



DEF supply network coming together: Survey

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GREENSBORO, N.C. -- Truckstops and retail service stations can expect to get about 80 percent of the vocational market for [diesel exhaust fluid](#) (DEF) when the new EPA 2010 emissions standards goes into effect, according to a research study conducted by [Quixote Group Research](#).

The study, which was conducted on behalf of the [North American SCR Stakeholders Group](#)-- which is made up of truck OEMs with SCR engines in the market and DEF suppliers -- also found that there will be new opportunities for growing supply and distribution of DEF among automotive retail chain stores and fleet base refilling operations, as well as dealer service networks, independent service centers, card key lots, worksite and mobile refueling operations.

The study, which surveyed vocational fleets in classes 3-8, also reported that 46 percent of the industry refuels at retail service stations. Seventy-one percent of fleets that operate class 3-5 prefer retail service stations, while more than 50 percent of those involved in construction and distribution and services refuel at retail service stations.

According to the study, automotive retail chains, such as NAPA and AutoZone, can also expect opportunities to distribute DEF, which is the urea-based aftertreatment required in 2010 SCR diesel engines.

While retail locations can expect a market in DEF opportunities, company-owned facilities will also play a large role, as over 80 percent of all fueling, maintenance and fluid refills are handled at base facilities, in the government sector.

For other vocational respondents, including construction, petroleum and bulk transport in particular, they use their own facilities for DEF refilling 67 percent of the time.

Study data came from an online survey designed by Quixote Group fielded among Heavy Duty Trucking magazine subscribers in late July 2009.