

Global Passenger Vehicle Exhaust System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Passenger Vehicle Exhaust System market size is expected to reach \$ 19648 million by 2032, rising at a market growth of 1.4% CAGR during the forecast period (2026-2032).

Passenger Vehicle Exhaust System refers to the integrated assembly installed on gasoline, diesel and hybrid passenger vehicles to collect engine combustion gases, convert regulated pollutants, control exhaust noise and vibration, manage exhaust temperature and backpressure, and discharge treated gases safely. A complete system generally extends from the exhaust manifold or turbocharger outlet to the tailpipe and combines hot-end emission-control modules with cold-end acoustic components. Principal elements include exhaust manifolds, catalytic converters, gasoline and diesel particulate filters, selective catalytic reduction modules, urea-dosing devices, flexible joints, connecting pipes, resonators, mufflers, exhaust valves, sensors, mounting components and tailpipes. This study focuses on complete passenger-vehicle exhaust systems and independently supplied system-level modules distributed through OEM, original-equipment service and aftermarket channels. Product performance is primarily evaluated through pollutant-conversion efficiency, catalyst light-off response, exhaust-flow resistance, acoustic characteristics, thermal durability, corrosion resistance, structural weight, packaging efficiency and compatibility with vehicle electronic-control architecture. The application scope is structured around gasoline passenger vehicles, diesel passenger vehicles and hybrid passenger vehicles.

Key Findings

OEM programs remain central because complete exhaust systems require

platform-specific engineering validation calibration and sequenced delivery

Hot-end systems carry greater technical complexity through catalysts filters dosing devices sensors and thermal-management components

Hybrid powertrains increase demand for rapid catalyst activation heat retention compact packaging and exhaust heat recovery

Asia-Pacific has developed extensive passenger-vehicle exhaust-system engineering manufacturing and localized supplier networks

Competition is shifting from metal fabrication toward integrated emissions thermal acoustic and electronic-control engineering

Global sales volume reached approximately 21.80 million sets in 2025

The weighted average ex-factory price was approximately US\$314 per set.

Market Trends

The Passenger Vehicle Exhaust System industry is evolving from conventional gas-routing and passive noise-reduction equipment toward an integrated platform combining emission conversion, thermal management, acoustic engineering and electronic control. Regulatory development increasingly emphasizes pollutant control under cold-start, low-load, real-driving and extended-use conditions, supporting close-coupled catalysts, integrated catalyst-filter modules, more effective mixing and dosing, additional sensing functions and active temperature-management technologies. Hybrid vehicles create a distinct engineering requirement because intermittent engine operation can lower exhaust temperature and delay catalyst activation. Suppliers are therefore developing electrically heated catalysts, burner-assisted heating, improved insulation, heat-retention structures and exhaust heat-recovery devices. Product architectures are also becoming lighter and more compact through thin-wall stainless steel, multifunctional housings, optimized flow paths, modular mufflers and active exhaust valves. Marelli's LeanExhaust development demonstrates the integration of lightweight construction, compact packaging, emission control and acoustic performance, while Futaba Industrial is developing standardized muffler modules that can be adapted to different passenger-vehicle platforms. Competitive capability is consequently moving beyond tube forming

and welding toward catalyst integration, computational fluid dynamics, thermal modelling, electronic calibration, packaging engineering and vehicle-level noise, vibration and harshness development.

Market Dynamics

Drivers

Emission regulation remains the principal structural driver of Passenger Vehicle Exhaust System development. Euro 7 strengthens the regulatory framework for road-vehicle pollutant emissions and type approval, while evolving US requirements continue to address harmful pollutants from light-duty vehicles. These requirements support the application of more effective three-way catalysts, gasoline and diesel particulate filters, selective catalytic reduction modules, dosing systems, sensors and exhaust thermal-management technologies. Gasoline, diesel and hybrid passenger vehicles each require different combinations of purification, flow-control, acoustic and thermal-management functions, increasing the need for platform-specific system engineering. Automakers are also seeking faster catalyst activation, lower exhaust backpressure, reduced structural weight, improved underbody packaging and more refined acoustic performance. These requirements encourage suppliers to integrate additional functions into fewer modules and participate earlier in vehicle-platform development. In the replacement channel, corrosion, thermal cycling, vibration, road impact, weld fatigue, catalyst aging and filter blockage create recurring requirements for exhaust pipes, mufflers, catalytic converters, filters and mounting components.

Restraints

The continuing transition toward battery-electric passenger vehicles is the principal long-term restraint because these vehicles do not require conventional engine exhaust and tailpipe aftertreatment systems. Hybrid vehicles continue to use combustion engines and technically advanced exhaust systems, but the changing powertrain mix creates uncertainty for suppliers investing in dedicated manufacturing assets. The industry is also exposed to fluctuations in stainless steel, aluminized steel, ceramic catalyst substrates, insulation materials, electronic sensors and platinum-group-metal inputs. Complete exhaust systems are physically large and highly specific to individual vehicle platforms, making localized production close to vehicle assembly plants important for transportation efficiency and sequenced delivery. This operating model increases fixed

investment and exposes suppliers to vehicle-program delays, production transfers and changes in automaker sourcing strategies. Mature cold-end products face sustained cost pressure, while advanced hot-end systems require substantial investment in product engineering, catalyst canning, automated welding, electronic calibration, emission testing, durability validation and warranty support.

Opportunities

The most attractive opportunities are concentrated in hybrid-compatible exhaust systems, active catalyst heating, modular product architectures, regional localization and replacement products. Hybrid passenger vehicles require rapid catalyst heating and improved heat retention when the engine operates intermittently, supporting electrically heated catalysts, burner systems, insulated pipes, compact converters and exhaust heat-recovery solutions. Marelli has developed an active catalyst-heating burner integrating fuel injection, ignition and dedicated electronic control, while Purem by Eberspächer has developed electrically heated components designed to improve conversion efficiency during cold-start and low-load operation. Modular mufflers, converter housings and connecting assemblies can be adapted across several passenger-vehicle programs, helping automakers reduce duplicated engineering, tooling complexity and unique component counts. Regional localization also creates opportunities for Chinese and other Asian manufacturers that can satisfy international OEM requirements for system development, quality management, testing and sequenced delivery. In the aftermarket, certified catalytic converters, particulate filters, pipes, mufflers and mounting kits benefit from continuing repair and replacement requirements, with vehicle coverage, fitment accuracy, certification and distribution capability forming the principal competitive differentiators.

Challenges

The central strategic challenge is balancing continuing demand from combustion-engine and hybrid passenger vehicles with uncertainty regarding the long-term powertrain mix. Suppliers must maintain investment in advanced aftertreatment, thermal-management and acoustic systems while limiting exposure to dedicated production assets that could become underutilized. Regional differences in emission limits, certification procedures, durability requirements, fuel properties and vehicle architecture restrict global product standardization. Different vehicle platforms may require distinct catalyst formulations, substrate dimensions, sensor configurations, flow paths and electronic calibrations. Technical risks include catalyst aging, particulate-filter blockage, thermal deformation,

corrosion, weld fatigue, sensor malfunction and acoustic leakage. Automakers also require shorter development schedules, local sourcing, just-in-time or just-in-sequence delivery, strict warranty performance and recurring cost improvement. Supply disruptions involving specialty steel, ceramic substrates, sensors and precious metals can affect production continuity. Competitive suppliers therefore require resilient regional sourcing, standardized engineering processes, flexible manufacturing cells and sufficient testing capability to support multiple passenger-vehicle platforms without compromising quality, durability or regulatory compliance.

Industry Chain Analysis

The upstream segment supplies stainless steel, aluminized steel, mild steel, cast iron, ceramic or metallic catalyst substrates, precious-metal coatings, glass fiber, acoustic filling materials, thermal insulation, flexible joints, brackets, oxygen and nitrogen-oxide sensors, electronic controllers and dosing components. Midstream manufacturers undertake system-architecture design, exhaust-flow simulation, tube bending, stamping, spinning, forming, welding, catalyst canning, muffler assembly, insulation integration, sensor installation, electronic calibration and complete-system testing. Value creation is increasingly concentrated in catalyst and filter integration, cold-start thermal management, exhaust-flow optimization, acoustic tuning, lightweight structures, durability validation and package design. Complete systems are commonly manufactured close to passenger-vehicle assembly plants and supplied through synchronized logistics because their dimensions and configurations are highly platform specific. Downstream customers are passenger-vehicle manufacturers producing gasoline, diesel, hybrid and range-extended models. The replacement channel consists of original-equipment service networks, specialist distributors, repair chains and independent workshops. Long development, testing and certification cycles create meaningful entry barriers while exposing suppliers to individual platform life cycles, customer concentration, production scheduling and recurring purchasing negotiations.

Segment Insights

By system position and function, Passenger Vehicle Exhaust Systems can be divided into hot-end and cold-end systems. Hot-end systems incorporate exhaust manifolds, close-coupled catalytic converters, gasoline or diesel particulate filters, selective catalytic reduction modules, dosing devices, sensors and thermal-management structures. This segment has comparatively high engineering intensity because its

performance directly determines pollutant conversion, catalyst activation and regulatory compliance. Cold-end systems mainly comprise connecting pipes, resonators, mufflers, exhaust valves and tailpipes. Competition in this segment focuses on noise attenuation, exhaust flow, corrosion resistance, structural weight, package space and vehicle sound character. Although cold-end technology is relatively mature, active valves, compact resonators, thin-wall structures and modular mufflers continue to provide meaningful differentiation.

By flow configuration, single-flow systems are primarily used in small- and medium-displacement passenger vehicles because of simpler routing, compact packaging and lower component requirements. Dual-flow systems are more common in higher-output, larger-displacement and selected premium vehicles requiring greater exhaust-flow capacity or differentiated acoustic characteristics. By material, stainless steel is the principal option for high-temperature and corrosion-sensitive sections, while aluminized steel remains relevant in cost-sensitive applications. Mild steel has a more limited role, and titanium is mainly associated with premium and performance-oriented systems. By sales channel, OEM supply covers initial vehicle installation and platform-specific assemblies, original-equipment service supports authorized replacement, and the independent aftermarket concentrates on mufflers, pipes, catalytic converters, particulate filters, mounting components and performance exhaust products.

Downstream Market Opportunities

By application, the market can be divided into gasoline passenger vehicles, diesel passenger vehicles and hybrid passenger vehicles. Gasoline passenger-vehicle systems typically combine three-way catalysts, gasoline particulate filters, exhaust manifolds, connecting pipes and cold-end acoustic modules, with development focused on rapid light-off, particulate control, low backpressure and compact packaging. Diesel passenger-vehicle systems use oxidation catalysts, diesel particulate filters and, depending on vehicle architecture, selective catalytic reduction and dosing modules, creating comparatively demanding requirements for temperature control and filter regeneration. Hybrid passenger-vehicle systems represent an important technology-upgrade opportunity because frequent engine shutdown and low-load operation can reduce exhaust temperature. These applications require improved insulation, catalyst heating, heat retention, compact packaging and coordination between the exhaust system and vehicle energy-management controls. Range-extended passenger vehicles present similar requirements because their combustion engines may operate intermittently under specific load conditions.

Regional Insights

Asia-Pacific is an important manufacturing, engineering and sourcing center for Passenger Vehicle Exhaust Systems. China combines a broad passenger-vehicle supply chain with domestic manufacturers covering catalysts, aftertreatment modules, exhaust manifolds, pipes, mufflers and complete assemblies. Wuxi WEIFU Lida provides complete passenger-car exhaust systems covering hot-end purification, cold-end mufflers and active valves. Airui Automobile Technology participates in passenger-vehicle exhaust-system and hot-end packaging projects, while Chongqing HITER supplies catalytic purification, manifolds and noise-control products. Japan retains established capabilities in metal forming, welding, catalyst packaging, acoustic engineering and long-term vehicle-platform development through Sango, Futaba Industrial and Motherson Yutaka Giken. South Korea has an established passenger-vehicle exhaust-system supply structure represented by SJG Sejong. Southeast Asian manufacturing is characterized by localized Japanese and global supplier plants serving regional passenger-vehicle assembly clusters.

Europe remains a technology-intensive region shaped by Euro 7, hybrid powertrains, lightweight design and demanding acoustic requirements. FORVIA, Tenneco, Marelli, Purem by Eberspächer and Boysen maintain relevant engineering and production capabilities across emission control, thermal management, complete exhaust systems and vehicle acoustics. North America covers passenger cars, sport utility vehicles and pickups, with stringent validation requirements and strong expectations for regional engineering and production support. Mexico is an important manufacturing and engineering base for Katcon, Boysen and other international suppliers serving North American passenger-vehicle platforms. South America is supported by regional passenger-vehicle manufacturing and replacement demand. Regional differences in vehicle architecture, emission regulation, fuel properties and OEM purchasing practices require localized product validation, customer engineering and manufacturing support rather than reliance on a single standardized global system.

Competitive Landscape Analysis

The competitive landscape comprises international complete-system suppliers, regional OEM specialists, emission-aftertreatment providers and aftermarket manufacturers. FORVIA, Tenneco, Marelli, Purem by Eberspächer and Boysen provide broad

capabilities spanning pollutant conversion, thermal management, acoustic engineering, lightweighting and passenger-vehicle platform integration. Sango and Futaba Industrial supply exhaust manifolds, catalysts, pipes, mufflers and other system-level products, while Motherson Yutaka Giken focuses on core components that form exhaust systems, including catalytic converters and silencers. SJG Sejong develops and mass-produces passenger- and commercial-vehicle exhaust systems, and Katcon provides complete engineering, prototyping, testing and manufacturing capabilities for passenger-car exhaust and aftertreatment applications. BOSAL combines integrated OEM emission-control systems with original-equipment service and independent aftermarket products. In China, Wuxi WEIFU Lida has complete passenger-car system capabilities, while Chongqing HITER and Airui Automobile Technology primarily participate through purification, manifold, muffler and hot-end products. Liuzhou Lihe Exhaust Control System and Wanxiang Tongda are relevant regional participants in localized exhaust-system and component programs. Competition increasingly depends on catalyst and filter integration, rapid light-off, thermal management, acoustic performance, system weight, regional engineering support, flexible manufacturing and lifecycle cost rather than conventional pipe and muffler fabrication alone.

Report Scope

This report studies the global Passenger Vehicle Exhaust System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Passenger Vehicle Exhaust 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 Passenger Vehicle Exhaust System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Passenger Vehicle Exhaust System total production and demand,
2021-2032, (K Sets)

Global Passenger Vehicle Exhaust System total production value, 2021-2032,
(USD Million)

Global Passenger Vehicle Exhaust System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sets), (based on production site)

Global Passenger Vehicle Exhaust System consumption by region & country, CAGR, 2021-2032 & (K Sets)

U.S. VS China: Passenger Vehicle Exhaust System domestic production, consumption, key domestic manufacturers and share

Global Passenger Vehicle Exhaust System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sets)

Global Passenger Vehicle Exhaust System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

Global Passenger Vehicle Exhaust System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

This report profiles key players in the global Passenger Vehicle Exhaust 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 FORVIA, Tenneco, Marelli, Purem by Eberspächer, Boysen, Sango, Motherson Yutaka Giken, Futaba Industrial, SJG Sejong, Katcon, 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 Passenger Vehicle Exhaust System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sets) and average price (US\$/Set) 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 Passenger Vehicle Exhaust System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Passenger Vehicle Exhaust System Market, Segmentation by Type:

Single Exhaust System

Dual Exhaust System

Global Passenger Vehicle Exhaust System Market, Segmentation by Material:

Stainless Steel Exhaust System

Aluminized Steel Exhaust System

Mild Steel Exhaust System

Titanium and Other Materials

Global Passenger Vehicle Exhaust System Market, Segmentation by Sales Channel:

OEM

Aftermarket

Global Passenger Vehicle Exhaust System Market, Segmentation by Application:

Gasoline Passenger Cars

Diesel Passenger Cars

Hybrid Passenger Cars

Companies Profiled:

FORVIA

Tenneco

Marelli

Purem by Eberspächer

Boysen

Sango

Motherson Yutaka Giken

Futaba Industrial

SJG Sejong

Katcon

Bosal

Wuxi WEIFU Lida

Chongqing HITER Automotive Exhaust System

Airui Automobile Technology

Liuzhou Lihe Exhaust Control System

Wanxiang Tongda

Key Questions Answered:

1. How big is the global Passenger Vehicle Exhaust System market?
2. What is the demand of the global Passenger Vehicle Exhaust System market?
3. What is the year over year growth of the global Passenger Vehicle Exhaust System market?
4. What is the production and production value of the global Passenger Vehicle Exhaust System market?
5. Who are the key producers in the global Passenger Vehicle Exhaust System market?
6. What are the growth factors driving the market demand?

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