

# **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 to 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 to reduce harmful emissions from older vehicles and machinery not originally designed to 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 to comply with increasingly stringent emission norms, especially in sectors where aging equipment remains operational.

### **Key Market Drivers**

#### **Stringent Emission Norms**

India's commitment to environmental sustainability has led to the enforcement of

rigorous emission regulations, significantly driving the demand for retrofit emission control devices. The government is actively working to 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 Euro IV to Euro VI. Notably, the transition from Bharat Stage (BS) IV to BS VI in 2020 intensified emission limits, compelling non-compliant older vehicles and machinery to seek alternatives to 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 to stricter environmental norms, particularly the upgrade from BS-IV to 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 into exhaust streams, are gaining traction due to their efficiency. Likewise, DPFs effectively capture particulate matter, and EGR systems help curb NOx output by reintroducing exhaust gases into 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 into the following categories, in addition to the industry trends which have also 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

- o Exhaust Gas Recirculation

- o Oxidation Catalysts

#### India Retrofit Emission Control Device Market, By Fuel Type:

- o Diesel Vehicles

- o Petrol Vehicles

- o Electric & Hybrid Vehicles

#### India Retrofit Emission Control Device Market, By Region:

- o South India

- o North India

- o West India

- o East India

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Retrofit Emission Control Device Market.

#### Available Customizations:

India Retrofit Emission Control Device 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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