

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

Market Report | 2025-05-16 | 86 pages | TechSci Research

AVAILABLE LICENSES:

- Single User License \$3500.00
- Multi-User License \$4500.00
- Custom Research License \$7000.00

Report description:

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 (NO_x), 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 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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Formulation of the Scope
 - 2.4. Assumptions and Limitations
 - 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
 - 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
 - 2.7. Methodology Followed for Calculation of Market Size & Market Shares
 - 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, and Trends
4. Voice of Customer
5. India Retrofit Emission Control Device Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Application (Automotive, Industrial)
 - 5.2.2. By Technology (Diesel Particulate Filters, Selective Catalytic Reduction, Exhaust Gas Recirculation, Oxidation Catalysts)
 - 5.2.3. By Fuel Type (Diesel Vehicles, Petrol Vehicles, Electric & Hybrid Vehicles)
 - 5.2.4. By Region (South India, North India, West India, East India)
 - 5.2.5. By Company (2025)
 - 5.3. Market Map

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6. South India Retrofit Emission Control Device Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share & Forecast
 - 6.2.1. By Application
 - 6.2.2. By Technology
 - 6.2.3. By Fuel Type
7. North India Retrofit Emission Control Device Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Application
 - 7.2.2. By Technology
 - 7.2.3. By Fuel Type
8. West India Retrofit Emission Control Device Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Application
 - 8.2.2. By Technology
 - 8.2.3. By Fuel Type
9. East India Retrofit Emission Control Device Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Application
 - 9.2.2. By Technology
 - 9.2.3. By Fuel Type
10. Market Dynamics
 - 10.1. Drivers
 - 10.2. Challenges
11. Market Trends & Developments
 - 11.1. Merger & Acquisition (If Any)
 - 11.2. Product Launches (If Any)
 - 11.3. Recent Developments
12. Policy and Regulatory Landscape
13. India Economic Profile
14. Company Profiles
 - 14.1. Inventive Gas Equipment Pvt. Ltd.
 - 14.2. Eoenergy
 - 14.3. Kirloskar
 - 14.4. Platino
 - 14.5. Cummins India Limited
 - 14.6. Ekta Fueltech Private Limited
 - 14.7. Dekonix India
 - 14.8. VASTHI Instruments
15. Strategic Recommendations

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2025-05-16 | 86 pages | TechSci Research

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$3500.00
	Multi-User License	\$4500.00
	Custom Research License	\$7000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

□** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-23"/>
		Signature	<input type="text"/>