

# Global Heavy Duty Diesel (HDD) Catalyst Market: Trends and Opportunities (2013-2018)

April 2014



## **Scope of the Report**

The report titled "Global Heavy-Duty Diesel Catalyst Market: Trends and Opportunities (2013-2018)" provides an in-depth analysis of global diesel catalyst market with focus on regional markets including North America, Asia and Europe. It also accesses the underlying trends and challenges in the market and outlines the factors that are and will be driving the growth of the industry in the forecasted period (2013-18). Further, it also analyzes the competitive scenario of global heavy duty diesel catalyst market. The profiles of three major players, Johnson Matthey, BASF and Umicore are being included in the report.

## **Geographical Coverage**

- ⊕ North America
- ⊕ Europe
- ⊕ Asia

## **Company Coverage**

- ⊕ Johnson Matthey
- ⊕ BASF
- ⊕ Umicore

## **Executive Summary**

Heavy duty diesel (HDD) catalysts turn toxic exhaust emissions from diesel fuelled vehicles into non-toxic substances by using precious metals, such as platinum and palladium. Depending on the type of vehicle, the amount and composition of platinum group metals used can differ. Catalytic converters used in diesel vehicles generally need more platinum than typical petrol-engine cars. As a result, diesel catalysts require much more sophisticated technology; hence the value of catalyst for diesel engines is higher than that for gasoline/petrol engines.

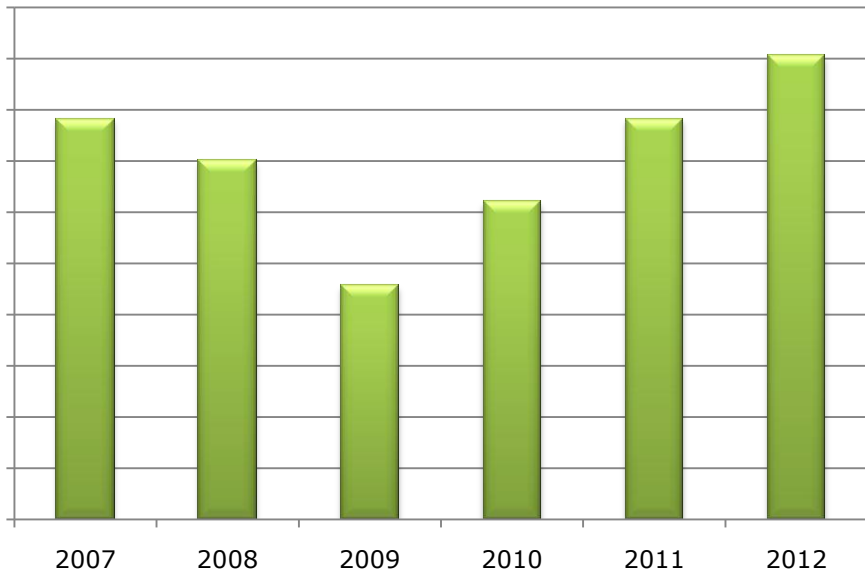
Sales of HDD catalysts is set to grow substantially in emerging markets like China and India where rising automobile sales and stricter emission standards are creating new demand. HDD catalyst market will be driven by the introduction of the Euro VI standard in Europe and Phase IV in China which are expected to come into force in 2014. Sales of HDD catalysts significantly increased in 2012 supported by rise in demand from both on-road and off-road diesel vehicles worldwide. North America, Europe and Japan have established standards that apply to non-road vehicles, locomotive and marine engines. The US and Europe have the most progressive standards in HDD with the strictest requirements regarding nitrogen dioxide emissions as well as levels of particulate matter in the exhaust.

The global HDD catalyst market is oligopolistic in nature with three major players namely Johnson Matthey, Umicore and BASF controlling majority share in 2013. Companies are continuously focusing on upgrading its technology and production lines in developing markets.

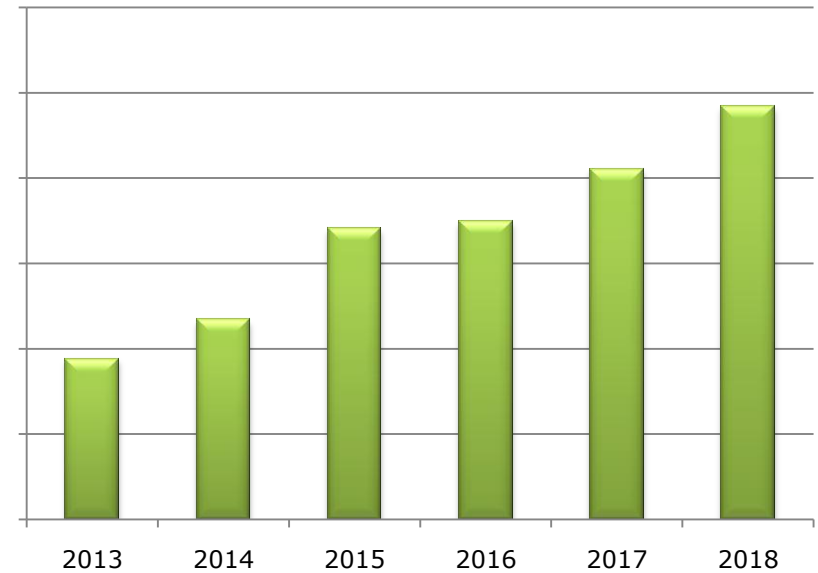
# Global Heavy Duty Diesel Catalyst Market: Overview

Sales of HDD catalysts is set to grow substantially in emerging markets like China and India where rising automobile sales and stricter emission standards are creating new demand. With China adopting the equivalent of Euro 4 HDD emissions standards from 2013 and India following later, demand is expected to escalate over next few years.

Global HDD Catalyst Sales,  
2007-12 (US\$ Millions)



Global HDD Catalyst Sales Forecasted,  
2013E-18E (US\$ Millions)



- Global sales of HDD catalyst for both on road and off-road applications grew by .....% y-o-y and reached US\$.....million in 2012.
- Growth in the market is due to .....

# Global HDD Catalyst - Competitive Landscape

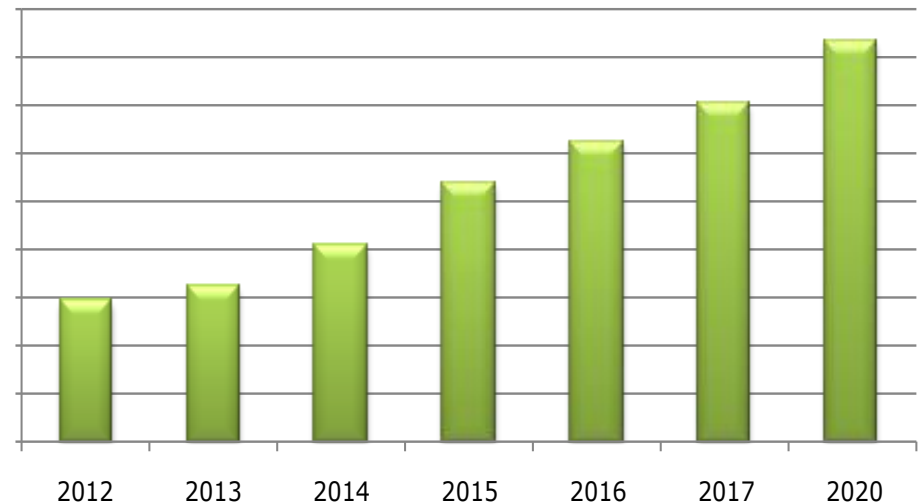
The global HDD catalyst market is oligopolistic in nature with three major players namely Johnson Matthey and BASF controlling ....% share in 2013. The tougher emissions standards that are coming into force across the globe are encouraging the use of more sophisticated and expensive auto catalyst technologies.

Market Share by Players of Global HDD Catalyst, 2013E



Johnson Matthey BASF Umicore Others

Global Number of Heavy Duty Diesel Vehicles, 2012-2020 (In Thousands)



- The number of heavy duty diesel vehicles worldwide is estimated to grow at a CAGR of ....% over the period 2012-2020 and will reach approximately ..... million units.
- Growth was on account of.....