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Automotive Exhaust Aftertreatment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Vehicle Type (Passenger Cars and Commercial Vehicles), By Fuel Type (Gasoline and Diesel), By Sales Channel (OEM, Aftermarket), By Region & Competition, 2021-2031F

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Abstracts

The Global Automotive Exhaust Aftertreatment Market is projected to expand from USD 37.73 Billion in 2025 to USD 82.34 Billion by 2031, registering a CAGR of 13.89%. These systems serve as essential emission control mechanisms for internal combustion engines, tasked with neutralizing harmful substances like nitrogen oxides, hydrocarbons, and particulate matter before they exit the tailpipe. This growth is largely fueled by strict government mandates requiring lower pollutant emissions, alongside a rebound in global vehicle production that drives demand for compliance hardware. Highlighting this industrial need, the International Organization of Motor Vehicle Manufacturers reported that global motor vehicle production hit 92.5 million units in 2024.

However, the market faces a significant hurdle due to the rapid global shift toward battery electric vehicles, which operate without exhaust systems. This structural evolution poses a threat to traditional aftertreatment demand as automakers increasingly divert investment and manufacturing resources toward zero-emission technologies to achieve future sustainability goals.

Market Driver

A primary catalyst for the exhaust aftertreatment sector is the rising global production of passenger and commercial vehicles, since every internal combustion engine requires a dedicated emission control system. This demand is particularly strong in key manufacturing regions that cater to both domestic consumption and exports. For instance, the China Association of Automobile Manufacturers reported in January 2025 that the nation's annual vehicle output hit a record 31.28 million units in 2024, indicating massive hardware requirements. Similarly, the Society of Indian Automobile Manufacturers noted in 2025 that passenger vehicle sales in India reached 4.3 million units for the fiscal year ending in March, highlighting the sector's growing presence in emerging markets.

Complementing production volume is the increasing uptake of hybrid electric vehicles, which helps offset potential losses from the battery electric shift. Hybrids continue to rely on internal combustion engines and sophisticated aftertreatment solutions to meet environmental regulations during their operational cycles. According to a February 2025 report by the European Automobile Manufacturers? Association, hybrid-electric car registrations in the European Union surged by 18.4% to 290,014 units in January 2025. This trend guarantees an enduring need for components like particulate filters and catalytic converters, even as the broader industry moves toward electrification.

Market Challenge

The rapid global migration toward battery electric vehicles creates a formidable structural obstacle for the automotive exhaust aftertreatment industry. Since electric powertrains operate without fuel combustion, they completely negate the necessity for exhaust infrastructure and emission control devices. As automakers prioritize electrification strategies to align with carbon neutrality targets, the potential market for conventional aftertreatment components is steadily contracting. This transition inevitably forces a decrease in total volume requirements for suppliers of essential parts such as catalytic converters, filters, and sensors.

The impact of this trend is underscored by the growing market share of zero-emission platforms, which directly displaces conventional gasoline and diesel engines. The International Energy Agency reported that global electric car sales reached roughly 17 million units in 2024, representing a significant portion of new inventory that requires no emission control hardware. As a result, component suppliers are contending with lower procurement orders as original equipment manufacturers shift capital and production focus away from combustion technologies, thereby limiting long-term revenue prospects for aftertreatment providers.

Market Trends

A prevailing trend involves the use of advanced nanomaterials to optimize the consumption of precious metals, addressing both high costs and supply volatility associated with platinum group metals (PGMs). Suppliers and OEMs are widely implementing sophisticated nano-coating techniques to maximize the catalytic surface area of palladium, rhodium, and platinum, achieving lower metal loading while maintaining strict emission standards. This efficiency strategy is essential given the tight PGM supply; according to Johnson Matthey's 'PGM Market Report' from May 2025, automotive platinum usage is projected to decrease by 5% from a sixteen-year peak as the industry adopts these material innovations to offset primary supply deficits.

Concurrently, there is a growing emphasis on developing modular and scalable aftertreatment architectures to manage the packaging challenges of hybrids and the economics of shrinking combustion engine volumes. Companies are designing flexible exhaust platforms adaptable across various vehicle segments, ranging from passenger cars to light commercial trucks, to amortize development costs and improve manufacturing efficiency. This standardization helps firms sustain profitability despite fluctuating production scales. For example, Forvia?s 'FY 2024 Results' released in February 2025 highlighted that its Clean Mobility segment supported a resilient Group operating margin of 5.2%, proving the financial success of these optimized exhaust systems amidst a complex global production landscape.

Key Market Players

- CDTi Advanced Materials Inc.
- Continental Reifen Deutschland GmbH
- Cummins Inc.
- DCL International Inc.
- Delphi Technologies PLC
- Dinex
- Donaldson Company Inc.

ESW Group

European Exhaust and Catalyst Ltd

Nett Technologies Inc.

Report Scope

In this report, the Global Automotive Exhaust Aftertreatment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Exhaust Aftertreatment Market, By Vehicle Type

Passenger Cars

Commercial Vehicles

Automotive Exhaust Aftertreatment Market, By Fuel Type

Gasoline

Diesel

Automotive Exhaust Aftertreatment Market, By Sales Channel

OEM

Aftermarket

Automotive Exhaust Aftertreatment Market, By Region

North America

United States

Canada

- Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia Pacific
  - China
  - India
  - Japan
  - Australia
  - South Korea
- South America
  - Brazil
  - Argentina
  - Colombia
- Middle East & Africa
  - South Africa
  - Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Exhaust Aftertreatment Market.

Available Customizations:

Global Automotive Exhaust Aftertreatment Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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