

Global Dissolved CO2 Sensor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dissolved CO2 Sensor market size is expected to reach \$ 249 million by 2032, rising at a market growth of 13.9% CAGR during the forecast period (2026-2032).

Dissolved carbon dioxide sensors are online and in situ analytical devices for liquid systems, used for continuous measurement of dissolved CO2 or pCO2 and for turning carbon dioxide conditions that once depended on offline sampling and operator judgment into process data that can be read, alarmed, and controlled in real time. Based on official product pages, these products mainly address metabolic fluctuation caused by carbon dioxide accumulation in fermentation and cell culture, unstable carbonation levels in beverage production, difficulty in tracking long term CO2 changes in aquaculture and water environments, and the challenge of obtaining field based carbon cycle parameters in marine and groundwater monitoring. Their core function is continuous detection of carbon dioxide in the liquid phase, combined with digital communication or control systems for recording, compensation, linkage, and closed loop adjustment. The main technical paradigms include the Severinghaus principle, solid state direct measurement, chemical optical sensing, and infrared detection based on membranes and gas liquid equilibrium. Product formats are not uniform and include inline insertion sensors for bioreactors and process pipelines, submersible in situ sensors for lakes, oceans, and aquaculture sites, as well as dipping probes, sensor spots, and modular components for research and multiparameter platforms. Typical applications cover biopharmaceuticals, industrial fermentation, food and beverage, aquaculture, water treatment, marine research, groundwater monitoring, and CCS monitoring. Major customers include pharmaceutical and fermentation companies, beverage plants, water and environmental agencies, research institutions, and system integrators. Common delivery formats range from standalone probes to integrated packages with transmitters, controllers, multiparameter platforms, and software

systems, while the business model mainly consists of equipment sales, system integration, calibration and maintenance services, and accessories and consumables.

The core value of the dissolved carbon dioxide sensor industry lies in turning liquid phase carbon dioxide conditions, which historically relied on offline sampling and operator judgment, into continuously available data that can directly support process control. For biopharmaceutical and industrial fermentation users, carbon dioxide is not merely a byproduct. It directly affects cell metabolism, mass transfer efficiency, and final product quality, which is why Hamilton, Mettler Toledo, and Metrohm position their products around cell culture, fermentation, and inline process control. For beverage producers, carbon dioxide concentration is closely tied to taste, stability, and carbonation efficiency, and Anton Paar has already developed this area into a mature offering for fast closed loop production control. For marine, lake, aquaculture, and groundwater users, carbon dioxide is an important observation parameter for ecological change, pollution load, and carbon cycle research. In other words, although this is not a very large industry, downstream demand is highly rigid, and each major application is directly linked to the customer's operational performance indicators. This gives the sector meaningful technical barriers, high validation thresholds, and strong long term stickiness.

From a technology evolution perspective, the industry has not converged on a single dominant route. Instead, it has developed a multi technology structure centered on application scenarios. Sterile process environments require compatibility with SIP, CIP, and autoclaving, so Severinghaus based solutions and solid state direct measurement remain highly competitive in bioprocess control. Research, microscale cultivation, and flexible experimental systems place more value on non invasive measurement and configurability, which gives chemical optical solutions such as those from PreSens a clear advantage. Marine and surface water environments place greater emphasis on long term in situ deployment, deep water capability, and resilience under complex field conditions, so vendors such as AquaMS, Pro-Oceanus, Franatech, and -4H-JENA more often rely on submersible, flow through, or gas liquid equilibrium architectures combined with infrared detection. At the same time, interfaces and business models are also upgrading. The product is no longer just a probe. It is increasingly becoming a complete solution that includes digital communication, controllers, platform compatibility, and calibration and maintenance services. This means future competition will not be decided only by single point measurement accuracy, but also by system integration capability, application know how, and long term service reach.

From a growth perspective, this segment is benefiting simultaneously from advanced

manufacturing, environmental governance, and climate related demand. The first force comes from digital biopharmaceutical manufacturing. The FDA PAT framework continues to encourage the use of online process analytics to improve manufacturing consistency and quality assurance, which should strengthen the penetration of dissolved carbon dioxide sensors in high end fermentation and cell culture. The second force comes from refined water environment and aquaculture management. As monitoring of aquaculture, wastewater, surface water, and groundwater becomes routine, CO₂ sensors that can operate online for long periods and integrate easily into platforms are more likely to be incorporated into standardized projects. The third force comes from CCS and carbon cycle observation. Both the European CCS legislative framework and the US EPA Class VI system emphasize monitoring requirements, while ocean acidification, air sea gas exchange, and blue carbon research continue to expand the boundaries of sensor demand. Overall, the industry is unlikely to become fully generalized. Instead, it is likely to deepen along three main tracks: highly reliable bioprocess control, low maintenance water monitoring, and long duration in situ monitoring for marine and CCS applications. The outlook is constructive, and the highest value orders are still most likely to concentrate in manufacturers with verifiable official product portfolios, application references, and strong system capabilities.

This report studies the global Dissolved CO₂ Sensor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dissolved CO₂ Sensor 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 Dissolved CO₂ Sensor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dissolved CO₂ Sensor total production and demand, 2021-2032, (Units)

Global Dissolved CO₂ Sensor total production value, 2021-2032, (USD Million)

Global Dissolved CO₂ Sensor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Dissolved CO₂ Sensor consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Dissolved CO₂ Sensor domestic production, consumption, key domestic manufacturers and share

Global Dissolved CO₂ Sensor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Dissolved CO2 Sensor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Dissolved CO2 Sensor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Dissolved CO2 Sensor 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 Mettler Toledo^{CH}, Pro-Oceanus Systems Inc.^{CA}, Aqua Monitoring System SAS^{FR}, PreSens Precision Sensing GmbH^{DE}, Hamilton Company^{US}, Jiangsu SWR Science & Technology Co., Ltd.^{CN}, Metrohm AG^{CH}, -4H-JENA engineering GmbH^{DE}, Franatech AS^{DE}, Anton Paar GmbH^{AT}, 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 Dissolved CO2 Sensor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, 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 Dissolved CO2 Sensor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dissolved CO2 Sensor Market, Segmentation by Type:

Potentiometric

Thermal Conductivity

Infrared Optics

Global Dissolved CO2 Sensor Market, Segmentation by Installation Form:

Inline Insertion

Submersible In Situ

Flow-Through Bypass

Dipping Probe

Sensor Spot And Fiber Optic

Platform Module

Global Dissolved CO2 Sensor Market, Segmentation by Operating Environment:

Bioreactor And Sterile Pipeline

Beverage Hygienic Production Line

Surface Water And Aquaculture Water

Marine And Deepwater

Laboratory And Pilot Scale

Global Dissolved CO2 Sensor Market, Segmentation by Application:

Pharmaceutical

Life Sciences

Food and Drink

Aquaculture

Others

Companies Profiled:

Mettler Toledo?CH?

Pro-Oceanus Systems Inc.?CA?

Aqua Monitoring System SAS?FR?

PreSens Precision Sensing GmbH?DE?

Hamilton Company?US?

Jiangsu SWR Science & Technology Co., Ltd.?CN?

Metrohm AG?CH?

-4H-JENA engineering GmbH?DE?

Franatech AS?DE?

Anton Paar GmbH?AT?

Honde Technology Co., Ltd.?CN?

Solinst Canada Ltd.?CA?

Aquas Inc.?TW?

Key Questions Answered:

1. How big is the global Dissolved CO2 Sensor market?
2. What is the demand of the global Dissolved CO2 Sensor market?
3. What is the year over year growth of the global Dissolved CO2 Sensor market?
4. What is the production and production value of the global Dissolved CO2 Sensor market?
5. Who are the key producers in the global Dissolved CO2 Sensor market?
6. What are the growth factors driving the market demand?

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