

# **Euro 7 Regulations Compliant Market by Vehicle Type & Country (Passenger Cars, LCVs, HCVs), Technology (DOC, DPF/GPF, SCR, ASC, EGR, EHC, & LNT), Sensors (Exhaust Gas Pressure & Temperature, PM, Oxygen/Lambda, NOx, & MAP/MAF Sensors) - Forecast to 2035**

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## **Abstracts**

The Euro 7 regulations compliant market is estimated to grow from 13.6 million units in 2026 to USD 14.1 million units by 2035 at a CAGR of 0.4% from 2026 to 2035. Euro 7 emission norms will help in the reduction of NOx and PM emissions to a great extent, which will help to achieve cleaner air. To monitor the emissions and employ onboard sensors, periodic technical controls, and compliance checks will be done to ensure emissions do not increase over the period.

“Passenger cars are expected to be the largest segment in the Euro 7 regulations compliant market.”

According to the European Commission's proposal, the entry into force of the new Euro 7/VII Regulation is 1 July 2025 for new light-duty vehicles (cars and vans) and 1 July 2027 for new heavy-duty vehicles (lorries and buses). The passenger car segment contributes to around 78% of the total vehicle production in the EU. In passenger cars, the NOx emission limit is reduced from 0.08 g/km under Euro 6 to 0.02 g/km under Euro 7, and to achieve this, OEMs and Tier-1 companies need to focus on dual SCR systems for diesel engines and lean NOx traps and NOx adsorbers for gasoline engines. These systems will help to achieve the set targets under Euro 7 norms. As in the passenger car segment, the penetration of gasoline is around 70-75% in the year 2022; the lean NOx trap technology witnesses the largest market size. OEMs have already started

developing strategies to comply with Euro 7 and changing the existing Euro 6 after-treatment technologies. Few OEMs have already started towards the developments related to Euro 7 compliance. For instance, In March 2022, BMW launched BMW 7 Series G70 Combustion Engines, ready to comply with Euro 7 Regulations. In January 2023, Renault Group and PUNCH Torino signed a strategic partnership on low-emission diesel engines. Both companies will develop the Euro VI and Euro 7 variants of Renault 4-cylinder diesel engines for light commercial vehicles for production starting in 2025.

On the other hand, a few OEMs are moving ahead with their electrification targets and observe that Euro 7 complaints will lead to huge investments. According to Fleet Europe's insights, the Euro 7 implementation will lead to an incremental cost of around USD 320 per car or van. Hence, OEMs and Tier-1 are finding ways to comply with Euro 7 through extensive research and development. Passenger cars being the major contributor in production across the EU, will lead the market in 2035.

"Exhaust Gas Recirculation Technology is expected to witness the largest market size during the forecast period."

The exhaust gas recirculation system is an effective technology to control NO<sub>x</sub> emissions from diesel engines. EGR is also used in gasoline engines to reduce pumping work and increase engine efficiency. According to the ACEA insights, 40% of all new cars registered in the European Union run on petrol, while diesel accounts for 19.6% of registrations in 2021. With the increasing registrations of diesel and gasoline cars, the demand for exhaust gas recirculation systems is also increasing. Under Euro 6, the NO<sub>x</sub> limit is set at 0.4 g/kWh in commercial vehicles; hence, most manufacturers use a combination of EGR and urea-SCR. The competing technology coming in heavy duty vehicles is urea-SCR without EGR, which is present in a few Iveco and Scania truck engines.

Exhaust gas recirculation can reduce NO<sub>x</sub> emissions by around 40%. Depending upon the vehicle type, SCR systems remove up to 90% of the NO<sub>x</sub> from exhaust gases. In case of stringent emission norms such as Euro 7, the EGR system is combined with SCR to achieve the emission targets. Hence, the demand for EGR is increasing with the upcoming Euro 7 norms.

Germany is expected to hold the largest market in the Euro 7 regulations complaint market

With the increasing stringency of emission norms, OEMs find it difficult to certify their vehicles. Implementing the Euro 7 mandates will increase the R&D, vehicle, and other production costs too. This increase in cost will lead to the phasing out of smaller, cheaper models. According to European Union, for cars and vans, the expected increase in cost is between USD 95 to USD 160. The major German OEMs such as BMW (Germany) & Renault (France) are moving towards engine technology development to comply with Euro 7 and getting into strategic partnerships to develop products that will help comply with Euro 7 mandates.

On the other hand, VW (Germany) believes the cost of subcompact hatchbacks will lie between USD 3,000 to USD 5,000, with Euro 7 in place. This will make the car unaffordable for its customers. The impact of Euro 7 is huge on the cost of vehicles, and the company doesn't want to invest more in this, hence planning for complete electrification soon. OEMs are finding it difficult to accept the changes which they are supposed to make in the powertrain technologies to comply with Euro 7, Germany is still the major contributor (30-40%) in the EU27 country's passenger car production, leads the Euro 7 compliant passenger cars market.

### Breakdown of primaries

The study contains various industry experts' insights, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: OEMs – 30%, Tier I/II - 70%,

By Designation: C level - 30%, Director Level– 60%, Others– 10%

By Region: Asia Pacific - 55%, Europe - 30%, North America - 15%

The key players in the Euro 7 regulations compliant market are Eberspächer (Germany), FORVIA (Germany), Tenneco (US), and Johnson Matthey (UK). The key strategies adopted by major companies to sustain their position in the market are expansions, contracts and agreements, and partnerships.

### Research Coverage

The Euro 7 regulations compliant market by vehicle type (Passenger cars, LCVs, Trucks, and Buses), By Technology (DOC, SCR, DPF/GPF, Ammonia Slip Catalyst,

Electrically Heated Catalyst, EGR, Lean NOx trap), Sensors (exhaust gas pressure & temperature sensor, oxygen/lambda sensor, NOx sensor, engine coolant temperature sensors, PM sensors, and MAP/MAF sensors) and by EU countries.

#### Key Benefits of Buying the Report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the Euro 7 regulations compliant market and the sub-segments. This will also help the key players identify the highest potential region and design their product portfolio per market requirements. A detailed study on the after-treatment and sensor technologies will help manufacturers understand their potential market. This report includes analyses like emission limits, key powertrain and after-treatment technologies, OEM readiness and their challenges accepting the Euro 7, RDE boundary challenges, vehicle incremental cost, regulatory landscape, and others. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

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