

# **Diesel Exhaust Fluid Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Component (SCR Catalyst, DEF Tank, Injector, Supply Module and Sensor), By Application (Construction, Agriculture and Others), By Supply Mode (Cans, IBC and Pump), By Vehicle Type (Passenger Car, Light Commercial Vehicle and Medium & Heavy Commercial Vehicle), By Region, By Competition Forecast & Opportunities, 2018-2028**

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## **Abstracts**

The Global Diesel Exhaust Fluid Market, with a valuation of USD 26.18 billion in 2022, is experiencing a robust growth trajectory, marked by a Compound Annual Growth Rate (CAGR) of 6.92% during the forecast period. This growth is primarily driven by the increasing demand for diesel exhaust fluid (DEF) to adhere to emission regulations and treat diesel engine exhaust in various industries, including marine, automotive, and aerospace. Additionally, stringent regulations concerning Greenhouse Gas (GHG) emissions have further propelled the market's revenue growth.

DEF plays a pivotal role in mitigating harmful Nitrogen Oxide (NOx) emissions, which pose significant risks to both the environment and human health. This crucial function positions DEF as a key solution for reducing the environmental impact of diesel engine exhaust, thus driving its adoption in diverse industries.

### **Key Market Drivers**

**Stringent Emission Regulations Driving Diesel Exhaust Fluid (DEF) Market Growth**

In recent years, one of the key factors driving the growth of the global Diesel Exhaust Fluid (DEF) market is the implementation of stringent emission regulations worldwide. Governments and regulatory bodies around the world have shown increasing concern regarding the harmful impact of nitrogen oxides (NOx) and other pollutants emitted from diesel-powered vehicles and machinery. To combat air pollution and mitigate the adverse effects on public health and the environment, these authorities have enacted strict emissions standards.

The DEF market has gained significant traction as a direct response to these regulations, as governments now mandate the use of DEF in diesel engines equipped with selective catalytic reduction (SCR) systems. DEF, typically composed of urea and deionized water, is injected into the exhaust stream to convert NOx emissions into harmless nitrogen and water vapor. This process effectively reduces NOx emissions, enabling diesel engines to meet the stringent emission standards.

For example, the European Union's Euro 6 standard, the United States' Environmental Protection Agency (EPA) Tier 4 Final regulations, and similar regulations in other regions have played a crucial role in driving the growth of the DEF market. Vehicle manufacturers and fleet operators have been compelled to adopt DEF systems to ensure compliance with these regulations, resulting in a significant demand for DEF.

As emission regulations continue to evolve and become even more stringent, the demand for DEF is expected to further escalate. Moreover, as regions such as Asia-Pacific and Latin America adopt similar emission standards, the global DEF market is likely to witness sustained growth in the coming years.

### Expanding Diesel-Powered Vehicle Fleet and Industrial Machinery

One of the key driving factors behind the global Diesel Exhaust Fluid (DEF) market is the consistent expansion of the diesel-powered vehicle fleet and industrial machinery across multiple sectors. Diesel engines are renowned for their robustness, fuel efficiency, and high torque characteristics, making them the preferred choice for applications such as long-haul transportation, construction, agriculture, and mining.

The transportation and logistics industry, fueled by the increasing demand for goods and services worldwide, has witnessed significant growth. This growth has resulted in an expanded fleet of diesel-powered trucks, buses, and other vehicles that rely on DEF to comply with emission regulations. Likewise, the construction and mining sectors have

experienced continuous expansion, leading to an increased demand for DEF in heavy-duty machinery like bulldozers, excavators, and loaders.

The agricultural sector heavily relies on diesel-powered machinery for crucial tasks such as tractors, combines, and irrigation pumps. As the global population continues to grow, exerting pressure on food production, the agricultural industry is expected to further increase its utilization of DEF to ensure adherence to emission standards.

In addition to these sectors, the marine and stationary power generation industries are also embracing DEF systems to reduce NOx emissions from diesel engines. The widespread adoption of DEF across diverse sectors is projected to significantly contribute to market growth, given the continuous rise in demand for diesel-powered equipment on a global scale.

### Increasing Awareness of Environmental Sustainability

The third key driver influencing the global Diesel Exhaust Fluid (DEF) market is the growing awareness of environmental sustainability. As individuals, organizations, and governments become increasingly concerned about the environmental impact of their activities, there is a rising interest in reducing carbon footprints and mitigating air pollution.

DEF is considered a crucial component in the broader effort to reduce harmful emissions from diesel engines, aligning with the objectives of sustainability and environmental responsibility. Organizations and individuals are acknowledging the role DEF plays in curbing air pollution, minimizing smog formation, and improving air quality in urban areas.

Furthermore, sustainability initiatives and corporate social responsibility (CSR) programs are propelling the adoption of DEF among businesses. Companies are actively seeking ways to reduce their environmental impact and demonstrate their commitment to eco-friendly practices. Consequently, they are integrating DEF into their fleets of vehicles and industrial equipment.

Consumers are also displaying increased environmental consciousness, which influences their choices when it comes to purchasing vehicles and products. Diesel vehicles equipped with DEF systems are perceived as more eco-friendly, positively impacting sales in regions where DEF usage is prevalent.

In conclusion, the global DEF market is driven by a combination of stringent emission regulations, the expansion of diesel-powered vehicles and machinery, and the growing awareness of environmental sustainability. These factors are expected to continue shaping the growth trajectory of the DEF market as the world seeks cleaner and more sustainable solutions for the transportation and industrial sectors.

## Key Market Challenges

### Price Volatility and Supply Chain Disruptions

One of the major challenges confronting the global Diesel Exhaust Fluid (DEF) market is the potential for price volatility and disruptions in the supply chain. DEF primarily consists of urea, which is derived from ammonia, a crucial raw material in its production. Fluctuations in ammonia prices are influenced by various factors, including changes in natural gas prices (a primary feedstock for ammonia production), global supply and demand dynamics, and geopolitical influences.

These price fluctuations can directly impact the cost of DEF production, leading manufacturers to adjust their pricing accordingly. As a result, the entire DEF supply chain, from manufacturers and distributors to end-users, can be affected. For instance, sharp increases in ammonia prices can raise production costs for DEF producers, potentially resulting in higher prices for consumers.

Supply chain disruptions can further exacerbate these challenges. The DEF supply chain is a complex network involving multiple stakeholders, including ammonia suppliers, DEF manufacturers, distributors, and end-users. Any disruptions in the supply of ammonia or other key components can disrupt the production and distribution of DEF. Such disruptions can arise from unforeseen events like natural disasters, transportation bottlenecks, or geopolitical tensions affecting ammonia supply.

To mitigate these challenges, industry stakeholders must engage in effective supply chain management, establish contingency plans for supply disruptions, and explore alternative sources of feedstock to reduce dependency on volatile ammonia prices. Additionally, forging long-term contracts and strategic partnerships with ammonia suppliers can provide stability in the face of price fluctuations and uncertainties in the supply chain.

### Counterfeit and Low-Quality DEF Products

Another significant challenge in the global DEF market is the proliferation of counterfeit and low-quality DEF products. With the increasing demand for DEF due to emission regulations, unscrupulous actors have entered the market with substandard or even counterfeit DEF, posing a serious risk to diesel engines and exhaust after-treatment systems.

Counterfeit DEF products often fail to meet the required quality standards and can contain impurities that may damage the Selective Catalytic Reduction (SCR) systems in vehicles and machinery. Such damage can result in costly repairs and downtime for end-users. Additionally, the use of low-quality DEF can lead to increased emissions, nullifying the environmental benefits of DEF usage.

Customers may unintentionally purchase these counterfeit or low-quality DEF products, assuming they comply with regulations. To address this challenge, regulators and industry organizations are working to establish quality standards and certification programs for DEF. End-users are encouraged to procure DEF from reputable suppliers who adhere to these standards and maintain a transparent supply chain.

Enhanced education and awareness campaigns are vital in informing consumers about the risks associated with counterfeit DEF and the importance of utilizing certified DEF products. Manufacturers and distributors should actively engage in educating their customers to ensure the proper use of high-quality DEF.

### Storage and Handling Issues

Proper storage and handling of Diesel Exhaust Fluid (DEF) present a distinct set of challenges for the global DEF market. DEF is highly sensitive to temperature and contamination, and inadequate storage or handling practices can compromise its quality and efficacy.

One of the primary concerns is DEF's vulnerability to freezing and evaporation. With a significant water content, DEF has a freezing point of approximately 12°F (-11°C). Freezing can cause expansion, potentially damaging storage containers and dispensing equipment. Furthermore, extreme heat can lead to evaporation, reducing DEF concentration and effectiveness.

To tackle these challenges, users of DEF must implement appropriate storage and handling protocols. This includes storing DEF in climate-controlled areas to prevent freezing or excessive heat exposure. Specialized DEF storage and dispensing

equipment is available to maintain product integrity.

Contamination is another critical issue in DEF storage and handling. DEF is highly sensitive to impurities like dust, dirt, and metal particles, which can impede the SCR system and result in costly repairs. To prevent contamination, DEF should be stored in dedicated containers and dispensed using clean equipment. It is crucial for end-users to adhere to recommended guidelines and avoid cross-contamination with other fluids, such as diesel fuel or motor oil.

Proper training and education of personnel involved in DEF handling and dispensing are essential to minimize contamination risks and ensure product effectiveness. These challenges emphasize the significance of maintaining rigorous quality control measures throughout the DEF supply chain to deliver a reliable and compliant product to end-users.

## Key Market Trends

### Increasing Adoption of Advanced Emission Reduction Technologies

One of the prominent trends observed in the global Diesel Exhaust Fluid (DEF) market is the increasing adoption of advanced emission reduction technologies in diesel engines. Governments and regulatory bodies worldwide are continuously tightening emission standards to combat air pollution and reduce the environmental impact caused by diesel-powered vehicles and machinery. Consequently, manufacturers are actively investing in innovative exhaust after-treatment systems, including Selective Catalytic Reduction (SCR) systems that rely on DEF to convert nitrogen oxides (NOx) into harmless nitrogen and water vapor.

SCR technology, now a standard feature in modern diesel engines, is a key driver of the demand for DEF. As emission standards become more stringent, manufacturers are continuously refining and enhancing SCR systems to achieve higher efficiency and lower NOx emissions. This trend is not limited to the automotive sector but extends to various industries, including heavy-duty transportation, construction, agriculture, and mining.

Moreover, emerging markets are increasingly embracing SCR technology as they align with global emission standards. This expanding adoption of advanced emission reduction technologies is expected to drive sustained growth in the DEF market, creating opportunities for DEF producers and suppliers worldwide.

## Growing Demand for DEF in Off-Road and Non-Road Applications

While the initial focus of the DEF market was primarily on on-road applications, such as trucks and buses, there is a notable trend towards increased demand for DEF in off-road and non-road applications. Off-road machinery, including construction equipment, agricultural tractors, and mining vehicles, are now being equipped with SCR systems to ensure compliance with emission regulations.

This trend is particularly evident as governments worldwide expand their efforts to control emissions, encompassing non-road vehicles and equipment. For instance, the United States' Environmental Protection Agency (EPA) Tier 4 Final regulations have imposed stringent emission limits on off-road diesel engines, driving the adoption of SCR technology and DEF in this sector.

The agricultural industry, in particular, has experienced a significant rise in DEF usage due to the prevalence of diesel-powered tractors and combines. Given the crucial role of agriculture in global food production, the integration of DEF systems into farming machinery has become essential to meet emission standards while maintaining productivity.

Furthermore, the mining and construction sectors are also embracing DEF technology to reduce emissions from heavy machinery, aligning with sustainability goals and regulatory requirements. The expansion of DEF usage into off-road and non-road applications is anticipated to be a substantial growth driver in the years ahead.

### Segmental Insights

#### Supply Mode Insights

The IBC segment holds a significant market share in the Global Diesel Exhaust Fluid Market. Intermediate Bulk Containers (IBCs) are specialized containers designed for the safe storage and transportation of liquids, including Diesel Exhaust Fluid (DEF). IBCs are commonly utilized in industries that require bulk quantities of DEF, such as agriculture, construction, mining, and logistics.

Industries relying on diesel-powered machinery often have a substantial demand for DEF. IBCs provide a convenient solution for storing and transporting large volumes of DEF, making them a preferred choice for businesses with significant requirements. IBCs

are designed to facilitate efficient handling and dispensing of DEF, equipped with integrated pumps, hoses, and dispensing nozzles, ensuring convenient and precise distribution.

The growing need for bulk DEF storage and distribution is the key driver for the IBC segment. Industries with extensive fleets of diesel-powered equipment seek reliable and efficient methods to store and transport DEF in sizable quantities.

The increasing adoption of DEF across various industries is expected to drive continuous growth in the IBC segment. As emission regulations become more stringent, businesses are likely to invest in DEF storage and dispensing solutions. The IBC segment presents opportunities for innovation, including the development of advanced IBCs with improved dispensing systems, integrated monitoring technology, and features that enhance user experience and DEF quality.

### Vehicle Type Insights

The Medium & Heavy Commercial Vehicle segment holds a significant market share in the Global Diesel Exhaust Fluid Market. Continuous advancements in SCR technology, engine efficiency, and DEF dosing systems have significantly improved the performance of DEF in medium and heavy commercial vehicles. These innovations play a crucial role in driving the growth and efficiency of this segment. Many fleet operators and logistics companies prioritize environmental responsibility, and the use of DEF and SCR technology allows them to showcase their commitment to reducing their carbon footprint and supporting cleaner air quality.

Companies that offer DEF solutions and support services, including training, maintenance, and quality assurance, can set themselves apart and strengthen customer loyalty. As emission regulations continue to expand to new regions and countries, DEF manufacturers and suppliers have opportunities to extend their presence into emerging markets. In conclusion, the Medium & Heavy Commercial Vehicle segment in the Global Diesel Exhaust Fluid Market is strongly influenced by emission regulations, global transportation demands, and technological advancements.

### Regional Insights

The North America region is expected to dominate the market during the forecast period due to its substantial size. North America stands as one of the largest and most mature DEF markets worldwide. Over the past decade, the market has experienced substantial



growth propelled by the enforcement of stringent emission regulations. Notably, the United States and Canada have both adopted emissions standards, such as the Environmental Protection Agency's (EPA) Tier 4 Final regulations and Canada's Non-Road Diesel Engines Emission Regulations. These regulations mandate the utilization of DEF in diesel-powered vehicles and machinery to curtail nitrogen oxides (NOx) emissions.

The primary catalyst driving the North American DEF market remains the rigorous emission regulations established by federal and state governments. These regulations compel manufacturers and operators of diesel-powered vehicles and equipment to employ DEF and Selective Catalytic Reduction (SCR) technology to meet NOx emission standards. As these regulations continue to evolve, the demand for DEF in North America is expected to persist robustly.

As emission regulations become increasingly widespread, the North American DEF market continues to expand. This expansion opens opportunities for DEF manufacturers and suppliers to cater to a broader customer base, including off-road applications, as more industries embrace DEF technology to comply with emissions standards.

Noteworthy advancements in SCR technology and DEF delivery systems present promising prospects for companies to develop more efficient and cost-effective solutions. Innovations in DEF-related equipment, such as pumps and dispensers, have the potential to enhance the user experience.

In conclusion, the North American DEF market is set for ongoing growth due to stringent emission regulations, the expanding diesel-powered fleet, and a growing environmental consciousness.

## Key Market Players

Yara International ASA

Royal Dutch Shell PLC

Blue Sky Diesel Exhaust Fluid.

Certified DEF

CF Industries Holdings, Inc.

The Potash Corporation of Saskatchewan

Cummins Filtration

STOCKMEIER Group

KOST USA, Inc.

Old World Industries, LLC

Report Scope:

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

Global Diesel Exhaust Fluid Market, By Component:

SCR Catalyst

DEF Tank

Injector

Supply Module

Sensor

Global Diesel Exhaust Fluid Market, By Application:

Construction

Agriculture

Others

Global Diesel Exhaust Fluid Market, By Supply Mode:

Cans

IBC

Pump

Global Diesel Exhaust Fluid Market, By Vehicle Type:

Passenger Car

Light Commercial Vehicle

Medium & Heavy Commercial Vehicle

Global Diesel Exhaust Fluid Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Diesel Exhaust Fluid Market.

## Available Customizations:

Global Diesel Exhaust Fluid 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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## 13.10. Old World Industries, LLC

13.10.1. Business Overview

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## **14. STRATEGIC RECOMMENDATIONS**

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