

Global FTIR Exhaust Gas Analyzer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global FTIR Exhaust Gas Analyzer market size is expected to reach \$ 208 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032).

A Fourier Transform Infrared (FTIR) exhaust gas analyzer is a high-precision analytical instrument that utilizes broad-spectrum infrared radiation and mathematical Fourier transforms to simultaneously identify and quantify multiple gas components in a single sample. Unlike traditional non-dispersive infrared (NDIR) sensors that target specific gas wavelengths using filters, FTIR systems capture a complete 'molecular fingerprint' of the exhaust stream. This allows for the detection of a wide array of pollutants, including carbon monoxide (\$CO\$), nitrogen oxides (\$NO_x\$), methane (\$CH_4\$), and crucially for 2026 regulatory compliance ammonia (\$NH_3\$) and nitrous oxide (\$N_2O\$). The core of the system is the Michelson interferometer, which modulates the light to create an interferogram that is then decoded into a readable spectrum. In 2026, FTIR technology is the benchmark for 'Real Driving Emissions' (RDE) testing and Euro 7 compliance, offering the sensitivity needed to detect trace pollutants at parts-per-billion (ppb) levels while maintaining the high-speed response required for dynamic engine testing.

In 2025, global FTIR Exhaust Gas Analyzer production reached approximately 76.79 k units, with an average global market price of around US\$ 1719 per unit. And global FTIR Exhaust Gas Analyzer production capacity reached approximately 90 k units. The average gross margin in this industry reached 36.89%.

The upstream supply chain for FTIR exhaust gas analyzers is a specialized tier of the photonics and precision optics industry. The performance of the analyzer is dictated by

the quality of its optical 'engine,' which requires components capable of extreme stability under high-vibration automotive environments. Key upstream suppliers include Hamamatsu Photonics (supplying high-sensitivity InGaAs and MCT infrared detectors), MKS Instruments (providing ruggedized MultiGas FTIR engines and integrated pressure/temperature controllers), and Thorlabs (delivering precision mirrors, beam splitters, and laser-stable interferometry components). As the market shifts toward portable PEMS-integrated FTIR in 2026, there is an increasing reliance on suppliers of Quantum Cascade Lasers (QCL) and high-speed FPGA-based processors that can handle the massive computational load of real-time Fourier transformation at the vehicle's edge.

The downstream segment involves the integration of these analyzers into vehicle certification labs, industrial stack monitoring systems, and mobile emissions testing rigs. Strategic value is realized here through the reduction of 'measurement uncertainty,' which is critical as 2026 regulations like Euro 7 remove the previous 'conformity factors' and demand absolute accuracy on the road. Major downstream customers and high-volume institutional users include Horiba and AVL List GmbH (who integrate FTIR cores into their global 'turnkey' emissions testing platforms), Toyota Motor Corporation and Stellantis (utilizing FTIR for RDE certification of new hybrid and hydrogen combustion powertrains), and ExxonMobil (employing FTIR for continuous emissions monitoring systems [CEMS] at large-scale refining and chemical processing facilities). In 2026, the market is seeing a surge in demand from the pharmaceutical and biotech sectors, where compact FTIR units are being repurposed for real-time gas analytics in sterile manufacturing environments.

This report studies the global FTIR Exhaust Gas Analyzer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for FTIR Exhaust Gas Analyzer 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 FTIR Exhaust Gas Analyzer that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global FTIR Exhaust Gas Analyzer total production and demand, 2021-2032, (K Units)
Global FTIR Exhaust Gas Analyzer total production value, 2021-2032, (USD Million)
Global FTIR Exhaust Gas Analyzer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global FTIR Exhaust Gas Analyzer consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: FTIR Exhaust Gas Analyzer domestic production, consumption, key domestic manufacturers and share

Global FTIR Exhaust Gas Analyzer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global FTIR Exhaust Gas Analyzer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global FTIR Exhaust Gas Analyzer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global FTIR Exhaust Gas Analyzer 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 HORIBA, MKS Instruments, ABB, Agilent, Gasmet Technologies, ARCOptix, Bruker, California Analytical Instruments, Cerex Monitoring Solutions, Envea, 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 FTIR Exhaust Gas Analyzer market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (USD/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 FTIR Exhaust Gas Analyzer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global FTIR Exhaust Gas Analyzer Market, Segmentation by Type:

Dilute Measurement Type

Direct Measurement Type

Global FTIR Exhaust Gas Analyzer Market, Segmentation by System Type:

Fixed System

Portable Analyzer

Global FTIR Exhaust Gas Analyzer Market, Segmentation by Spectral Range:

Mid-IR

Near-IR

Others

Global FTIR Exhaust Gas Analyzer Market, Segmentation by Application:

Automotive

Chemical

Agriculture

Oil & Gas

Research And Development

Others

Companies Profiled:

HORIBA

MKS Instruments

ABB

Agilent

Gasmet Technologies

ARCOptix

Bruker

California Analytical Instruments

Cerex Monitoring Solutions

Envea

AVL

Thermo Fisher

Leshi Tech

ESE Technology

Key Questions Answered:

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

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