABLE 43 DEF TANK OE MARKET, BY REGION, 2021–2027 (THOUSAND UNITS)

TABLE 44 DEF TANK OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 45 DEF TANK OE MARKET, BY REGION, 2021–2027 (USD MILLION)

### **7.5 DEF INJECTORS**

TABLE 46 DEF INJECTORS OE MARKET, BY REGION, 2018–2020 (THOUSAND

UNITS)

TABLE 47 DEF INJECTORS OE MARKET, BY REGION, 2021–2027 (THOUSAND UNITS)

TABLE 48 DEF INJECTORS OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 49 DEF INJECTORS OE MARKET, BY REGION, 2021–2027 (USD MILLION)

#### 7.6 DEF SUPPLY MODULES

TABLE 50 DEF SUPPLY MODULE OE MARKET, BY REGION, 2018–2020 (THOUSAND UNITS)

TABLE 51 DEF SUPPLY MODULE OE MARKET, BY REGION, 2021–2027 (THOUSAND UNITS)

TABLE 52 DEF SUPPLY MODULE OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 53 DEF SUPPLY MODULE OE MARKET, BY REGION, 2021–2027 (USD MILLION)

#### 7.7 DEF SENSORS

TABLE 54 DEF SENSORS OE MARKET, BY REGION, 2018–2020 (THOUSAND UNITS)

TABLE 55 DEF SENSORS OE MARKET, BY REGION, 2021–2027 (THOUSAND UNITS)

TABLE 56 DEF SENSORS OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 57 DEF SENSORS OE MARKET, BY REGION, 2021–2027 (USD MILLION)

#### 7.8 NOX SENSORS

TABLE 58 NOX SENSORS OE MARKET, BY REGION, 2018–2020 (THOUSAND UNITS)

TABLE 59 NOX SENSORS OE MARKET, BY REGION, 2021–2027 (THOUSAND UNITS)

TABLE 60 NOX SENSORS OE MARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 61 NOX SENSORS OE MARKET, BY REGION, 2021–2027 (USD MILLION)

## 8 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE

### 8.1 INTRODUCTION

#### 8.1.1 RESEARCH METHODOLOGY

FIGURE 34 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE, 2022 VS. 2027 (USD MILLION)

### 8.2 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE

TABLE 62 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE, 2018–2020 (MILLION GALLONS)

TABLE 63 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE,

2021–2027 (MILLION GALLONS)

TABLE 64 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE,  
2018–2020 (USD MILLION)

TABLE 65 DIESEL EXHAUST FLUID AFTERMARKET, BY SUPPLY MODE,  
2021–2027 (USD MILLION)

### 8.3 CANS & BOTTLES

TABLE 66 CANS & BOTTLES: DIESEL EXHAUST FLUID AFTERMARKET, BY  
REGION, 2018–2020 (MILLION GALLONS)

TABLE 67 CANS & BOTTLES: DIESEL EXHAUST FLUID AFTERMARKET, BY  
REGION, 2021–2027 (MILLION GALLONS)

TABLE 68 CANS & BOTTLES: DIESEL EXHAUST FLUID AFTERMARKET, BY  
REGION, 2018–2020 (USD MILLION)

TABLE 69 CANS & BOTTLES: DIESEL EXHAUST FLUID AFTERMARKET, BY  
REGION, 2021–2027 (USD MILLION)

### 8.4 INTERMEDIATE BULK CONTAINERS (IBCS)

TABLE 70 INTERMEDIATE BULK CONTAINERS (IBCS): DIESEL EXHAUST FLUID  
AFTERMARKET, BY REGION, 2018–2020 (MILLION GALLONS)

TABLE 71 INTERMEDIATE BULK CONTAINERS (IBCS): DIESEL EXHAUST FLUID  
AFTERMARKET, BY REGION, 2021–2027 (MILLION GALLONS)

TABLE 72 INTERMEDIATE BULK CONTAINERS (IBCS): DIESEL EXHAUST FLUID  
AFTERMARKET, BY REGION, 2018–2020 (USD MILLION)

TABLE 73 INTERMEDIATE BULK CONTAINERS (IBCS): DIESEL EXHAUST FLUID  
AFTERMARKET, BY REGION, 2021–2027 (USD MILLION)

### 8.5 BULK

TABLE 74 BULK: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2018–2020 (MILLION GALLONS)

TABLE 75 BULK: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2021–2027 (MILLION GALLONS)

TABLE 76 BULK: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2018–2020 (USD MILLION)

TABLE 77 BULK: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2021–2027 (USD MILLION)

### 8.6 PUMPS

TABLE 78 PUMPS: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2018–2020 (MILLION GALLONS)

TABLE 79 PUMPS: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2021–2027 (MILLION GALLONS)

TABLE 80 PUMPS: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2018–2020 (USD MILLION)

TABLE 81 PUMPS: DIESEL EXHAUST FLUID AFTERMARKET, BY REGION,  
2021–2027 (USD MILLION)

## **9 DIESEL EXHAUST FLUID OE MARKET FOR OFF-HIGHWAY VEHICLES, BY APPLICATION**

### **9.1 INTRODUCTION**

#### **9.1.1 RESEARCH METHODOLOGY**

FIGURE 35 OFF-HIGHWAY DIESEL EXHAUST FLUID OE MARKET, BY APPLICATION, 2022 VS. 2027 (USD THOUSAND)

TABLE 82 OFF-HIGHWAY DIESEL EXHAUST FLUID OE MARKET, BY APPLICATION, 2018–2020 (THOUSAND GALLONS)

TABLE 83 OFF-HIGHWAY DIESEL EXHAUST FLUID OE MARKET, BY APPLICATION, 2021–2027 (THOUSAND GALLONS)

TABLE 84 OFF-HIGHWAY DIESEL EXHAUST FLUID OE MARKET, BY APPLICATION, 2018–2020 (USD THOUSAND)

TABLE 85 OFF-HIGHWAY DIESEL EXHAUST FLUID OE MARKET, BY APPLICATION, 2021–2027 (USD THOUSAND)

### **9.2 CONSTRUCTION EQUIPMENT**

9.2.1 CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY POWER OUTPUT

TABLE 86 CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY POWER OUTPUT, 2018–2020 (THOUSAND GALLONS)

TABLE 87 CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY POWER OUTPUT, 2021–2027 (THOUSAND GALLONS)

TABLE 88 CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY POWER OUTPUT, 2018–2020 (USD THOUSAND)

TABLE 89 CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY POWER OUTPUT, 2021–2027 (USD THOUSAND)

#### **9.2.2 80-100 HP**

TABLE 90 80-100 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (THOUSAND GALLONS)

TABLE 91 80-100 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (THOUSAND GALLONS)

TABLE 92 80-100 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD THOUSAND)

TABLE 93 80-100 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD THOUSAND)

#### **9.2.3 101-200 HP**

TABLE 94 101-200 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (THOUSAND GALLONS)

TABLE 95 101-200 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (THOUSAND GALLONS)

TABLE 96 101-200 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD THOUSAND)

TABLE 97 101-200 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD THOUSAND)

#### 9.2.4 201-400 HP

TABLE 98 201-400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (THOUSAND GALLONS)

TABLE 99 201-400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (THOUSAND GALLONS)

TABLE 100 201-400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD THOUSAND)

TABLE 101 201-400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD THOUSAND)

#### 9.2.5 >400 HP

TABLE 102 >400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (THOUSAND GALLONS)

TABLE 103 >400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (THOUSAND GALLONS)

TABLE 104 >400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD THOUSAND)

TABLE 105 >400 HP CONSTRUCTION EQUIPMENT DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD THOUSAND)

### 9.3 AGRICULTURAL TRACTORS

TABLE 106 AGRICULTURAL TRACTORS DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (THOUSAND GALLONS)

TABLE 107 AGRICULTURAL TRACTORS DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (THOUSAND GALLONS)

TABLE 108 AGRICULTURAL TRACTORS DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2018–2020 (USD THOUSAND)

TABLE 109 AGRICULTURAL TRACTORS DIESEL EXHAUST FLUID OE MARKET, BY REGION, 2021–2027 (USD THOUSAND)

## 10 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET

### 10.1 INTRODUCTION

### 10.1.1 RESEARCH METHODOLOGY

FIGURE 36 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET, 2022 VS. 2027 (USD MILLION)

TABLE 110 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET, 2018–2020 (MILLION GALLONS)

TABLE 111 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET, 2021–2027 (MILLION GALLONS)

TABLE 112 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET, 2018–2020 (USD MILLION)

TABLE 113 DIESEL EXHAUST FLUID MARKET, BY END-USE MARKET, 2021–2027 (USD MILLION)

### 10.2 OE

TABLE 114 OE: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 115 OE: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 116 OE: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 117 OE: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2021–2027 (USD MILLION)

### 10.3 AFTERMARKET

TABLE 118 AFTERMARKET: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 119 AFTERMARKET: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 120 AFTERMARKET: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 121 AFTERMARKET: DIESEL EXHAUST FLUID MARKET, BY VEHICLE TYPE, 2021–2027 (USD MILLION)

## 11 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION

### 11.1 INTRODUCTION

#### 11.1.1 RESEARCH METHODOLOGY

FIGURE 37 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2022 VS. 2027 (USD MILLION)

TABLE 122 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2018–2020 (MILLION GALLONS)

TABLE 123 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2021–2027



(MILLION GALLONS)

TABLE 124 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2018–2020  
(USD MILLION)

TABLE 125 DIESEL EXHAUST FLUID AFTERMARKET, BY REGION, 2021–2027  
(USD MILLION)

## 11.2 NORTH AMERICA

FIGURE 38 NORTH AMERICA: DIESEL EXHAUST FLUID AFTERMARKET  
SNAPSHOT

TABLE 126 NORTH AMERICA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
COUNTRY, 2018–2020 (MILLION GALLONS)

TABLE 127 NORTH AMERICA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
COUNTRY, 2021–2027 (MILLION GALLONS)

TABLE 128 NORTH AMERICA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
COUNTRY, 2018–2020 (USD MILLION)

TABLE 129 NORTH AMERICA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
COUNTRY, 2021–2027 (USD MILLION)

TABLE 130 US: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (MILLION GALLONS)

TABLE 131 US: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (MILLION GALLONS)

TABLE 132 US: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (USD MILLION)

TABLE 133 US: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (USD MILLION)

### 11.2.1 MEXICO

TABLE 134 MEXICO: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (MILLION GALLONS)

TABLE 135 MEXICO: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (MILLION GALLONS)

TABLE 136 MEXICO: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (USD MILLION)

TABLE 137 MEXICO: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027(USD MILLION)

### 11.2.2 CANADA

TABLE 138 CANADA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2018–2020 (MILLION GALLONS)

TABLE 139 CANADA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2021–2027 (MILLION GALLONS)

TABLE 140 CANADA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE



TYPE, 2018–2020 (USD MILLION)

TABLE 141 CANADA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2021–2027 (USD MILLION)

### 11.3 EUROPE

FIGURE 39 EUROPE: DIESEL EXHAUST FLUID AFTERMARKET SNAPSHOT

TABLE 142 EUROPE: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2018–2020 (MILLION GALLONS)

TABLE 143 EUROPE: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2021–2027 (MILLION GALLONS)

TABLE 144 EUROPE: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2018–2020 (USD MILLION)

TABLE 145 EUROPE: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2021–2027 (USD MILLION)

#### 11.3.1 GERMANY

TABLE 146 GERMANY: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2018–2020 (MILLION GALLONS)

TABLE 147 GERMANY: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2021–2027 (MILLION GALLONS)

TABLE 148 GERMANY: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2018–2020 (USD MILLION)

TABLE 149 GERMANY: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2021–2027 (USD MILLION)

#### 11.3.2 FRANCE

TABLE 150 FRANCE: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2018–2020 (MILLION GALLONS)

TABLE 151 FRANCE: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2021–2027 (MILLION GALLONS)

TABLE 152 FRANCE: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2018–2020 (USD MILLION)

TABLE 153 FRANCE: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE  
TYPE, 2021–2027 (USD MILLION)

#### 11.3.3 UK

TABLE 154 UK: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (MILLION GALLONS)

TABLE 155 UK: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (MILLION GALLONS)

TABLE 156 UK: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (USD MILLION)

TABLE 157 UK: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,

2021–2027 (USD MILLION)

#### 11.3.4 RUSSIA

TABLE 158 RUSSIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 159 RUSSIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 160 RUSSIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 161 RUSSIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2021–2027 (USD MILLION)

#### 11.4 ASIA OCEANIA

TABLE 162 ASIA OCEANIA: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY, 2018–2020 (MILLION GALLONS)

TABLE 163 ASIA OCEANIA: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY, 2021–2027 (MILLION GALLONS)

TABLE 164 ASIA OCEANIA: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY, 2018–2020 (USD MILLION)

TABLE 165 ASIA OCEANIA: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY, 2021–2027 (USD MILLION)

##### 11.4.1 CHINA

TABLE 166 CHINA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 167 CHINA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 168 CHINA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 169 CHINA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2021–2027 (USD MILLION)

##### 11.4.2 JAPAN

TABLE 170 JAPAN: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 171 JAPAN: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 172 JAPAN: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 173 JAPAN: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE, 2021–2027 (USD MILLION)

##### 11.4.3 SOUTH KOREA

TABLE 174 SOUTH KOREA: DIESEL EXHAUST FLUID AFTERMARKET, BY

VEHICLE TYPE, 2018–2020 (MILLION GALLONS)

TABLE 175 SOUTH KOREA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
VEHICLE TYPE, 2021–2027 (MILLION GALLONS)

TABLE 176 SOUTH KOREA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
VEHICLE TYPE, 2018–2020 (USD MILLION)

TABLE 177 SOUTH KOREA: DIESEL EXHAUST FLUID AFTERMARKET, BY  
VEHICLE TYPE, 2021–2027 (USD MILLION)

#### 11.4.4 INDIA

TABLE 178 INDIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (MILLION GALLONS)

TABLE 179 INDIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (MILLION GALLONS)

TABLE 180 INDIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (USD MILLION)

TABLE 181 INDIA: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (USD MILLION)

#### 11.5 ROW

TABLE 182 ROW: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2018–2020 (MILLION GALLONS)

TABLE 183 ROW: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2021–2027 (MILLION GALLONS)

TABLE 184 ROW: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2018–2020 (USD MILLION)

TABLE 185 ROW: DIESEL EXHAUST FLUID AFTERMARKET, BY COUNTRY,  
2021–2027 (USD MILLION)

#### 11.5.1 BRAZIL

TABLE 186 BRAZIL: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (MILLION GALLONS)

TABLE 187 BRAZIL: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (MILLION GALLONS)

TABLE 188 BRAZIL: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2018–2020 (USD MILLION)

TABLE 189 BRAZIL: DIESEL EXHAUST FLUID AFTERMARKET, BY VEHICLE TYPE,  
2021–2027 (USD MILLION)

## 12 COMPETITIVE LANDSCAPE

### 12.1 OVERVIEW

### 12.2 MARKET RANKING ANALYSIS

TABLE 190 DIESEL EXHAUST FLUID MARKET RANKING, 2021

FIGURE 40 REVENUE ANALYSIS OF TOP LISTED/PUBLIC PLAYERS

12.3 STRENGTH OF PRODUCT PORTFOLIO

FIGURE 41 PRODUCT PORTFOLIO ANALYSIS OF TOP PLAYERS IN DIESEL EXHAUST FLUID MARKET

12.4 BUSINESS STRATEGY EXCELLENCE

FIGURE 42 BUSINESS STRATEGY EXCELLENCE OF TOP PLAYERS IN DIESEL EXHAUST FLUID MARKET

FIGURE 43 DIESEL EXHAUST FLUID MANUFACTURERS: COMPETITIVE EVALUATION MATRIX, 2021

12.5 COMPETITIVE EVALUATION QUADRANT – DIESEL EXHAUST FLUID MANUFACTURERS

12.5.1 STARS

12.5.2 EMERGING LEADERS

12.5.3 PERVASIVE

12.5.4 PARTICIPANTS

12.6 COMPETITIVE SCENARIO

12.6.1 DEALS

TABLE 191 DEALS, 2019–2022

12.6.2 OTHER DEVELOPMENTS, 2019–2022

TABLE 192 OTHER DEVELOPMENTS, 2019–2022

12.7 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2019–2022

FIGURE 44 COMPANIES ADOPTED ACQUISITIONS AND EXPANSIONS AS KEY GROWTH STRATEGIES FROM 2019 TO 2022

## **13 COMPANY PROFILES**

13.1 KEY PLAYERS

(Business overview, Products offered, Recent Developments, MNM view)\*

13.1.1 SHELL PLC

TABLE 193 SHELL PLC: BUSINESS OVERVIEW

FIGURE 45 SHELL PLC: COMPANY SNAPSHOT

TABLE 194 SHELL PLC: PRODUCTS OFFERED

TABLE 195 SHELL PLC: DEALS

13.1.2 TOTALENERGIES

TABLE 196 TOTALENERGIES: BUSINESS OVERVIEW

FIGURE 46 TOTALENERGIES: COMPANY SNAPSHOT

TABLE 197 TOTALENERGIES: PRODUCTS OFFERED

TABLE 198 TOTALENERGIES: OTHER DEVELOPMENTS

### 13.1.3 CHINA PETROCHEMICAL CORPORATION (SINOPEC)

TABLE 199 CHINA PETROCHEMICAL CORPORATION (SINOPEC): BUSINESS OVERVIEW

FIGURE 47 CHINA PETROCHEMICAL CORPORATION (SINOPEC): COMPANY SNAPSHOT

TABLE 200 CHINA PETROCHEMICAL CORPORATION (SINOPEC): PRODUCTS OFFERED

TABLE 201 CHINA PETROCHEMICAL CORPORATION (SINOPEC): DEALS

TABLE 202 CHINA PETROCHEMICAL CORPORATION (SINOPEC): OTHER DEVELOPMENTS

### 13.1.4 BASF SE

TABLE 203 BASF SE: BUSINESS OVERVIEW

FIGURE 48 BASF SE: COMPANY SNAPSHOT

TABLE 204 BASF SE: PRODUCTS OFFERED

TABLE 205 BASF SE: DEALS

### 13.1.5 BRENNTAG SE

TABLE 206 BRENNTAG SE: BUSINESS OVERVIEW

FIGURE 49 BRENNTAG SE: COMPANY SNAPSHOT

TABLE 207 BRENNTAG SE: PRODUCTS OFFERED

TABLE 208 BRENNTAG SE: DEALS

TABLE 209 BRENNTAG SE: OTHER DEVELOPMENTS

### 13.1.6 INDIAN OIL CORPORATION LIMITED

TABLE 210 INDIAN OIL CORPORATION LIMITED: BUSINESS OVERVIEW

FIGURE 50 INDIAN OIL CORPORATION LIMITED: COMPANY SNAPSHOT

TABLE 211 INDIAN OIL CORPORATION LIMITED: PRODUCTS OFFERED

TABLE 212 INDIAN OIL CORPORATION LIMITED: DEALS

### 13.1.7 MITSUI CHEMICALS

TABLE 213 MITSUI CHEMICALS: BUSINESS OVERVIEW

FIGURE 51 MITSUI CHEMICALS: COMPANY SNAPSHOT

TABLE 214 MITSUI CHEMICALS: PRODUCTS OFFERED

### 13.1.8 CF INDUSTRIES HOLDINGS, INC.

TABLE 215 CF INDUSTRIES HOLDINGS, INC.: BUSINESS OVERVIEW

FIGURE 52 CF INDUSTRIES HOLDINGS, INC.: COMPANY SNAPSHOT

TABLE 216 CF INDUSTRIES HOLDINGS, INC.: PRODUCTS OFFERED

### 13.1.9 VALVOLINE

TABLE 217 VALVOLINE: BUSINESS OVERVIEW

FIGURE 53 VALVOLINE: COMPANY SNAPSHOT

TABLE 218 VALVOLINE: PRODUCTS OFFERED

TABLE 219 VALVOLINE: DEALS

**TABLE 220 VALVOLINE: OTHER DEVELOPMENTS****13.1.10 NISSAN CHEMICAL INDUSTRIES, LTD.****TABLE 221 NISSAN CHEMICAL INDUSTRIES, LTD.: BUSINESS OVERVIEW****FIGURE 54 NISSAN CHEMICAL INDUSTRIES, LTD.: COMPANY SNAPSHOT****TABLE 222 NISSAN CHEMICAL INDUSTRIES, LTD.: PRODUCTS OFFERED**

\*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

**13.2 OTHER PLAYERS****13.2.1 CASTROL LIMITED****TABLE 223 CASTROL LIMITED: BUSINESS OVERVIEW****13.2.2 CUMMINS FILTRATION****TABLE 224 CUMMINS FILTRATION: BUSINESS OVERVIEW****13.2.3 YARA INTERNATIONAL****TABLE 225 YARA INTERNATIONAL: BUSINESS OVERVIEW****13.2.4 MCPHERSON OIL****TABLE 226 MCPHERSON OIL: BUSINESS OVERVIEW****13.2.5 DYNO NOBEL****TABLE 227 DYNO NOBEL: BUSINESS OVERVIEW****13.2.6 STOCKMEIER GROUP****TABLE 228 STOCKMEIER GROUP: BUSINESS OVERVIEW****13.2.7 TERSUS DEF****TABLE 229 TERSUS DEF: BUSINESS OVERVIEW****13.2.8 DAKOTA GASIFICATION COMPANY****TABLE 230 DAKOTA GASIFICATION COMPANY: BUSINESS OVERVIEW****13.2.9 COLONIAL CHEMICAL****TABLE 231 COLONIAL CHEMICAL: BUSINESS OVERVIEW****13.2.10 AZOTAL S.P.A.****TABLE 232 AZOTAL S.P.A.: BUSINESS OVERVIEW****14 RECOMMENDATIONS BY MARKETSANDMARKETS****14.1 NORTH AMERICA IS KEY AFTERMARKET FOR DIESEL EXHAUST FLUID****14.2 RISING INSTALLATION OF DEF PUMPS - KEY FOCUS AREAS****14.3 CONCLUSION****15 APPENDIX****15.1 INSIGHTS OF INDUSTRY EXPERTS****15.2 DISCUSSION GUIDE**

15.3 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

15.4 AVAILABLE CUSTOMIZATIONS

15.4.1 DIESEL EXHAUST FLUID MARKET FOR ORIGINAL EQUIPMENT, BY COUNTRY & VEHICLE TYPE

15.4.2 DIESEL EXHAUST FLUID OE MARKET, BY TANK SIZE & COUNTRY

15.4.2.1 2.0-3.0 gallons

15.4.2.2 >3.0- 5.0 gallons

15.4.2.3 >5.0 gallons

15.4.3 DIESEL EXHAUST FLUID OE MARKET, BY TANK MATERIAL & REGION

15.4.3.1 Stainless steel

15.4.3.2 Plastic

15.4.3.3 Titanium

15.4.3.4 EPDM

15.4.4 DIESEL EXHAUST FLUID OE MARKET IN CONSTRUCTION EQUIPMENT, BY COUNTRY

15.4.5 DIESEL EXHAUST FLUID OE MARKET IN AGRICULTURAL EQUIPMENT, BY POWER OUTPUT & REGION

15.4.5.1 30 HP

15.4.5.2 31-100 HP

15.4.5.3 101-200 HP

15.4.5.4 >200 HP

15.5 RELATED REPORTS

15.6 AUTHOR DETAILS



## I would like to order

Product name: Diesel Exhaust Fluid Market by Component (SCR Catalysts, DEF Tanks, Injectors, Supply Modules, Sensors), OHV Market by Application, Aftermarket by Vehicle Type, Supply Mode (Cans, IBCs, Bulk & Pumps), End Use Market and Region - Global Forecast to 2027

Product link: <https://marketpublishers.com/r/DA41C973F2DEN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/DA41C973F2DEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below  
and fax the completed form to +44 20 7900 3970