

Global Opacity Analyzer Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G0F8E5AEC6CFEN.html>

Date: August 2026

Pages: 141

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

ID: G0F8E5AEC6CFEN

Abstracts

The global Opacity Analyzer market size is expected to reach \$ 106 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032).

In 2025, global Opacity Analyzer sales reached approximately 3,845 Units with an average global market price of around 21.42 K USD per Unit.

Opacity Analyzer is an online optical monitoring instrument used to continuously measure the degree to which smoke, dust, particulate matter, or exhaust gases block or attenuate light in an industrial gas stream. It is typically installed on stacks, flues, boiler exhaust ducts, industrial furnace outlets, process ventilation channels, or tunnel ventilation systems. The instrument works by detecting changes in light transmission, reflection, extinction, or scattering between an emitter and a receiver, and then converts the optical signal into percent opacity, transmission, optical density, extinction coefficient, or a calibrated particulate-related output. A typical system includes a light source, receiver, retroreflector, purge-air protection, automatic calibration unit, signal processing electronics, mounting hardware, and communication interfaces. It can be integrated with CEMS, DCS, environmental data platforms, and plant automation systems. Its core value is to support emissions compliance, visible-smoke control, baghouse failure detection, combustion optimization, and real-time monitoring of pollution-control equipment. In the United States, continuous opacity monitoring systems are addressed by specific performance requirements; in the United Kingdom, permanently installed CEMS are covered by quality assurance guidance; and in China, HJ 75-2017 addresses continuous monitoring of SO₂, NO_x, and particulate matter in stationary-source flue gas.

The Opacity Analyzer is a small-volume, high-reliability industrial environmental

instrument with strong engineering customization requirements. Its gross margin is generally higher than that of standard sensors and electrical components, but lower than that of pure software platforms or premium laboratory analyzers. Based on our research, high-end compliance-grade double-pass opacity monitoring systems and dust-opacity hybrid analyzers with automatic calibration, purge protection, long-term stability, and regulatory compatibility usually achieve an estimated gross margin of 45%-60%. Regional, price-sensitive, or project-bundled products typically fall in the 30%-45% range, while CEMS package projects, integration-heavy contracts, or low-cost hardware competition may reduce project-level margins to around 20%-35%. The upstream value chain includes LED or laser light sources, photodetectors, optical lenses, retroreflectors, window assemblies, purge devices, power modules, embedded control boards, machined housings, and corrosion-resistant or explosion-proof enclosures. The midstream consists of opacity analyzer OEMs, dust monitor manufacturers, and CEMS subsystem suppliers, where the key competencies are optical-path design, anti-contamination structure, field calibration, signal algorithms, regulatory adaptation, and lifecycle service. Downstream demand comes mainly from power boilers, cement, steel, waste incineration, refining, chemicals, industrial furnaces, marine exhaust, and tunnel ventilation. As industrial emissions rules and CEMS quality assurance frameworks continue to evolve, value creation is shifting from standalone hardware sales toward integrated packages covering instruments, calibration, compliance data, and maintenance services.

Market Development Opportunities & Main Driving Factors

The growth opportunity for Opacity Analyzers does not come from explosive new installations, but from long-term industrial emissions compliance, replacement of aging stack monitoring equipment, more refined particulate and visible-smoke management, and the digital upgrade of pollution-control systems. The existence of performance requirements for continuous opacity monitoring systems in the United States, quality assurance expectations for permanently installed CEMS in Europe, and stationary-source continuous monitoring standards in China all provide a stable regulatory foundation for the market. For CEOs and investors, the attractiveness of this niche lies in its resilient demand profile: customers care not only about equipment price, but also about measurement stability, regulatory acceptance, lifecycle service, and integration with plant monitoring systems. As waste incineration, steel, cement, industrial boilers, refining, and chemical plants move from basic compliance toward continuously traceable emissions management, Opacity Analyzers will remain important tools for visible-smoke control, baghouse failure warning, and abnormal particulate trend detection.

Market Challenges, Risks, & Restraints

The main challenge facing the Opacity Analyzer market is the redefinition of its measurement value and the diversion of demand toward substitute technologies. Opacity reflects how much light is blocked by smoke or particles, but it is not the same as particulate mass concentration. In many ultra-low-emission and compliance-driven applications, users increasingly prefer direct PM CEMS, scattering-based dust monitors, triboelectric dust monitors, or multi-parameter particulate monitoring systems. Traditional single-function opacity instruments may therefore face limited growth unless they are combined with particulate concentration correlation, extinction measurement, automatic calibration, and compliant data platforms. Field conditions also create technical barriers: flue gas temperature, moisture, acidic gases, dust adhesion, optical-window contamination, vibration, installation angle, and purge-air reliability can all affect long-term measurement stability. On the pricing side, low-cost regional suppliers and CEMS package contractors can compress mid- and low-end hardware margins. On the policy and demand side, environmental enforcement cycles, coal-fired unit retirement, industrial restructuring, and capital expenditure fluctuations may affect new installations. In mature regions, declining emissions from large combustion plants indicate that the market is increasingly driven by replacement and upgrades rather than pure capacity expansion.

Downstream Demand Trends

Downstream demand for Opacity Analyzers is evolving from basic "black-smoke visibility" monitoring toward a broader role in emissions visualization, pollution-control equipment health management, and process safety warning. In the power sector, new coal-fired capacity may contribute less in some markets due to energy transition, but existing boilers, standby power assets, captive power plants, and high-load industrial power systems still require reliable monitoring. In cement, steel, non-ferrous metals, glass, ceramics, waste incineration, and hazardous waste treatment, customers are increasingly focused on baghouse failures, declining dust-collector efficiency, short-term particulate spikes, and continuous ultra-low-emission operation. In refining and chemicals, the need to link safety, environmental control, and process operations is pushing opacity monitoring toward deeper integration with DCS, CEMS, data acquisition systems, and remote maintenance platforms. Marine exhaust, tunnel ventilation, and special industrial ventilation channels will also create small but stable adjacent demand. Overall, customers are moving away from one-time hardware procurement and toward suppliers that can deliver long-term data credibility, automatic calibration, low

maintenance, fast diagnostics, and compliance reporting. This shift will strengthen the pricing power of leading brands while also creating opportunities for regional suppliers with strong local service capability.

This report studies the global Opacity Analyzer production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Opacity Analyzer total production and demand, 2021-2032, (Units)

Global Opacity Analyzer total production value, 2021-2032, (USD Million)

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

Global Opacity Analyzer consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Opacity Analyzer domestic production, consumption, key domestic manufacturers and share

Global Opacity Analyzer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Opacity Analyzer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Opacity Analyzer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Opacity Analyzer 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 AMETEK, SICK, DURAG GROUP, ENVEA, Teledyne Monitor Labs, Dynoptic (Acoem), CODEL International, Fives Group, Environmental Monitor Service, Preferred Utilities Manufacturing, 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 Opacity Analyzer 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 Opacity Analyzer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Opacity Analyzer Market, Segmentation by Type:

Single-pass Transmissometer

Double-pass Transmissometer

Others

Global Opacity Analyzer Market, Segmentation by Sampling Method:

In-situ

Extractive

Global Opacity Analyzer Market, Segmentation by Application:

Power & Industrial Boilers

Cement & Minerals

Metals & Steel

Waste Incineration

Refining & Chemicals

Marine & Transport Infrastructure

Others

Companies Profiled:

AMETEK

SICK

DURAG GROUP

ENVEA

Teledyne Monitor Labs

Dynoptic (Acoem)

CODEL International

Fives Group

Environmental Monitor Service

Preferred Utilities Manufacturing

HORIBA

Forbes Marshall

Concept Engineering

Steam Equipments

Bhoomi Process Management

MRU Instruments

Emerson

KANSAI Automation

MIP Electronics

Key Questions Answered:

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

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