

Diesel Exhaust Fluid (AdBlue) Market Research Report Information By Storage Solution (Bulk Storage, Dispensers, Tanks, Portable Containers, Others), By Application (Automotive, Construction Machinery, Farm Machinery, Electronic Generators, Railway Engines, Others), By Region Global Forecast to 2028

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Market Overview

The Diesel Exhaust Fluid (AdBlue) Market Size is anticipated to grow at a compound annual growth rate (CAGR) of 8.57% over the forecast period. Diesel exhaust fluid (DEF) is a liquid that is employed to mitigate the air pollution generated by diesel engines. It is also marketed as AdBlue and is known by the names AUS 32 and ARLA 32. The aqueous urea solution known as DEF or AdBlue is composed of 32.5% urea and 67.5% deionized water. To comply with the rigorous NOx emission standards that were implemented for commercial truck engines in 2010 and for the majority of off-road engines in 2014, the majority of engine manufacturers have implemented an embedded selective catalytic reduction (SCR) technology in their diesel vehicles. This technology necessitates DEF to function. In vehicles equipped with SCR technology, AdBlue is refilled from a distinct receptacle. DEF is introduced into the selective catalytic reduction (SCR) system, where it is heated in the exhaust stream and subsequently decomposes into ammonia and CO₂. The harmful NOx molecules in the exhaust stream are converted to harmless nitrogen and water. These substances are subsequently discharged from the vehicle's tailpipe when the NOx from the engine exhaust stream reacts with the ammonia inside the catalyst. Typically, a diesel engine necessitates approximately 3% DEF in its fuel.

Market segmentation insights

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According to the storage tank, the Diesel Exhaust Fluid (AdBlue) Market segmentation is as follows: Bulk Storage, Dispensers, Tanks, Portable Containers, and Others.

The Diesel Exhaust Fluid (AdBlue) Market is broadly categorized into the following: automotive, construction machinery, agricultural machinery, electronic generators, railway engines, and others.

Regional Perspectives

The Diesel Exhaust Fluid (AdBlue) Market has been segmented into North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa based on region. The North American market accounted for the highest share of 57.52% in 2020, because of the strict regulations in the region and the compliance of automobile and agricultural machinery manufacturers. This is anticipated to result in an increase in the consumption of diesel exhaust fluid (AdBlue). The market was valued at USD 9,063.32 million in 2020 and is anticipated to grow at a compound annual growth rate (CAGR) of 8.42% to reach USD 20,023.98 million by the end of 2030.

Major Players

BASF SE (Germany), Yara (Norway), Mitsui Chemicals Inc (Japan), BP p.l.c (UK), Borealis AG (Austria), Nissan Chemical Corporation (Japan), GreenChem (Netherlands), NOVAX Material & Technology Inc (China), Royal Dutch Shell PLC (Netherlands), and Adeco doo (Siberia) are the primary stakeholders in the market.

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