

Automotive Exhaust Aftertreatment Systems Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Vehicle Type (Passenger Cars and Commercial Vehicles), By Fuel Type (Gasoline and Diesel), By Sales Channel (OEM, Aftermarket), By Region, By Competition.

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Abstracts

Global Automotive Exhaust Aftertreatment Systems Market has valued at USD 25 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 13.3% through 2028. The global automotive exhaust aftertreatment systems market finds itself in a phase of dynamic evolution and unprecedented significance. This evolution is precipitated by mounting apprehensions about air quality deterioration and the urgent need to combat climate change. As a direct response to these concerns, governments and regulatory bodies across the globe have wielded their regulatory might to impose stringent emissions standards and regulations on vehicular emissions. The core objective: to curtail the release of harmful pollutants into the atmosphere, which are detrimental to both human health and the environment. Consequently, the automotive industry is in the midst of a profound transformation, with a growing reliance on advanced exhaust aftertreatment systems emerging as a pivotal strategy for achieving regulatory compliance and substantially mitigating emissions. The essence of these exhaust aftertreatment systems encompasses a diverse array of critical components and cutting-edge technologies. These include Selective Catalytic Reduction (SCR) systems, Diesel Particulate Filters (DPF), Diesel Oxidation Catalysts (DOC), and Gasoline Particulate Filters (GPF), among others. The market landscape is marked by a continuous and relentless pursuit of innovation, with manufacturers ardently endeavoring to develop ever-more-efficient, cost-effective, and environmentally sustainable aftertreatment solutions. These solutions are designed not only to meet the

rigorous demands of regulatory bodies but also to align with the heightened environmental consciousness of today's consumers.

Key Market Drivers

Stringent Emission Regulations

One of the primary drivers of the global automotive exhaust aftertreatment systems market is the increasingly stringent emission regulations imposed by governments and international organizations. These regulations aim to reduce harmful pollutants such as nitrogen oxides (NO_x), particulate matter (PM), carbon monoxide (CO), and hydrocarbons (HC) emitted by vehicles. Major regulatory bodies such as the Environmental Protection Agency (EPA) in the United States and the European Union's Euro standards have been pushing for lower emission limits. As a result, automakers are compelled to adopt advanced aftertreatment systems to meet these requirements. The introduction of Euro 6 and similar standards in various regions has mandated the use of technologies like selective catalytic reduction (SCR), diesel particulate filters (DPF), and lean NO_x traps (LNT). As emission standards continue to evolve and become more stringent, the demand for advanced exhaust aftertreatment systems is expected to rise significantly.

Increasing Adoption of Clean and Green Technologies

The global automotive industry is witnessing a shift towards cleaner and more sustainable technologies. Electric vehicles (EVs) and hybrid vehicles are gaining popularity as consumers and manufacturers alike strive to reduce their carbon footprint. However, internal combustion engines (ICEs) are still prevalent, and many regions have an existing fleet of conventional vehicles. To make these vehicles more environmentally friendly and compliant with emissions regulations, the adoption of advanced exhaust aftertreatment systems is crucial. Automakers are investing in research and development to enhance the efficiency and effectiveness of exhaust aftertreatment systems. This includes optimizing catalytic converters, improving filtration systems, and developing innovative materials to reduce emissions. As a result, the automotive industry is becoming more aligned with global efforts to combat climate change, further driving the demand for these systems.

Growing Vehicle Production

The automotive industry continues to expand, with growing demand for vehicles

worldwide. Emerging markets in Asia, particularly China and India, have become significant contributors to global vehicle production. The rise in disposable income, urbanization, and infrastructure development in these regions has fueled the demand for automobiles. Moreover, the replacement cycle for vehicles in developed markets remains steady. As vehicle production increases, so does the demand for exhaust aftertreatment systems. Every new vehicle produced needs to meet emission standards, and retrofitting older vehicles with advanced aftertreatment systems is also a growing market segment. This growth in vehicle production acts as a driver for the automotive exhaust aftertreatment systems market.

Advancements in Technology

Advancements in technology have played a pivotal role in the development of more efficient and reliable exhaust aftertreatment systems. Manufacturers are investing heavily in research and development to create systems that can reduce emissions while maintaining vehicle performance and fuel efficiency.

Key technological advancements include:

Improved catalyst materials: The development of advanced catalyst materials such as platinum-group metals (PGMs) and zeolites has enhanced the efficiency of exhaust aftertreatment systems, allowing for greater pollutant conversion.

Real-time monitoring and control: Advanced sensors and control systems provide real-time data on exhaust emissions, enabling precise control of aftertreatment processes to optimize performance and minimize fuel consumption.

Integration with vehicle systems: Exhaust aftertreatment systems are increasingly integrated into the vehicle's overall powertrain management, ensuring seamless operation and better fuel economy.

These technological advancements not only improve the effectiveness of exhaust aftertreatment systems but also create opportunities for manufacturers to offer innovative solutions to automakers.

Consumer Awareness and Demand for Clean Vehicles

Consumer awareness of environmental issues and the desire for cleaner transportation options are driving automakers to prioritize emissions reduction in their marketing

strategies. Many consumers are willing to pay a premium for vehicles that have advanced exhaust aftertreatment systems, as they want to minimize their impact on the environment. Furthermore, government incentives, tax breaks, and rebates for purchasing eco-friendly vehicles have incentivized consumers to choose vehicles equipped with advanced emission control technologies. As this trend continues, automakers are motivated to invest in exhaust aftertreatment systems to meet consumer demand and gain a competitive edge in the market.

Urbanization and Air Quality Concerns

The world is experiencing rapid urbanization, with more people living in cities than ever before. This urbanization trend has led to increased congestion and traffic in urban areas, resulting in higher levels of air pollution. Governments and city authorities are becoming more focused on improving air quality to protect public health. To address this issue, many urban centers are implementing low-emission zones (LEZs) and stricter emission standards for vehicles entering city limits. As a response to these measures, automakers are equipping their vehicles with advanced exhaust aftertreatment systems to ensure compliance with urban emission regulations. This trend is expected to grow as more cities prioritize air quality and sustainable transportation.

Global Expansion of Commercial Vehicle Fleets

The expansion of commercial vehicle fleets, including trucks, buses, and delivery vehicles, is another significant driver of the automotive exhaust aftertreatment systems market. Commercial vehicles typically have higher emissions due to their larger engine sizes and frequent use. To meet emission standards and reduce operating costs, fleet operators are increasingly adopting advanced exhaust aftertreatment technologies. Furthermore, the growth of e-commerce and the demand for timely delivery services have led to an increase in the number of delivery vehicles on the road. As many countries and regions have specific emissions standards for commercial vehicles, manufacturers are developing tailored exhaust aftertreatment solutions to cater to this expanding market.

Key Market Challenges

Increasingly Stringent Emission Standards

One of the most prominent challenges facing the automotive exhaust aftertreatment systems market is the constant evolution of emission standards and regulations.

Governments and international bodies around the world are imposing increasingly strict limits on the emissions of harmful pollutants such as nitrogen oxides (NOx), particulate matter (PM), carbon monoxide (CO), and hydrocarbons (HC). These stringent standards, such as the Euro 6 and US EPA Tier 3 regulations, require automakers to invest heavily in advanced aftertreatment technologies to meet compliance. Meeting these standards necessitates the development and integration of complex and expensive systems, which in turn increase the production costs of vehicles. This can be especially challenging for smaller automakers and manufacturers in emerging markets that may lack the resources and infrastructure to rapidly adapt to new regulatory requirements.

Cost and Complexity of Technology

The development and implementation of advanced exhaust aftertreatment systems involve significant costs. These systems often include components like selective catalytic reduction (SCR) systems, diesel particulate filters (DPF), and lean NOx traps (LNT), all of which require specialized materials and manufacturing processes. Additionally, these technologies need to be integrated into the overall vehicle design, further increasing the complexity and cost. For consumers, the cost of vehicles equipped with these advanced systems can be a barrier to adoption, particularly in price-sensitive markets. Manufacturers need to strike a balance between compliance with emission regulations and affordability for consumers.

Durability and Maintenance Challenges

Exhaust aftertreatment systems are exposed to harsh operating conditions, including high temperatures and corrosive exhaust gases. These conditions can lead to wear and deterioration over time, affecting the durability and reliability of these systems. For example, diesel particulate filters (DPFs) can become clogged and require periodic regeneration, which can be inconvenient for vehicle owners. Ensuring the long-term performance of these systems and minimizing maintenance requirements is an ongoing challenge for manufacturers. Additionally, failure to properly maintain and service aftertreatment systems can result in reduced efficiency and increased emissions, potentially leading to non-compliance with emission standards.

Fuel Efficiency Trade-Offs

While exhaust aftertreatment systems are effective at reducing harmful emissions, they can also have an impact on a vehicle's fuel efficiency. Technologies like selective

catalytic reduction (SCR) require the injection of a urea-based solution (AdBlue) into the exhaust stream, which can increase fuel consumption. Similarly, diesel particulate filters (DPFs) can create backpressure in the exhaust system, reducing engine efficiency. Automakers face the challenge of optimizing exhaust aftertreatment systems to minimize their impact on fuel efficiency while still meeting emission standards. Striking the right balance between emissions reduction and fuel economy is a constant challenge, especially as fuel efficiency standards continue to evolve.

Key Market Trends

Stringent Emission Regulations:

Stringent emission regulations, such as Euro 6d and EPA Tier 3, are driving the demand for advanced exhaust aftertreatment systems. These regulations limit the amount of harmful pollutants that vehicles can emit, including nitrogen oxides (NOx), particulate matter (PM), and carbon monoxide (CO). Manufacturers are increasingly adopting aftertreatment systems like selective catalytic reduction (SCR) and diesel particulate filters (DPF) to meet these standards.

Electrification and Hybridization:

The rise of electric and hybrid vehicles is influencing the exhaust aftertreatment systems market. While electric vehicles (EVs) produce no tailpipe emissions, hybrid vehicles still rely on internal combustion engines. Advanced aftertreatment systems are essential for hybrid vehicles to reduce emissions and comply with regulations, as well as improve overall efficiency.

Integration of Advanced Technologies:

To achieve better emission control and fuel efficiency, automotive exhaust aftertreatment systems are incorporating advanced technologies. This includes the use of sophisticated sensors, advanced catalyst materials, and improved control algorithms. These technologies enhance the efficiency of systems like SCR and DPF, ensuring optimal performance and compliance with emissions standards.

Real-World Emission Testing:

Real-world emission testing has gained prominence in the wake of emission scandals. Governments and regulatory bodies are implementing more stringent testing

procedures to ensure that vehicles meet emission standards not only in laboratory conditions but also in real-world driving scenarios. As a result, manufacturers are investing in aftertreatment systems that perform consistently under various driving conditions.

Lightweight Materials and Design Optimization:

Automakers are increasingly focusing on lightweight materials and design optimization to reduce vehicle weight and improve fuel efficiency. This trend also extends to exhaust aftertreatment systems, where lightweight components and materials help minimize the impact on vehicle weight while ensuring effective emissions control.

Growing Market for Commercial Vehicles:

The commercial vehicle segment is experiencing a surge in demand for exhaust aftertreatment systems. Governments worldwide are imposing stricter emissions regulations on heavy-duty trucks and buses to curb air pollution. Consequently, manufacturers are investing in aftertreatment solutions like diesel oxidation catalysts (DOCs), SCR systems, and DPFs to comply with these regulations.

Segmental Insights

Vehicle Type Analysis

In 2022, passenger cars accounted for over 72.7% of the market's revenue for automotive exhaust systems, and this trend is anticipated to last throughout the forecast period. In 2022, passenger cars made for about 72.7% of the output of the sector. Europe had 569 cars per 1,000 persons in 2019, according to data from the European Automobile Manufacturers' Association (ACEA).

Additionally, it is estimated that the automotive exhaust systems market will expand faster than expected in developing nations like China and India. The market for commercial vehicles will grow between 2021 and 2028 as a direct result of the escalating need for large vehicles in the logistics and transportation sectors. One of the most significant ultimate customers for commercial vehicles is the logistics industry. Trucks and trailers are utilized more frequently now.

Regional Insights

Asia-Pacific led the world market in 2021. With major OEMs establishing manufacturing facilities there, China has become the most popular destination for the automotive industry. In the shift to electric vehicles, the government is a key player. Governments in several nations have put policies in place to improve the infrastructure for electric vehicles in order to lower carbon emissions and rely less on non-renewable resources. With money to build new facilities and to entice customers to buy, they are helping producers. Despite numerous efforts, there is still a demand for diesel-powered vehicles, particularly for mass transit and mining applications. With more than 35% of all passenger vehicle sales and 15% of all commercial vehicle sales worldwide, China is the largest automotive market in the world. The government is developing several ways to cut emissions considering the large number of active automobiles in the nation. For example, according to the China 6 emission regulations, China aims to reduce hydrocarbons by 50%, nitrogen oxides (NOx) by 40%, and particulate matter by 33%. China has made it necessary for all new gasoline automobiles to adhere to the rules. For instance, due to the impending adoption of China 6 regulations, sales of automobiles meeting the China 5 emission standard will be prohibited beginning in January 2021. India recently passed severe pollution regulations, which would likely lead to an increase in the demand for aftertreatment systems there. Another benefit is the huge market the nation's auto sector enjoys. Due to the region's strict emission regulations, the market for exhaust aftertreatment systems is expected to have healthy growth over the next few years and over the forecast period.

Key Market Players

CDTi Advanced Materials Inc.

Continental Reifen Deutschland GmbH

Cummins Inc.

DCL International Inc.

Delphi Technologies PLC

Dinex

Donaldson Company Inc.

ESW Group

European Exhaust and Catalyst Ltd

Nett Technologies Inc.

Report Scope:

In this report, the Global Automotive Exhaust Aftertreatment Systems Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Exhaust Aftertreatment Systems Market, By Vehicle Type:

Passenger Cars

Commercial Vehicles

Automotive Exhaust Aftertreatment Systems Market, By Fuel Type:

Gasoline

Diesel

Automotive Exhaust Aftertreatment Systems Market, By Sales Channel:

OEM

Aftermarket

Automotive Exhaust Aftertreatment Systems Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Exhaust Aftertreatment Systems Market.

Available Customizations:

Global Automotive Exhaust Aftertreatment Systems Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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- 11.4. Threats

12. MARKET DYNAMICS

- 12.1. Market Drivers
- 12.2. Market Challenges

13. MARKET TRENDS AND DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

- 14.1. Company Profiles (Up to 10 Major Companies)
 - 14.1.1. CDTi Advanced Materials Inc.
 - 14.1.1.1. Company Details
 - 14.1.1.2. Key Product Offered
 - 14.1.1.3. Financials (As Per Availability)
 - 14.1.1.4. Recent Developments
 - 14.1.1.5. Key Management Personnel
 - 14.1.2. Continental Reifen Deutschland GmbH
 - 14.1.2.1. Company Details
 - 14.1.2.2. Key Product Offered
 - 14.1.2.3. Financials (As Per Availability)
 - 14.1.2.4. Recent Developments
 - 14.1.2.5. Key Management Personnel
 - 14.1.3. Cummins Inc..
 - 14.1.3.1. Company Details
 - 14.1.3.2. Key Product Offered
 - 14.1.3.3. Financials (As Per Availability)
 - 14.1.3.4. Recent Developments
 - 14.1.3.5. Key Management Personnel
 - 14.1.4. DCL International Inc.
 - 14.1.4.1. Company Details
 - 14.1.4.2. Key Product Offered
 - 14.1.4.3. Financials (As Per Availability)
 - 14.1.4.4. Recent Developments
 - 14.1.4.5. Key Management Personnel

- 14.1.5. Delphi Technologies PLC
 - 14.1.5.1. Company Details
 - 14.1.5.2. Key Product Offered
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Recent Developments
 - 14.1.5.5. Key Management Personnel
- 14.1.6. Dinex
 - 14.1.6.1. Company Details
 - 14.1.6.2. Key Product Offered
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Recent Developments
 - 14.1.6.5. Key Management Personnel
- 14.1.7. Donaldson Company Inc.
 - 14.1.7.1. Company Details
 - 14.1.7.2. Key Product Offered
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Recent Developments
 - 14.1.7.5. Key Management Personnel
- 14.1.8. ESW Group
 - 14.1.8.1. Company Details
 - 14.1.8.2. Key Product Offered
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Recent Developments
 - 14.1.8.5. Key Management Personnel
- 14.1.9. European Exhaust and Catalyst Ltd
 - 14.1.9.1. Company Details
 - 14.1.9.2. Key Product Offered
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Recent Developments
 - 14.1.9.5. Key Management Personnel
- 14.1.10. Nett Technologies Inc.
 - 14.1.10.1. Company Details
 - 14.1.10.2. Key Product Offered
 - 14.1.10.3. Financials (As Per Availability)
 - 14.1.10.4. Recent Developments
 - 14.1.10.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas

15.1.1. Target Regions

15.1.2. Target Vehicle Type

15.1.3. Target Fuel Type

16. ABOUT US & DISCLAIMER

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