

Global Acoustic Temperature Measurement Equipment Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G8A98B1651E0EN.html>

Date: August 2026

Pages: 94

Price: US\$ 4,480.00 (Single User License)

ID: G8A98B1651E0EN

Abstracts

The global Acoustic Temperature Measurement Equipment market size is expected to reach \$ 41.86 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032).

Acoustic temperature measurement equipment is a category of industrial process monitoring equipment that determines gas temperature by using the established relationship between acoustic wave propagation velocity, travel time, and the thermodynamic temperature of the gas medium. It is primarily installed in boilers, furnaces, flue gas ducts, waste incinerators, blast furnaces, recovery boilers, and other large high temperature industrial spaces where continuous and representative gas temperature information is required. A typical system consists of acoustic transmitters, acoustic receivers, high temperature acoustic ports, purge and protection assemblies, signal acquisition units, timing control modules, industrial computers, and temperature calculation software. The equipment transmits acoustic signals across a defined measurement path, records the time required for the sound wave to travel between the transmitter and receiver, and calculates the path averaged gas temperature after correcting for path length, gas composition, pressure, and operating conditions.

The main product forms include single path acoustic pyrometers, multi path acoustic temperature measurement systems, two dimensional acoustic temperature field imaging systems, and customized systems designed for large boilers and industrial furnaces. Multi path configurations arrange acoustic transceivers around the measurement section and combine travel time data from several intersecting paths. Acoustic tomography algorithms are then used to reconstruct a two dimensional temperature field or, in selected applications, a localized three dimensional temperature distribution. The

principal technical processes include high power acoustic source design, weak signal detection, background noise suppression, precise time of flight identification, high temperature interface fabrication, continuous purge protection, path calibration, temperature field reconstruction, and data integration with distributed control systems.

Key specifications generally include measurement range, temperature accuracy, number of acoustic paths, response time, measurement section dimensions, environmental temperature resistance, spatial resolution, system availability, and communication protocol. The equipment provides continuous non contact measurement of average gas temperature and temperature distribution under operating conditions in which conventional contact sensors may suffer from radiation errors, thermal inertia, corrosion, slag deposition, or limited spatial representativeness. Its major functions include combustion balance monitoring, burner air distribution adjustment, slagging risk identification, heating surface protection, selective non catalytic reduction temperature window control, thermal efficiency optimization, and emissions management. Major applications include coal fired and gas fired power boilers, waste to energy plants, biomass boilers, pulp recovery boilers, iron and steel furnaces, petrochemical process heaters, glass melting furnaces, and other large industrial kilns. In 2025, the industry average gross margin was approximately 45% to 55%.

The upstream value chain of acoustic temperature measurement equipment includes high temperature acoustic components, industrial sound sources, microphones and sensing elements, signal acquisition modules, industrial computers, control cabinets, purge assemblies, heat resistant alloy structures, and software development tools. Midstream activities cover acoustic source engineering, receiver manufacturing, measurement path design, hardware integration, time of flight identification, temperature field reconstruction, control interface development, site calibration, and commissioning. Most of the industry value is concentrated in reliable signal recognition under severe background noise, long term operation in high temperature environments, accurate reconstruction of nonuniform temperature fields, and accumulated project engineering experience. Downstream demand comes from power generation, waste incineration, iron and steel, petrochemicals, pulp and paper, glass, and other high temperature process industries. Procurement is mainly project based because system configuration depends on furnace geometry, fuel characteristics, measurement section size, acoustic path quantity, and the operating objectives of each plant.

The global supply structure is characterized by a small number of established technology platforms and a broader network of regional engineering and service companies. European and North American suppliers have accumulated long operating

records in acoustic pyrometry, gas temperature measurement, and acoustic tomography for utility boilers and industrial furnaces. Mature products typically combine acoustic hardware, temperature calculation software, control system communication, installation engineering, and lifecycle support. China is gradually shifting from imported systems toward locally developed equipment, supported by power plant digitalization, intelligent combustion projects, and the modernization of existing generating units. However, the number of companies capable of supplying complete acoustic transmitters, receivers, algorithms, software platforms, and long term operating support remains limited. Industry consolidation has also reshaped the competitive landscape, as specialized acoustic pyrometer technologies have been acquired and incorporated into larger industrial automation portfolios.

Demand remains anchored in utility boilers and large industrial combustion systems, while waste to energy plants, biomass boilers, blast furnaces, and petrochemical process heaters provide important incremental opportunities. Slower construction of new coal fired capacity does not eliminate the market because existing power units increasingly require flexible operation, deep load cycling, low emission combustion, heating surface protection, and more accurate control of reagent injection temperature windows. Waste and biomass fuels generate highly variable combustion conditions, making continuous temperature distribution monitoring more valuable than isolated point measurements. Applications in steel, refining, glass, and specialty furnaces are more customized and involve fewer projects, but they generally require more complex configurations and higher engineering content. The application mix is therefore expected to become more diversified, with growth supported by both power plant modernization and broader adoption across high temperature process industries.

Energy efficiency policies, industrial digitalization programs, emissions regulations, waste incineration operating standards, and power plant safety requirements are creating steady demand for greater visibility into furnace conditions. Product development is moving toward higher acoustic path density, improved spatial resolution, intelligent noise filtering, automatic calibration, edge computing, remote diagnostics, and direct integration with combustion control platforms. New systems are increasingly designed not only to measure temperature but also to support air distribution adjustment, slagging prevention, thermal efficiency optimization, and emissions control. Competitive pressure from infrared imaging, thermocouples, suction pyrometers, optical instruments, and model based estimation will continue to limit the addressable market. Nevertheless, acoustic temperature measurement retains strong technical relevance in large and complex furnace spaces where representative non contact temperature distribution data is difficult to obtain through conventional methods, supporting stable

long term growth and sustained technical barriers.

Report Scope

This report studies the global Acoustic Temperature Measurement Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Acoustic Temperature Measurement Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Acoustic Temperature Measurement Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Acoustic Temperature Measurement Equipment total production and demand, 2021-2032, (Units)

Global Acoustic Temperature Measurement Equipment total production value, 2021-2032, (USD Million)

Global Acoustic Temperature Measurement Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Acoustic Temperature Measurement Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Acoustic Temperature Measurement Equipment domestic production, consumption, key domestic manufacturers and share

Global Acoustic Temperature Measurement Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Acoustic Temperature Measurement Equipment production by Measurement Architecture, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Acoustic Temperature Measurement Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Acoustic Temperature Measurement Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bonnenberg & Drescher GmbH, Valmet Oyj, Scientific Environmental Instruments, Inc., Beijing Allinby

Technology Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Acoustic Temperature Measurement Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Measurement Architecture, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Acoustic Temperature Measurement Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Acoustic Temperature Measurement Equipment Market, Segmentation by Measurement Architecture:

Single Path Acoustic Measurement

Multi Path Acoustic Measurement

Global Acoustic Temperature Measurement Equipment Market, Segmentation by Technology Route:

Sound-Velocity Pyrometry

Acoustic Resonance Thermometry

Others

Global Acoustic Temperature Measurement Equipment Market, Segmentation by Key Component Technology:

Pneumatic Acoustic Source

Spark Discharge Acoustic Source

PiezoelectricSource

High-Temperature Microphone

Others

Global Acoustic Temperature Measurement Equipment Market, Segmentation by Application:

Power Generation

Waste to Energy and Environmental Services

Iron and Steel

Refining and Petrochemicals

Pulp and Paper

Building Materials

Others

Companies Profiled:

Bonnenberg & Drescher GmbH

Valmet Oyj

Scientific Environmental Instruments, Inc.

Beijing Allinby Technology Co., Ltd.

Key Questions Answered:

1. How big is the global Acoustic Temperature Measurement Equipment market?
2. What is the demand of the global Acoustic Temperature Measurement Equipment market?
3. What is the year over year growth of the global Acoustic Temperature Measurement Equipment market?
4. What is the production and production value of the global Acoustic Temperature Measurement Equipment market?
5. Who are the key producers in the global Acoustic Temperature Measurement Equipment market?
6. What are the growth factors driving the market demand?

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