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Exhaust Aftertreatment System Market by Product Type (DOC, DPF, LNT, SCR, GPF), Vehicle Type (Passenger Cars, LCVs, Trucks, Buses), Fuel Type (Diesel, Gasoline), Sales Channel (OEM, Aftermarket), and Region - Global Forecast to 2033

https://marketpublishers.com/r/E7E05C49BFC3EN.html
Date: June 2026
Pages: 268
Price: US$ 4,950.00 (Single User License)
ID: E7E05C49BFC3EN

Abstracts

The exhaust aftertreatment system market is projected to be valued at USD 37.17 billion in 2026 and USD 45.56 billion by 2033, exhibiting a CAGR of at 2.9% during the forecast period. OEMs are deploying compact multi-stage aftertreatment architectures, advanced catalyst materials, intelligent urea dosing systems, and sensor-integrated emission control systems to improve vehicle performance. Rising freight transportation activity, fleet modernization, and higher utilization of heavy-duty diesel trucks are further accelerating the demand for SCR and DPF systems with larger catalyst volumes and higher NOx conversion efficiency. As emission norms tighten globally, advanced exhaust aftertreatment technologies are becoming essential for OEMs to balance regulatory compliance, fuel economy, durability, and engine performance.

“Gasoline particulate filters segment to be the fastest-growing aftertreatment device from 2026 to 2033”

The gasoline particulate filters segment is expected to witness the fastest growth in the exhaust aftertreatment system market during the forecast period due to the adoption of gasoline direct injection (GDI) engines across passenger cars and light commercial vehicles. Gasoline particulate filter (GPF) adoption is increasing with the rising penetration of turbocharged gasoline vehicles, particularly in compact SUVs, crossover vehicles, and premium passenger cars. Automakers are increasingly combining GPF systems with three-way catalysts and close-coupled exhaust layouts to improve cold-start emission control, catalyst light-off efficiency, and particulate filtration without

compromising engine responsiveness or fuel economy. Companies such as Forvia, Tenneco, and Sango are investing in low-backpressure substrate technologies, compact filter integration, and advanced coating materials to improve filtration efficiency, thermal durability, and packaging flexibility for next-generation gasoline vehicles. As gasoline direct injection passenger vehicle production continues expanding globally, GPF systems are expected to witness rapid growth among exhaust aftertreatment technologies.

“Aftermarket sales channel segment to capture a major market share during the forecast period”

The aftermarket segment accounts for a commendable market share during the forecast period due to the large installed base of diesel vehicles across Europe, Asia Pacific, and North America. Europe has a high replacement demand from diesel passenger cars and commercial vehicles equipped with DPF and SCR systems under Euro IV, V, and VI regulations. Similarly, China and India are witnessing rising replacement demand following large-scale adoption of SCR and DPF systems under China VI and BS VI norms. North America remains a key aftermarket market due to the high penetration of large-displacement heavy-duty diesel trucks operating under EPA emission standards. Rising average vehicle age and increasing miles driven in freight, mining, and construction applications are accelerating replacement cycles for DPF, SCR, DOC, sensors, and DEF-related components. Additionally, stricter in-use emission compliance programs, retrofit regulations, periodic inspection requirements, and fleet modernization initiatives across Europe, China, India, and California are increasing demand for certified aftermarket aftertreatment systems.

“Europe to be the second-largest market for exhaust aftertreatment systems in 2026”

Europe is expected to be the second-largest market for exhaust aftertreatment systems in 2026 due to its early adoption of advanced emission technologies and stringent Euro 6 and upcoming Euro 7 regulations. The region has a high penetration of diesel aftertreatment systems across premium passenger cars, multivans, LCVs, buses, and heavy-duty trucks, particularly from OEMs such as Mercedes-Benz, BMW, Volkswagen Group, Stellantis, and Renault. Diesel powertrains continue to dominate Europe’s heavy commercial vehicle, bus, and large van segments, requiring advanced SCR, DPF, DOC, and ammonia slip catalyst systems for compliance with low NOX and real driving emission requirements. Premium SUVs, executive sedans, long-haul trucks, and multi-purpose vans still witness significant diesel adoption due to higher torque requirements, fuel efficiency, and long-distance operational advantages. Upcoming

Euro 7 regulations are expected to further increase aftertreatment system complexity through stricter cold-start, low-temperature, brake dust, and real driving emission limits. This is accelerating OEM investments in integrated close-coupled exhaust architectures, dual-dosing SCR systems, advanced onboard diagnostics, and thermally efficient catalyst technologies. Additionally, Europe maintains one of the world's largest installed bases of Euro VI diesel vehicles, creating sustained demand for high-value aftertreatment systems across both OEM and replacement markets, particularly in long-haul freight transportation and commercial fleet applications.

The breakup of the profile of primary participants in the exhaust aftertreatment system market:

By Company Type: Exhaust Aftertreatment System Manufacturers – 70% and Automotive OEMs – 30%

By Designation: C-Level Executives – 60%, Director Level – 10%, and Others – 30%

By Region: North America – 20%, Europe – 15%, Asia Pacific – 40%, and RoW – 25%

Tenneco Inc. (US), Forvia (France), Ebersp?cher (Germany), Friedrich Boysen GmbH & Co KG (Germany), and Futaba Industrial Co.Ltd. (Japan) are the leading providers of exhaust system aftertreatment in the global market.

Research Coverage:

This research report categorizes the exhaust aftertreatment system market size based on aftertreatment device, vehicle type, fuel type, sales channel, and region. The report comprehensively discusses key factors impacting the growth of the exhaust aftertreatment system market, including drivers, constraints, challenges, and opportunities. It provides detailed analyses of major industry players, offering insights into their business profiles, solutions, services, key strategies, contracts, partnerships, agreements, new product and service launches, mergers and acquisitions, recession impacts, and recent developments. Additionally, the report includes a competitive analysis of emerging startups within the exhaust aftertreatment system market ecosystem.

Reasons to buy this report:

This report offers comprehensive analyses of market share and supply chains and detailed information on component manufacturers. It is designed to aid market leaders and new entrants by providing precise revenue estimates for the overall exhaust aftertreatment system market. Additionally, the report helps stakeholders understand the market dynamics, highlighting key drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Analysis of key drivers (Rising GPF deployment in gasoline direct injection vehicles for particulate reduction, Increasing adoption of integrated SCR, DPF, and DOC systems in diesel trucks and buses), restraints (Reduction in long-term demand for aftertreatment systems amid rising EV popularity), opportunities (Mounting demand for GPF in GDI engines, Rising replacement demand for aftertreatment systems in aging commercial vehicles), and challenges (Fluctuating precious metal prices, Limited vehicle packaging space complicating multi device integration) fueling the demand of the exhaust systems

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the exhaust aftertreatment system market, such as the use of various kinds of metals in exhaust systems, including titanium, stainless steel, etc.

Market Development: Comprehensive information about lucrative markets–the report analyses the exhaust aftertreatment system market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the exhaust aftertreatment system market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the exhaust aftertreatment system market, such as Tenneco Inc.(US), Forvia (France), Ebersp?cher (Germany), Friedrich Boysen GmbH & Co KG (Germany), and Futaba Industrial Co.Ltd. (Japan)

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