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# Exhaust System Market by After-Treatment Device (DOC, DPF, LNT, SCR, GPF), Vehicle Type (PC, LCV, Trucks, Buses, Ag Tractor, Construction & Mining Equipment), Aftermarket, Component, Sensor, Application, Sales Channel and Region - Global Forecast to 2026

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## Abstracts

The exhaust system (OE) market, by vehicle type is projected to grow from USD 36.9 billion in 2021 to USD 47.9 billion by 2026, at a CAGR of 5.3% during the forecast period. Passenger cars, light commercial vehicles, and heavy commercial vehicles are classified as on-road vehicles. Most countries follow Euro standards such as Euro 5 and Euro 6. The particle mass and particle number standards for diesel cars in Euro 6 are the same as those in Euro 5. Limits on particle mass emissions for diesel cars have been reduced by large amounts since the Euro 1 standards were introduced. The Euro 6 particle mass limits for diesel cars represent a reduction of 96% from Euro 1 limits. Euro 6 is a significant advancement over Euro 5 with regard to NOX limits. The NOX limit declines from 0.18 g/km to 0.08 g/km, a reduction of 56%. Explicit NOX limits were introduced at the Euro 3 level, and in the Euro 6 standards, the NOX limit is 84% lower than the Euro 3 level. Emerging economies with higher vehicle production like India launched new standards of BS 6 emission standards on April 1, 2020; the diesel vehicle nitrogen oxide (NOx) limit was declined from 250 mg/Km in BS5 to 80 mg/km in BS6.

Countries adhering to the Paris Agreement for a reduction in vehicle emissions are planning to introduce more stringent emission regulations. Countries such as Brazil, Russia, and South Africa are planning to introduce emission regulations like Euro 5 and Euro 6 post-2023. This will result in more emission stringency and a reduction in vehicle weight. Manufacturers are shifting toward exhaust after-treatment devices through

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advanced components and technologies to comply with the emission standards. Thus, this is expected to fuel the demand for exhaust systems in on-highway vehicles.

The Corporate Average Fuel Economy (CAFE) regulations have set standards related to fuel economy. These regulations mainly aim to lower fuel consumption (or improve fuel efficiency) of vehicles by lowering carbon dioxide ($CO_2$) emissions, hence serving the twin purposes of reducing dependence on oil for fuel and controlling pollution.

The EPA and the Department of Transportation issued a proposed ruling that, if enacted, would roll back some of the goals set in 2012, in August 2018. This issue ruling-freezes the fuel economy goals to the 2021 target of 37 miles per gallon. China has Phase V standards with an average fleet target of 4.0 L/100 km (NEDC) by 2025 for passenger vehicles produced in or imported to China, a 20% reduction from the previous 5.0L/100 km target in 2020. In India, mandates that the average corporate $CO_2$ emission must be less than 130 gm per km till 2022 and below 113 gm per km thereafter as per the CAF? regulation.

Thus, the on and off-highway vehicle emission regulations combined with the stringent fuel economy regulations are expected to lead the automotive OEMs and exhaust system manufacturers to adopt and develop new components and systems as well as use after-treatment devices to minimize vehicle emissions and drive the exhaust system market during the forecast period.

“The passenger car segment is expected to lead the vehicle type segment due to the increased global vehicle production.”

The production of these vehicles is growing rapidly in emerging countries such as China and India. In China and India, the production of diesel vehicles is significant as consumers prefer gasoline and diesel vehicles. Automotive manufacturers are increasingly investing in these countries due to the availability of cheap labor, suitable infrastructure for production, and attractive government policies for the automotive industry. Key OEMs are Toyota, Volkswagen, Hyundai, General Motors, and Ford.

The passenger car market in the US is growing at a steady rate as consumers are switching to SUVs and pickup trucks. In the US, SUVs and pickup trucks are considered under LCVs.

The maximum share of passenger cars in global vehicle production is expected to drive this segment. According to OICA statistics, passenger cars accounted for 79% of vehicle production in 2020, which is anticipated to grow at a significant rate during the forecast period.

Asia Pacific is projected to be the largest regional market

Asia Pacific is estimated to be the largest OE market for exhaust systems and after-treatment devices during the forecast period, followed by Europe. The growth of the exhaust system market in Asia Pacific is mainly attributed to the increasing vehicle production and constant upgradations in emission norms, especially in countries such as China, Japan, and India.

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: Tier1 – 40%,Tier2–30%, and OEMs – 30%

By Designation: C Level - 35%, Directors- 35%, and Others – 30%

By Region: Asia Pacific - 50%, Europe - 20%, North America –30%

Tenneco Inc.(US), Faurecia (France), Ebersp?cher (Germany), Friedrich Boysen GMBH & CO. KG (Germany), and BENTELER International (Austria) are the leading providers of an exhaust system in the global market.

Research Coverage:

The study segments the exhaust system market and forecasts the market size based on OE Market, by after-treatment device (DOC, DPF, SCR, LNT, and GPF), OE Market, by component (manifold, downpipe, catalytic converter, muffler, tailpipe, sensors, and hangers), OE Market, by vehicle type (passenger cars, LCVs, buses, and trucks), OE Market, by off-highway vehicle (agricultural tractor, mining equipment, and construction equipment), Application (on-highway vehicles and off-highway vehicles), Aftermarket, By vehicle type (LDV and HDV), Sensor Type (temperature sensors, oxygen sensors, NOx sensors, and PM sensors), Sales Channel (OEM and aftermarket), and Region (Asia Pacific, North America, Europe, and the Rest of the World).

The study also includes an in-depth competitive analysis of the major exhaust system 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 exhaust system 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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