

Global Mercury Continuous Emission Monitoring System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Mercury Continuous Emission Monitoring System market size was valued at US\$ 210 million in 2025 and is forecast to a readjusted size of US\$ 286 million by 2032 with a CAGR of 4.3% during review period.

In 2025, global Mercury Continuous Emission Monitoring System production reached approximately 3,973 units with average price of 51,240 USD/Unit.

A Mercury Continuous Emission Monitoring System is a dedicated automated monitoring system installed on industrial stacks, ducts, or other stationary-source exhaust channels to continuously measure vapor-phase mercury concentrations and emission rates. A typical system consists of a sampling probe, heated sample line, particulate filter, mercury-speciation conversion unit, sample-conditioning system, mercury analyzer, calibration equipment, and a data acquisition and handling platform. Because mercury in flue gas may occur as elemental mercury and oxidized mercury, the system generally converts different vapor-phase mercury species into a common measurable form through thermal conversion, catalytic treatment, or chemical reduction. Measurement is then performed using technologies such as cold-vapor atomic absorption, cold-vapor atomic fluorescence, or Zeeman background-corrected atomic absorption. The system is used for compliance monitoring, abnormal-emission detection, evaluation of mercury-control equipment, emission accounting, and process optimization.

The upstream segment includes ultraviolet light sources, low-pressure mercury lamps, atomic-absorption and atomic-fluorescence detectors, photomultiplier tubes, optical

filters, reaction chambers, catalytic conversion materials, sample pumps, solenoid valves, filters, heated sample lines, mercury calibration generators, flow controllers, and industrial computers. Mercury-conversion units, low-concentration detection modules, and calibration systems are particularly important because they determine measurement accuracy, detection limits, response time, and long-term stability. The midstream consists of mercury-analyzer manufacturers, complete-system suppliers, environmental engineering integrators, software providers, and third-party operation and maintenance companies. These participants undertake system design, equipment integration, installation, commissioning, certification testing, quality assurance, and remote maintenance. Major downstream users include coal-fired power plants, industrial boilers, municipal and hazardous-waste incinerators, cement clinker plants, non-ferrous metal smelters, steel-sintering facilities, and other industries processing mercury-containing fuels or raw materials. Recurring revenue is also generated from calibration services, catalyst and filter replacement, sample-line cleaning, comparison testing, data validation, spare parts, and long-term maintenance contracts.

The market for mercury continuous emission monitoring systems is expected to be driven by global mercury-control policies, stricter industrial emission limits, broader monitoring requirements, and replacement of aging installed systems. The Minamata Convention on Mercury requires participating countries to control mercury emissions from major source categories, including coal-fired power plants, industrial boilers, waste-incineration facilities, cement clinker production, and certain non-ferrous metal smelters. In the United States, the Mercury and Air Toxics Standards and dedicated quality-assurance procedures continue to support compliance monitoring and replacement demand in the power sector. In China, the introduction of a national technical standard for automated vapor-phase mercury monitoring systems, effective from April 15, 2026, is expected to support a gradual transition from intermittent manual testing toward standardized online monitoring.

Future growth opportunities are likely to be concentrated in waste incineration, hazardous-waste treatment, cement-kiln co-processing, non-ferrous metallurgy, and coal-fired industrial boilers. Low mercury concentrations, high moisture and dust levels, and interference from sulfur dioxide, chlorides, and other flue-gas components will increase demand for more efficient mercury conversion, lower detection limits, automated calibration, intelligent blowback, and remote diagnostics. However, market expansion may be constrained by relatively high system costs, adsorption losses in sampling lines, complex converter maintenance, strict calibration-source requirements, and the absence of mandatory continuous mercury monitoring in some jurisdictions.

Future competition is therefore expected to focus not only on analyzer sensitivity, but also on complete-system reliability, data availability, low-maintenance design, and lifecycle service capability.

Report Scope

This report is a detailed and comprehensive analysis for global Mercury Continuous Emission Monitoring System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Mercury Continuous Emission Monitoring System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Mercury Continuous Emission Monitoring System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Mercury Continuous Emission Monitoring System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Mercury Continuous Emission Monitoring System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Mercury Continuous Emission Monitoring System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Mercury Continuous Emission Monitoring System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Gasmeter Technologies Oy, ENVEA, SICK AG, DURAG GROUP, Tekran Instruments Corporation, P S Analytical Ltd., OPSIS AB, Thermo Fisher Scientific Inc., Nippon Instruments Corporation, Focused Photonics (Hangzhou), Inc., etc.

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

Market Segmentation

Mercury Continuous Emission Monitoring System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Total Gaseous Mercury CEMS (TGM)

Mercury Speciation CEMS (Hg²⁺/Hg⁰)

Mercury and Multi-pollutant Integrated CEMS

Market segment by Measurement Method

Fully Extractive Hg-CEMS

Dilution Extractive Hg-CEMS

In-situ CEMS

Market segment by Fluorescence

Cold Vapor Atomic Fluorescence Spectroscopy (CVAFS)

Cold Vapor Atomic Absorption Spectroscopy (CVAAS)

Zeeman Atomic Absorption Spectroscopy

Others

Market segment by Application

Coal-fired Power Plants

Municipal Waste Incineration & Waste-to-Energy

Hazardous and Medical Waste Incineration

Cement Kilns

Non-ferrous Metal Smelting

Iron & Steel and Sintering Plants

Industrial Boilers and Chemical/Petrochemical Plants

Mercury Production, Recycling and Remediation

Mercury Removal Process Control

Others

Major players covered

Gasmet Technologies Oy

ENVEA

SICK AG

DURAG GROUP

Tekran Instruments Corporation

P S Analytical Ltd.

OPSIS AB

Thermo Fisher Scientific Inc.

Nippon Instruments Corporation

Focused Photonics (Hangzhou), Inc.

Beijing SDL Technology Co., Ltd.

HORIBA, Ltd.

Ohio Lumex Co., Inc.

Enviro Solutions Technology Co., Ltd. (ESEGas)

Vasthi Instruments Pvt. Ltd.

Lumex Instruments

Hangzhou Zetian Chunlai Technology Co., Ltd.

Sichuan Jiuhuan Instruments Co., Ltd.

Dongwoo Optron Co., Ltd.

Samil Industry Co., Ltd.

Global Power Instrumentation Pvt. Ltd.

Forbes Marshall Pvt. Ltd.

Cooper Environmental / Sailbri Cooper Inc.

CleanAir Engineering, Inc.

Teledyne Leeman Labs

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Mercury Continuous Emission Monitoring System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Mercury Continuous Emission Monitoring System, with price, sales quantity, revenue, and global market share of Mercury Continuous Emission Monitoring System from 2021 to 2026.

Chapter 3, the Mercury Continuous Emission Monitoring System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Mercury Continuous Emission Monitoring System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Mercury Continuous Emission Monitoring System market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Mercury Continuous Emission Monitoring System.

Chapter 14 and 15, to describe Mercury Continuous Emission Monitoring System sales channel, distributors, customers, research findings and conclusion.

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