

Global Non-Dispersive Infrared Gas Analyzers (NDIR) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-Dispersive Infrared Gas Analyzers (NDIR) market size is expected to reach \$ 925 million by 2032, rising at a market growth of 4.2% CAGR during the forecast period (2026-2032).

In 2025, global Non-Dispersive Infrared Gas Analyzers (NDIR) production reached approximately 46,050 units, with an average global market price of around K US\$ 14.62 per unit.

A Non-Dispersive Infrared Gas Analyzers (NDIR) is a device that measures the concentration of specific gases (like CO₂, CO, CH₄, SO₂) by detecting how much infrared (IR) light those gas molecules absorb at unique wavelengths, allowing for precise monitoring in industrial processes, emissions control, and air quality monitoring. It works by passing broadband IR light through a sample, using optical filters to isolate the target gas's absorption band, and measuring the reduced light intensity to determine gas concentration.

A Non-Dispersive Infrared Gas Analyzers (NDIR) quantifies gas concentration based on selective absorption at specific IR wavelengths. A typical architecture includes an IR source, an optical gas cell, narrow-band optical filters, and detectors—often with a reference channel so that a measurement/reference ratio compensates for drift caused by source aging or window contamination. NDIR is known for fast response, mature interference-management design, and predictable maintenance economics. It is widely deployed in stationary-source emissions monitoring (e.g., CO₂ determination in flue gas), process control, and safety monitoring—evolving from a compliance instrument into a core sensing node for energy-efficiency and carbon data closed loops.

The dominant manufacturing model is ?platformized core modules + industry-specific integration.? The platform covers optics/cell design, filter?detector pairing, temperature compensation, calibration algorithms, and optional multi-component channels.

Customization concentrates on sample conditioning (heated lines, moisture/dust

removal, flow/pressure regulation), hazardous-area compliance, cabinet/system integration, communications, and linkage to DCS or environmental reporting platforms. Commercially, revenue is typically a mix of one-off hardware, calibration/spares/consumables, and recurring O&M/data services?higher service share usually means more resilient margins and cash flow. As an industry estimate, standard NDIR modules/instruments often run ~35%?55% gross margin, with higher blended margins when turnkey systems and long-term services dominate. Upstream: IR components & optics, electronics, pumps/valves/fluidics, machining & sheet metal. Midstream: analyzer OEMs and system integrators. Downstream: power/steel/cement, petrochemicals, waste-to-energy & utilities, plus process-industry efficiency and safety programs.

Market Development Opportunities & Main Driving Factors

Regulatory acceleration in emissions control and carbon metrology is expanding NDIR from a traditional process instrument into a broader growth market. The U.S. EPA?s final rule announced in December 2023 strengthens methane/VOC reductions in the oil and gas sector, driving upgrades in leak monitoring, process measurement, and auditable data chains. The EU Methane Regulation for the energy sector (Regulation (EU) 2024/1787) anchors obligations around MRV and emissions reduction, pushing monitoring from periodic checks toward higher-frequency, traceable engineering systems. In China, the NDRC-led action plan for the ?dual-carbon? standards and metrology system calls for accelerated development of high-precision multi-component gas analysis/spectroscopy instruments and metrological performance evaluation for domestic CEMS, while MEE?s carbon monitoring and assessment pilots provide application pull. Together, these policies raise demand for stable, quantifiable, traceable NDIR measurements?especially for CO?/CO/CH?.

Market Challenges, Risks, & Restraints

Competition is shifting from ?spot accuracy? to ?lifetime trustworthiness,? constrained by three factors. (1) Harsh flue/process gases (humidity, dust, corrosives, cross-interferences) raise the bar for sample conditioning and drift management?directly determining uptime and maintenance economics. (2) Standards and technical specifications increasingly demand robust functionality, data logging/auditability, and QA/QC, forcing simultaneous upgrades in hardware stability, software traceability, and service systems. (3) Project-based delivery (shelters, heat tracing, sampling, communications, platform interfacing) requires dense local service and strong execution; weaknesses show up immediately in tenders and renewals. Method-standardization for NDIR (e.g., NDIR-based CO? determination for stationary sources) expands the addressable space while also making consistency, comparability, and traceability hard requirements.

Downstream Demand Trends

Three structural trends are emerging downstream. First, buyers are moving from compliance-only monitoring to ?compliance + cost/efficiency,? embedding NDIR data into DCS/energy and carbon data systems for combustion optimization, anomaly detection, and carbon accounting verification. Second, deployments are expanding from fixed installations to ?fixed + portable/mobile? to cover inspection, emergency response, and distributed sources?particularly relevant for on-site comparisons in GHG pilots. Third, monetization is shifting from selling instruments to selling availability, with calibration, remote diagnostics, predictive maintenance, and data services gaining share and making revenue more recurring. Annual reports reinforce this direction: Endress+Hauser?s 2024 report highlights its partnership with SICK to expand process analysis and gas measurement to help customers improve efficiency, protect the environment, and reduce carbon footprints; Spectris? annual report showcases Servomex enabling low-carbon steel/green-hydrogen processes, underscoring the critical role of advanced gas analysis in hard-to-abate decarbonization.

The world's major Non-Dispersive Infrared Gas Analyzers (NDIR) manufacturers include ABB, Fuji Electric, Thermo Fisher Scientific, HORIBA, Emerson, Yokogawa Electric, MKS Inc., CAI ENVEA Group, Gaset 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, LESH 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 48%.

This report studies the global Non-Dispersive Infrared Gas Analyzers (NDIR) production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

site)

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

U.S. VS China: Non-Dispersive Infrared Gas Analyzers (NDIR) domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Non-Dispersive Infrared Gas Analyzers (NDIR) 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, Gaset 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 Non-Dispersive Infrared Gas Analyzers (NDIR) 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 Non-Dispersive Infrared Gas Analyzers (NDIR) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-Dispersive Infrared Gas Analyzers (NDIR) Market, Segmentation by Type:

Portable Type

Fixed Type

Global Non-Dispersive Infrared Gas Analyzers (NDIR) Market, Segmentation by Optical Design:

Single-beam

Double-beam

Global Non-Dispersive Infrared Gas Analyzers (NDIR) Market, Segmentation by Gas Type:

SO₂ and NO_X Analyzers

CO_X Analyzers

Methane Analyzers

Others

Global Non-Dispersive Infrared Gas Analyzers (NDIR) 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 Non-Dispersive Infrared Gas Analyzers (NDIR) market?
2. What is the demand of the global Non-Dispersive Infrared Gas Analyzers (NDIR) market?
3. What is the year over year growth of the global Non-Dispersive Infrared Gas Analyzers (NDIR) market?
4. What is the production and production value of the global Non-Dispersive Infrared Gas Analyzers (NDIR) market?
5. Who are the key producers in the global Non-Dispersive Infrared Gas Analyzers (NDIR) market?
6. What are the growth factors driving the market demand?

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