

# Global NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers market size was valued at US\$ 887 million in 2025 and is forecast to a readjusted size of US\$ 1143 million by 2032 with a CAGR of 3.9% during review period.

In 2024, global NDIR and FTIR Infrared Gas Analyzers sales reached approximately 56,435 units, with an average global market price of around US\$ 15,270 per unit.

NDIR and FTIR Infrared Gas Analyzers are instruments that identify and quantify gases by exploiting the fact that gas molecules absorb infrared radiation at characteristic wavelengths. By measuring how much IR light is attenuated as it passes through a sample cell, the analyzer can calculate gas concentrations. Typical systems include an IR source, a gas cell, optical components and detectors, plus signal processing and calibration/compensation modules. Depending on the sensing approach and spectral library, they can measure gases such as CO, CO<sub>2</sub>, CH<sub>4</sub>, NO<sub>x</sub>, SO<sub>2</sub>, and various VOCs. Key advantages include fast response, non-contact measurement, and suitability for continuous monitoring in process control, combustion optimization, emissions compliance, and workplace safety applications.

Production model typically follows ?platform optical modules + modular assembly + calibration/validation delivery.? Core optical platforms (IR source/interferometer or filter set, gas cell/optics, detector), algorithms/software, and calibration workflows are often kept in-house to ensure long-term stability and repeatability. Commodity items?machined housings, PCB assembly, pumps/valves and flow control?are frequently sourced externally, while final clean assembly, leak/drift/cross-interference tests, T/P compensation, and factory calibration (using certified span gases or blending

systems) are completed internally. Application engineering commonly adds explosion-proof/corrosion-resistant designs, heated sampling, and sample-conditioning skids. Indicative gross margin is usually ~35%?55%: standardized online NDIR tends to be more volume- and cost-driven (~30%?45%), whereas multi-component FTIR, CEMS packages, and harsh-duty engineered solutions can move higher (~45%?60%) due to software/spectral libraries, conditioning systems, and project content; aftermarket service, calibration, and spares often carry higher margins. Value chain: upstream covers IR sources/detectors, optical filters/interferometers/mirrors, gas-cell materials and seals, pumps/valves/flow control, electronics & industrial communications, certified calibration gases and metrology services; midstream includes OEMs and system integrators (sample conditioning, cabinets, certifications, software platforms); downstream spans chemical & O&G process control, combustion & power, emissions compliance, semiconductor & gas supply, occupational safety, and lab analysis?sold via key-account/EPC direct sales plus channels/integrators for long-tail coverage, forming an integrated ?instrument + project + service? stack.

## Market Development Opportunities & Main Driving Factors

Growth in infrared gas analyzers is driven by a powerful overlap of regulatory enforcement, process efficiency, and decarbonization. The EU?s revised Industrial Emissions Directive tightens industrial emissions control and advances digital permitting, accelerating compliance-driven upgrades. In China, the Ministry of Ecology and Environment continues to advance technical specifications and standardized methods for continuous monitoring of stationary sources, strengthening the institutional certainty for online measurement across stack gas, process off-gas, and greenhouse gases. On the corporate side, leading players are expanding their emissions-monitoring and process-analytics capabilities through portfolio moves, while listed Chinese companies disclose FTIR/NDIR product coverage and multi-scenario penetration across environmental, industrial process, and laboratory markets.

## Market Challenges, Risks, & Restraints

The key barrier is not 'being able to measure,' but delivering results that remain reliable, auditable, and field-proven over time. IR measurement must handle cross-interference, drift, and variable temperature/humidity/pressure under complex sample matrices, which often requires integrated delivery with sample conditioning, thermal control, and calibration infrastructure?making projects more service-intensive. Regional differences in regulations, certifications, and site acceptance standards raise the bar for traceability and metrological rigor. Brokerage research also notes that spending on environmental

and online process analytics can be sensitive to macro and capex cycles, while gaps in critical components or engineering capability can amplify margin volatility and execution risk under intensifying competition.

### Downstream Demand Trends

Downstream demand is shifting from 'single concentration readings' toward system-level diagnostics and closed-loop data workflows. In process industries such as steel and coal chemicals, users increasingly prioritize explosion-proofing, corrosion resistance, and low-maintenance online IR analysis to support optimization and safe operation. On the emissions side, requirements are moving toward multi-component identification, stable performance at low ranges, and stronger data-quality governance?plus tighter integration with regulatory platforms, plant DCS/PLC systems, audit trails, and remote O&M. Ongoing advances in compliance testing and standardized methods are also pushing FTIR/NDIR from standalone instrument sales toward an integrated 'hardware + software + service' value chain.

This report is a detailed and comprehensive analysis for global NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global NDIR and FTIR Infrared Gas Analyzers market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global NDIR and FTIR Infrared Gas Analyzers market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global NDIR and FTIR Infrared Gas Analyzers market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (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 NDIR and FTIR Infrared Gas Analyzers

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 NDIR and FTIR Infrared Gas Analyzers 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 ABB, Fuji Electric, Thermo Fisher Scientific, HORIBA, Emerson, Yokogawa Electric, MKS Inc., CAI ENVEA Group, Gasmeter Technologies, Beijing SDL Technology, etc.

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

### **Market Segmentation**

NDIR and FTIR Infrared Gas Analyzers 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

Portable

Desktop

## Market segment by Technology

NDIR

FTIR

## Market segment by Measurement Form

Extractive

In-situ

Open-path

## Market segment by Component

Single Component

Multi-Component

## Market segment 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

#### Major players covered

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 lonying

Beijing HUAYUN Analytical Instrument

Hangzhou Chunlai Technology

SIGAS Measurement

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)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe NDIR and FTIR Infrared Gas Analyzers product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of NDIR and FTIR Infrared Gas Analyzers, with price, sales quantity, revenue, and global market share of NDIR and FTIR Infrared Gas Analyzers from 2021 to 2026.

Chapter 3, the NDIR and FTIR Infrared Gas Analyzers competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers.

Chapter 14 and 15, to describe NDIR and FTIR Infrared Gas Analyzers sales channel, distributors, customers, research findings and conclusion.

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