

India Retrofit Emission Control Device Market, By Application (Automotive, Industrial), By Technology (Diesel Particulate Filters, Selective Catalytic Reduction, Exhaust Gas Recirculation, Oxidation Catalysts), By Fuel Type (Diesel Vehicles, Petrol Vehicles, Electric & Hybrid Vehicles) By Region, Competition, Forecast & Opportunities, 2021-2031F

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# **Abstracts**

Market Overview

The India Retrofit Emission Control Device Market was valued at USD 2.13 billion in 2025 and is projected t%li%reach USD 2.98 billion by 2031, expanding at a CAGR of 5.57% during the forecast period. Retrofit emission control devices are aftermarket systems used t%li%reduce harmful emissions from older vehicles and machinery not originally designed t%li%meet current environmental standards. These devices, such as diesel particulate filters (DPFs), selective catalytic reduction (SCR) systems, and exhaust gas recirculation (EGR) units, help reduce pollutants including nitrogen oxides (NOx), particulate matter (PM), carbon monoxide (CO), and hydrocarbons (HC). Widely adopted across automotive and industrial applications, these technologies offer a cost-efficient way for operators t%li%comply with increasingly stringent emission norms, especially in sectors where aging equipment remains operational.

**Key Market Drivers** 

Stringent Emission Norms

India's commitment t%li%environmental sustainability has led t%li%the enforcement of



rigorous emission regulations, significantly driving the demand for retrofit emission control devices. The government is actively working t%li%enhance air quality by curbing emissions from vehicles, industrial operations, and construction equipment. Recent years have seen the implementation of stricter pollutant standards, aligning with international benchmarks such as Eur%li%IV t%li%VI. Notably, the transition from Bharat Stage (BS) IV t%li%BS VI in 2020 intensified emission limits, compelling noncompliant older vehicles and machinery t%li%seek alternatives t%li%full replacement. Retrofit solutions like DPFs and SCR systems offer a viable and cost-effective means for achieving compliance with these updated norms.

Key Market Challenges

High Initial Installation Costs and Financial Constraints

A major challenge for the India retrofit emission control device market is the high initial cost of installation. Although retrofitting is more economical than replacing entire fleets, the upfront investment remains substantial, especially for small and medium-sized enterprises (SMEs). The deployment of technologies such as DPFs, SCR systems, and EGR units involves expensive components, specialized labor, and technical integration. For example, incorporating SCR systems in older diesel vehicles requires auxiliary elements like urea tanks and sensors, further escalating costs. These financial barriers can be particularly burdensome for small fleet operators already operating under tight margins.

**Key Market Trends** 

Increased Adoption of Advanced Emission Control Technologies

The market is witnessing a growing preference for advanced emission control technologies in response t%li%stricter environmental norms, particularly the upgrade from BS-IV t%li%BS-VI standards. Technologies such as Selective Catalytic Reduction (SCR), Diesel Particulate Filters (DPFs), and Exhaust Gas Recirculation (EGR) systems are being increasingly retrofitted in older vehicles. SCR systems, which mitigate NOx emissions through urea injection int%li%exhaust streams, are gaining traction due t%li%their efficiency. Likewise, DPFs effectively capture particulate matter, and EGR systems help curb NOx output by reintroducing exhaust gases int%li%the combustion cycle. These advanced solutions are becoming standard retrofitting options across the Indian automotive and industrial sectors.



# **Key Market Players** Inventive Gas Equipment Pvt. Ltd. Eoenergy Kirloskar **Platino Cummins India Limited** Ekta Fueltech Private Limited **Dekonix India VASTHI** Instruments Report Scope: In this report, the India Retrofit Emission Control Device Market has been segmented int%li%the following categories, in addition t%li%the industry trends which have als%li%been detailed below: India Retrofit Emission Control Device Market, By Application: o Automotive o Industrial India Retrofit Emission Control Device Market, By Technology: o Diesel Particulate Filters

o Selective Catalytic Reduction

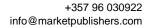


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Company Information

India Retrofit Emission Control Device Market, By Application (Automotive, Industrial), By Technology (Diesel...

t%li%five).

Detailed analysis and profiling of additional market players (up







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