



Prepared By:



[www.chemanalyst.com](http://www.chemanalyst.com)

An Update Document-

# Market and Business Environment Report— Diesel Exhaust Fluid (AdBlue)

Prepared For:



December 19, 2022

## **Diesel Exhaust Fluid (AdBlue)**





AdBlue is a diesel exhaust fluid used in vehicles with Selective Catalytic Reduction (SCR) technology to reduce harmful gases being released into the atmosphere. AdBlue is a 32,5 % solution of high-purity, synthetically manufactured urea in de-mineralized water. It is a safe-to-use fluid.

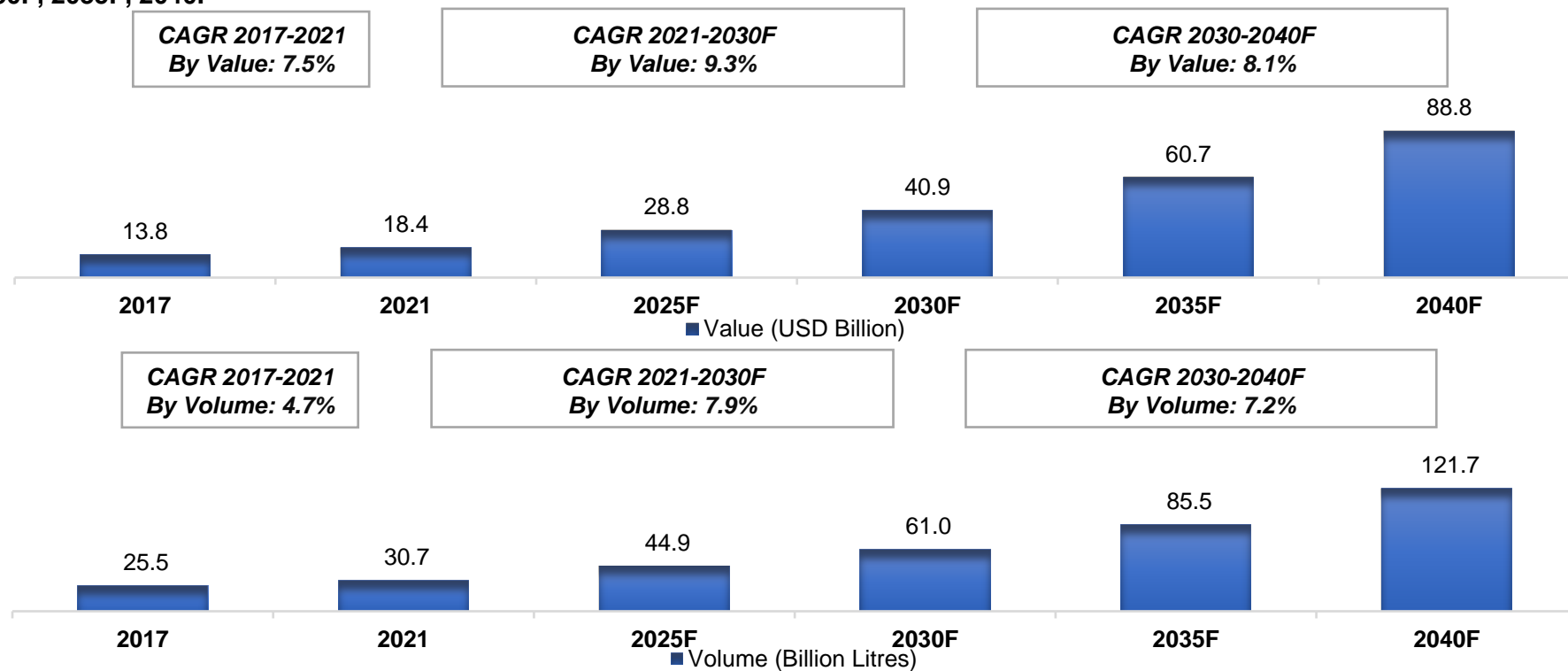
AdBlue is used in vehicles with a Selective Catalytic Reduction catalyst, or SCR. An SCR catalyst ensures that exhaust gases are treated before they leave the vehicle. A large proportion of the heavy-duty vehicles complying with the Euro 4, Euro 5 and Euro 6 standards are equipped with an SCR system and therefore use AdBlue. This applies to most trucks after 2005; the first passenger cars with diesel engines and SCR were introduced in response to the Euro 6 standard in 2014.

AdBlue aims to significantly reduce emissions of nitrogen oxide (NOx) which are harmful to the environment and thus meet the stringent emission limits set by European standards (Euro 6) - which are standard for the control of emissions of new vehicles sold in the European Union and America.

AdBlue fluid treatment is injected into the exhaust gases and can filter out more than 90% of the harmful gas emissions of nitrogen oxide into steam and nitrogen, resulting in less pollution.

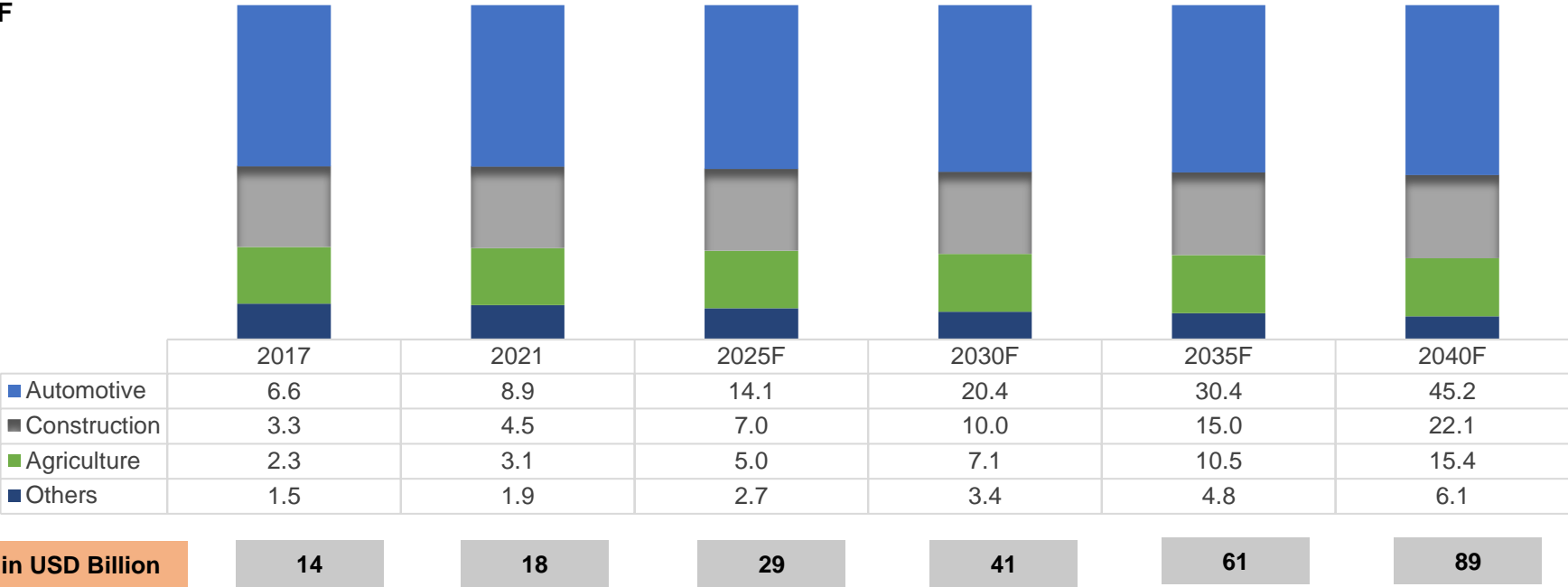
# Global Diesel Exhaust Fluid (AdBlue) Market, By Value & Volume

Figure 1: Global Diesel Exhaust Fluid (AdBlue) Market Size, By Value (USD Billion) & By Volume (in Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



- Global Diesel Exhaust Fluid (AdBlue) market stood at USD 18 billion in 2021 and is expected to reach USD 41 billion at a CAGR of 9.3% by 2030 and 89 billion by the end of 2040 at a CAGR of 8.1%.
- Due to rising auto manufacturing in nations like China and India, the Asia-Pacific region dominates the market for Diesel Exhaust Fluid (AdBlue).
- The diesel exhaust fluid market is expanding as a result of the rising number of DEF pumps, rising average vehicle age, and rising mileage.

Figure 2: Global Diesel Exhaust Fluid (AdBlue) Market, By Application, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F

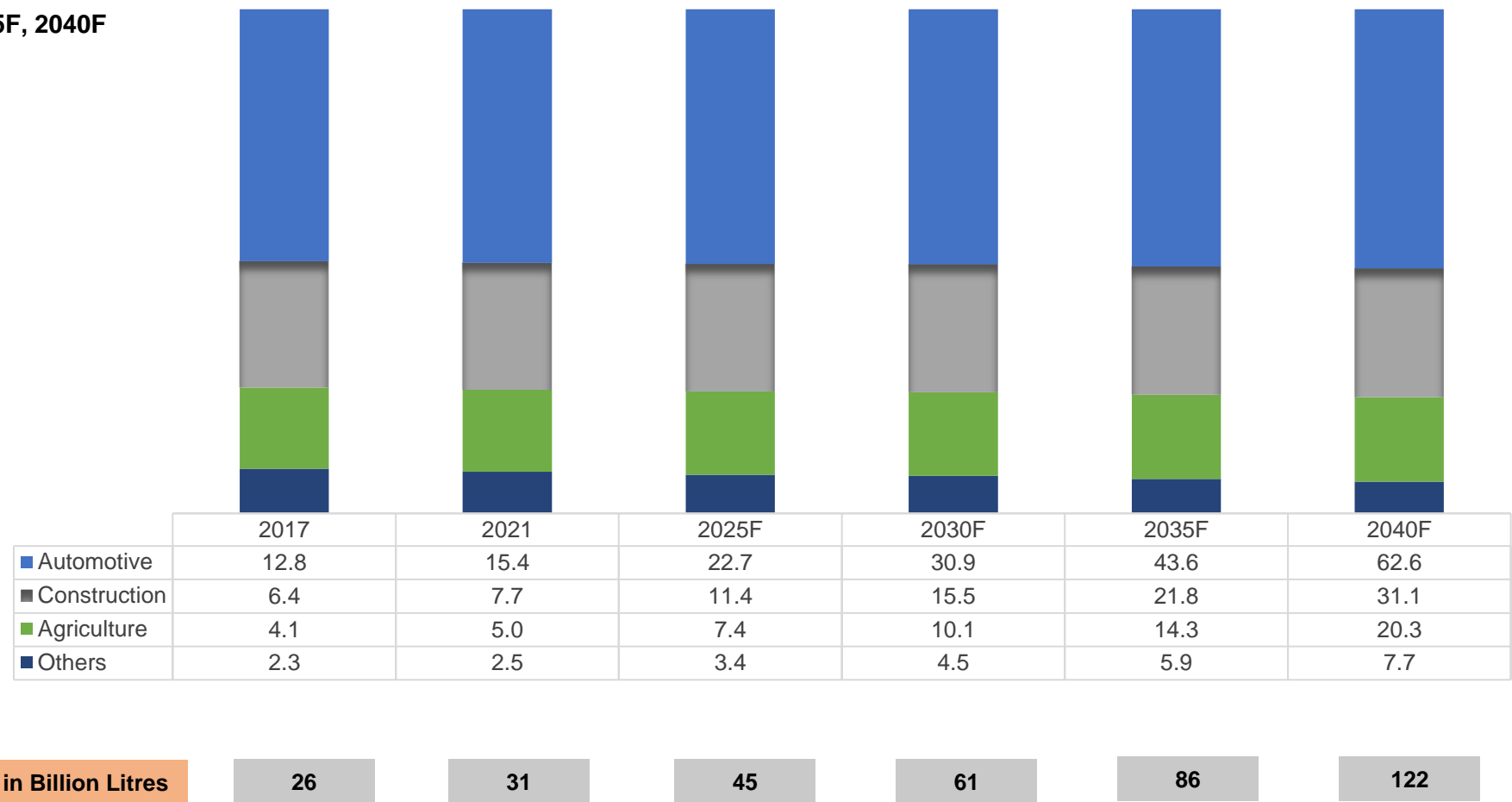


Others: Mining, Generators etc..

- Automotive segment holds largest share of overall demand, having a market share of more than 50%, and it stood at USD 9 billion in FY2021.
- In the forecast period, it is expected that automotive segment will dominate the Diesel Exhaust Fluid (AdBlue) with a market share of over 50%.
- The low cost of production and growing use of Adblue in farm equipment have further fueled the Indian Adblue Market, which is focused on agriculture.



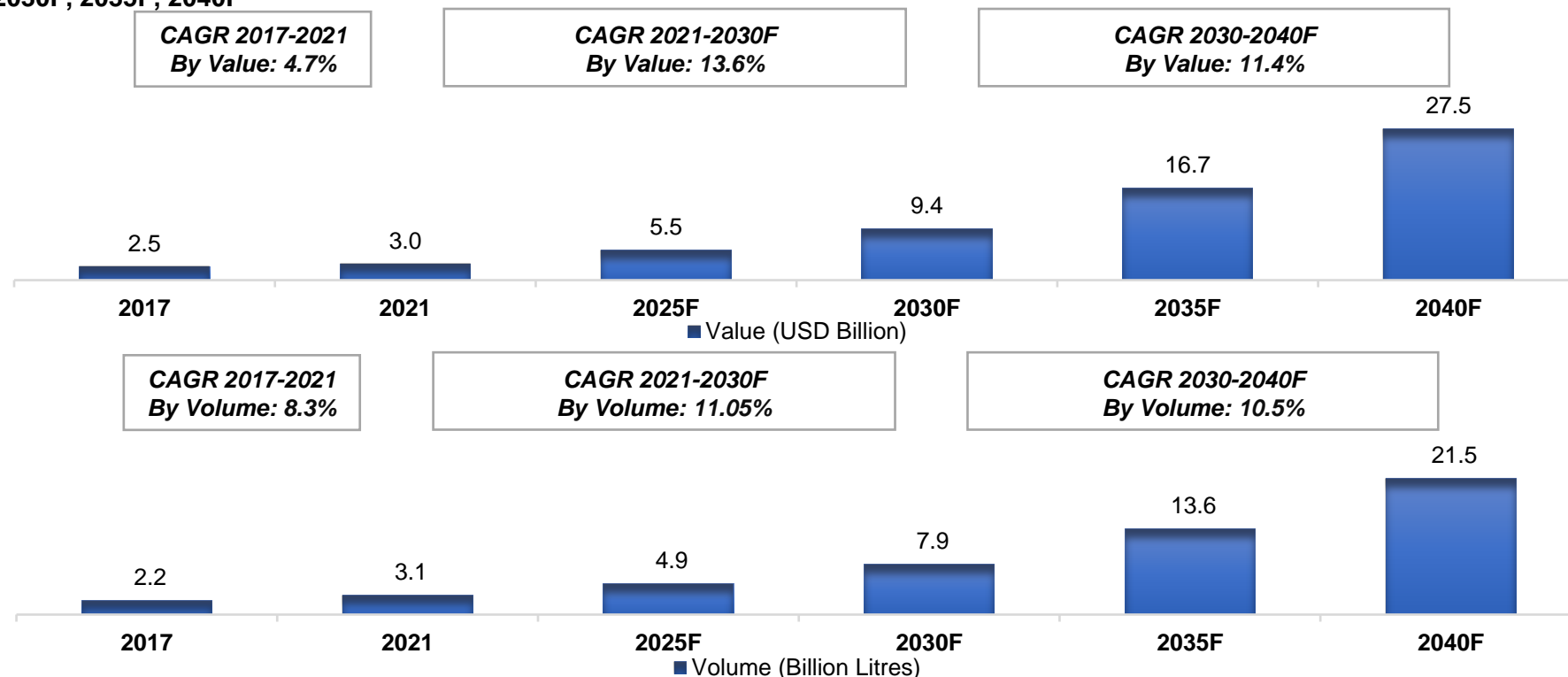
Figure 3: Global Diesel Exhaust Fluid (AdBlue) Market, By Application, By Volume (Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Others: Mining, Generators etc..

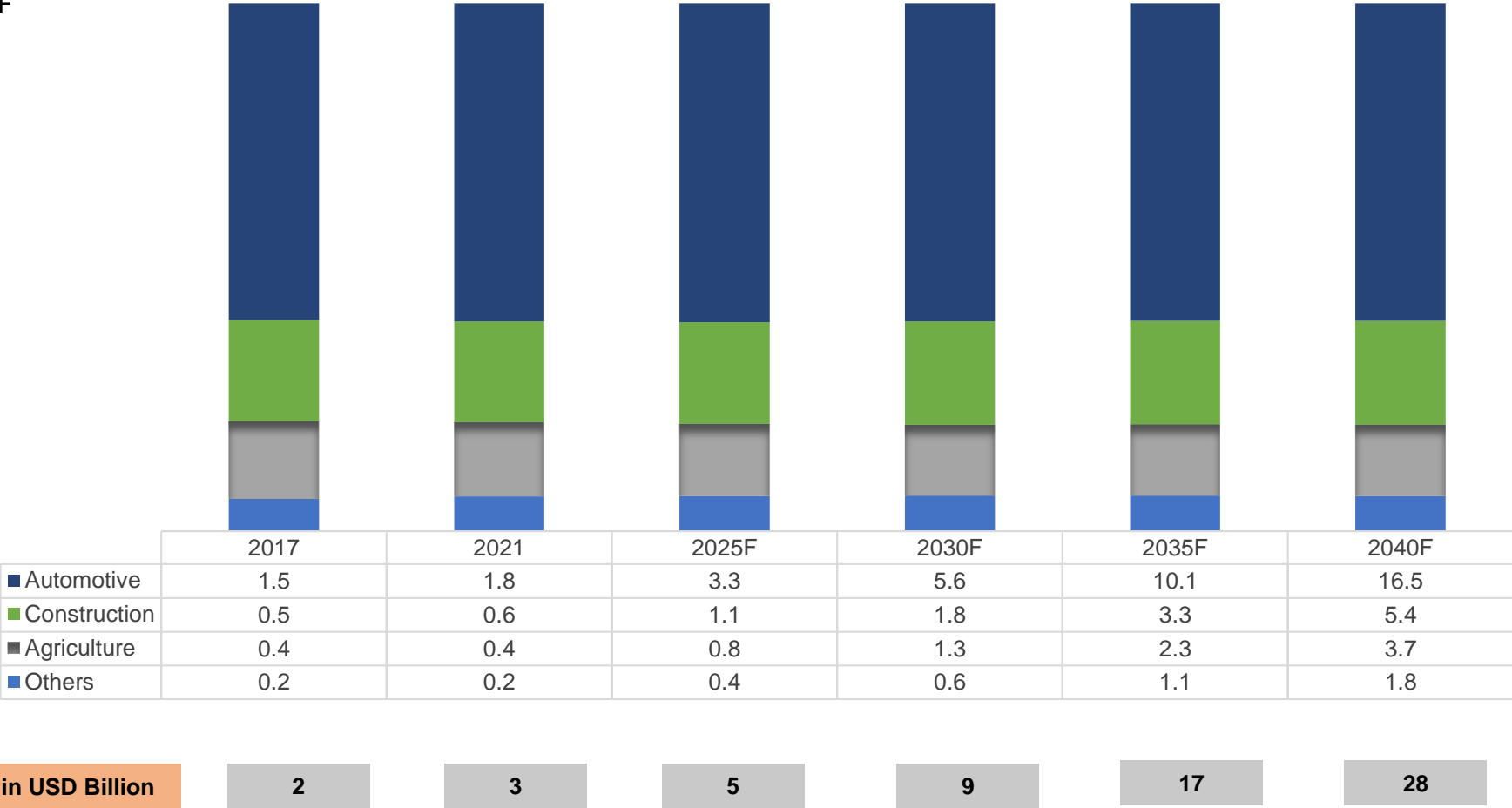
## India Diesel Exhaust Fluid (AdBlue) Market, By Value & Volume

Figure 4: India Diesel Exhaust Fluid (AdBlue) Market Size, By Value (USD Billion) & By Volume (in Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



- India Diesel Exhaust Fluid (AdBlue) market stood at USD 3.0 billion in 2021 and is expected to reach USD 9.4 billion at a CAGR of 13.6% by 2030 and 27.5 billion by the end of 2040 at a CAGR of 11.4%.
- The severe emission standards that are causing a greater penetration of diesel SCR cars and an increase in the number of DEF pumps are the main factors anticipated to fuel the growth of the diesel exhaust fluid market during the forecast period.
- Increased demand for heavy-duty trucks, improved infrastructure, and ongoing industrialization have all significantly boosted the AdBlue market in India.

Figure 5: India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Others: Mining, Generators etc..



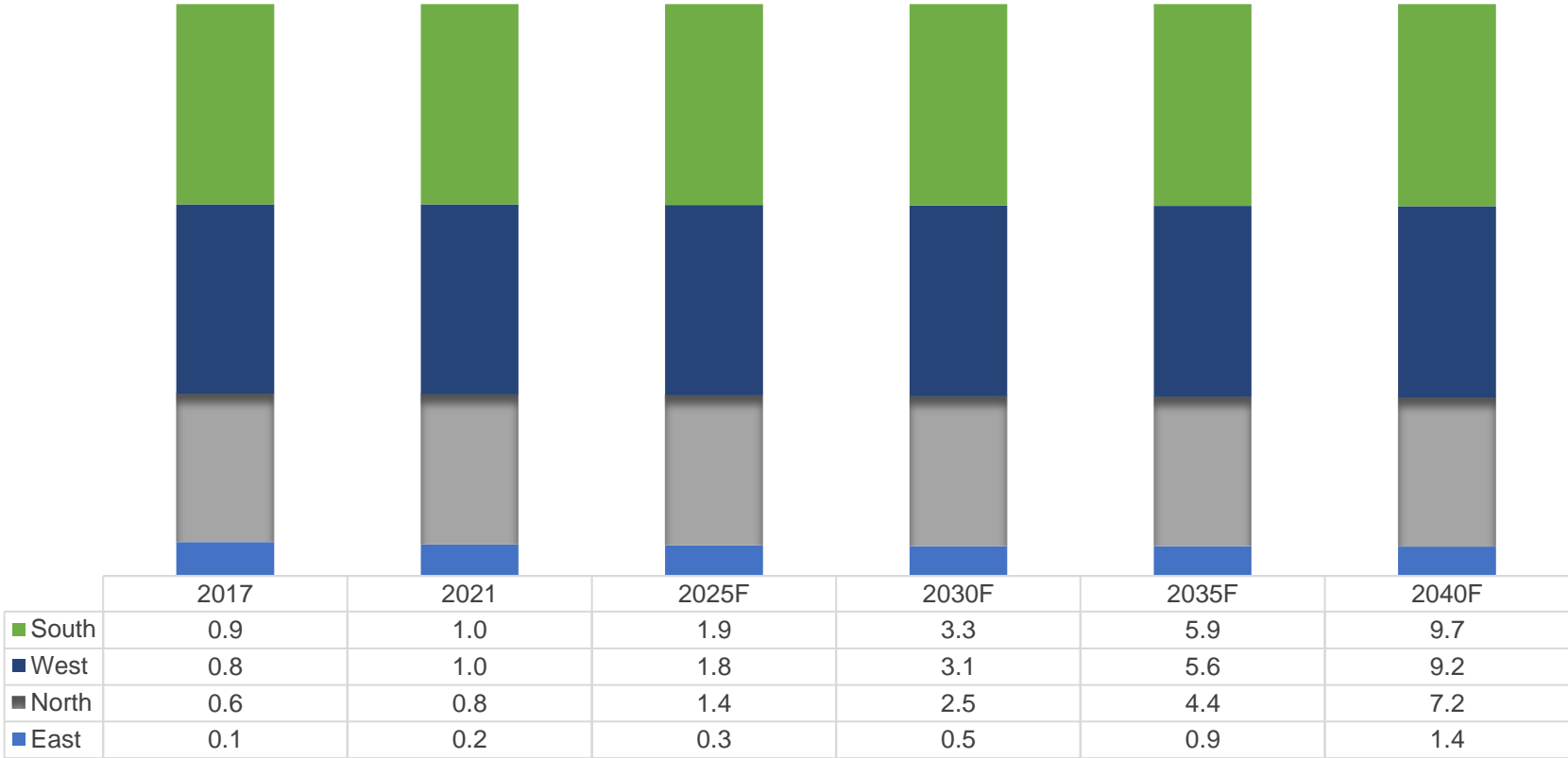
Figure 6: India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Volume (Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Others: Mining, Generators etc..

Source: ChemAnalyst

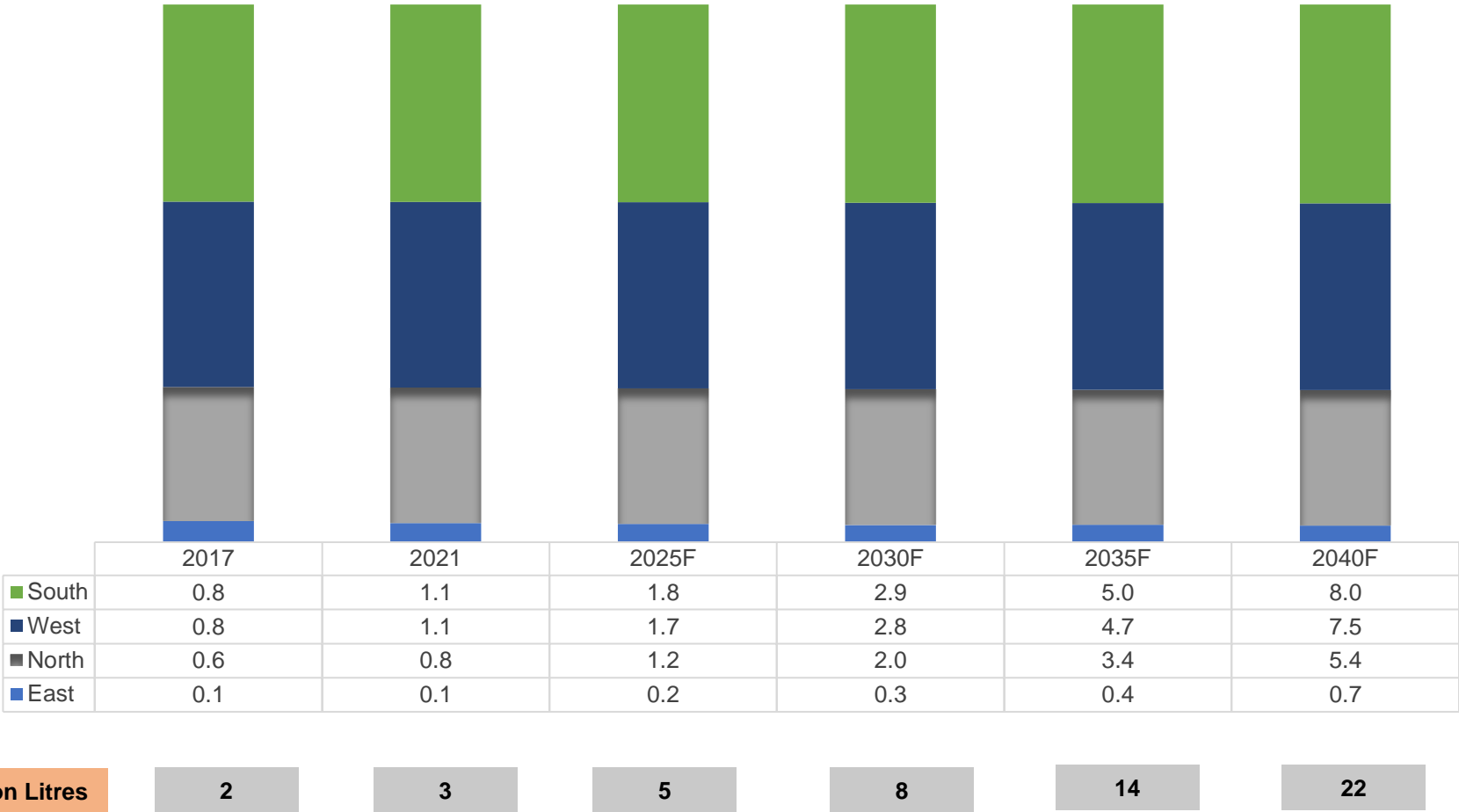
Figure 7: India Diesel Exhaust Fluid (AdBlue) Market, By Region, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Total in USD Billion	2	3	5	9	17	28
----------------------	---	---	---	---	----	----

Others: Mining, Generators etc..

Figure 8: India Diesel Exhaust Fluid (AdBlue) Market, By Region, By Volume (Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F

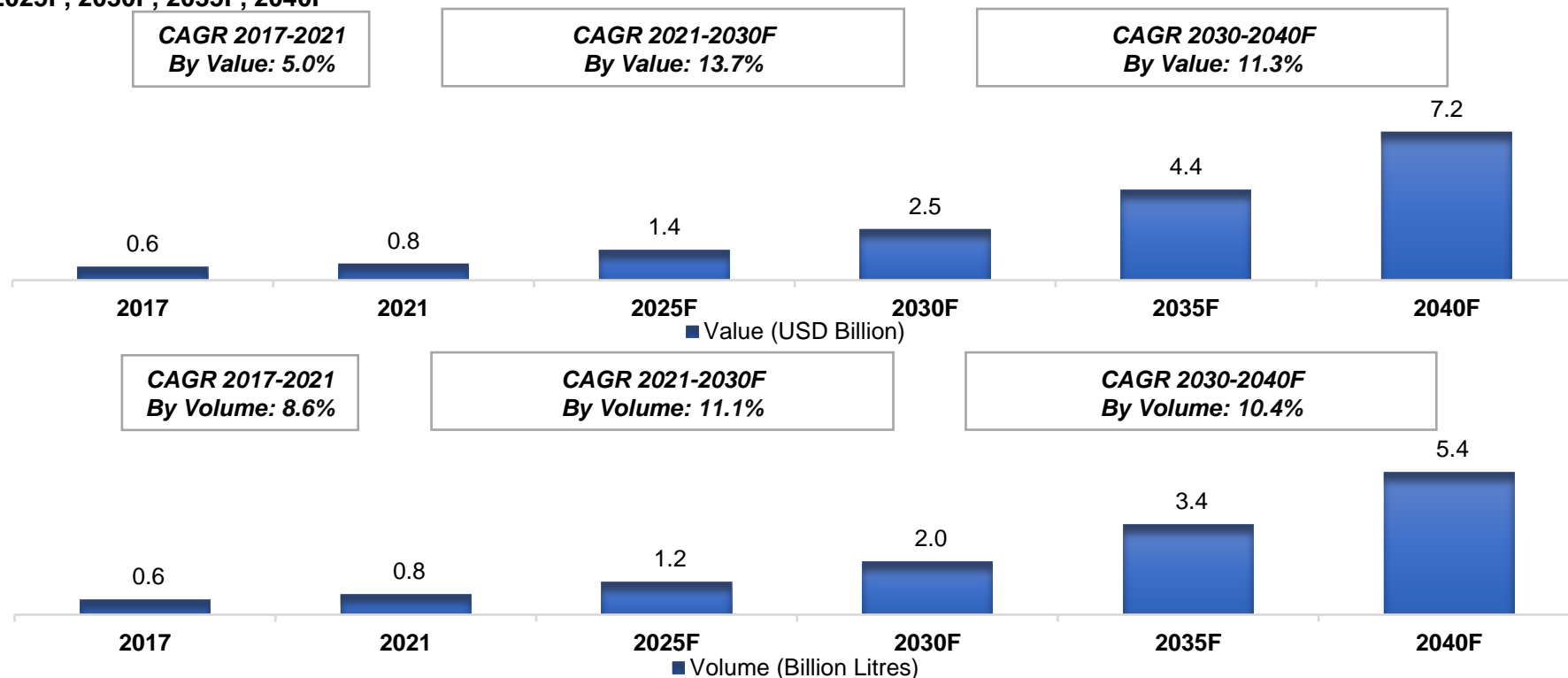


Others: Mining, Generators etc..

Source: ChemAnalyst

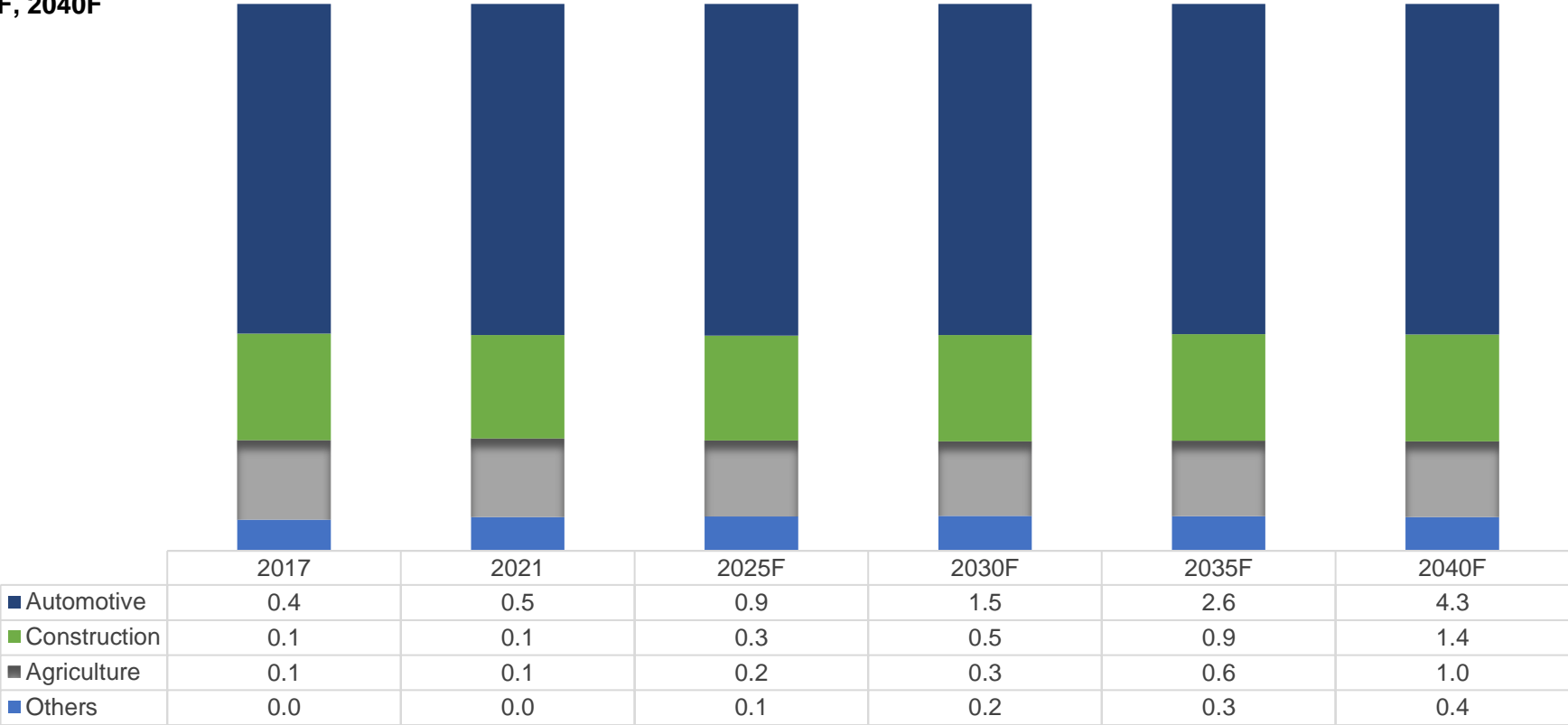
## North India Diesel Exhaust Fluid (AdBlue) Market, By Value & Volume

Figure 9: North India Diesel Exhaust Fluid (AdBlue) Market Size, By Value (USD Billion) & By Volume (in Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



- North India Diesel Exhaust Fluid (AdBlue) market stood at USD 0.8 billion in 2021 and is expected to reach USD 2.5 billion at a CAGR of 13.7% by 2030 and 7.2 billion by the end of 2040 at a CAGR of 11.3%.
- To meet the rising demand for vehicle production in the nation, numerous manufacturers are investing in new manufacturing strategies and upgrading current facilities.
- Like in July 2021, Maruti Suzuki India stated that it would invest INR 18,000 crore (USD 2.42 billion) in a new production facility in Haryana

Figure 10: North India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F

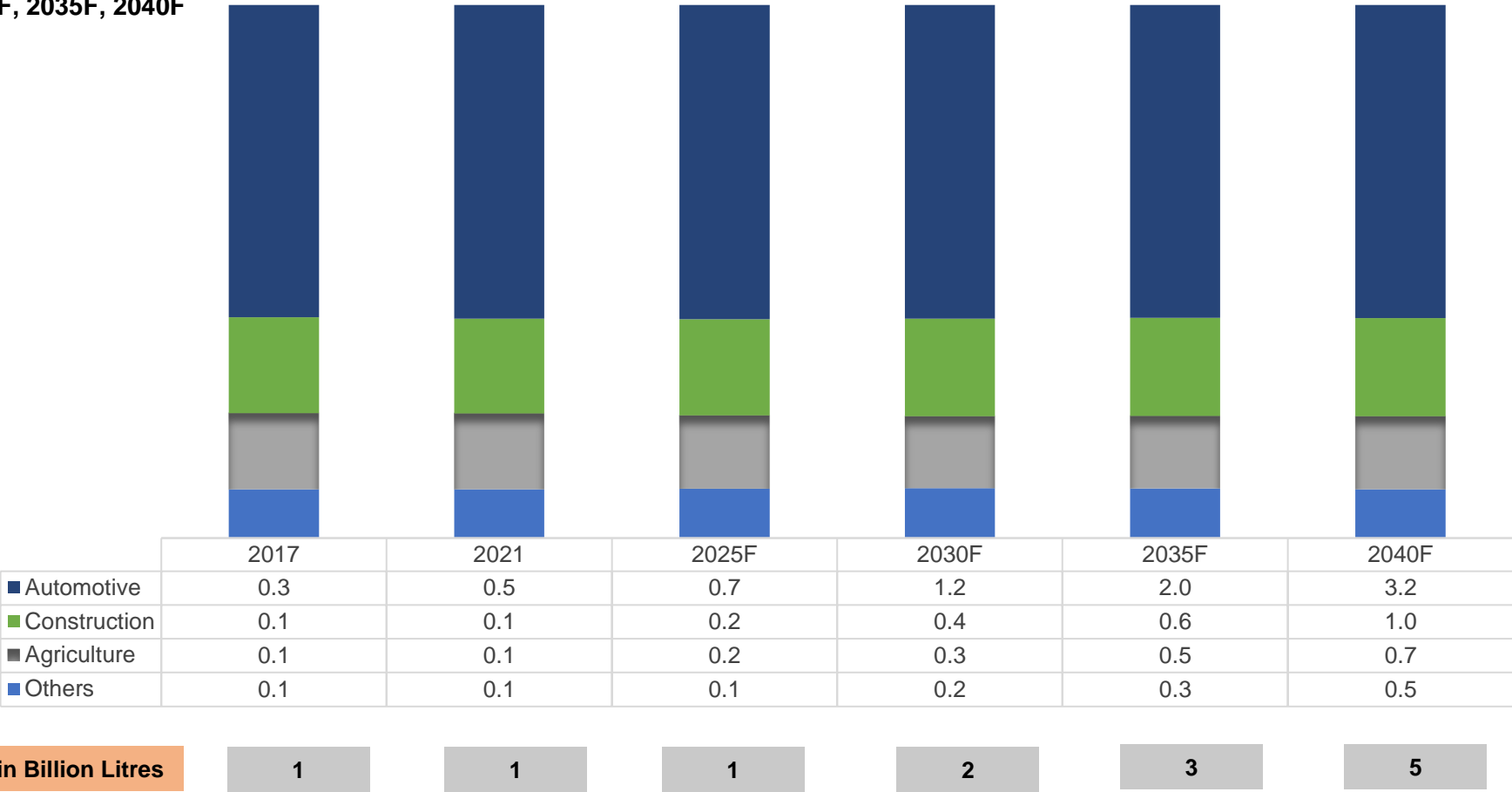


Total in USD Billion

1	1	1	2	4	7
---	---	---	---	---	---

Others: Mining, Generators etc..

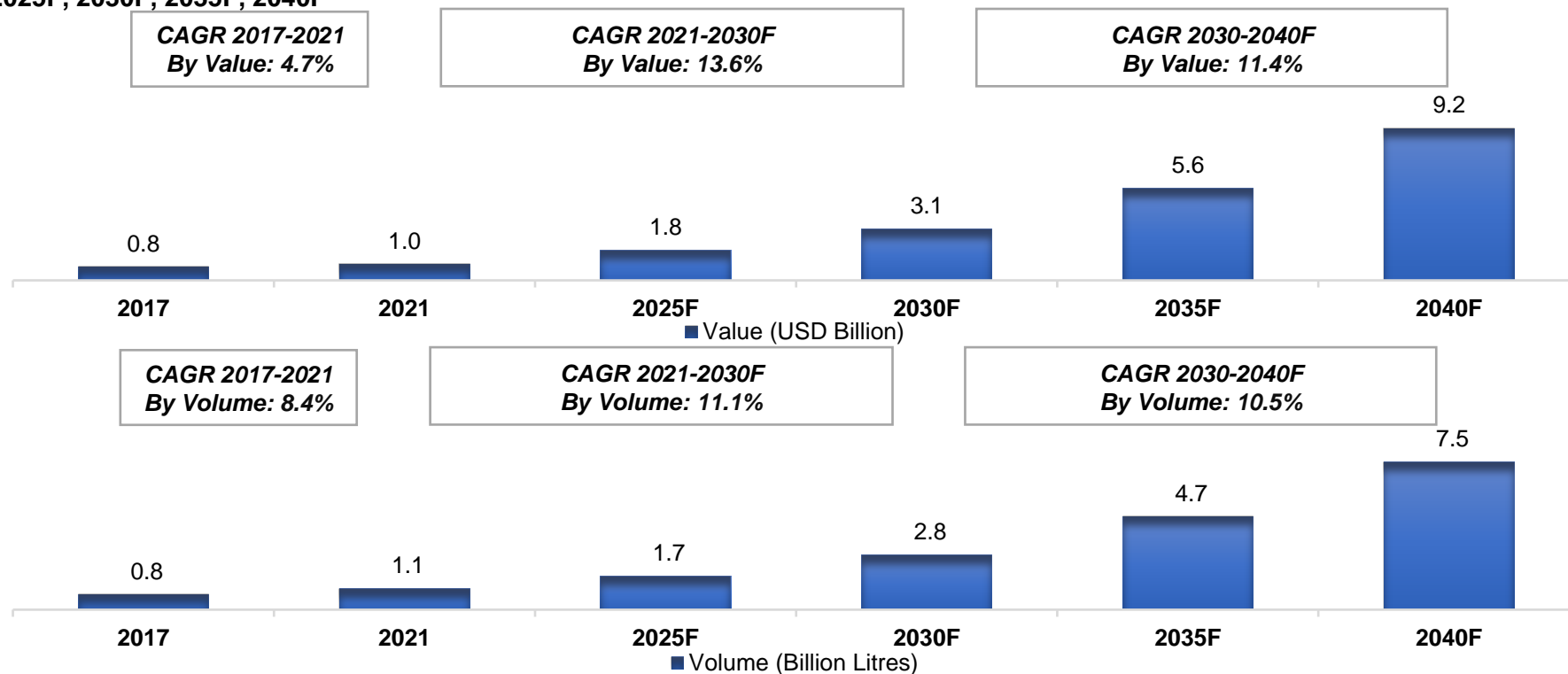
Figure 11: North India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Volume (Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Others: Mining, Generators etc..

## West India Diesel Exhaust Fluid (AdBlue) Market, By Value & Volume

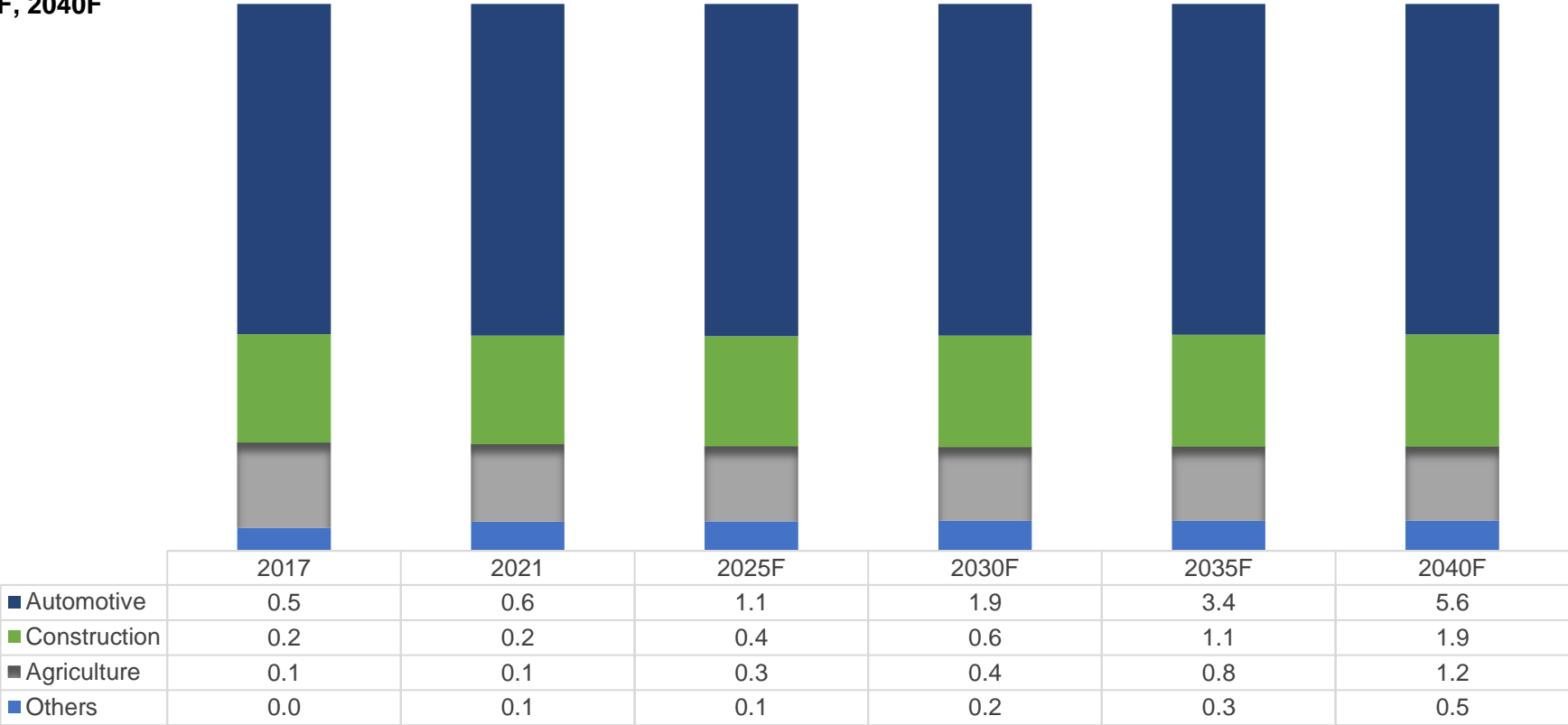
Figure 12: West India Diesel Exhaust Fluid (AdBlue) Market Size, By Value (USD Billion) & By Volume (in Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



- West India Diesel Exhaust Fluid (AdBlue) market stood at USD 1.0 billion in 2021 and is expected to reach USD 3.1 billion at a CAGR of 13.6% by 2030 and 9.2 billion by the end of 2040 at a CAGR of 11.4%.
- The agro-focused Indian Adblue Market has also been fueled by low manufacturing costs and an increase in the use of Adblue in farm equipment.
- The Government of India anticipates the vehicle sector to draw US\$ 8–10 billion in domestic and international investments by 2023, therefore there have been a lot of investments recently.



Figure 13: West India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Total in USD Billion	1	1	2	3	6	9
----------------------	---	---	---	---	---	---

Others: Mining, Generators etc..

Figure 14: West India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Volume (Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F

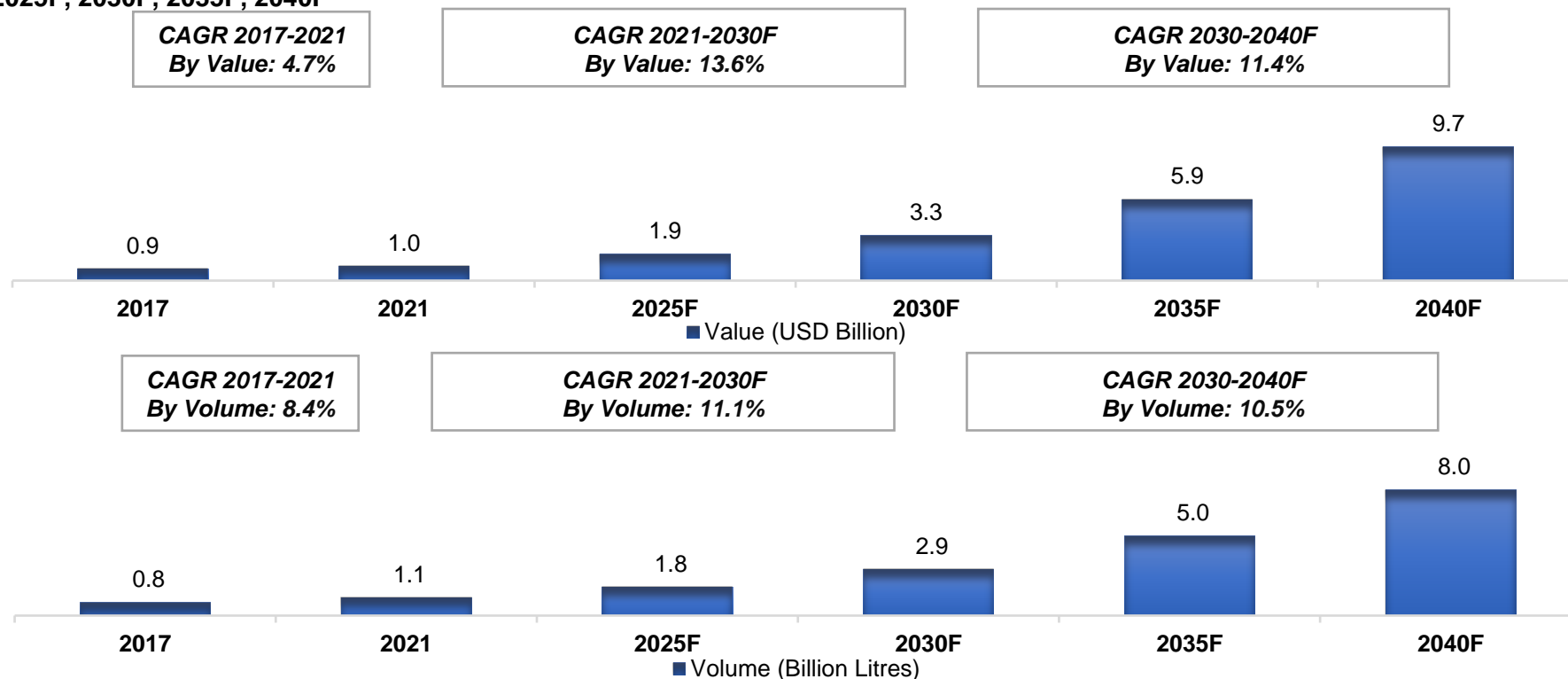


Others: Mining, Generators etc..

Source: ChemAnalyst

## South India Diesel Exhaust Fluid (AdBlue) Market, By Value & Volume

Figure 15: South India Diesel Exhaust Fluid (AdBlue) Market Size, By Value (USD Billion) & By Volume (in Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F

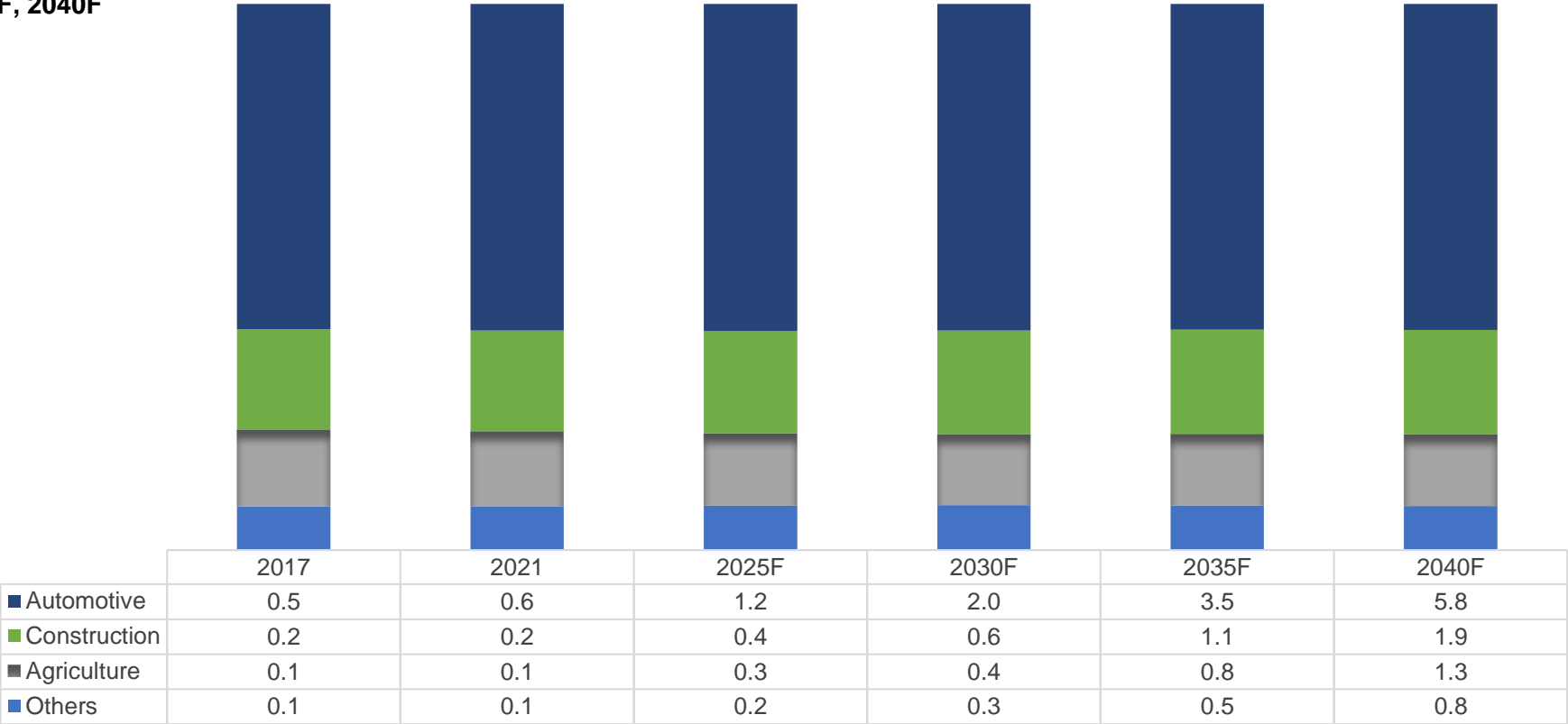


- South India Diesel Exhaust Fluid (AdBlue) market stood at USD 1.0 billion in 2021 and is expected to reach USD 3.3 billion at a CAGR of 13.6% by 2030 and 9.7 billion by the end of 2040 at a CAGR of 11.4%.
- In terms of volume, the South India Diesel Exhaust Fluid (AdBlue) market stood at 1.1 billion litres and is anticipated to reach 2.9 billion litres at a CAGR of 11.1% and 8.0 billion litres by the end of 2040 at a CAGR of 10.5%.
- Incentives of US\$ 3.5 billion are proposed by the Indian government as part of a revised programme to promote the production and export of clean technology vehicles over a five-year period until 2026.

Source: ChemAnalyst

# South India Diesel Exhaust Fluid (AdBlue) Market, By Value

Figure 16: South India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F



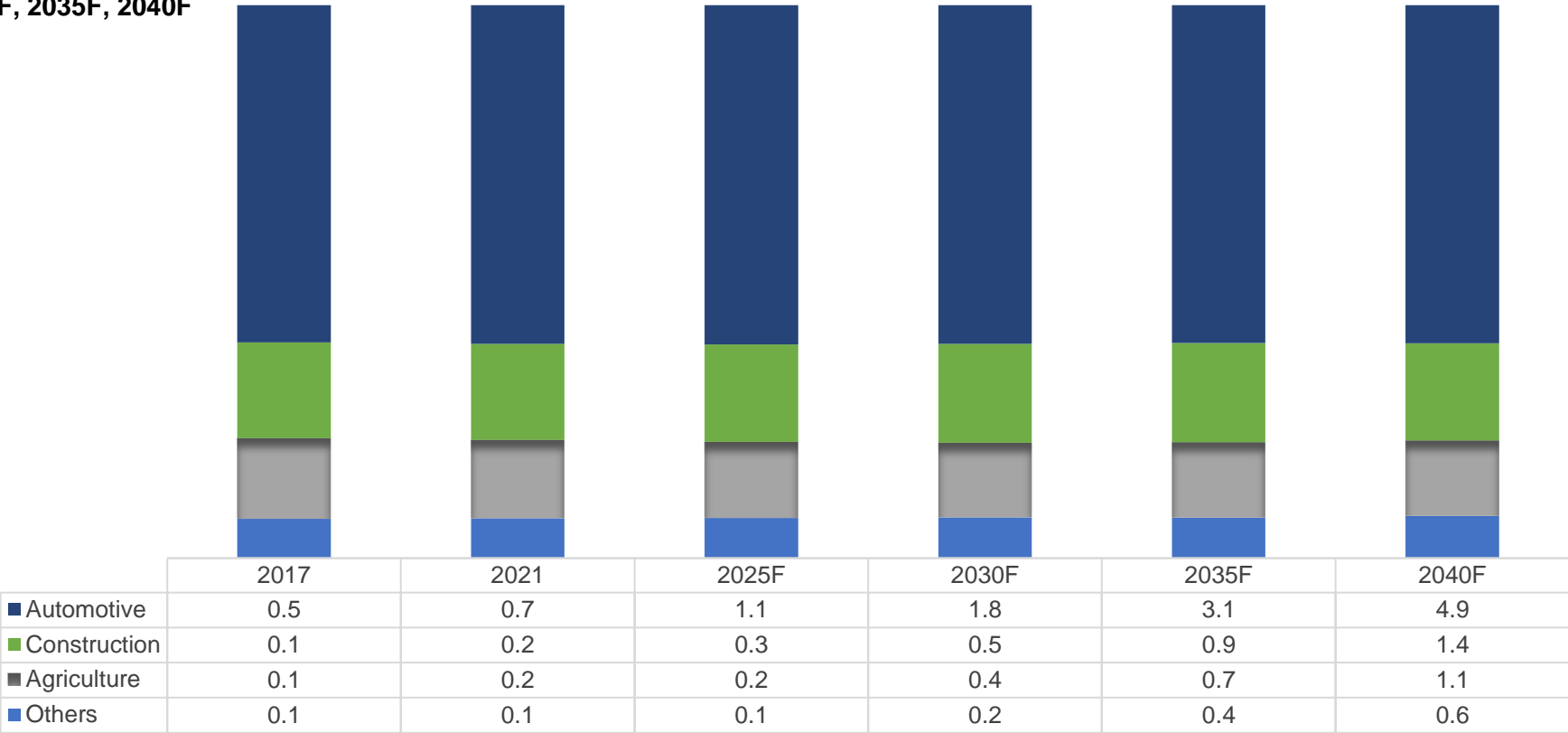
Total in USD Billion

1	1	2	3	6	10
---	---	---	---	---	----

Others: Mining, Generators etc..

# South India Diesel Exhaust Fluid (AdBlue) Market, By Volume

Figure 17: South India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Volume (Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Total in Billion Litres

1

1

2

3

5

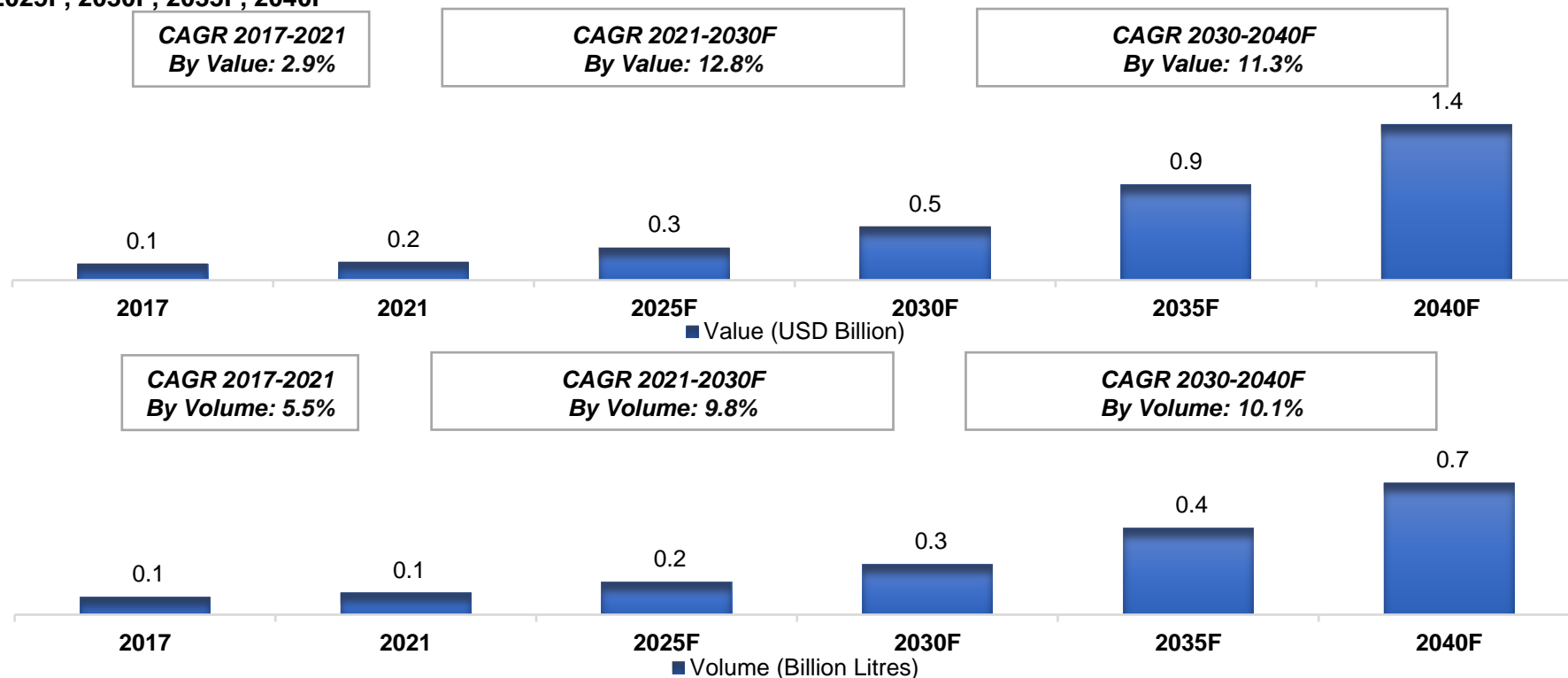
8

Others: Mining, Generators etc..

Source: ChemAnalyst

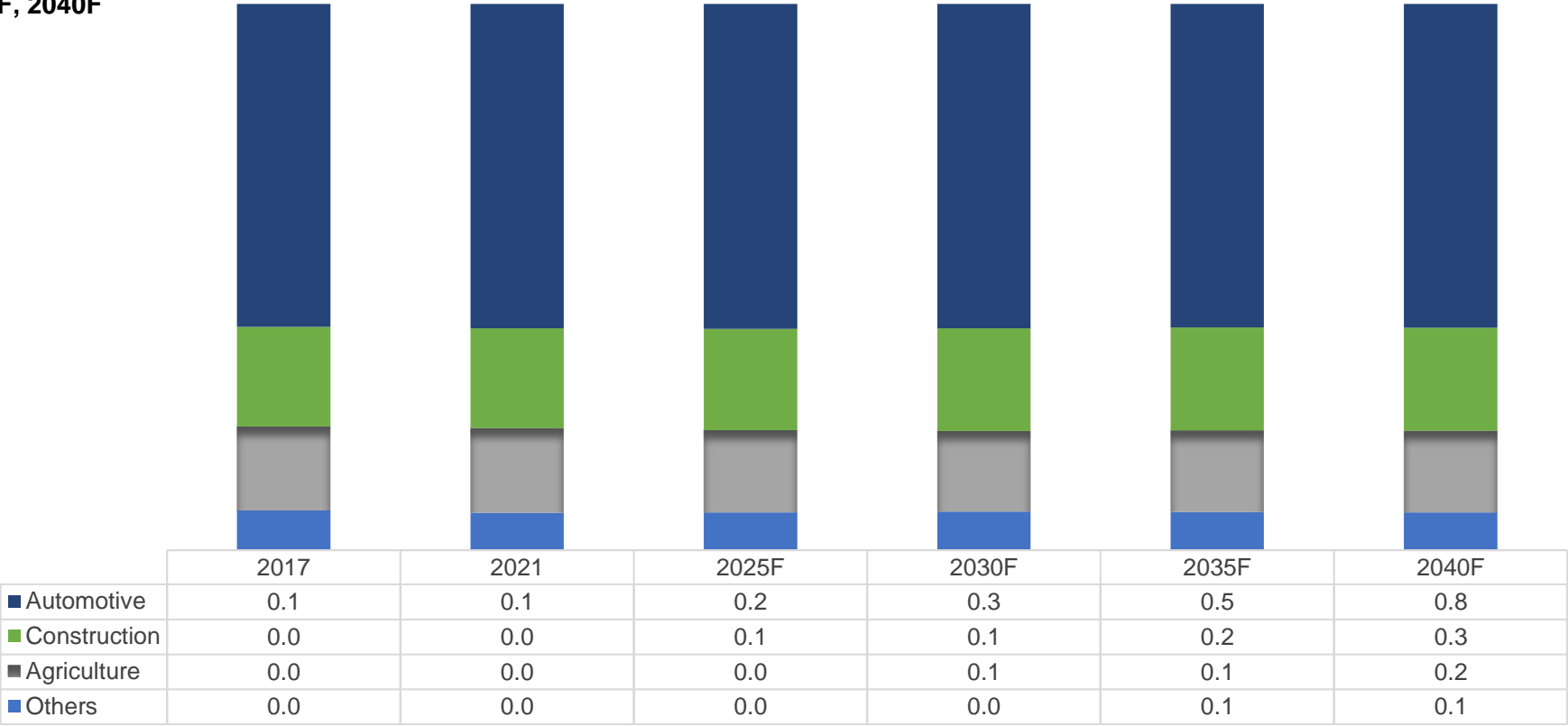
## East India Diesel Exhaust Fluid (AdBlue) Market, By Value & Volume

Figure 18: East India Diesel Exhaust Fluid (AdBlue) Market Size, By Value (USD Billion) & By Volume (in Billion Litres), 2017, 2021, 2025F, 2030F, 2035F, 2040F



- East India Diesel Exhaust Fluid (AdBlue) market stood at USD 0.2 billion in 2021 and is expected to reach USD 0.5 billion at a CAGR of 12.8% by 2030 and 1.4 billion by the end of 2040 at a CAGR of 11.3%.
- Currently, there are only two production plant for commercial and passenger vehicles in the eastern region namely, Tata Motors (Jamshedpur, Jharkhand) and Hindustan Motors (Hindmotor, West Bengal).

Figure 19: East India Diesel Exhaust Fluid (AdBlue) Market, By Application, By Value (USD Billion), 2017, 2021, 2025F, 2030F, 2035F, 2040F



Total in USD Billion

0.2

0.2

0.3

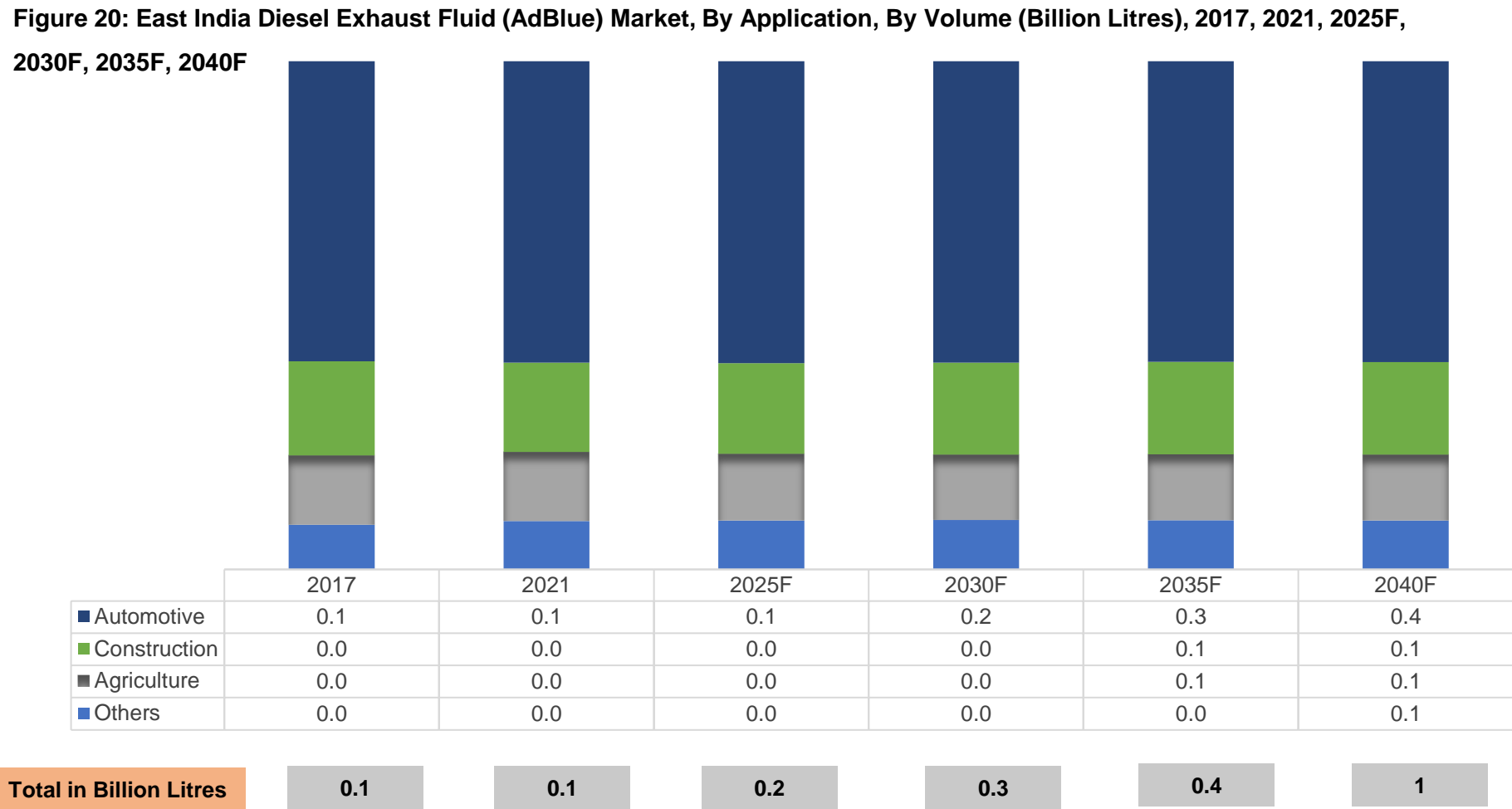
0.5

1

1

Others: Mining, Generators etc..





Others: Mining, Generators etc..

Source: ChemAnalyst

## Disclaimer :

The contents of this report are based on information generally available to the public from sources and primary interviews which are believed to be reliable. No representation is made that it is timely, accurate or complete. TechSci Research has taken due care and caution in compilation of data as this has been obtained from various sources including primary interviews which it considers reliable and firsthand. However, TechSci Research does not guarantee the accuracy, adequacy or completeness of any information and it is not responsible for any errors or omissions or for the results obtained from the use of such information and especially states that it has no financial liability whatsoever to the subscribers / users of this report. The information herein, together with all estimates and forecasts, can change without notice. All the figures provided in this document are indicative of relative market size and are strictly for client's internal consumption. Usage of the same for purpose other than internal will require prior approval of TechSci Research.

## CONTACT US

TechSci Research – North America  
2950, Boundary Road, Burnaby,  
British Columbia, Canada  
Tel: +1- 646- 360-1656  
E: sales@techsciresearch.com

TechSci Research – Europe  
54, Oldbrook, Bretton,  
Peterborough,  
United Kingdom  
E: sales@techsciresearch.com

TechSci Research – Asia-Pacific  
B-44, Sector -57, Noida, National Capital  
Region, UP, India  
Tel: +91-120-4523900  
E: sales@techsciresearch.com

TechSci Research  
Cyber City, Building No. 8C, Gurgaon,  
National Capital Region, Haryana, India  
Tel: +91-124-6428661  
E: sales@techsciresearch.com

[www.techsciresearch.com](http://www.techsciresearch.com)

## INDUSTRY ASSOCIATIONS



The information contained herein is of a general nature and is not intended to address any particular situation, individual or entity. No one should act upon such information without appropriate professional advice.

2021 © TechSci Research All Rights Reserved.

