

Global On-board Emissions Measurement System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global On-board Emissions Measurement System market size is expected to reach \$ 232 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

An On-board Emissions Measurement System, commonly known as a Portable Emissions Measurement System (PEMS), is a mobile instrumentation platform used to quantify pollutant emissions from vehicles and engines during real-world operation. Unlike laboratory dynamometer testing, PEMS provides a 'Real Driving Emissions' (RDE) profile, capturing how a vehicle performs under varying payloads, ambient temperatures, and traffic conditions. In 2026, the technology has bifurcated into two primary forms: Hardware-based PEMS, which uses physical gas analyzers (NDIR, FTIR, and Chemiluminescence) and flow meters attached to the exhaust, and Predictive PEMS (virtual sensors), which uses AI algorithms to estimate emissions based on engine ECU data and digital twins. These systems are now mandatory for regulatory certification in major markets (Euro 6d/7 and EPA Tier 3), ensuring that the 'emissions gap' between the lab and the road is permanently closed for both passenger cars and heavy-duty industrial machinery.

In 2025, global On-board Emissions Measurement System, production reached approximately 57.02 k units, with an average global market price of around US\$ 2732 per unit. And global On-board Emissions Measurement System, production capacity reached approximately 80 k units. The average gross margin in this industry reached 24.79%.

The upstream supply chain for PEMS is a high-precision sector involving the manufacturing of sensitive gas detection hardware and high-speed data acquisition

modules. The production of these systems requires specialized NDIR (Non-Dispersive Infrared) sensors for CO_2 , electrochemical cells for NO_x , and flame ionization detectors (FID) for hydrocarbons. Additionally, the move toward 'Virtual PEMS' has increased the importance of high-performance automotive-grade microcontrollers and edge-computing hardware. Key upstream suppliers include Hamamatsu Photonics (providing infrared detectors and light sources), Horiba (supplying high-precision gas analyzer cores), and Siemens Energy (a leader in the digital 'Predictive PEMS' space, providing the algorithmic models used for virtual monitoring). These suppliers provide the foundational accuracy required for a system to be 'regulatory-grade' and capable of surviving the vibration and thermal stress of on-road use. The downstream segment encompasses the entities that utilize PEMS for compliance, research, and fleet optimization. At this stage, value is generated through the verification of environmental standards and the reduction of legal risk for manufacturers. Significant downstream customers and high-volume institutional users include Toyota Motor Corporation and Volkswagen Group (using PEMS for RDE certification of new vehicle models), Cummins (deploying systems to monitor heavy-duty diesel and hydrogen engine performance), and the U.S. Environmental Protection Agency (EPA) (utilizing PEMS for market surveillance and enforcement of the Clean Air Act). As of 2026, a growing downstream niche is emerging in the Construction & Mining sector, where operators like Caterpillar use PEMS data to optimize fuel efficiency and report carbon footprints for ESG (Environmental, Social, and Governance) compliance in large-scale infrastructure projects.

This report studies the global On-board Emissions Measurement System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for On-board Emissions Measurement System 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 On-board Emissions Measurement System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global On-board Emissions Measurement System total production and demand, 2021-2032, (Units)

Global On-board Emissions Measurement System total production value, 2021-2032, (USD Million)

Global On-board Emissions Measurement System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production

site)

Global On-board Emissions Measurement System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: On-board Emissions Measurement System domestic production, consumption, key domestic manufacturers and share

Global On-board Emissions Measurement System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global On-board Emissions Measurement System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global On-board Emissions Measurement System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global On-board Emissions Measurement System 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 Dekra, GlobalMRV, Horiba, Sensors, AVL, Testo, Cubic Instruments, 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 On-board Emissions Measurement System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 On-board Emissions Measurement System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global On-board Emissions Measurement System Market, Segmentation by Type:

LDV Type

HDV Type

Global On-board Emissions Measurement System Market, Segmentation by Measurement Principle:

Non-Dispersive Infrared

Chemiluminescence Detection

Others

Global On-board Emissions Measurement System Market, Segmentation by Power Supply:

Vehicle Power

External Battery

Others

Global On-board Emissions Measurement System Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

Dekra

GlobalMRV

Horiba

Sensors

AVL

Testo

Cubic Instruments

Key Questions Answered:

1. How big is the global On-board Emissions Measurement System market?
2. What is the demand of the global On-board Emissions Measurement System market?
3. What is the year over year growth of the global On-board Emissions Measurement System market?
4. What is the production and production value of the global On-board Emissions Measurement System market?
5. Who are the key producers in the global On-board Emissions Measurement System market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 On-board Emissions Measurement System Introduction
- 1.2 World On-board Emissions Measurement System Supply & Forecast
 - 1.2.1 World On-board Emissions Measurement System Production Value (2021 & 2025 & 2032)
 - 1.2.2 World On-board Emissions Measurement System Production (2021-2032)
 - 1.2.3 World On-board Emissions Measurement System Pricing Trends (2021-2032)
- 1.3 World On-board Emissions Measurement System Production by Region (Based on Production Site)
 - 1.3.1 World On-board Emissions Measurement System Production Value by Region (2021-2032)
 - 1.3.2 World On-board Emissions Measurement System Production by Region (2021-2032)
 - 1.3.3 World On-board Emissions Measurement System Average Price by Region (2021-2032)
 - 1.3.4 North America On-board Emissions Measurement System Production (2021-2032)
 - 1.3.5 Europe On-board Emissions Measurement System Production (2021-2032)
 - 1.3.6 China On-board Emissions Measurement System Production (2021-2032)
 - 1.3.7 Japan On-board Emissions Measurement System Production (2021-2032)
 - 1.3.8 South Korea On-board Emissions Measurement System Production (2021-2032)
 - 1.3.9 India On-board Emissions Measurement System Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 On-board Emissions Measurement System Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 On-board Emissions Measurement System Major Market Trends

2 DEMAND SUMMARY

- 2.1 World On-board Emissions Measurement System Demand (2021-2032)
- 2.2 World On-board Emissions Measurement System Consumption by Region
 - 2.2.1 World On-board Emissions Measurement System Consumption by Region (2021-2026)
 - 2.2.2 World On-board Emissions Measurement System Consumption Forecast by Region (2027-2032)
- 2.3 United States On-board Emissions Measurement System Consumption (2021-2032)

- 2.4 China On-board Emissions Measurement System Consumption (2021-2032)
- 2.5 Europe On-board Emissions Measurement System Consumption (2021-2032)
- 2.6 Japan On-board Emissions Measurement System Consumption (2021-2032)
- 2.7 South Korea On-board Emissions Measurement System Consumption (2021-2032)
- 2.8 ASEAN On-board Emissions Measurement System Consumption (2021-2032)
- 2.9 India On-board Emissions Measurement System Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World On-board Emissions Measurement System Production Value by Manufacturer (2021-2026)
- 3.2 World On-board Emissions Measurement System Production by Manufacturer (2021-2026)
- 3.3 World On-board Emissions Measurement System Average Price by Manufacturer (2021-2026)
- 3.4 On-board Emissions Measurement System Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global On-board Emissions Measurement System Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for On-board Emissions Measurement System in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for On-board Emissions Measurement System in 2025
- 3.6 On-board Emissions Measurement System Market: Overall Company Footprint Analysis
 - 3.6.1 On-board Emissions Measurement System Market: Region Footprint
 - 3.6.2 On-board Emissions Measurement System Market: Company Product Type Footprint
 - 3.6.3 On-board Emissions Measurement System 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: On-board Emissions Measurement System Production Value Comparison

4.1.1 United States VS China: On-board Emissions Measurement System Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: On-board Emissions Measurement System Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: On-board Emissions Measurement System Production Comparison

4.2.1 United States VS China: On-board Emissions Measurement System Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: On-board Emissions Measurement System Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: On-board Emissions Measurement System Consumption Comparison

4.3.1 United States VS China: On-board Emissions Measurement System Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: On-board Emissions Measurement System Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based On-board Emissions Measurement System Manufacturers and Market Share, 2021-2026

4.4.1 United States Based On-board Emissions Measurement System Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers On-board Emissions Measurement System Production Value (2021-2026)

4.4.3 United States Based Manufacturers On-board Emissions Measurement System Production (2021-2026)

4.5 China Based On-board Emissions Measurement System Manufacturers and Market Share

4.5.1 China Based On-board Emissions Measurement System Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers On-board Emissions Measurement System Production Value (2021-2026)

4.5.3 China Based Manufacturers On-board Emissions Measurement System Production (2021-2026)

4.6 Rest of World Based On-board Emissions Measurement System Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based On-board Emissions Measurement System Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers On-board Emissions Measurement System

Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers On-board Emissions Measurement System
Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World On-board Emissions Measurement System Market Size Overview by Type:
2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 LDV Type

5.2.2 HDV Type

5.3 Market Segment by Type

5.3.1 World On-board Emissions Measurement System Production by Type
(2021-2032)

5.3.2 World On-board Emissions Measurement System Production Value by Type
(2021-2032)

5.3.3 World On-board Emissions Measurement System Average Price by Type
(2021-2032)

6 MARKET ANALYSIS BY MEASUREMENT PRINCIPLE

6.1 World On-board Emissions Measurement System Market Size Overview by
Measurement Principle: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Measurement Principle

6.2.1 Non-Dispersive Infrared

6.2.2 Chemiluminescence Detection

6.2.3 Others

6.3 Market Segment by Measurement Principle

6.3.1 World On-board Emissions Measurement System Production by Measurement
Principle (2021-2032)

6.3.2 World On-board Emissions Measurement System Production Value by
Measurement Principle (2021-2032)

6.3.3 World On-board Emissions Measurement System Average Price by
Measurement Principle (2021-2032)

7 MARKET ANALYSIS BY POWER SUPPLY

7.1 World On-board Emissions Measurement System Market Size Overview by Power
Supply: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Power Supply

7.2.1 Vehicle Power

7.2.2 External Battery

7.2.3 Others

7.3 Market Segment by Power Supply

7.3.1 World On-board Emissions Measurement System Production by Power Supply (2021-2032)

7.3.2 World On-board Emissions Measurement System Production Value by Power Supply (2021-2032)

7.3.3 World On-board Emissions Measurement System Average Price by Power Supply (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World On-board Emissions Measurement System Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Passenger Cars

8.2.2 Commercial Vehicles

8.3 Market Segment by Application

8.3.1 World On-board Emissions Measurement System Production by Application (2021-2032)

8.3.2 World On-board Emissions Measurement System Production Value by Application (2021-2032)

8.3.3 World On-board Emissions Measurement System Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Dekra

9.1.1 Dekra Details

9.1.2 Dekra Major Business

9.1.3 Dekra On-board Emissions Measurement System Product and Services

9.1.4 Dekra On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Dekra Recent Developments/Updates

9.1.6 Dekra Competitive Strengths & Weaknesses

9.2 GlobalMRV

9.2.1 GlobalMRV Details

- 9.2.2 GlobalMRV Major Business
- 9.2.3 GlobalMRV On-board Emissions Measurement System Product and Services
- 9.2.4 GlobalMRV On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 GlobalMRV Recent Developments/Updates
- 9.2.6 GlobalMRV Competitive Strengths & Weaknesses
- 9.3 Horiba
 - 9.3.1 Horiba Details
 - 9.3.2 Horiba Major Business
 - 9.3.3 Horiba On-board Emissions Measurement System Product and Services
 - 9.3.4 Horiba On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Horiba Recent Developments/Updates
 - 9.3.6 Horiba Competitive Strengths & Weaknesses
- 9.4 Sensors
 - 9.4.1 Sensors Details
 - 9.4.2 Sensors Major Business
 - 9.4.3 Sensors On-board Emissions Measurement System Product and Services
 - 9.4.4 Sensors On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Sensors Recent Developments/Updates
 - 9.4.6 Sensors Competitive Strengths & Weaknesses
- 9.5 AVL
 - 9.5.1 AVL Details
 - 9.5.2 AVL Major Business
 - 9.5.3 AVL On-board Emissions Measurement System Product and Services
 - 9.5.4 AVL On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 AVL Recent Developments/Updates
 - 9.5.6 AVL Competitive Strengths & Weaknesses
- 9.6 Testo
 - 9.6.1 Testo Details
 - 9.6.2 Testo Major Business
 - 9.6.3 Testo On-board Emissions Measurement System Product and Services
 - 9.6.4 Testo On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Testo Recent Developments/Updates
 - 9.6.6 Testo Competitive Strengths & Weaknesses
- 9.7 Cubic Instruments

- 9.7.1 Cubic Instruments Details
- 9.7.2 Cubic Instruments Major Business
- 9.7.3 Cubic Instruments On-board Emissions Measurement System Product and Services
- 9.7.4 Cubic Instruments On-board Emissions Measurement System Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.7.5 Cubic Instruments Recent Developments/Updates
- 9.7.6 Cubic Instruments Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 On-board Emissions Measurement System Industry Chain
- 10.2 On-board Emissions Measurement System Upstream Analysis
 - 10.2.1 On-board Emissions Measurement System Core Raw Materials
 - 10.2.2 Main Manufacturers of On-board Emissions Measurement System Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 On-board Emissions Measurement System Production Mode
- 10.6 On-board Emissions Measurement System Procurement Model
- 10.7 On-board Emissions Measurement System Industry Sales Model and Sales Channels
 - 10.7.1 On-board Emissions Measurement System Sales Model
 - 10.7.2 On-board Emissions Measurement System 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 On-board Emissions Measurement System Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World On-board Emissions Measurement System Production Value by Region (2021-2026) & (USD Million)

Table 3. World On-board Emissions Measurement System Production Value by Region (2027-2032) & (USD Million)

Table 4. World On-board Emissions Measurement System Production Value Market Share by Region (2021-2026)

Table 5. World On-board Emissions Measurement System Production Value Market Share by Region (2027-2032)

Table 6. World On-board Emissions Measurement System Production by Region (2021-2026) & (Units)

Table 7. World On-board Emissions Measurement System Production by Region (2027-2032) & (Units)

Table 8. World On-board Emissions Measurement System Production Market Share by Region (2021-2026)

Table 9. World On-board Emissions Measurement System Production Market Share by Region (2027-2032)

Table 10. World On-board Emissions Measurement System Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World On-board Emissions Measurement System Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. On-board Emissions Measurement System Major Market Trends

Table 13. World On-board Emissions Measurement System Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World On-board Emissions Measurement System Consumption by Region (2021-2026) & (Units)

Table 15. World On-board Emissions Measurement System Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World On-board Emissions Measurement System Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key On-board Emissions Measurement System Producers in 2025

Table 18. World On-board Emissions Measurement System Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key On-board Emissions Measurement System Producers in 2025

Table 20. World On-board Emissions Measurement System Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global On-board Emissions Measurement System Company Evaluation Quadrant

Table 22. World On-board Emissions Measurement System Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and On-board Emissions Measurement System Production Site of Key Manufacturer

Table 24. On-board Emissions Measurement System Market: Company Product Type Footprint

Table 25. On-board Emissions Measurement System Market: Company Product Application Footprint

Table 26. On-board Emissions Measurement System Competitive Factors

Table 27. On-board Emissions Measurement System New Entrant and Capacity Expansion Plans

Table 28. On-board Emissions Measurement System Mergers & Acquisitions Activity

Table 29. United States VS China On-board Emissions Measurement System Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China On-board Emissions Measurement System Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China On-board Emissions Measurement System Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based On-board Emissions Measurement System Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers On-board Emissions Measurement System Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers On-board Emissions Measurement System Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers On-board Emissions Measurement System Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers On-board Emissions Measurement System Production Market Share (2021-2026)

Table 37. China Based On-board Emissions Measurement System Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers On-board Emissions Measurement System Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers On-board Emissions Measurement System

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers On-board Emissions Measurement System Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers On-board Emissions Measurement System Production Market Share (2021-2026)

Table 42. Rest of World Based On-board Emissions Measurement System Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers On-board Emissions Measurement System Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers On-board Emissions Measurement System Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers On-board Emissions Measurement System Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers On-board Emissions Measurement System Production Market Share (2021-2026)

Table 47. World On-board Emissions Measurement System Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World On-board Emissions Measurement System Production by Type (2021-2026) & (Units)

Table 49. World On-board Emissions Measurement System Production by Type (2027-2032) & (Units)

Table 50. World On-board Emissions Measurement System Production Value by Type (2021-2026) & (USD Million)

Table 51. World On-board Emissions Measurement System Production Value by Type (2027-2032) & (USD Million)

Table 52. World On-board Emissions Measurement System Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World On-board Emissions Measurement System Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World On-board Emissions Measurement System Production Value by Measurement Principle, (USD Million), 2021 & 2025 & 2032

Table 55. World On-board Emissions Measurement System Production by Measurement Principle (2021-2026) & (Units)

Table 56. World On-board Emissions Measurement System Production by Measurement Principle (2027-2032) & (Units)

Table 57. World On-board Emissions Measurement System Production Value by Measurement Principle (2021-2026) & (USD Million)

Table 58. World On-board Emissions Measurement System Production Value by Measurement Principle (2027-2032) & (USD Million)

- Table 59. World On-board Emissions Measurement System Average Price by Measurement Principle (2021-2026) & (US\$/Unit)
- Table 60. World On-board Emissions Measurement System Average Price by Measurement Principle (2027-2032) & (US\$/Unit)
- Table 61. World On-board Emissions Measurement System Production Value by Power Supply, (USD Million), 2021 & 2025 & 2032
- Table 62. World On-board Emissions Measurement System Production by Power Supply (2021-2026) & (Units)
- Table 63. World On-board Emissions Measurement System Production by Power Supply (2027-2032) & (Units)
- Table 64. World On-board Emissions Measurement System Production Value by Power Supply (2021-2026) & (USD Million)
- Table 65. World On-board Emissions Measurement System Production Value by Power Supply (2027-2032) & (USD Million)
- Table 66. World On-board Emissions Measurement System Average Price by Power Supply (2021-2026) & (US\$/Unit)
- Table 67. World On-board Emissions Measurement System Average Price by Power Supply (2027-2032) & (US\$/Unit)
- Table 68. World On-board Emissions Measurement System Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 69. World On-board Emissions Measurement System Production by Application (2021-2026) & (Units)
- Table 70. World On-board Emissions Measurement System Production by Application (2027-2032) & (Units)
- Table 71. World On-board Emissions Measurement System Production Value by Application (2021-2026) & (USD Million)
- Table 72. World On-board Emissions Measurement System Production Value by Application (2027-2032) & (USD Million)
- Table 73. World On-board Emissions Measurement System Average Price by Application (2021-2026) & (US\$/Unit)
- Table 74. World On-board Emissions Measurement System Average Price by Application (2027-2032) & (US\$/Unit)
- Table 75. Dekra Basic Information, Manufacturing Base and Competitors
- Table 76. Dekra Major Business
- Table 77. Dekra On-board Emissions Measurement System Product and Services
- Table 78. Dekra On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 79. Dekra Recent Developments/Updates

- Table 80. Dekra Competitive Strengths & Weaknesses
- Table 81. GlobalMRV Basic Information, Manufacturing Base and Competitors
- Table 82. GlobalMRV Major Business
- Table 83. GlobalMRV On-board Emissions Measurement System Product and Services
- Table 84. GlobalMRV On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. GlobalMRV Recent Developments/Updates
- Table 86. GlobalMRV Competitive Strengths & Weaknesses
- Table 87. Horiba Basic Information, Manufacturing Base and Competitors
- Table 88. Horiba Major Business
- Table 89. Horiba On-board Emissions Measurement System Product and Services
- Table 90. Horiba On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Horiba Recent Developments/Updates
- Table 92. Horiba Competitive Strengths & Weaknesses
- Table 93. Sensors Basic Information, Manufacturing Base and Competitors
- Table 94. Sensors Major Business
- Table 95. Sensors On-board Emissions Measurement System Product and Services
- Table 96. Sensors On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Sensors Recent Developments/Updates
- Table 98. Sensors Competitive Strengths & Weaknesses
- Table 99. AVL Basic Information, Manufacturing Base and Competitors
- Table 100. AVL Major Business
- Table 101. AVL On-board Emissions Measurement System Product and Services
- Table 102. AVL On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. AVL Recent Developments/Updates
- Table 104. AVL Competitive Strengths & Weaknesses
- Table 105. Testo Basic Information, Manufacturing Base and Competitors
- Table 106. Testo Major Business
- Table 107. Testo On-board Emissions Measurement System Product and Services
- Table 108. Testo On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Testo Recent Developments/Updates

Table 110. Testo Competitive Strengths & Weaknesses

Table 111. Cubic Instruments Basic Information, Manufacturing Base and Competitors

Table 112. Cubic Instruments Major Business

Table 113. Cubic Instruments On-board Emissions Measurement System Product and Services

Table 114. Cubic Instruments On-board Emissions Measurement System Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Cubic Instruments Recent Developments/Updates

Table 116. Cubic Instruments Competitive Strengths & Weaknesses

Table 117. Global Key Players of On-board Emissions Measurement System Upstream (Raw Materials)

Table 118. Global On-board Emissions Measurement System Typical Customers

Table 119. On-board Emissions Measurement System Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. On-board Emissions Measurement System Picture

Figure 2. World On-board Emissions Measurement System Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World On-board Emissions Measurement System Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 5. World On-board Emissions Measurement System Average Price (2021-2032) & (US\$/Unit)

Figure 6. World On-board Emissions Measurement System Production Value Market Share by Region (2021-2032)

Figure 7. World On-board Emissions Measurement System Production Market Share by Region (2021-2032)

Figure 8. North America On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 9. Europe On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 10. China On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 11. Japan On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 12. South Korea On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 13. India On-board Emissions Measurement System Production (2021-2032) & (Units)

Figure 14. On-board Emissions Measurement System Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World On-board Emissions Measurement System Consumption (2021-2032) & (Units)

Figure 17. World On-board Emissions Measurement System Consumption Market Share by Region (2021-2032)

Figure 18. United States On-board Emissions Measurement System Consumption (2021-2032) & (Units)

Figure 19. China On-board Emissions Measurement System Consumption (2021-2032) & (Units)

- Figure 20. Europe On-board Emissions Measurement System Consumption (2021-2032) & (Units)
- Figure 21. Japan On-board Emissions Measurement System Consumption (2021-2032) & (Units)
- Figure 22. South Korea On-board Emissions Measurement System Consumption (2021-2032) & (Units)
- Figure 23. ASEAN On-board Emissions Measurement System Consumption (2021-2032) & (Units)
- Figure 24. India On-board Emissions Measurement System Consumption (2021-2032) & (Units)
- Figure 25. Producer Shipments of On-board Emissions Measurement System by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 26. Global Four-firm Concentration Ratios (CR4) for On-board Emissions Measurement System Markets in 2025
- Figure 27. Global Four-firm Concentration Ratios (CR8) for On-board Emissions Measurement System Markets in 2025
- Figure 28. United States VS China: On-board Emissions Measurement System Production Value Market Share Comparison (2021 & 2025 & 2032)
- Figure 29. United States VS China: On-board Emissions Measurement System Production Market Share Comparison (2021 & 2025 & 2032)
- Figure 30. United States VS China: On-board Emissions Measurement System Consumption Market Share Comparison (2021 & 2025 & 2032)
- Figure 31. United States Based Manufacturers On-board Emissions Measurement System Production Market Share 2025
- Figure 32. China Based Manufacturers On-board Emissions Measurement System Production Market Share 2025
- Figure 33. Rest of World Based Manufacturers On-board Emissions Measurement System Production Market Share 2025
- Figure 34. World On-board Emissions Measurement System Production Value by Type, (USD Million), 2021 & 2025 & 2032
- Figure 35. World On-board Emissions Measurement System Production Value Market Share by Type in 2025
- Figure 36. LDV Type
- Figure 37. HDV Type
- Figure 38. World On-board Emissions Measurement System Production Market Share by Type (2021-2032)
- Figure 39. World On-board Emissions Measurement System Production Value Market Share by Type (2021-2032)
- Figure 40. World On-board Emissions Measurement System Average Price by Type

(2021-2032) & (US\$/Unit)

Figure 41. World On-board Emissions Measurement System Production Value by Measurement Principle, (USD Million), 2021 & 2025 & 2032

Figure 42. World On-board Emissions Measurement System Production Value Market Share by Measurement Principle in 2025

Figure 43. Non-Dispersive Infrared

Figure 44. Chemiluminescence Detection

Figure 45. Others

Figure 46. World On-board Emissions Measurement System Production Market Share by Measurement Principle (2021-2032)

Figure 47. World On-board Emissions Measurement System Production Value Market Share by Measurement Principle (2021-2032)

Figure 48. World On-board Emissions Measurement System Average Price by Measurement Principle (2021-2032) & (US\$/Unit)

Figure 49. World On-board Emissions Measurement System Production Value by Power Supply, (USD Million), 2021 & 2025 & 2032

Figure 50. World On-board Emissions Measurement System Production Value Market Share by Power Supply in 2025

Figure 51. Vehicle Power

Figure 52. External Battery

Figure 53. Others

Figure 54. World On-board Emissions Measurement System Production Market Share by Power Supply (2021-2032)

Figure 55. World On-board Emissions Measurement System Production Value Market Share by Power Supply (2021-2032)

Figure 56. World On-board Emissions Measurement System Average Price by Power Supply (2021-2032) & (US\$/Unit)

Figure 57. World On-board Emissions Measurement System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 58. World On-board Emissions Measurement System Production Value Market Share by Application in 2025

Figure 59. Passenger Cars

Figure 60. Commercial Vehicles

Figure 61. World On-board Emissions Measurement System Production Market Share by Application (2021-2032)

Figure 62. World On-board Emissions Measurement System Production Value Market Share by Application (2021-2032)

Figure 63. World On-board Emissions Measurement System Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. On-board Emissions Measurement System Industry Chain

Figure 65. On-board Emissions Measurement System Procurement Model

Figure 66. On-board Emissions Measurement System Sales Model

Figure 67. On-board Emissions Measurement System Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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