

Global Automotive Exhaust Particulate Filter Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Exhaust Particulate Filter market size is expected to reach \$ 6557 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

The Automotive Exhaust Particulate Filter market covers commercial wall-flow filtration products installed within the exhaust aftertreatment path of gasoline- and diesel-powered road vehicles. These filters capture solid particulate matter and particle-number emissions by forcing exhaust gas through porous channel walls, while accumulated soot is removed through passive or active oxidation and regeneration. The research scope encompasses Diesel Particulate Filters (DPF) and Gasoline Particulate Filters (GPF), supplied as functional filter bodies or filter-containing exhaust assemblies for passenger cars, light commercial vehicles, and heavy commercial vehicles. The product structure is assessed by engine fuel type, filter diameter, and substrate material, with mainstream substrates comprising cordierite, silicon carbide, aluminum titanate, and selected metallic or other ceramic systems. Key product attributes include filtration efficiency, pressure drop, soot and ash loading capacity, thermal-shock resistance, regeneration behavior, durability, packaging volume, and compatibility with catalytic coatings and integrated DOC, SCR, or multifunctional aftertreatment configurations.

Key Findings

DPF remains the largest product segment, supported by diesel commercial vehicles and the substantial installed vehicle fleet

GPF is the main structural growth segment as gasoline direct-injection and hybrid platforms adopt particle-number control

Cordierite leads volume demand, while silicon carbide and aluminum titanate serve higher-temperature and higher-value requirements

Asia-Pacific forms the largest regional demand base, while Europe remains a regulation- and technology-intensive market

Competition is concentrated among ceramic substrate specialists, catalyst developers, integrated system suppliers, and regional replacement-filter manufacturers

Market Trends

The Automotive Exhaust Particulate Filter market is shifting from standalone filtration components toward integrated and multifunctional exhaust aftertreatment architectures. In diesel systems, the DPF is increasingly engineered together with DOC, SCR, thermal-management devices, sensors, and control software, while SCR-on-filter and configurable modular systems reduce packaging volume and support emission control under a broader range of engine operating conditions. In gasoline applications, conventional uncoated GPF products are being supplemented by catalyzed GPF and four-way conversion configurations that combine particle filtration with the treatment of gaseous pollutants. Substrate development is focusing on higher porosity, thinner walls, lower thermal mass, and reduced pressure drop without sacrificing filtration efficiency, mechanical strength, or ash-storage capacity. Hybrid powertrains create more demanding temperature profiles because frequent engine stop-start operation and lower exhaust heat can delay catalyst activation and filter regeneration, increasing the importance of close-coupled installation, active heating, and precise thermal control. Battery-electric vehicle penetration is gradually narrowing the new-vehicle addressable base, directing supplier strategies toward hybrid platforms, commercial vehicles, replacement products, and regions where internal-combustion vehicles retain a longer market life.

Market Dynamics

Drivers

Demand for Automotive Exhaust Particulate Filter products is primarily driven by mandatory particulate-mass and particle-number limits, extended emission-system durability requirements, and the expansion of real-driving and broader operating-condition compliance. More stringent standards for light-, medium-, and heavy-duty vehicles increase the engineering content required in exhaust filtration systems and make particulate control a non-discretionary component of vehicle homologation. Continued global vehicle production, particularly in Asian manufacturing markets, supports original-equipment demand, while the aging diesel vehicle fleet creates recurring replacement requirements for filters affected by ash accumulation, thermal damage, contamination, or excessive backpressure. Commercial fleets also place increasing emphasis on maintaining regulatory compliance without sacrificing uptime, fuel efficiency, or vehicle packaging flexibility. The combination of regulatory enforcement, new vehicle output, and the installed-base replacement cycle provides the market with a broader demand foundation than new passenger-vehicle production alone.

Restraints

Market expansion is constrained by the cost and system complexity associated with advanced ceramic substrates, catalytic coatings, stainless-steel canning, insulation materials, sensors, dosing equipment, electronic controls, and application-specific calibration. Silicon carbide and other high-durability filter materials generally require more complex manufacturing and assembly than conventional cordierite solutions, limiting their adoption in highly cost-sensitive vehicle platforms. Filters also create exhaust backpressure, requiring careful optimization to prevent adverse effects on fuel consumption, engine performance, and thermal management. Active regeneration can consume additional fuel and may increase component temperatures, while ash accumulation eventually requires cleaning or replacement. Incorrect maintenance, unsuitable lubricants, short-distance operation, and low exhaust temperatures can shorten service life. In the longer term, the increasing share of battery-electric vehicles reduces the addressable population of new exhaust-equipped passenger cars, particularly in highly electrified markets, placing pressure on suppliers with excessive dependence on conventional light-vehicle platforms.

Opportunities

The strongest product opportunity is the continued adoption of GPF and catalyzed GPF configurations in gasoline direct-injection, mild-hybrid, full-hybrid, and plug-in hybrid vehicles that must control particle-number emissions under cold-start and real-driving conditions. Additional value can be created through integrated SCRF, four-way conversion catalysts, electrically assisted regeneration, compact modular assemblies, and filter designs that combine lower pressure drop with higher catalyst-loading capability. Heavy commercial vehicles and long-lived diesel fleets provide opportunities for direct-fit replacement filters, upgraded substrates, remanufactured assemblies, and application-specific products designed to reduce vehicle downtime. Asia's large vehicle-production base and the continued implementation of advanced emission standards in developing automotive markets create opportunities for localized manufacturing and lower-cost systems adapted to regional engines, fuels, and duty cycles. Suppliers capable of combining substrate design, catalyst coating, canning, controls, and validation can capture a greater share of system value than companies supplying an undifferentiated filter body.

Challenges

The principal technical challenge is balancing high particulate-filtration efficiency with low pressure drop, adequate soot capacity, rapid regeneration, and long-term structural durability. Vehicle duty cycles vary significantly, and filters must operate reliably during cold starts, short urban journeys, sustained highway loading, high-altitude operation, and prolonged low-load conditions. Inadequate regeneration can cause soot accumulation and excessive backpressure, whereas uncontrolled regeneration temperatures can crack or melt the substrate. Ash from lubricants and engine wear cannot be oxidized and progressively reduces usable filter volume. Manufacturers must also control ceramic microstructure, plugging accuracy, coating uniformity, canning stress, sensor calibration, and system diagnostics across high-volume production. Lengthy OEM qualification and certification cycles increase commercialization risk, while changes in regional emission policy, powertrain mix, vehicle production, energy costs, and precious-metal prices complicate capacity planning. Suppliers therefore face the simultaneous requirement to invest in advanced filtration technology while managing uncertainty over the future volume of internal-combustion and hybrid platforms.

Industry Chain Analysis

The upstream chain for Automotive Exhaust Particulate Filter production consists of

ceramic minerals and powders, binders, pore-forming agents, silicon carbide materials, aluminum titanate formulations, metallic foils, catalyst chemicals, platinum-group metals, stainless-steel housings, insulation and holding mats, sensors, and electronic control components. Material formulation has a direct influence on porosity, thermal expansion, mechanical strength, filtration efficiency, and manufacturing yield. Energy-intensive drying and high-temperature firing also represent meaningful cost components, particularly for segmented silicon carbide filters and large commercial-vehicle products. Precious-metal exposure is more significant in catalyzed filters and integrated multifunctional systems than in uncoated filter bodies.

Midstream manufacturing includes raw-material preparation, extrusion of honeycomb monoliths, controlled drying, firing, alternate-channel plugging, machining, segmentation and bonding where required, catalyst washcoating, canning, welding, sensor integration, and durability validation. Value creation increasingly moves beyond the ceramic body toward the optimization of filtration, catalytic conversion, thermal management, packaging, and engine-control interaction. Downstream customers include vehicle manufacturers, engine producers, Tier 1 exhaust-system integrators, authorized replacement channels, independent aftermarket distributors, fleet operators, and vehicle repair networks. Higher margins are generally associated with proprietary substrate materials, qualified catalyst formulations, application engineering, integrated assemblies, and products carrying vehicle-specific certification, while standardized replacement filters face greater price competition.

Segment Insights

By engine fuel type, Diesel Particulate Filters represent the largest established segment because DPF systems are widely used in diesel commercial vehicles and remain essential across a substantial installed fleet. This segment benefits from both original-equipment production and recurring replacement demand, although its long-term passenger-car exposure is constrained by declining diesel penetration in several mature markets. Gasoline Particulate Filters form the more dynamic structural segment, supported by gasoline direct-injection engines and hybrid powertrains. Catalyzed GPF products carry higher functional value by combining particulate filtration with the conversion of hydrocarbons, carbon monoxide, and nitrogen oxides.

By substrate material, cordierite accounts for the broadest volume demand because of its lower cost, low weight, and established manufacturing base. Silicon carbide is positioned at a higher value level where thermal conductivity, soot-loading capacity,

mechanical strength, and resistance to severe regeneration conditions are important. Aluminum titanate addresses applications requiring low thermal expansion and strong thermal-shock performance, while metallic and other ceramic filters remain more specialized. In diameter terms, small and medium filters dominate passenger-car and light-commercial-vehicle unit demand, whereas large-diameter products generate higher value per unit in heavy commercial vehicles because of greater material consumption, canning complexity, soot capacity, and durability requirements.

Downstream Market Opportunities

Passenger cars provide the largest unit-demand pool for Automotive Exhaust Particulate Filter products, with incremental opportunity shifting from diesel DPF toward GPF and catalyzed GPF configurations used in gasoline and hybrid models. Light commercial vehicles require compact, durable systems capable of supporting frequent urban operation, delivery cycles, and repeated low-temperature engine use. Heavy commercial vehicles offer higher product value per vehicle and a stronger replacement opportunity because filters are larger, exhaust systems are more complex, annual mileage is higher, and fleet operators prioritize uptime and predictable maintenance. The aftermarket is therefore strategically important for vehicle-specific filters, certified direct-fit assemblies, higher-durability substrate upgrades, and products supported by reliable diagnostics and technical service. Suppliers that reduce regeneration frequency, cleaning requirements, fuel penalties, and installation complexity can address fleet total-cost-of-ownership concerns rather than competing solely on initial purchase price.

Regional Insights

Asia-Pacific is the largest demand and production center for Automotive Exhaust Particulate Filter products, supported by the region's concentration of vehicle manufacturing, large gasoline and diesel fleets, and continued implementation of stricter emission requirements. China combines extensive automotive production with established domestic capabilities in ceramic substrates, catalyst coatings, and integrated aftertreatment systems. Rapid vehicle electrification moderates the long-term addressable market for exhaust filters in Chinese passenger cars, but hybrid vehicles, commercial vehicles, replacement demand, and exports continue to support the regional supply chain. India and other developing Asian automotive markets provide additional opportunities as vehicle output increases and advanced emission-control requirements become more deeply embedded in new platforms.

Europe remains a mature and technology-intensive market, characterized by demanding real-driving compliance, durability expectations, advanced GPF penetration, and strong capabilities in integrated aftertreatment engineering. North America has an important position in heavy commercial vehicles, diesel replacement products, and systems designed for long useful-life requirements. Emerging markets in Latin America, the Middle East, and parts of Southeast Asia offer longer-term potential, although adoption depends on emission-standard enforcement, fuel and lubricant quality, vehicle affordability, and the development of qualified maintenance channels.

Competitive Landscape Analysis

The Automotive Exhaust Particulate Filter competitive landscape is structured across several interdependent supplier groups rather than a single homogeneous market. Corning Incorporated, NGK INSULATORS, LTD., IBIDEN CO., LTD., and Shandong AOFU Environmental Technology Co., Ltd. compete primarily through ceramic-material formulation, honeycomb design, filtration performance, thermal durability, and global or regional substrate capacity. FORVIA SE, Tenneco Inc., Cummins Inc., Purem GmbH, and BOSAL International N.V. emphasize system engineering, canning, packaging, thermal management, vehicle integration, and access to original-equipment programs. BASF SE, Umicore NV, Sinocat Environmental Technology Co., Ltd., and Anhui ActBlue Environmental Protection Co., Ltd. strengthen their positions through catalyst coating and multifunctional configurations that combine particulate filtration with the treatment of gaseous pollutants. Dinex A/S, HJS Emission Technology GmbH & Co. KG, Nett Technologies Inc., Roadwarrior Inc., and EHC Teknik AB have stronger exposure to commercial vehicles, retrofit systems, vehicle-specific replacement filters, and regional aftermarket demand. Competition at the original-equipment level is relatively concentrated because technical qualification, durability validation, production consistency, and vehicle-platform integration create high entry barriers. The replacement market is more fragmented and price-sensitive, although certification, correct backpressure, substrate quality, and system compatibility remain important differentiators. Strategic priorities increasingly include GPF development, integrated catalyst-filter functions, regional manufacturing, commercial-vehicle durability, aftermarket coverage, and the reallocation of investment toward hybrid and long-lived internal-combustion platforms.

Report Scope

This report studies the global Automotive Exhaust Particulate Filter production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Exhaust Particulate Filter and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Exhaust Particulate Filter that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Exhaust Particulate Filter total production and demand, 2021-2032, (K Units)

Global Automotive Exhaust Particulate Filter total production value, 2021-2032, (USD Million)

Global Automotive Exhaust Particulate Filter production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automotive Exhaust Particulate Filter consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automotive Exhaust Particulate Filter domestic production, consumption, key domestic manufacturers and share

Global Automotive Exhaust Particulate Filter production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automotive Exhaust Particulate Filter production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive Exhaust Particulate Filter production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive Exhaust Particulate Filter

market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Corning Incorporated, NGK INSULATORS, LTD., IBIDEN CO., LTD., FORVIA SE, Tenneco Inc., Cummins Inc., Purem by Eberspächer, Umicore NV, Dinex A/S, BOSAL International N.V., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive Exhaust Particulate Filter market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Exhaust Particulate Filter Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Automotive Exhaust Particulate Filter Market, Segmentation by Type:

DPF(Diesel Particulate Filter)

GPF(Gasoline Particulate Filter)

Global Automotive Exhaust Particulate Filter Market, Segmentation by Filter Diameter Types:

Small Diameter (<150 mm)

Medium Diameter (150–250 mm)

Large Diameter (>250 mm)

Global Automotive Exhaust Particulate Filter Market, Segmentation by Filter Substrate Material Types:

Cordierite Particulate Filters

Silicon Carbide Particulate Filters

Aluminum Titanate Particulate Filters

Others

Global Automotive Exhaust Particulate Filter Market, Segmentation by Application:

Passenger Cars

Light Commercial Vehicles (Vans, Pickups, and Light Trucks)

Heavy Commercial Vehicles (Heavy Trucks and Buses)

Companies Profiled:

Corning Incorporated

NGK INSULATORS, LTD.

IBIDEN CO., LTD.

FORVIA SE

Tenneco Inc.

Cummins Inc.

Purem by Eberspächer

Umicore NV

Dinex A/S

BOSAL International N.V.

HJS Emission Technology GmbH & Co. KG

Anhui ActBlue Environmental Protection Co., Ltd.

Sinocat Environmental Technology Co., Ltd.

Shandong AOFU Environmental Technology Co., Ltd.

Kailong High Technology Co., Ltd

Key Questions Answered

1. How big is the global Automotive Exhaust Particulate Filter market?
2. What is the demand of the global Automotive Exhaust Particulate Filter market?
3. What is the year over year growth of the global Automotive Exhaust Particulate Filter market?
4. What is the total value of the global Automotive Exhaust Particulate Filter market?
5. Who are the Major Players in the global Automotive Exhaust Particulate Filter market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Automotive Exhaust Particulate Filter Introduction
- 1.2 World Automotive Exhaust Particulate Filter Supply & Forecast
 - 1.2.1 World Automotive Exhaust Particulate Filter Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Automotive Exhaust Particulate Filter Production (2021-2032)
 - 1.2.3 World Automotive Exhaust Particulate Filter Pricing Trends (2021-2032)
- 1.3 World Automotive Exhaust Particulate Filter Production by Region (Based on Production Site)
 - 1.3.1 World Automotive Exhaust Particulate Filter Production Value by Region (2021-2032)
 - 1.3.2 World Automotive Exhaust Particulate Filter Production by Region (2021-2032)
 - 1.3.3 World Automotive Exhaust Particulate Filter Average Price by Region (2021-2032)
 - 1.3.4 North America Automotive Exhaust Particulate Filter Production (2021-2032)
 - 1.3.5 Europe Automotive Exhaust Particulate Filter Production (2021-2032)
 - 1.3.6 China Automotive Exhaust Particulate Filter Production (2021-2032)
 - 1.3.7 Japan Automotive Exhaust Particulate Filter Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Automotive Exhaust Particulate Filter Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Automotive Exhaust Particulate Filter Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Automotive Exhaust Particulate Filter Demand (2021-2032)
- 2.2 World Automotive Exhaust Particulate Filter Consumption by Region
 - 2.2.1 World Automotive Exhaust Particulate Filter Consumption by Region (2021-2026)
 - 2.2.2 World Automotive Exhaust Particulate Filter Consumption Forecast by Region (2027-2032)
- 2.3 United States Automotive Exhaust Particulate Filter Consumption (2021-2032)
- 2.4 China Automotive Exhaust Particulate Filter Consumption (2021-2032)
- 2.5 Europe Automotive Exhaust Particulate Filter Consumption (2021-2032)
- 2.6 Japan Automotive Exhaust Particulate Filter Consumption (2021-2032)
- 2.7 South Korea Automotive Exhaust Particulate Filter Consumption (2021-2032)

2.8 ASEAN Automotive Exhaust Particulate Filter Consumption (2021-2032)

2.9 India Automotive Exhaust Particulate Filter Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Automotive Exhaust Particulate Filter Production Value by Manufacturer (2021-2026)

3.2 World Automotive Exhaust Particulate Filter Production by Manufacturer (2021-2026)

3.3 World Automotive Exhaust Particulate Filter Average Price by Manufacturer (2021-2026)

3.4 Automotive Exhaust Particulate Filter Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Automotive Exhaust Particulate Filter Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Automotive Exhaust Particulate Filter in 2025

3.5.3 Global Concentration Ratios (CR8) for Automotive Exhaust Particulate Filter in 2025

3.6 Automotive Exhaust Particulate Filter Market: Overall Company Footprint Analysis

3.6.1 Automotive Exhaust Particulate Filter Market: Region Footprint

3.6.2 Automotive Exhaust Particulate Filter Market: Company Product Type Footprint

3.6.3 Automotive Exhaust Particulate Filter Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Automotive Exhaust Particulate Filter Production Value Comparison

4.1.1 United States VS China: Automotive Exhaust Particulate Filter Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Automotive Exhaust Particulate Filter Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Automotive Exhaust Particulate Filter Production Comparison

4.2.1 United States VS China: Automotive Exhaust Particulate Filter Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Automotive Exhaust Particulate Filter Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Automotive Exhaust Particulate Filter Consumption Comparison

4.3.1 United States VS China: Automotive Exhaust Particulate Filter Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Automotive Exhaust Particulate Filter Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Automotive Exhaust Particulate Filter Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Automotive Exhaust Particulate Filter Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Automotive Exhaust Particulate Filter Production Value (2021-2026)

4.4.3 United States Based Manufacturers Automotive Exhaust Particulate Filter Production (2021-2026)

4.5 China Based Automotive Exhaust Particulate Filter Manufacturers and Market Share

4.5.1 China Based Automotive Exhaust Particulate Filter Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Automotive Exhaust Particulate Filter Production Value (2021-2026)

4.5.3 China Based Manufacturers Automotive Exhaust Particulate Filter Production (2021-2026)

4.6 Rest of World Based Automotive Exhaust Particulate Filter Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Automotive Exhaust Particulate Filter Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Automotive Exhaust Particulate Filter Market Size Overview by Type: 2021

VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 DPF(Diesel Particulate Filter)

5.2.2 GPF(Gasoline Particulate Filter)

5.3 Market Segment by Type

5.3.1 World Automotive Exhaust Particulate Filter Production by Type (2021-2032)

5.3.2 World Automotive Exhaust Particulate Filter Production Value by Type (2021-2032)

5.3.3 World Automotive Exhaust Particulate Filter Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY FILTER DIAMETER TYPES

6.1 World Automotive Exhaust Particulate Filter Market Size Overview by Filter Diameter Types: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Filter Diameter Types

6.2.1 Small Diameter (<150 mm)

6.2.2 Medium Diameter (150–250 mm)

6.2.3 Large Diameter (>250 mm)

6.3 Market Segment by Filter Diameter Types

6.3.1 World Automotive Exhaust Particulate Filter Production by Filter Diameter Types (2021-2032)

6.3.2 World Automotive Exhaust Particulate Filter Production Value by Filter Diameter Types (2021-2032)

6.3.3 World Automotive Exhaust Particulate Filter Average Price by Filter Diameter Types (2021-2032)

7 MARKET ANALYSIS BY FILTER SUBSTRATE MATERIAL TYPES

7.1 World Automotive Exhaust Particulate Filter Market Size Overview by Filter Substrate Material Types: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Filter Substrate Material Types

7.2.1 Cordierite Particulate Filters

7.2.2 Silicon Carbide Particulate Filters

7.2.3 Aluminum Titanate Particulate Filters

7.2.4 Others

7.3 Market Segment by Filter Substrate Material Types

7.3.1 World Automotive Exhaust Particulate Filter Production by Filter Substrate Material Types (2021-2032)

7.3.2 World Automotive Exhaust Particulate Filter Production Value by Filter Substrate

Material Types (2021-2032)

7.3.3 World Automotive Exhaust Particulate Filter Average Price by Filter Substrate

Material Types (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Automotive Exhaust Particulate Filter Market Size Overview by Application:
2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Passenger Cars

8.2.2 Light Commercial Vehicles (Vans, Pickups, and Light Trucks)

8.2.3 Heavy Commercial Vehicles (Heavy Trucks and Buses)

8.3 Market Segment by Application

8.3.1 World Automotive Exhaust Particulate Filter Production by Application
(2021-2032)

8.3.2 World Automotive Exhaust Particulate Filter Production Value by Application
(2021-2032)

8.3.3 World Automotive Exhaust Particulate Filter Average Price by Application
(2021-2032)

9 COMPANY PROFILES

9.1 Corning Incorporated

9.1.1 Corning Incorporated Details

9.1.2 Corning Incorporated Major Business

9.1.3 Corning Incorporated Automotive Exhaust Particulate Filter Product and Services

9.1.4 Corning Incorporated Automotive Exhaust Particulate Filter Production, Price,
Value, Gross Margin and Market Share (2021-2026)

9.1.5 Corning Incorporated Recent Developments/Updates

9.1.6 Corning Incorporated Competitive Strengths & Weaknesses

9.2 NGK INSULATORS, LTD.

9.2.1 NGK INSULATORS, LTD. Details

9.2.2 NGK INSULATORS, LTD. Major Business

9.2.3 NGK INSULATORS, LTD. Automotive Exhaust Particulate Filter Product and
Services

9.2.4 NGK INSULATORS, LTD. Automotive Exhaust Particulate Filter Production,
Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 NGK INSULATORS, LTD. Recent Developments/Updates

9.2.6 NGK INSULATORS, LTD. Competitive Strengths & Weaknesses

9.3 IBIDEN CO., LTD.

9.3.1 IBIDEN CO., LTD. Details

9.3.2 IBIDEN CO., LTD. Major Business

9.3.3 IBIDEN CO., LTD. Automotive Exhaust Particulate Filter Product and Services

9.3.4 IBIDEN CO., LTD. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 IBIDEN CO., LTD. Recent Developments/Updates

9.3.6 IBIDEN CO., LTD. Competitive Strengths & Weaknesses

9.4 FORVIA SE

9.4.1 FORVIA SE Details

9.4.2 FORVIA SE Major Business

9.4.3 FORVIA SE Automotive Exhaust Particulate Filter Product and Services

9.4.4 FORVIA SE Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 FORVIA SE Recent Developments/Updates

9.4.6 FORVIA SE Competitive Strengths & Weaknesses

9.5 Tenneco Inc.

9.5.1 Tenneco Inc. Details

9.5.2 Tenneco Inc. Major Business

9.5.3 Tenneco Inc. Automotive Exhaust Particulate Filter Product and Services

9.5.4 Tenneco Inc. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Tenneco Inc. Recent Developments/Updates

9.5.6 Tenneco Inc. Competitive Strengths & Weaknesses

9.6 Cummins Inc.

9.6.1 Cummins Inc. Details

9.6.2 Cummins Inc. Major Business

9.6.3 Cummins Inc. Automotive Exhaust Particulate Filter Product and Services

9.6.4 Cummins Inc. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Cummins Inc. Recent Developments/Updates

9.6.6 Cummins Inc. Competitive Strengths & Weaknesses

9.7 Purem by Eberspächer

9.7.1 Purem by Eberspächer Details

9.7.2 Purem by Eberspächer Major Business

9.7.3 Purem by Eberspächer Automotive Exhaust Particulate Filter Product and Services

9.7.4 Purem by Eberspächer Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Purem by Eberspächer Recent Developments/Updates

9.7.6 Purem by Eberspächer Competitive Strengths & Weaknesses

9.8 Umicore NV

9.8.1 Umicore NV Details

9.8.2 Umicore NV Major Business

9.8.3 Umicore NV Automotive Exhaust Particulate Filter Product and Services

9.8.4 Umicore NV Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Umicore NV Recent Developments/Updates

9.8.6 Umicore NV Competitive Strengths & Weaknesses

9.9 Dinex A/S

9.9.1 Dinex A/S Details

9.9.2 Dinex A/S Major Business

9.9.3 Dinex A/S Automotive Exhaust Particulate Filter Product and Services

9.9.4 Dinex A/S Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Dinex A/S Recent Developments/Updates

9.9.6 Dinex A/S Competitive Strengths & Weaknesses

9.10 BOSAL International N.V.

9.10.1 BOSAL International N.V. Details

9.10.2 BOSAL International N.V. Major Business

9.10.3 BOSAL International N.V. Automotive Exhaust Particulate Filter Product and Services

9.10.4 BOSAL International N.V. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 BOSAL International N.V. Recent Developments/Updates

9.10.6 BOSAL International N.V. Competitive Strengths & Weaknesses

9.11 HJS Emission Technology GmbH & Co. KG

9.11.1 HJS Emission Technology GmbH & Co. KG Details

9.11.2 HJS Emission Technology GmbH & Co. KG Major Business

9.11.3 HJS Emission Technology GmbH & Co. KG Automotive Exhaust Particulate Filter Product and Services

9.11.4 HJS Emission Technology GmbH & Co. KG Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 HJS Emission Technology GmbH & Co. KG Recent Developments/Updates

9.11.6 HJS Emission Technology GmbH & Co. KG Competitive Strengths & Weaknesses

9.12 Anhui ActBlue Environmental Protection Co., Ltd.

9.12.1 Anhui ActBlue Environmental Protection Co., Ltd. Details

- 9.12.2 Anhui ActBlue Environmental Protection Co., Ltd. Major Business
- 9.12.3 Anhui ActBlue Environmental Protection Co., Ltd. Automotive Exhaust Particulate Filter Product and Services
- 9.12.4 Anhui ActBlue Environmental Protection Co., Ltd. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.12.5 Anhui ActBlue Environmental Protection Co., Ltd. Recent Developments/Updates
- 9.12.6 Anhui ActBlue Environmental Protection Co., Ltd. Competitive Strengths & Weaknesses
- 9.13 Sinocat Environmental Technology Co., Ltd.
 - 9.13.1 Sinocat Environmental Technology Co., Ltd. Details
 - 9.13.2 Sinocat Environmental Technology Co., Ltd. Major Business
 - 9.13.3 Sinocat Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Product and Services
 - 9.13.4 Sinocat Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Sinocat Environmental Technology Co., Ltd. Recent Developments/Updates
 - 9.13.6 Sinocat Environmental Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.14 Shandong AOFU Environmental Technology Co., Ltd.
 - 9.14.1 Shandong AOFU Environmental Technology Co., Ltd. Details
 - 9.14.2 Shandong AOFU Environmental Technology Co., Ltd. Major Business
 - 9.14.3 Shandong AOFU Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Product and Services
 - 9.14.4 Shandong AOFU Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Shandong AOFU Environmental Technology Co., Ltd. Recent Developments/Updates
 - 9.14.6 Shandong AOFU Environmental Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.15 Kailong High Technology Co., Ltd
 - 9.15.1 Kailong High Technology Co., Ltd Details
 - 9.15.2 Kailong High Technology Co., Ltd Major Business
 - 9.15.3 Kailong High Technology Co., Ltd Automotive Exhaust Particulate Filter Product and Services
 - 9.15.4 Kailong High Technology Co., Ltd Automotive Exhaust Particulate Filter Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Kailong High Technology Co., Ltd Recent Developments/Updates
 - 9.15.6 Kailong High Technology Co., Ltd Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Automotive Exhaust Particulate Filter Industry Chain
- 10.2 Automotive Exhaust Particulate Filter Upstream Analysis
 - 10.2.1 Automotive Exhaust Particulate Filter Core Raw Materials
 - 10.2.2 Main Manufacturers of Automotive Exhaust Particulate Filter Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Automotive Exhaust Particulate Filter Production Mode
- 10.6 Automotive Exhaust Particulate Filter Procurement Model
- 10.7 Automotive Exhaust Particulate Filter Industry Sales Model and Sales Channels
 - 10.7.1 Automotive Exhaust Particulate Filter Sales Model
 - 10.7.2 Automotive Exhaust Particulate Filter Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Automotive Exhaust Particulate Filter Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Automotive Exhaust Particulate Filter Production Value by Region (2021-2026) & (USD Million)

Table 3. World Automotive Exhaust Particulate Filter Production Value by Region (2027-2032) & (USD Million)

Table 4. World Automotive Exhaust Particulate Filter Production Value Market Share by Region (2021-2026)

Table 5. World Automotive Exhaust Particulate Filter Production Value Market Share by Region (2027-2032)

Table 6. World Automotive Exhaust Particulate Filter Production by Region (2021-2026) & (K Units)

Table 7. World Automotive Exhaust Particulate Filter Production by Region (2027-2032) & (K Units)

Table 8. World Automotive Exhaust Particulate Filter Production Market Share by Region (2021-2026)

Table 9. World Automotive Exhaust Particulate Filter Production Market Share by Region (2027-2032)

Table 10. World Automotive Exhaust Particulate Filter Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Automotive Exhaust Particulate Filter Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Automotive Exhaust Particulate Filter Major Market Trends

Table 13. World Automotive Exhaust Particulate Filter Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Automotive Exhaust Particulate Filter Consumption by Region (2021-2026) & (K Units)

Table 15. World Automotive Exhaust Particulate Filter Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Automotive Exhaust Particulate Filter Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Automotive Exhaust Particulate Filter Producers in 2025

Table 18. World Automotive Exhaust Particulate Filter Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Automotive Exhaust Particulate Filter Producers in 2025

Table 20. World Automotive Exhaust Particulate Filter Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Automotive Exhaust Particulate Filter Company Evaluation Quadrant

Table 22. World Automotive Exhaust Particulate Filter Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Automotive Exhaust Particulate Filter Production Site of Key Manufacturer

Table 24. Automotive Exhaust Particulate Filter Market: Company Product Type Footprint

Table 25. Automotive Exhaust Particulate Filter Market: Company Product Application Footprint

Table 26. Automotive Exhaust Particulate Filter Competitive Factors

Table 27. Automotive Exhaust Particulate Filter New Entrant and Capacity Expansion Plans

Table 28. Automotive Exhaust Particulate Filter Mergers & Acquisitions Activity

Table 29. United States VS China Automotive Exhaust Particulate Filter Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Automotive Exhaust Particulate Filter Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Automotive Exhaust Particulate Filter Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Automotive Exhaust Particulate Filter Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Automotive Exhaust Particulate Filter Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Automotive Exhaust Particulate Filter Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Automotive Exhaust Particulate Filter Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Automotive Exhaust Particulate Filter Production Market Share (2021-2026)

Table 37. China Based Automotive Exhaust Particulate Filter Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Automotive Exhaust Particulate Filter Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Automotive Exhaust Particulate Filter Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Automotive Exhaust Particulate Filter Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Automotive Exhaust Particulate Filter Production Market Share (2021-2026)

Table 42. Rest of World Based Automotive Exhaust Particulate Filter Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production Market Share (2021-2026)

Table 47. World Automotive Exhaust Particulate Filter Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Automotive Exhaust Particulate Filter Production by Type (2021-2026) & (K Units)

Table 49. World Automotive Exhaust Particulate Filter Production by Type (2027-2032) & (K Units)

Table 50. World Automotive Exhaust Particulate Filter Production Value by Type (2021-2026) & (USD Million)

Table 51. World Automotive Exhaust Particulate Filter Production Value by Type (2027-2032) & (USD Million)

Table 52. World Automotive Exhaust Particulate Filter Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Automotive Exhaust Particulate Filter Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Automotive Exhaust Particulate Filter Production Value by Filter Diameter Types, (USD Million), 2021 & 2025 & 2032

Table 55. World Automotive Exhaust Particulate Filter Production by Filter Diameter Types (2021-2026) & (K Units)

Table 56. World Automotive Exhaust Particulate Filter Production by Filter Diameter Types (2027-2032) & (K Units)

Table 57. World Automotive Exhaust Particulate Filter Production Value by Filter Diameter Types (2021-2026) & (USD Million)

Table 58. World Automotive Exhaust Particulate Filter Production Value by Filter Diameter Types (2027-2032) & (USD Million)

Table 59. World Automotive Exhaust Particulate Filter Average Price by Filter Diameter

Types (2021-2026) & (US\$/Unit)

Table 60. World Automotive Exhaust Particulate Filter Average Price by Filter Diameter Types (2027-2032) & (US\$/Unit)

Table 61. World Automotive Exhaust Particulate Filter Production Value by Filter Substrate Material Types, (USD Million), 2021 & 2025 & 2032

Table 62. World Automotive Exhaust Particulate Filter Production by Filter Substrate Material Types (2021-2026) & (K Units)

Table 63. World Automotive Exhaust Particulate Filter Production by Filter Substrate Material Types (2027-2032) & (K Units)

Table 64. World Automotive Exhaust Particulate Filter Production Value by Filter Substrate Material Types (2021-2026) & (USD Million)

Table 65. World Automotive Exhaust Particulate Filter Production Value by Filter Substrate Material Types (2027-2032) & (USD Million)

Table 66. World Automotive Exhaust Particulate Filter Average Price by Filter Substrate Material Types (2021-2026) & (US\$/Unit)

Table 67. World Automotive Exhaust Particulate Filter Average Price by Filter Substrate Material Types (2027-2032) & (US\$/Unit)

Table 68. World Automotive Exhaust Particulate Filter Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Automotive Exhaust Particulate Filter Production by Application (2021-2026) & (K Units)

Table 70. World Automotive Exhaust Particulate Filter Production by Application (2027-2032) & (K Units)

Table 71. World Automotive Exhaust Particulate Filter Production Value by Application (2021-2026) & (USD Million)

Table 72. World Automotive Exhaust Particulate Filter Production Value by Application (2027-2032) & (USD Million)

Table 73. World Automotive Exhaust Particulate Filter Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Automotive Exhaust Particulate Filter Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Corning Incorporated Basic Information, Manufacturing Base and Competitors

Table 76. Corning Incorporated Major Business

Table 77. Corning Incorporated Automotive Exhaust Particulate Filter Product and Services

Table 78. Corning Incorporated Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Corning Incorporated Recent Developments/Updates

Table 80. Corning Incorporated Competitive Strengths & Weaknesses

Table 81. NGK INSULATORS, LTD. Basic Information, Manufacturing Base and Competitors

Table 82. NGK INSULATORS, LTD. Major Business

Table 83. NGK INSULATORS, LTD. Automotive Exhaust Particulate Filter Product and Services

Table 84. NGK INSULATORS, LTD. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. NGK INSULATORS, LTD. Recent Developments/Updates

Table 86. NGK INSULATORS, LTD. Competitive Strengths & Weaknesses

Table 87. IBIDEN CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 88. IBIDEN CO., LTD. Major Business

Table 89. IBIDEN CO., LTD. Automotive Exhaust Particulate Filter Product and Services

Table 90. IBIDEN CO., LTD. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. IBIDEN CO., LTD. Recent Developments/Updates

Table 92. IBIDEN CO., LTD. Competitive Strengths & Weaknesses

Table 93. FORVIA SE Basic Information, Manufacturing Base and Competitors

Table 94. FORVIA SE Major Business

Table 95. FORVIA SE Automotive Exhaust Particulate Filter Product and Services

Table 96. FORVIA SE Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. FORVIA SE Recent Developments/Updates

Table 98. FORVIA SE Competitive Strengths & Weaknesses

Table 99. Tenneco Inc. Basic Information, Manufacturing Base and Competitors

Table 100. Tenneco Inc. Major Business

Table 101. Tenneco Inc. Automotive Exhaust Particulate Filter Product and Services

Table 102. Tenneco Inc. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Tenneco Inc. Recent Developments/Updates

Table 104. Tenneco Inc. Competitive Strengths & Weaknesses

Table 105. Cummins Inc. Basic Information, Manufacturing Base and Competitors

Table 106. Cummins Inc. Major Business

Table 107. Cummins Inc. Automotive Exhaust Particulate Filter Product and Services

Table 108. Cummins Inc. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Cummins Inc. Recent Developments/Updates

Table 110. Cummins Inc. Competitive Strengths & Weaknesses

Table 111. Purem by Eberspächer Basic Information, Manufacturing Base and Competitors

Table 112. Purem by Eberspächer Major Business

Table 113. Purem by Eberspächer Automotive Exhaust Particulate Filter Product and Services

Table 114. Purem by Eberspächer Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Purem by Eberspächer Recent Developments/Updates

Table 116. Purem by Eberspächer Competitive Strengths & Weaknesses

Table 117. Umicore NV Basic Information, Manufacturing Base and Competitors

Table 118. Umicore NV Major Business

Table 119. Umicore NV Automotive Exhaust Particulate Filter Product and Services

Table 120. Umicore NV Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Umicore NV Recent Developments/Updates

Table 122. Umicore NV Competitive Strengths & Weaknesses

Table 123. Dinex A/S Basic Information, Manufacturing Base and Competitors

Table 124. Dinex A/S Major Business

Table 125. Dinex A/S Automotive Exhaust Particulate Filter Product and Services

Table 126. Dinex A/S Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Dinex A/S Recent Developments/Updates

Table 128. Dinex A/S Competitive Strengths & Weaknesses

Table 129. BOSAL International N.V. Basic Information, Manufacturing Base and Competitors

Table 130. BOSAL International N.V. Major Business

Table 131. BOSAL International N.V. Automotive Exhaust Particulate Filter Product and Services

Table 132. BOSAL International N.V. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133.	BOSAL International N.V. Recent Developments/Updates
Table 134.	BOSAL International N.V. Competitive Strengths & Weaknesses
Table 135.	HJS Emission Technology GmbH & Co. KG Basic Information, Manufacturing Base and Competitors
Table 136.	HJS Emission Technology GmbH & Co. KG Major Business
Table 137.	HJS Emission Technology GmbH & Co. KG Automotive Exhaust Particulate Filter Product and Services
Table 138.	HJS Emission Technology GmbH & Co. KG Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139.	HJS Emission Technology GmbH & Co. KG Recent Developments/Updates
Table 140.	HJS Emission Technology GmbH & Co. KG Competitive Strengths & Weaknesses
Table 141.	Anhui ActBlue Environmental Protection Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 142.	Anhui ActBlue Environmental Protection Co., Ltd. Major Business
Table 143.	Anhui ActBlue Environmental Protection Co., Ltd. Automotive Exhaust Particulate Filter Product and Services
Table 144.	Anhui ActBlue Environmental Protection Co., Ltd. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145.	Anhui ActBlue Environmental Protection Co., Ltd. Recent Developments/Updates
Table 146.	Anhui ActBlue Environmental Protection Co., Ltd. Competitive Strengths & Weaknesses
Table 147.	Sinocat Environmental Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 148.	Sinocat Environmental Technology Co., Ltd. Major Business
Table 149.	Sinocat Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Product and Services
Table 150.	Sinocat Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151.	Sinocat Environmental Technology Co., Ltd. Recent Developments/Updates
Table 152.	Sinocat Environmental Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 153.	Shandong AOFU Environmental Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 154.	Shandong AOFU Environmental Technology Co., Ltd. Major Business

Table 155. Shandong AOFU Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Product and Services

Table 156. Shandong AOFU Environmental Technology Co., Ltd. Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Shandong AOFU Environmental Technology Co., Ltd. Recent Developments/Updates

Table 158. Shandong AOFU Environmental Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 159. Kailong High Technology Co., Ltd Basic Information, Manufacturing Base and Competitors

Table 160. Kailong High Technology Co., Ltd Major Business

Table 161. Kailong High Technology Co., Ltd Automotive Exhaust Particulate Filter Product and Services

Table 162. Kailong High Technology Co., Ltd Automotive Exhaust Particulate Filter Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Kailong High Technology Co., Ltd Recent Developments/Updates

Table 164. Kailong High Technology Co., Ltd Competitive Strengths & Weaknesses

Table 165. Global Key Players of Automotive Exhaust Particulate Filter Upstream (Raw Materials)

Table 166. Global Automotive Exhaust Particulate Filter Typical Customers

Table 167. Automotive Exhaust Particulate Filter Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Automotive Exhaust Particulate Filter Picture

Figure 2. World Automotive Exhaust Particulate Filter Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Automotive Exhaust Particulate Filter Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Automotive Exhaust Particulate Filter Production (2021-2032) & (K Units)

Figure 5. World Automotive Exhaust Particulate Filter Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Automotive Exhaust Particulate Filter Production Value Market Share by Region (2021-2032)

Figure 7. World Automotive Exhaust Particulate Filter Production Market Share by Region (2021-2032)

Figure 8. North America Automotive Exhaust Particulate Filter Production (2021-2032) & (K Units)

Figure 9. Europe Automotive Exhaust Particulate Filter Production (2021-2032) & (K Units)

Figure 10. China Automotive Exhaust Particulate Filter Production (2021-2032) & (K Units)

Figure 11. Japan Automotive Exhaust Particulate Filter Production (2021-2032) & (K Units)

Figure 12. Automotive Exhaust Particulate Filter Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 15. World Automotive Exhaust Particulate Filter Consumption Market Share by Region (2021-2032)

Figure 16. United States Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 17. China Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 18. Europe Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 19. Japan Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 20. South Korea Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 22. India Automotive Exhaust Particulate Filter Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Automotive Exhaust Particulate Filter by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Automotive Exhaust Particulate Filter Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Automotive Exhaust Particulate Filter Markets in 2025

Figure 26. United States VS China: Automotive Exhaust Particulate Filter Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Automotive Exhaust Particulate Filter Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Automotive Exhaust Particulate Filter Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Automotive Exhaust Particulate Filter Production Market Share 2025

Figure 30. China Based Manufacturers Automotive Exhaust Particulate Filter Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Automotive Exhaust Particulate Filter Production Market Share 2025

Figure 32. World Automotive Exhaust Particulate Filter Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Automotive Exhaust Particulate Filter Production Value Market Share by Type in 2025

Figure 34. DPF(Diesel Particulate Filter)

Figure 35. GPF(Gasoline Particulate Filter)

Figure 36. World Automotive Exhaust Particulate Filter Production Market Share by Type (2021-2032)

Figure 37. World Automotive Exhaust Particulate Filter Production Value Market Share by Type (2021-2032)

Figure 38. World Automotive Exhaust Particulate Filter Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. World Automotive Exhaust Particulate Filter Production Value by Filter Diameter Types, (USD Million), 2021 & 2025 & 2032

Figure 40. World Automotive Exhaust Particulate Filter Production Value Market Share

by Filter Diameter Types in 2025

Figure 41. Small Diameter (<150 mm)

Figure 42. Medium Diameter (150–250 mm)

Figure 43. Large Diameter (>250 mm)

Figure 44. World Automotive Exhaust Particulate Filter Production Market Share by Filter Diameter Types (2021-2032)

Figure 45. World Automotive Exhaust Particulate Filter Production Value Market Share by Filter Diameter Types (2021-2032)

Figure 46. World Automotive Exhaust Particulate Filter Average Price by Filter Diameter Types (2021-2032) & (US\$/Unit)

Figure 47. World Automotive Exhaust Particulate Filter Production Value by Filter Substrate Material Types, (USD Million), 2021 & 2025 & 2032

Figure 48. World Automotive Exhaust Particulate Filter Production Value Market Share by Filter Substrate Material Types in 2025

Figure 49. Cordierite Particulate Filters

Figure 50. Silicon Carbide Particulate Filters

Figure 51. Aluminum Titanate Particulate Filters

Figure 52. Others

Figure 53. World Automotive Exhaust Particulate Filter Production Market Share by Filter Substrate Material Types (2021-2032)

Figure 54. World Automotive Exhaust Particulate Filter Production Value Market Share by Filter Substrate Material Types (2021-2032)

Figure 55. World Automotive Exhaust Particulate Filter Average Price by Filter Substrate Material Types (2021-2032) & (US\$/Unit)

Figure 56. World Automotive Exhaust Particulate Filter Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Automotive Exhaust Particulate Filter Production Value Market Share by Application in 2025

Figure 58. Passenger Cars

Figure 59. Light Commercial Vehicles (Vans, Pickups, and Light Trucks)

Figure 60. Heavy Commercial Vehicles (Heavy Trucks and Buses)

Figure 61. World Automotive Exhaust Particulate Filter Production Market Share by Application (2021-2032)

Figure 62. World Automotive Exhaust Particulate Filter Production Value Market Share by Application (2021-2032)

Figure 63. World Automotive Exhaust Particulate Filter Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. Automotive Exhaust Particulate Filter Industry Chain

Figure 65. Automotive Exhaust Particulate Filter Procurement Model

Figure 66. Automotive Exhaust Particulate Filter Sales Model

Figure 67. Automotive Exhaust Particulate Filter Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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