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Automotive Selective Catalytic Reduction (SCR) System Market by Vehicle Type (Passenger Car, LCV, and M&HCV), by Catalyst Type (Copper Zeolite, Iron Zeolite, and Others), by Catalyst Structure Type (Honeycomb Catalyst Structure and Others), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023

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Abstracts

This report, from Stratview Research, studies the automotive selective catalytic reduction (SCR) system market over the trend period 2012 to 2017 and forecast period 2018 to 2023 both in terms of value and units. The report provides detailed insights into the market dynamics to enable informed business decision making and growth strategy formulation based on the opportunities present in the market.

The Global Automotive SCR System Market: Highlights

There has been an incessant increase in emissions of polluting substances including carbon dioxide (CO2) and nitrogen oxide (NOx) particles from vehicles into the environment. In diesel engines, the level of NOx emissions is very high, whereas, in petrol engines, the emission of NOx particles is merely 5% that of emission from diesel engines. Hence, there is a dire need for a proficient depollution system that can curb the NOx particles emitted from diesel vehicles. At present, there are two depollution systems available for reducing NOx particle emissions from diesel engine vehicles: SCR system (Selective Catalytic System) and Lean NOx-Trap (LNT) system.

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Between the two depollution systems available for diesel engine vehicles, the SCR system is expensive and complex but is also more efficient one than the LNT system as it converts nitrogen oxide into diatomic nitrogen and water vapor by injecting aqueous urea solution into the exhaust system. The SCR System has a maximum efficiency of 90-95% (NOx reduction of 90-95%), whereas the LNT system is a relatively less efficient system and offers the maximum efficiency of 70%. The SCR system is capable of handling a higher volume of exhaust fumes and can reduce NOx emissions up to 90 percent, while simultaneously reducing HC (hydrocarbon) and CO (carbon monoxide) emissions by 50-90 percent, and PM (particulate matter) emissions by 30-50 percent.

Despite the high cost of the SCR system, it is expeditiously gaining the market traction, driven by its higher efficiency. Another factor giving an impetus to the demand for SCR system over LNT system is that there is a problem of clogging associated with the LNT system that results into the blockage of EGR (exhaust gas recirculation) valve. Due to which, automakers cannot reduce the number of recirculation processes, which leads to an increase in temperature and rise in the rate of NOx particles exceeding the amount of NOx that the LNT system can handle.

The global automotive SCR system market is projected to grow at an impressive rate over the next five years to reach US$ 3.2 billion in 2023. Incessant increase in the penetration of SCR system in diesel vehicles to address the stringent regulations regarding the NOx emission reductions and fuel efficiency enhancements is the prime growth driver of the market.

Development of innovative SCR system is an indispensable focus area of the SCR system suppliers based on the requirements of auto OEMs. The market for SCR system is marked by major global automotive tier players including Faurecia, Plastic Omnium, and Tenneco. Also, it is expected that the excellent growth of SCR system may entice other players to enter the market to tap the growth potential.

The global automotive SCR system market is segmented based on the vehicle type as Passenger Car, LCV (Light Commercial Vehicle), and M&HCV (Medium- and Heavy-Duty Commercial Vehicle). Passenger car segment is expected to remain the growth engine of the market during the forecast period of 2018 to 2023. Increasing production of passenger cars coupled with increasing penetration of SCR system in diesel engine-based passenger car models is likely to elevate the demand for SCR system in the segment in the foreseeable future.

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Based on the catalyst type, the automotive SCR system market is segmented as Copper Zeolite, Iron Zeolite, and Others (platinum, palladium, rhodium, etc.). Copper Zeolite is expected to remain the most dominant catalyst type in the global automotive SCR system market during the forecast period, owing to its better ammonia storage capabilities. Both, Iron Zeolite as well as other segments, are also likely to witness healthy growth rates over the next five years.

Based on the catalyst structure type, the market is segmented as honeycomb catalyst structure and others (plate and corrugated type). Honeycomb structure is expected to remain the most dominant type in the global automotive SCR System market during the forecast period, owing to its better surface coverage and regular flow.

Based on regions, Europe is expected to remain the largest automotive SCR system market during the forecast period. Stricter emission norms of the European Commission have led to a faster adoption of SCR System into European vehicles. Ford Focus & Fusion, BMW 5 Series & 7 Series, Renault Twingo & Talisman, Citroen C4 Picasso, and Audi Q7 are some of the key European models that are relying on SCR system to reduce the level of emissions. Asia-Pacific is likely to depict the highest growth during the forecast period with China and India being the key sources of growth.

The supply chain of this market comprises raw material suppliers, SCR system suppliers, distributors, automotive OEMs, and dealers. Key automotive SCR system manufacturers are Tenneco Inc., Faurecia SA, Plastic Omnium SA, and Rochling Group. Major automotive OEMs in the industry, which currently relies on the SCR systems, are Ford, BMW, Renault, Citroen, and Audi. Development of integrated SCR systems and formation of strategic alliances with automakers are the key strategies adopted by the major players to gain a competitive edge in the market.

RESEARCH METHODOLOGY

This report offers high-quality insights and is the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research’s internal database and statistical tools. More than 1,000 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles have been leveraged to gather the data. About 15 detailed primary interviews with the market players across the value chain in all four regions and industry experts have been executed to obtain both qualitative and quantitative insights.

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REPORT FEATURES

This report provides market intelligence in the most comprehensive way. The report structure has been kept such that it offers maximum business value. It provides critical insights into the market dynamics and will enable strategic decision making for the existing market players as well as those willing to enter the market. The following are the key features of the report:

- Market structure: Overview, industry life cycle analysis, supply chain analysis
- Market environment analysis: Growth drivers and constraints, Porter's five forces analysis, SWOT analysis
- Market trend and forecast analysis
- Market segment trend and forecast
- Competitive landscape and dynamics: Market share, product portfolio, product launches, etc.
- Attractive market segments and associated growth opportunities
- Emerging trends
- Strategic growth opportunities for the existing and new players
- Key success factors

The automotive SCR system market is segmented into the following categories.

Automotive Selective Catalytic Reduction System Market, By Vehicle Type

- Passenger Car (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
- Light Commercial Vehicle (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

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Medium- & Heavy-Duty Commercial Vehicle (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Automotive Selective Catalytic Reduction System Market, By Catalyst Type

Copper Zeolite (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Iron Zeolite (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Automotive Selective Catalytic Reduction System Market, By Catalyst Structure Type

Honeycomb (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Automotive Selective Catalytic Reduction System Market, By Region

North America (Country Analysis: The USA, Canada, and Mexico)

Europe (Country Analysis: Germany, The UK, Russia, Italy and Rest of Europe)

Asia-Pacific (Country Analysis: China, Japan, South Korea, India and Rest of Asia-Pacific)

Rest of the World (Country Analysis: Brazil, Argentina, and Others)

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COMPETITIVE ASSESSMENT

Competitive Benchmarking of key players (up to 3 players)

SWOT analysis of key players (up to 3 players)

REGIONAL SEGMENTATION

Current market size (2017) of the SCR system market in any of the European country by vehicle type

Custom Research: Stratview Research offers custom research services across sectors. In case of any custom research requirement related to market assessment, competitive benchmarking, sourcing and procurement, target screening, and others, please send your inquiry at sales@stratviewresearch.com.

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