

# **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**

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## **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.

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

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