

Global Infrared Gas Analyzers Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G30450973A9FEN.html>

Date: January 2026

Pages: 232

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

ID: G30450973A9FEN

Abstracts

The global Infrared Gas Analyzers market size is expected to reach \$ 1143 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032). In 2025, global Infrared Gas Analyzers production reached approximately 56,432 units, with an average global market price of around K US\$ 15.27 per unit.

Infrared Gas Analyzers are instruments that detect and measure gas concentrations based on the principle of infrared absorption spectroscopy. These devices leverage the unique absorption characteristics of gases such as carbon dioxide, carbon monoxide, methane, nitrogen oxides, and volatile organic compounds at specific infrared wavelengths to perform both qualitative and quantitative analyses. Featuring non-contact detection, rapid response, high sensitivity, and wide applicability, infrared gas analyzers are widely used in environmental monitoring, industrial process control, safety inspections, medical diagnostics, and scientific research. As environmental regulations become stricter and awareness of emissions control increases, the demand for these analyzers continues to grow, especially in flue gas analysis, greenhouse gas monitoring, and petrochemical industries. Modern analyzers often integrate multi-channel detection, auto-calibration, remote monitoring, and data logging capabilities, enhancing operational efficiency and reliability. With ongoing advancements in sensing technology, infrared components, and AI algorithms, infrared gas analyzers are expected to evolve toward greater miniaturization, precision, and energy efficiency, making them a key direction in the future of gas detection technologies.

Infrared Gas Analyzers measure gas concentrations based on selective absorption at specific infrared wavelengths, typically using NDIR or laser-based IR absorption. They are widely applied to monitor CO₂, CO, CH₄, SO₂, NO_x and hydrocarbons for process control, continuous emissions monitoring (CEMS), leak detection and repair (LDAR) in oil & gas and chemicals, carbon monitoring pilots, and safety/ex-proof environments. Beyond concentration reading, their strategic value is to connect compliance, energy

efficiency, and risk early-warning into a traceable data loop?turning gas measurement into an operational backbone for low-carbon and compliant industrial operations.

Most suppliers follow a hybrid model of ?modular platforms + application engineering?. Core competencies?IR optics/sensing (IR source & detector, optical cell, filters/light path) and calibration algorithms?are standardized platforms, while sample conditioning (heated lines, moisture/dust removal, flow/pressure regulation), hazardous-area compliance/certifications, and system integration (cabinets/probes/field shelters) are customized to site conditions. Monetization typically combines one-off hardware sales with recurring consumables, calibration gases, maintenance services, and software. In practice, gross margin for IR gas analyzers often falls around 35%?55% for hardware, with higher blended margins when system integration and long-term services increase. Upstream: IR components & optics, electronics, pumps/valves/fluidics, machining & sheet metal. Midstream: analyzer OEMs and system integrators (industrial measurement groups explicitly position ?gas and liquid composition analyzers? within their analyzer portfolios). Downstream: oil & gas/chemicals, steel/cement/power, waste-to-energy & utilities, semiconductors & specialty gases, plus regulators and third-party monitoring bodies.

Market Development Opportunities & Main Driving Factors

Policy is rapidly turning ?measure accurately, report transparently, and fix quickly? into a non-negotiable requirement. The U.S. EPA?s final rule (Dec 2023) expands methane and VOC controls across oil and natural gas operations, reinforcing investment in quantifiable monitoring, LDAR, and process analytics. The EU Methane Regulation for the energy sector hardwires MRV and LDAR-type obligations, accelerating the shift from periodic checks to continuous, auditable monitoring. In China, the NDRC-led action plan for the carbon metrology system explicitly calls for accelerating development of high-precision multi-component gas analysis and spectroscopy instruments and for metrological performance evaluation of domestic CEMS. Meanwhile, MEE continues to refine technical norms and pilots for stationary-source monitoring, widening the institutional pathway for IR analyzers to penetrate CEMS and carbon-monitoring applications.

Market Challenges, Risks, & Restraints

Competition is moving from ?spot accuracy? to ?lifetime trustworthiness?, creating three constraints. (1) Harsh conditions?high humidity/dust/corrosion and cross-interferences?raise the bar for sample conditioning and optical contamination control, making uptime and maintenance economics key purchasing criteria. (2) Tightening compliance and metrology requirements (technical specifications, QA/QC, auditability, traceability) force simultaneous upgrades in hardware stability, software logging, and service systems?pulling R&D and certification costs forward. (3) Project-based system

integration (sampling lines, shelters, heat tracing, connectivity and platform interfacing) demands strong delivery discipline and local service density; weak localization often translates to lost tenders and renewals. Annual reports from large measurement groups explicitly position ?gas and liquid composition analyzers? as core portfolios and highlight portfolio expansion via gas analysis and flow measurement capabilities?signaling widening differentiation by product breadth and service execution.

Downstream Demand Trends

Demand is evolving along three structural lines. First, customers are moving from compliance-only monitoring to ?compliance + cost/efficiency gains?, embedding IR analytics into DCS/EMS/carbon platforms for combustion optimization, energy diagnostics, and anomaly early-warning. Second, the footprint is expanding from fixed installations to ?fixed + portable/mobile? to cover inspections, emergencies, and distributed sources; MEE?s push around portable IR methods and carbon-monitoring pilots strengthens the field-verification use case. Third, the market is shifting from selling instruments to selling availability?calibration, remote diagnostics, predictive maintenance, and data services are gaining share, making spending more recurring and resilient. In parallel, integrated reports show continued investment in IR gas-analysis core technologies and multi-industry productization, indicating technology iteration toward higher selectivity, lower drift, and easier maintainability.

The world's major Infrared Gas Analyzers manufacturers include ABB, Fuji Electric, Thermo Fisher Scientific, HORIBA, Emerson, Yokogawa Electric, MKS Inc., CAI ENVEA Group, Gasmot Technologies, Beijing SDL Technology, Shimadzu, Servomex (Spectris), Siemens, Endress+Hauser, Focused Photonics Inc., Teledyne Analytical Instruments, AMETEK, Bruker, Cubic Sensor and Instrument, Nanhua Instrument, Shanghai ChangAi, LI-COR Environmental, LESHU Tech, Beijing Jun-Fang-LI-HUA, Protea Ltd, Beijing Xibi Instrument, Wuhan Ganwei Technology, Qingdao lonying, Beijing HUAYUN Analytical Instrument, Hangzhou Chunlai Technology, SIGAS Measurement, etc. In 2025, the revenue share of the world's top five manufacturers is about 52%.

This report studies the global Infrared Gas Analyzers production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Infrared Gas Analyzers total production and demand, 2021-2032, (Units)

Global Infrared Gas Analyzers total production value, 2021-2032, (USD Million)

Global Infrared Gas Analyzers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Infrared Gas Analyzers consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Infrared Gas Analyzers domestic production, consumption, key domestic manufacturers and share

Global Infrared Gas Analyzers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Infrared Gas Analyzers production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Infrared Gas Analyzers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Infrared Gas Analyzers 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 ABB, Fuji Electric, Thermo Fisher Scientific, HORIBA, Emerson, Yokogawa Electric, MKS Inc., CAI ENVEA Group, Gasmot Technologies, Beijing SDL Technology, 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 Infrared Gas Analyzers 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 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 Infrared Gas Analyzers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Infrared Gas Analyzers Market, Segmentation by Type:

Portable Type

Desktop Type

Global Infrared Gas Analyzers Market, Segmentation by Technology:

NDIR Gas Analyzers

FTIR Gas Analyzers

Others

Global Infrared Gas Analyzers Market, Segmentation by Gas Type:

SO₂ and NO_X Analyzers

CO_X Analyzers

Methane Analyzers

Others

Global Infrared Gas Analyzers Market, Segmentation by Application:

Energy and Electricity

Oil and Gas

Chemicals and Petrochemicals

Metals and Mining

Fertilizers and Cement

Education and Scientific Research

Waste Incineration

Automotive Industry

Others

Companies Profiled:

ABB

Fuji Electric

Thermo Fisher Scientific

HORIBA

Emerson

Yokogawa Electric

MKS Inc.

CAI ENVEA Group

Gasmet Technologies

Beijing SDL Technology

Shimadzu

Servomex (Spectris)

Siemens

Endress+Hauser

Focused Photonics Inc.

Teledyne Analytical Instruments

AMETEK

Bruker

Cubic Sensor and Instrument

Nanhua Instrument

Shanghai ChangAi

LI-COR Environmental

LESHI Tech

Beijing Jun-Fang-LI-HUA

Protea Ltd

Beijing Xibi Instrument

Wuhan Ganwei Technology

Qingdao Ionying

Beijing HUAYUN Analytical Instrument

Hangzhou Chunlai Technology

SIGAS Measurement

Key Questions Answered:

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

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