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Automotive Catalytic Converter Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Two-way oxidation Catalytic Converter, Three-way oxidation-reduction Catalytic Converter, Four-Way Catalytic Converter, Selective Catalytic Reduction, Diesel oxidation, Lean Nox Trap), By Catalyst (Platinum, Palladium, Rhodium, Others), By Vehicle Type (Passenger Car, Light Commercial Vehicle, Truck, Bus, Off-Highway Vehicle (Agriculture Tractors, Construction Equipment, Mining Equipment)), By Region & Competition, 2021-2031F

https://marketpublishers.com/r/A2BEEDF2FE05EN.html
Date: May 2026
Pages: 185
Price: US$ 4,500.00 (Single User License)
ID: A2BEEDF2FE05EN

Abstracts

The Global market for automotive catalytic converters is forecast to expand from USD 162.67 billion in 2025 to USD 268.78 billion by 2031, reflecting a compound annual growth rate (CAGR) of 8.73%. These devices are essential exhaust emission control systems that reduce harmful pollutants from internal combustion engines by converting toxic gases into safer substances via catalyzed redox reactions. The primary catalyst for this market growth is the tightening of global emission laws, which require vehicles to be equipped with sophisticated aftertreatment technologies. Additionally, consistent worldwide vehicle manufacturing, especially within developing nations, supports this growth since every new internal combustion vehicle needs a catalytic converter to meet regulatory standards. Supporting this trend, the European Automobile Manufacturers' Association (ACEA) reported a 4.2% rise in global vehicle production in 2025, totaling 78.7 million units.

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Conversely, a major obstacle hindering market expansion is the price instability of precious group metals like platinum, palladium, and rhodium, which serve as essential raw materials for producing these converters. Furthermore, the rapid worldwide transition toward electric vehicles acts as a prolonged barrier, given that these automobiles operate without conventional exhaust aftertreatment mechanisms.

Market Driver

The enforcement of rigorous global emission standards serves as a major catalyst for the automotive catalytic converter industry. Governments across the globe are consistently introducing tougher regulations to reduce toxic vehicle emissions, making advanced aftertreatment systems indispensable. As detailed in EU regulation 2024/1257 on the European Union's official site, the initial phase of the Euro 7 emissions standard takes effect for new cars and vans starting November 29, 2026, forcing vehicle manufacturers to adopt upgraded catalytic converter technologies for compliance. These progressing global rules require greater durability and higher efficiency in pollutant conversion, directly elevating the need for advanced catalytic converters. Consequently, producers are motivated to refine and innovate their designs to align with these intensifying environmental requirements, thereby facilitating cleaner exhaust outputs.

In addition to regulatory requirements, technological progress in catalytic converters acts as a primary growth driver. Ongoing research and development initiatives concentrate on creating superior catalyst materials, enhancing substrate architectures, and decreasing dependence on expensive precious metals. For instance, BASF announced in March 2026 that it launched the world's first manufacturing facility for 3D-printed catalysts at its Ludwigshafen location. Utilizing X3D technology, this process produces catalysts with ideal geometries that boost efficiency while lowering energy usage. Such dedication to innovation is crucial for the continuous expansion of the sector. Furthermore, data from the International Organization of Motor Vehicle Manufacturers (OICA) indicates that global vehicle output exceeded 68.7 million units during the first nine months of 2025, establishing a solid baseline demand for these crucial emission control systems.

Market Challenge

The fluctuating prices of precious group metals, particularly rhodium, palladium, and platinum, present a major obstacle to the expansion of the worldwide automotive catalytic converter industry. Because these metals are essential raw materials, their

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unstable costs lead directly to erratic manufacturing expenses for component suppliers. This unpredictability creates difficulties for businesses attempting to set consistent product prices and reliably project their future profit margins. For example, the World Platinum Investment Council reported that platinum showed robust price movement in 2025, experiencing a significant surge of 127%.

This type of dramatic and swift fluctuation in metal values injects considerable financial jeopardy throughout the supply chain. A climate of unpredictable costs disrupts strategic business forecasting and deters companies from making prolonged investments in technological progress or manufacturing capabilities. Ultimately, this economic instability directly restricts the broader growth of the automotive catalytic converter sector by undermining both financial health and operational effectiveness.

Market Trends

A major trend in the global market is the growing aftermarket for replacement catalytic converters, fueled by the rising average lifespan and age of vehicles currently in use. As consumers keep their internal combustion engine cars for extended periods, the need for replacement parts like catalytic converters naturally rises to ensure optimal vehicle performance and adherence to emission standards. This pattern guarantees a consistent source of income for producers, even as new vehicle sales gradually shift toward electric alternatives, because the current vehicle fleet still demands regular upkeep. Highlighting the importance of this sector, a February 2025 article by Messe Frankfurt titled 'Global car parc ageing at a significant rate of growth' noted that the worldwide automotive aftermarket volume surpassed US$430 billion in 2024.

Another key trend influencing the industry is the heightened emphasis on circular economy initiatives and the recycling of precious metals. This shift is driven by a stronger dedication to environmental preservation alongside the steep and unpredictable pricing of platinum group metals (PGMs). By extracting valuable materials like rhodium, palladium, and platinum from discarded catalytic converters, the sector can lessen its dependence on fresh mining operations, stabilize cost variations, and support a greener supply chain. Such strategies encourage advancements in business frameworks and recycling methods designed to optimize the reclamation of materials for new manufacturing cycles. Demonstrating this progress, Johnson Matthey's 2025 white paper, 'Reclaiming the future: PGM insights for a circular economy,' revealed that nearly 60% of the platinum group metals utilized in new goods each year are presently derived from recycled sources.

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Key Market Players

BASF SE

Johnson Matthey Plc

Umicore SA

Tenneco Inc.

Continental AG

Faurecia SE

Eberspacher Group GmbH & Co. KG

Benteler International AG

Futaba Industrial Co., Ltd.

CDTi Advanced Materials, Inc.

Report Scope

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

Automotive Catalytic Converter Market, By Type

Two-way oxidation Catalytic Converter

Three-way oxidation-reduction Catalytic Converter

Four-Way Catalytic Converter

Selective Catalytic Reduction

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- Diesel oxidation
- Lean Nox Trap

Automotive Catalytic Converter Market, By Catalyst

- Platinum
- Palladium
- Rhodium
- Others

Automotive Catalytic Converter Market, By Vehicle Type

- Passenger Car
- Light Commercial Vehicle
- Truck
- Bus
- Off-Highway Vehicle

Automotive Catalytic Converter Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France

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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

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Company Profiles: Detailed analysis of the major companies present in the Global Automotive Catalytic Converter Market.

Available Customizations:

Global Automotive Catalytic Converter 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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