

Europe Automotive Exhaust Aftertreatment Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 70 pages | Mordor Intelligence

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Report description:

The Europe Automotive Exhaust Aftertreatment Systems Market is valued at USD 6.33 billion in the current year and is expected to grow to USD 9.61 billion by the next five years, registering a CAGR of 7.2% in terms of revenue during the forecast period.

Over the medium term, the rise in vehicle production, along with growing carbon emission concerns, are likely to increase the demand for exhaust after-treatment systems devices during the forecast period.

Additionally, the technological level for the automotive exhaust after-treatment systems market evolved with modern engine design and active exhaust gas after-treatment systems. As a result, there is a decrease in exhaust emissions from automobiles in the past few years. However, with the continuous production of vehicles along with increasing car ownership, there are tremendous challenges for scientists and engineers to develop improved exhaust after-treatment systems.

However, the rapid adoption of electric vehicles and a ban on diesel engine vehicles, especially in developed nations, may hinder the growth of the European exhaust Aftertreatment Systems market. However, Europe is a growing market for exhaust systems with lucrative opportunities in countries like the United Kingdom, Germany, and France and Eastern Europe, especially the Czech Republic, Poland, Slovakia, and Romania.

Based on the growing emission concern and the data point mentioned above, the target market is expected to witness considerable market growth in the upcoming time.

Europe Automotive Exhaust Aftertreatment Systems Market Trends

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Growth in Emission Control Technology in Automotive and Transportation Industry

Exhaust Aftertreatment Systems engineers work hand in hand with OEM manufacturers to develop emissions control systems. It enables both gasoline and diesel-powered engines to provide cost-effective solutions while also mandating emissions level regulation set by the government.

Technologies such as particulate control, compound control, NOX control system, and newer exhaust system featuring air gap pipe, designed to work together with other components, provide superior thermal efficiency and improve fuel economy.

The demand for gasoline-powered light commercial vehicles is growing due to the less initial cost as compared to diesel and alternative fuels as well as less maintenance cost than diesel vehicles. Moreover, the liberty to incorporate CNG as a fuel option, which substantially minimizes operational costs and reduces carbon emissions, is driving the demand for a gasoline-light commercial vehicle. It, in turn, is likely to witness major growth for the market during the forecast period.

Growing collaboration between the automotive component and vehicle manufacturers for the development of exhaust after-treatment systems across the region is likely to witness major growth for the market during the forecast period. For instance,

- In December 2022, Delphi Technologies introduced a new Hartridge diesel particulate filter (DPF) cleaning machine for light and medium-duty applications. The DPF improves vehicle fuel efficiency and improves exhaust emission functions.

The Diesel Particulate Filter (DPF) provides an effective solution in which an advanced modular design allows easy cleaning and servicing of engine vehicles for every 200,000 miles. Technologies such as ash modeling particulate computer-aided engineering and computational fluid dynamics help design better DPF systems. Also, such an advanced design allows technicians to remove the DPF from any vehicle in less than 15 minutes.

Stringent Emission Control Regulations Driving Growth

In 2022, sales of diesel vans across the European Union fell by 21.9% to 1.1 million units, as the general decline in the van market mainly affected diesel-powered vehicles. The four largest EU markets all suffered double-digit losses: France (-23.5%), Spain (-23.5%), Italy (-19.4%) and Germany (-17.0%).

After the Volkswagen scandal, automotive exhaust emission testing came under global scrutiny. Resulting in the European Commission gaining greater authority when it comes to the approval of car models in Europe. The uncovered United States Volkswagen scandal led to a European Union recall of 8.5 million vehicles, pushed the automaker into a crisis, and left policymakers in Europe scrambling to patch up regulatory loopholes that had existed.

These cars emitted 40% more than the legal limit of nitrogen dioxide (NO_x). While nowadays, cars with new diesel engines are cleaner. Manufacturers are still exploiting loopholes to sell cars that emit much more pollutants than required. However, organizations such as the New European Driving Cycle (NEDC) now took up the task of certifying exhaust emissions of cars and light commercial vehicles, including NO_x, by themselves instead of accepting third-party validation. A strict and defined laboratory test using a chassis dynamometer with well-defined ambient parameters is ideal for temperature and humidity.

In the 2021 study phase, a very strict regulation proposal was planned to reduce oxides of nitrogen (NO_x) by less than half to 30 mg/km, which eliminated virtually all engine-equipped vehicles. But was vehemently opposed by European automobile groups and was not implemented. As a result, the NO_x limit became the same at 60 mg/km as the current Euro-6.

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Also, the legislative framework now granted access to Europe's Commission Enforcement powers to suspend or withdraw vehicle type approvals, launch recalls of non-compliant vehicles, and apply penalties.

Europe Automotive Exhaust Aftertreatment Systems Industry Overview

Europe's Automotive Exhaust Aftertreatment Systems Market is dominated by several key players such as Delphi Technologies PLC, Cummins Inc., Tenneco Inc., Donaldson Company, Bosal Group, John Matthey, Magneti Marelli, and others. The rise in vehicle manufacturers' trends toward lightweight vehicles to enhance vehicle fuel efficiency is likely to enhance the demand for exhaust after-treatment systems in the coming years. For instance,

- In September 2022, Mercedes-Benz Trucks introduced diesel-powered trucks Actros L, the Actros L Edition 3, and the Actros F plus at IAA Transportation. Actros L includes a third-generation 12.8 L OM 471 engine. The company introduced a consumption-optimized turbocharger, which, together with the revised exhaust gas aftertreatment system, enables maximum fuel savings of up to 4 % compared with the previous generation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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