

# Global On-board Emissions Measurement System Market Growth 2026-2032

<https://marketpublishers.com/r/GDBA6FAC4259EN.html>

Date: May 2026

Pages: 97

Price: US\$ 3,660.00 (Single User License)

ID: GDBA6FAC4259EN

## Abstracts

The global On-board Emissions Measurement System market size is predicted to grow from US\$ 153 million in 2025 to US\$ 225 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 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  $\text{CO}_2$ , electrochemical cells for  $\text{NO}_x$ , 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.

LP Information, Inc. (LPI)'s newest research report, the 'On-board Emissions Measurement System Industry Forecast' looks at past sales and reviews total world On-board Emissions Measurement System sales in 2025, providing a comprehensive analysis by region and market sector of projected On-board Emissions Measurement System sales for 2026 through 2032. With On-board Emissions Measurement System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world On-board Emissions Measurement System industry.

This Insight Report provides a comprehensive analysis of the global On-board Emissions Measurement System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on On-board Emissions Measurement System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global On-board Emissions

Measurement System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for On-board Emissions Measurement System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global On-board Emissions Measurement System.

This report presents a comprehensive overview, market shares, and growth opportunities of On-board Emissions Measurement System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

LDV Type

HDV Type

Segmentation by Measurement Principle:

Non-Dispersive Infrared

Chemiluminescence Detection

Others

Segmentation by Power Supply:

Vehicle Power

External Battery

Others

## Segmentation by Application:

Passenger Cars

Commercial Vehicles

## This report also splits the market by region:

### Americas

United States

Canada

Mexico

Brazil

### APAC

China

Japan

Korea

Southeast Asia

India

Australia

### Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Dekra

GlobalMRV

Horiba

Sensors

AVL

Testo

Cubic Instruments

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global On-board Emissions Measurement System market?

What factors are driving On-board Emissions Measurement System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do On-board Emissions Measurement System market opportunities vary by end market size?

How does On-board Emissions Measurement System break out by Type, by Application?

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