

# **Automotive Diagnostic Scan Tools Aftermarket Size - By Offering, By Vehicle, By End Use, By Distribution Channel, Analysis, Share, Growth Forecast, 2025 - 2034**

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## **Abstracts**

The Global Automotive Diagnostic Scan Tools Aftermarket was valued at USD 17.3 billion in 2024 and is projected to grow at a CAGR of 6.2%, reaching USD 29.2 billion by 2034, driven by rising vehicle complexity, the expansion of electric and hybrid vehicles, and growing investments in advanced vehicle diagnostics. Automotive diagnostic scan tools enable precise identification of vehicle faults, supporting efficient maintenance and compliance with increasingly stringent emission and safety regulations. The shift towards wireless, cloud-based, and AI-powered diagnostic solutions transforms the industry by enabling real-time, remote vehicle health monitoring and predictive maintenance capabilities.

The growing popularity of connected vehicles and telematics-based services is enhancing the demand for advanced diagnostic tools. These vehicles, equipped with sophisticated electronic control units (ECUs) and real-time data transmission capabilities, require diagnostic solutions that continuously monitor performance, detect anomalies remotely, and deliver predictive maintenance insights. Workshops and fleet operators rely on cloud-based diagnostics to reduce downtime, optimize maintenance schedules, and extend vehicle lifecycles. With governments globally enforcing tougher emission standards such as Euro 6, China 6, and forthcoming Euro 7 regulations, compliance has become a top priority, prompting service centers to invest heavily in modern, multi-protocol diagnostic technologies capable of handling a wide range of emissions and safety parameters. In addition, the emergence of subscription-based software updates ensures that users maintain access to the latest diagnostic capabilities, new vehicle model support, and enhanced functionalities without the need

for frequent hardware replacements.

The automotive diagnostic scan tools aftermarket is primarily segmented by offering, with diagnostic hardware leading in 2024, generating USD 9.7 billion. These include advanced OBD-II scanners, code readers, and battery testers, essential for analyzing faults across increasingly complex automotive electronics and electric vehicle systems. Their ability to provide rapid, in-depth diagnostics has made them a preferred choice among independent repair shops, fleet operators, and mobile repair services.

In terms of end-users, independent repair shops accounted for the largest share in 2024, generating USD 9.5 billion. These businesses are rapidly adopting AI-enhanced diagnostic solutions and remote monitoring tools to improve service turnaround times and stay competitive against dealership service centers. Subscription-based diagnostics, OTA (over-the-air) updates, and customized training solutions are key enablers for this segment's growth.

Asia Pacific Automotive Diagnostics Scan Tools Aftermarket held a significant share in 2024, accounting for USD 6.0 billion, driven by rapid automotive production, expanding service networks, and rising vehicle ownership in key markets like China, India, and Southeast Asia. The region's transition toward EVs and stricter environmental regulations is accelerating the adoption of high-precision diagnostic tools. Companies invest heavily in cloud-based solutions, telematics integration, and fleet-focused diagnostic platforms to address growing demand across emerging economies.

Key players including Bosch, Snap-on, Hella, Fluke Corporation, and Launch Tech are focusing on product innovation, strategic partnerships, and geographic expansion to maintain their leadership in a highly competitive and evolving aftermarket landscape. Integrating AI, machine learning, and cloud computing into diagnostic scan tools promises to redefine the future of automotive maintenance and repair globally.

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