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Emission Control Technologies Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Technology (DPF, GPF, SCR, DOC, EGR and Others), By Fuel Type (Gasoline & Diesel), By End User Industry (Automotive, Industrial, Aerospace, Rolling Stock, Off-highway & Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Emission Control Technologies Market is projected to expand from USD 129.83 Billion in 2025 to USD 190.72 Billion by 2031, reflecting a CAGR of 6.62%. This market encompasses systems like electrostatic precipitators, scrubbers, and catalytic converters, which are engineered to eliminate or significantly reduce hazardous exhaust elements such as particulate matter, nitrogen oxides, and volatile organic compounds originating from industrial and automotive sources. Key factors driving this growth include the continued industrial development of emerging economies and the enforcement of increasingly stringent environmental regulations by governments worldwide, both of which require strict compliance with air quality standards to limit ecological damage.

Conversely, the shift toward vehicle electrification poses a major challenge to long-term growth, as electric powertrains eliminate the necessity for internal combustion engine exhaust aftertreatment. Despite this structural transition, specific sectors continue to generate substantial demand for traditional emission control systems. For instance, the European Automobile Manufacturers? Association reported that diesel-powered van registrations in the European Union rose by 10.5% to 1.34 million units in 2024. This statistic indicates that, although electrification represents a future risk, the enduring reliance on commercial combustion transport continues to support the need for

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emission mitigation technologies.

Market Driver

The enforcement of rigorous global environmental regulations and emission standards fundamentally directs the Global Emission Control Technologies Market by requiring manufacturers to implement sophisticated aftertreatment solutions. Governments are actively reducing permissible limits for pollutants such as particulate matter and nitrogen oxides, thereby necessitating the integration of selective catalytic reduction units and catalytic converters. For example, the U.S. Environmental Protection Agency announced in March 2024 that newly finalized pollution standards for heavy-duty vehicles are expected to prevent roughly 1 billion tons of greenhouse gas emissions through 2055, a mandate that requires extensive technological upgrades across fleets to ensure compliance with these evolving requirements.

Concurrently, the growth in commercial and automotive vehicle production volumes offers the scale needed to maintain market momentum, especially in industrializing nations where internal combustion engines remain critical for logistics. As manufacturing output increases to satisfy transportation demands, the quantity of required emission control units rises in tandem with vehicle assembly. This volume-based demand is highlighted by the China Association of Automobile Manufacturers, which reported in January 2025 that total vehicle sales in China hit a record 31.44 million units in 2024, emphasizing the massive ongoing need for exhaust treatment hardware. Furthermore, Cummins Inc. reported full-year 2023 revenues of $34.1 billion in 2024, a figure largely driven by global demand for its component and engine technologies, reflecting the financial scale of this sector.

Market Challenge

The global shift toward vehicle electrification creates a fundamental structural barrier for the Global Emission Control Technologies Market by systematically decreasing reliance on internal combustion engines. As automakers expedite the rollout of battery-electric platforms that produce zero tailpipe emissions, the necessity for exhaust aftertreatment components, including urea injection systems, particulate filters, and catalytic converters, is effectively removed for an expanding portion of the fleet. This transition forces component suppliers to face a contracting addressable market within the high-volume passenger vehicle segment, restricting revenue potential to legacy combustion applications that are facing a long-term downturn.

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This displacement of traditional powertrains is especially evident in major automotive markets where the change is happening rapidly. According to data from the China Association of Automobile Manufacturers, sales of new energy vehicles in 2024 reached 12.87 million units, representing 40.9% of all new car sales in the nation. This statistic underscores the scale of the disruption, as a significant percentage of new vehicle registrations now completely avoid the need for conventional emission mitigation hardware, thereby directly limiting the potential for market growth.

Market Trends

Manufacturers are increasingly focusing on the development of low-PGM and advanced catalyst formulations to address the high costs and price volatility of platinum group metals (PGMs) used in aftertreatment systems. Industry stakeholders are prioritizing the substitution of expensive palladium with platinum and the adoption of advanced washcoat technologies to lower total metal loading while maintaining conversion efficiency. This optimization of materials is financially essential given the industry's substantial consumption of these finite resources; as noted in the 'PGM Market Report May 2025' by Johnson Matthey, the automotive sector accounted for 61% of all new platinum group metals globally in 2024, emphasizing the critical need for cost-effective, material-efficient catalyst chemistries for the remaining internal combustion fleet.

Simultaneously, advancements in Selective Catalytic Reduction (SCR) for high-NOx abatement are transforming the heavy-duty sector, where electrification encounters operational challenges. To adhere to stricter emission limits, commercial vehicle manufacturers are integrating sophisticated dual-dosing SCR systems that operate effectively across a broader temperature range, ensuring compliance during low-load operations and cold starts. This technological emphasis is driven by the continued dependence on diesel powertrains for long-haul logistics. According to a January 2025 press release by the European Automobile Manufacturers? Association, diesel trucks retained market dominance by accounting for 95.1% of all new truck registrations in the European Union in 2024, guaranteeing ongoing demand for advanced diesel aftertreatment hardware.

Key Market Players

Johnson Matthey Plc

BASF SE

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Eberspacher Group

Cummins Inc.

Faurecia SA

Denso Corporation

Umicore NV/SA

Honeywell International Inc.

Hitachi Automotive Systems, Ltd.

BorgWarner Inc.

Report Scope

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

Emission Control Technologies Market, By Technology

DPF

GPF

SCR

DOC

EGR

Others

Emission Control Technologies Market, By Fuel Type

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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 Emission Control Technologies Market.

Available Customizations:

Global Emission Control Technologies 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

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

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