

Global Mercury Continuous Emission Monitoring System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mercury Continuous Emission Monitoring System market size is expected to reach \$ 286 million by 2032, rising at a market growth of 4.3% CAGR during the forecast period (2026-2032).

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 studies the global Mercury Continuous Emission Monitoring System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mercury Continuous Emission Monitoring System 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 Mercury Continuous Emission Monitoring System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mercury Continuous Emission Monitoring System total production and demand, 2021-2032, (Units)

Global Mercury Continuous Emission Monitoring System total production value, 2021-2032, (USD Million)

Global Mercury Continuous Emission Monitoring System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Mercury Continuous Emission Monitoring System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Mercury Continuous Emission Monitoring System domestic production, consumption, key domestic manufacturers and share

Global Mercury Continuous Emission Monitoring System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Mercury Continuous Emission Monitoring System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Mercury Continuous Emission Monitoring System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Mercury Continuous Emission Monitoring System 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 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., 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 Mercury Continuous Emission Monitoring System 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 Mercury Continuous Emission Monitoring System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mercury Continuous Emission Monitoring System Market, Segmentation by Type:

Total Gaseous Mercury CEMS (TGM)

Mercury Speciation CEMS (Hg²⁺/Hg⁰)

Mercury and Multi-pollutant Integrated CEMS

Global Mercury Continuous Emission Monitoring System Market, Segmentation by Measurement Method:

Fully Extractive Hg-CEMS

Dilution Extractive Hg-CEMS

In-situ CEMS

Global Mercury Continuous Emission Monitoring System Market, Segmentation by Fluorescence:

Cold Vapor Atomic Fluorescence Spectroscopy (CVAFS)

Cold Vapor Atomic Absorption Spectroscopy (CVAAS)

Zeeman Atomic Absorption Spectroscopy

Others

Global Mercury Continuous Emission Monitoring System Market, Segmentation 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

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Mercury Continuous Emission Monitoring System market?
2. What is the demand of the global Mercury Continuous Emission Monitoring System market?
3. What is the year over year growth of the global Mercury Continuous Emission Monitoring System market?
4. What is the production and production value of the global Mercury Continuous Emission Monitoring System market?
5. Who are the key producers in the global Mercury Continuous Emission Monitoring System market?
6. What are the growth factors driving the market demand?

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